



China Through a Southeast Asian Lens

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Preface

Carnegie China has a long history of operations in Beijing. But over the past year, we have shifted our operating model to become a China-focused center anchored in East Asia more broadly, not just on the Chinese mainland.

By basing Carnegie China's office operations in Singapore, our center has new reach in Southeast Asia even as we continue a full suite of activities with a range of Chinese institutional partners.

In this new incarnation, Carnegie China will be an East Asia-based research center focused on China's regional and global role—anchored in the wider region and engaging a wide swath of Asian voices.

To make a running start on this broadened mandate, we have brought onboard several leading Southeast Asian scholars, including some of the region's leading experts on Chinese policy and strategy. We are also launching new branded research products and analytical series, including the workstream that is reflected in this Carnegie China compendium on *China Through a Southeast Asian Lens*.

The revamped center will continue to be active in, on, and with Chinese stakeholders and institutional partners. For instance, we maintain a robust suite of track 2 policy dialogues with leading Chinese research centers in both Beijing and Shanghai. But with our broadened mandate anchored in the wider East Asian region, we aim to cast a critical eye on China's strategic and economic trajectory and look not just to harness Chinese perspectives from the inside out but regional perspectives on China from the outside in. And from its new base of office operations in Singapore, the center aims to highlight Southeast Asian perspectives especially.

This is important for several reasons. For one, intensifying strategic competition between the United States and China risks crowding out local perspectives, forcing a false choice onto Southeast Asian governments, firms, and people. The reality is that nearly everyone

in the region prefers addition and multiplication to subtraction and division. While Washington and Beijing seem to believe that Southeast Asians should focus on *their* agenda of competition with one another, the dominant dynamic in the region itself has been to leverage America and China to serve Southeast Asians' own aspirations for growth, employment, upskilling, and sustainability.

We aim to understand the implications of these local dynamics, even as we continue to address the big strategic and international security questions that will shape Asia's future with a more powerful and assertive China.

This compendium focuses on China and Southeast Asia from the perspective of each side. One section examines how Southeast Asia's many new governments of the past few years may or may not look at China differently from their predecessors. Another turns the focus back to Beijing by asking how effective Chinese diplomacy under President Xi Jinping has been in this diverse and multifaceted region. A final section considers China's much-vaunted Belt and Road Initiative, which has delivered mixed returns and complex stories across Southeast Asia.

This compendium is emblematic of our exciting new buildout under the center's dynamic new model.

Evan A. Feigenbaum

Vice President for Studies, Carnegie Endowment for International Peace

Acting Director, Carnegie China

INTRODUCTION

Threading a Needle: Contemporary Southeast Asian–China Ties

Chong Ja lan and Elina Noor

Contemporary relations between Southeast Asian states and the People’s Republic of China reflect an intricate mix of interests, actors, perceptions, and lived experiences. This complexity may seem obvious given China’s sheer size and the variance in political systems, economic models, historical traditions, and cultural diversity found in Southeast Asia. Yet too many analyses of the relationship focus on just one of these three explanatory aspects: ideological alignments, economic opportunism by one or the other side, or relative strategic acumen. Single-issue headlines around, say, the South China Sea dispute also tend to overshadow the diversity of the region’s individual and collective approaches toward China.

There is, therefore, a proclivity to imagine a spectrum in Southeast Asian states’ relations with Beijing and Chinese actors. Cambodia and Laos are often viewed as being “closest” to China in policy alignment and political preference, with the Philippines being at the opposite end, and the rest of the region’s countries falling somewhere in between. While this spectrum may be useful, it’s important to consider that perspectives, postures, and positions across Southeast Asian states are as diverse as the region itself. Some differences can even cut across national and societal lines within each country.

Many Southeast Asians view China as a significant [economic partner](#) given its market size and expectations of forthcoming investment. Even the Philippines, which terminated three of China’s Belt and Road Initiative (BRI) projects and advanced multiple fronts of defense cooperation with the United States and others since Ferdinand Marcos Jr., became president in 2022, remains [open](#) to Chinese trade and investment.

This growth-driven outlook emphasizes the large figures associated with Beijing’s infrastructure investments—notably, through the BRI—and that China is each Southeast Asian state’s largest trading partner in goods. Beijing shows consistent interest in participating in the region’s many economic frameworks, from the ASEAN-China Free

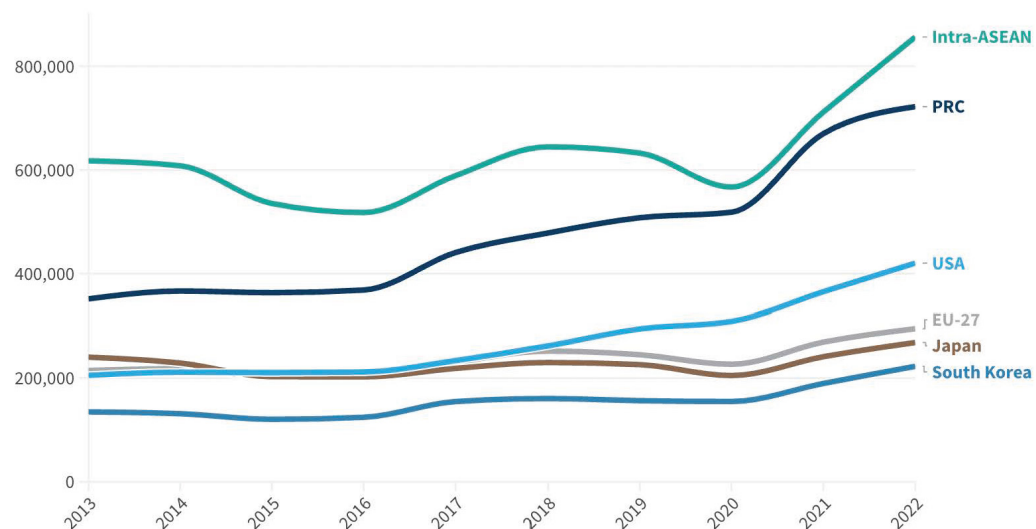
Trade Agreement to the Regional Comprehensive Economic Partnership. It is even seeking membership in the Comprehensive and Progressive Trans-Pacific Partnership, which includes several major Southeast Asian economies, such as Malaysia, Singapore, and Vietnam. Southeast Asia’s economic future, from this perspective, lies in accommodating Beijing.

But these interpretations understate the **reality** that Chinese foreign direct investment in the region persistently lags behind investment from the European Union, the United States, and Japan (see Figure 3), based on official ASEAN Secretariat reporting. Even though China is the largest bilateral trading partner in goods for all ASEAN states, the region runs a chronic trade deficit with China (see Figures 1 and 2), again according to ASEAN’s own data. In essence, regional states tend to use capital from various parts of the world to purchase and assemble components from China for further export to final markets elsewhere. Common interpretations have also overlooked how China’s still-maturing economy and demographic decline will impact bilateral ties in uncertain ways.

Penned by a group of regional scholars that represent nearly every country in Southeast Asia, this Carnegie China compendium considers a diverse spectrum of opinion on the issues listed above.

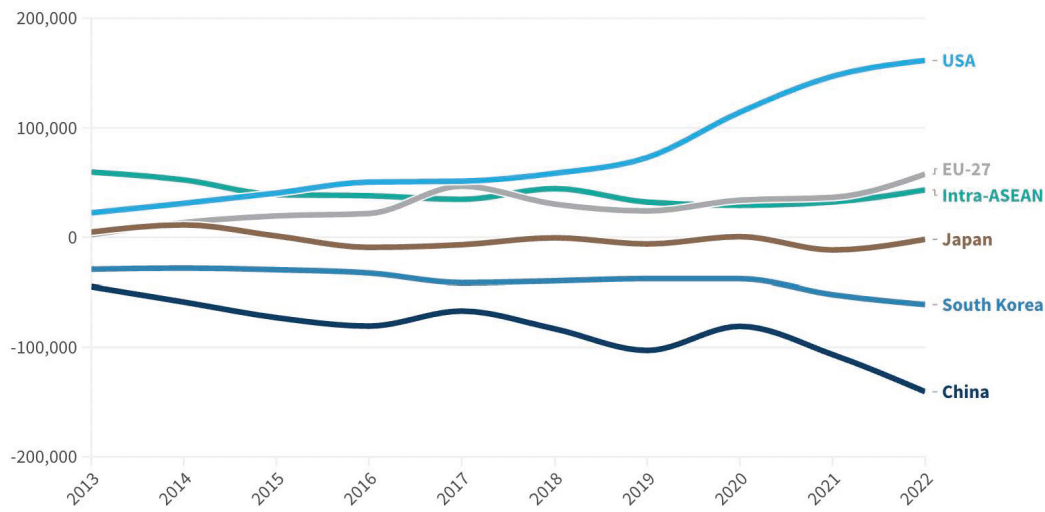
Beyond economic considerations, for example, countries remain ambivalent toward China’s long-term ambitions. Beijing and its vision of its own “great rejuvenation,” as President Xi Jinping puts it, offer a way to fend off “Western” and especially U.S. pressure. Southeast Asia contains a **reservoir** of “anti-Western,” anti-American sentiment borne from the

Figure 1. Value of ASEAN’s Trade in Goods by Top Trading Partners, 2013–2022



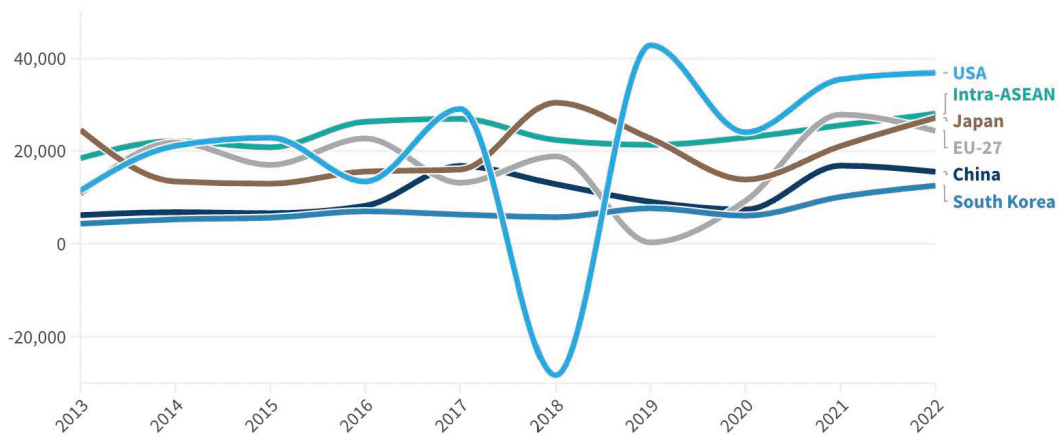
Source: “ASEAN Statistical Yearbook 2023,” The ASEAN Secretariat, December 2023, 107, <https://www.aseanstats.org/wp-content/uploads/2023/12/ASYB-2023-v1.pdf>.

Figure 2. Balance of Trade in Goods by ASEAN's Top Trading Partners, 2013-2022



Source: "ASEAN Statistical Yearbook 2023," The ASEAN Secretariat, December 2023, 109, <https://www.aseanstats.org/wp-content/uploads/2023/12/ASYB-2023-v1.pdf>.

Figure 3. Top Sources of Foreign Direct Investment (FDI) Flows to ASEAN, 2013-2022



Notes: 1) Data for 2022 are preliminary figures 2) Excludes reinvestment of earnings in the Philippines and intra-ASEAN breakdown for Lao PDR (2013) is estimated by the ASEAN Secretariat 3) Includes unspecified country source for reinvestment of earnings in the Philippines and estimated extra-ASEAN for Lao PDR (2013)
 Source: "ASEAN Statistical Yearbook 2023," The ASEAN Secretariat, December 2023, 183, <https://www.aseanstats.org/wp-content/uploads/2023/12/ASYB-2023-v1.pdf>.

excesses and abuses of colonialism, the Cold War, especially, in localities with large Muslim populations, which is tied to some of the excesses associated with the global war on terror, such as Islamophobia. The current crisis in the Middle East has entrenched these views in some places, especially in Indonesia and Malaysia; in these two countries, [impressions](#) of unequivocal and long-standing U.S. support for Israel—particularly since Tel Aviv’s military operation in Gaza to punish Hamas for the October 7, 2023, attacks in southern Israel—starkly contrasts with Beijing’s condemnation of Israel and its mediation among Palestinian [factions](#).

Meanwhile, others—especially Southeast Asian elites—see continued active [engagement](#) by the United States and other major powers as a crucial means of diluting Beijing’s excessive sway in the region. But this also means that frustrations about specific elements of American foreign policy, perceptions of U.S. hypocrisy, and Washington’s inconsistent commitment and unwillingness to grant market access that many Southeast Asian elites associate with the United States, can dampen ties. Such considerations sometimes encourage Southeast Asian elites to search for other partners.

Of course, like Washington, Beijing also has baggage that does not sit easily with Southeast Asian nations. Beijing has been [complicit](#) in bloody insurgencies, revolutionary regimes, and attacks on ethnic Chinese populations in Southeast Asia, such as during the Cold War. More recently, ethno-nationalist perspectives from Beijing that seek to mobilize Southeast Asia’s large ethnic Chinese populations in [support](#) of its “[Chinese dream](#)” of [national rejuvenation](#) have revived discomfiting shadows of the not-so-distant past.

Southeast Asian states have spent their post-independence decades trying to [incorporate](#) local ethnic Chinese communities, with varying degrees of success. Ethnic sensitivities remain fraught, ripe for exploitation in countries such as Indonesia and Malaysia, which experienced violent racial riots only a few decades ago. Any perceived attempt by Beijing to interfere, much less intervene, in this aspect of Southeast Asia’s domestic affairs triggers alarm bells for regional leaders.

There is also [uneasiness](#) about a return to a past that saw Sinitic empires impose subordinate, tributary positions on Southeast Asian polities, although there are some who may actually [welcome](#) such a future. Complicating matters further are [anxieties](#) among maritime Southeast Asian states about Beijing’s efforts to seize, control, and militarize disputed South China Sea features regardless of prevailing understandings of international law. Mainland Southeast Asian states worry that upstream Chinese-built dams enable Beijing to affect the flow of major rivers in ways that can [disrupt](#) livelihoods and economies downstream. Beijing has a recent history of getting specific ASEAN members to withhold their agreement to [prevent](#) the grouping from attaining the consensus necessary to develop a common position on key issues such as managing the South China Sea dispute.

Because strategic, economic, and ideological perceptions of China contain multiple, sometimes contradictory facets in Southeast Asia, receptions of and responses to Beijing diverge across and within state lines. [Public](#) and [elite opinion](#) surveys suggest that regional elites tend to be more skeptical, while the public is more sympathetic towards Chinese messaging—although U.S. support for Israel over Gaza seems to [move](#) elite views toward public ones.

Bearing the brunt of Beijing's pressure over the South China Sea and proximity to Taiwan makes the [Philippines](#) far more wary than its neighbors, even if it has experimented with accommodating China over several administrations, most recently that of former president Rodrigo Duterte. Other countries seem to believe they can have their cake and eat it, too, cultivating closer economic ties with Beijing while simultaneously encouraging the United States, its allies and partners, and others to restrain Chinese ambitions and maintain existing rules. Indonesia stands out as especially confident in its ability to [shift positions](#) with little cost, perhaps because of its size and importance in the region.

On one end of a spectrum, states such as Cambodia and Laos tend to see Beijing as integral to their economic and political futures and have close official relations. Both are major destinations for Chinese [infrastructure](#) investment. Cambodia receives [civil service](#) and [police](#) training from Beijing, hosts a Chinese-financed [naval base](#) at Ream that the People's Liberation Army Navy visits, and has even [blocked](#) ASEAN statements on the South China Sea that Beijing dislikes. [Timor-Leste](#) appears eager to [invite](#) investment, as well as support for building its [domestic institutions](#). Despite elite [cultivation](#), however, there is some [public wariness](#) in both Cambodia and Laos about the environmental degradation, corruption, crime, and inequality associated with Chinese capital.

At the other end of a spectrum, [Philippine](#) elite and public sentiment have hardened toward Beijing after years of unrelenting pressure over disputed maritime claims and the failure of efforts to mollify Beijing through engagement.

Other Southeast Asian states are more ambiguous, even split, toward Beijing. [Thai](#) establishment elites [desire](#) deeper economic and security engagement, but this orientation exacerbates a cleavage with younger people who are wary of the autocratic tendencies of the Thai establishment and their friends in China. In [Malaysia](#), where public opinion favors Beijing but elite sentiment is mixed, Kuala Lumpur courts Beijing and Chinese entities economically while seeking to [diversify](#) capital investment to encompass other sources. Malaysia has also quietly maintained security [cooperation](#) with the United States and its allies while [playing down](#) China's pressure on maritime claims. In [Singapore](#), there is substantial public sympathy for China and a broad desire to enjoy more of the economic opportunities that Beijing seems to promise, but there is also a general fear of friction with China's regime. Singaporean elites generally prefer to maintain robust economic and security ties with other major actors to preserve regional order and limit Beijing's influence.

[Indonesia](#) retains a degree of suspicion toward Beijing given its history of anti-communism and interethnic tensions, reinforced by economic [dislocation](#) from low-priced Chinese imports and environmental damage associated with direct investment. Differences also exist over Beijing's expansive maritime claims. However, Indonesian political and business elites still see significant gains from economic cooperation with China, especially in terms of infrastructure investment. The multisided civil war in [Myanmar](#) has various sides trying to win support from Beijing, especially the military, which prompts skepticism toward Beijing in other quarters.

Communist Party–run [Vietnam](#) generally tries to maintain its harder-line positions over territorial disputes while preserving positive ties with Beijing through direct party-to-party ties that include both an ideological and an internal security component. These ties may strengthen now that a public security official, To Lam, has become Vietnam’s new leader.

[Brunei](#) aims to [build stable ties](#) with China, which is a major buyer of its natural gas, and has kept silent about its competing claims in the South China Sea.

Beijing’s desire to advance its interests in Southeast Asia converges with most regional states’ aims to benefit from economic integration. Augmenting these material considerations are relatively popular views in Southeast Asia that China shares “[Asian](#)” civilizational, cultural, and historical reference points alongside experiences of resistance to imperialism. Those holding such perspectives find it easier to establish common cause with Beijing as a result.

Obviously, what adequately represents the diversity of “[Asian](#)” civilizations, cultures, and experiences remains a subject of robust debate. There remain lingering concerns in Southeast Asia—and beyond—that claims about more singular interpretations of “[Asian-ness](#)” by China can [mask](#) a desire for domination, as it did for Imperial Japan during the mid-twentieth century.

Beijing seems ready to use notions of “[ASEAN centrality](#)” and the grouping’s desire to complicate U.S. and allied calculations in the region, even as China entices and pressures ASEAN members into [shunning consensus](#) on matters it deems inimical to Chinese interests. This includes shunning criticism of efforts to occupy, reclaim, and arm features in the South China Sea. Southeast Asian governments looking to extra-regional players to counter China can end up inviting pushback from Beijing, potentially in ways that corrode prevailing practices and rules.

There is significant uncertainty about just what kind of power and influence Beijing will wield in the region in the coming decades. Analysts must keep in mind that although state-to-state relations between China and Southeast Asia have a level of deliberation, [interactions](#) by nonstate actors, particularly by business stakeholders and ordinary people on the ground, can have significant, though unintended, consequences in shaping engagement. For example, in May 2014, thousands of angry citizens in the south of Vietnam set fire to foreign factories—some of which were in fact Taiwanese—as part of anti-China protests over tensions in the South China Sea.

Demystifying Southeast Asian ties with Beijing against the backdrop of heightened major power contestation calls for a measured, clear-eyed understanding of the perspectives and impact of different stakeholders, within each country as well as across the region.

To that end, this compendium seeks to present the nuances and varied lenses through which Southeast Asians view China across three issue areas: leadership changes in Southeast Asia, Chinese diplomatic efforts, and Southeast Asia-China economic interactions.

SECTION 1

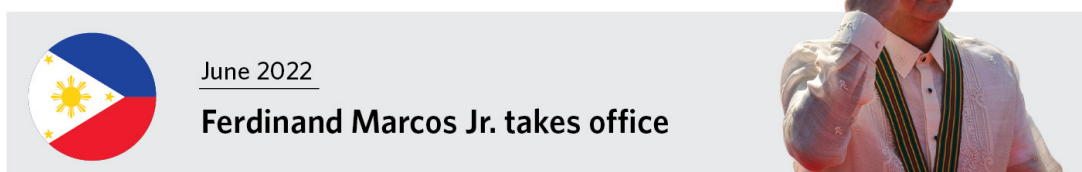
New Leader, New Approach to China?

Charmaine Misalucha-Willoughby, Cheng-Chwee Kuik, Lak Chansok, Thitinan Pongsudhirak, Lina A. Alexandra, Dien Nguyen An Luong, and Lam Peng Er

Over the past three years, Southeast Asia has witnessed a series of important leadership transitions. How will these new leaders approach China and how will they differ from their predecessors? Will the leadership change lead to closer or more distant relations with China? In this “China Through a Southeast Asia Lens” survey, Carnegie China asked scholars from seven different Southeast Asian countries for their views.

Philippines

CHARMAINE MISALUCHA-WILLOUGHBY
(Nonresident scholar, Carnegie China)



Source: Getty Images

On the campaign trail leading to the 2022 national elections, there were indications that Ferdinand Marcos Jr. would maintain continuity with then president Rodrigo Duterte’s policies. Not only was Duterte’s daughter, Sara, on the ticket as Marcos’s vice president, but Marcos was willing to [meet](#) with China’s ambassador to the Philippines, Huang Xilian, in October 2021, during his presidential bid. Once inaugurated, President Marcos [visited Beijing in January 2023](#), suggesting that he intended to maintain Duterte’s pivot to China.

However, China's continued occupation of the West Philippine Sea and an intensification of Chinese gray-zone operations throughout 2023 prompted Marcos to diversify the country's international relations. Incidents in the West Philippine Sea—including the Chinese Coast Guard pointing a [military-grade laser](#) at the Philippine Coast Guard, using [water cannons](#) to deter the Philippines' routine and resupply missions to the BRP Sierra Madre in Second Thomas Shoal, and relying on the Chinese [maritime militia](#) to chase Filipino fishers away from their traditional fishing grounds—heightened tensions between the two countries.

To safeguard the Philippines' national interests in the face of threats to its sovereign and territorial integrity in the West Philippine Sea, Marcos reinvigorated the country's long-standing alliance with the United States. For instance, the allies identified [new sites](#) in April 2023 to expand the scope and coverage of the 2014 Enhanced Cooperation Defense Cooperation Arrangement (EDCA). Joint military exercises, like the annual Balikatan drills, and [security cooperation with like-minded states](#) have contributed to the Philippines' goal of harnessing an independent foreign policy and completing the modernization of its armed forces.

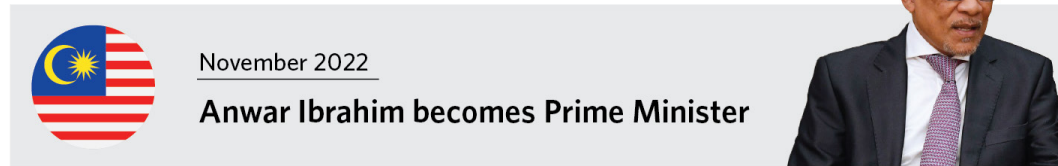
Marcos has successfully reintroduced the Philippines to the international community—a move in stark contrast to his predecessor's path of isolation. In conducting state and official visits to other countries, Marcos has reached out to partners and demonstrated the Philippines' resolve to be seen as a credible and responsible member of the international community. From 2016 to 2022, by contrast, former president Duterte focused primarily on domestic initiatives: the so-called war on drugs, a campaign pledge to rid the country of crime and corruption, and his flagship infrastructure program. In the face of widespread criticism related to human rights violations arising from the war on drugs, Duterte found an ally in Chinese President Xi Jinping, who supported Duterte's "[Build, Build, Build](#)" program. In exchange, the Philippines downplayed China's incursions into the West Philippine Sea. Duterte was also responsible for jump-starting the abrogation of the EDCA, which challenged the very foundation of the Philippine-U.S. alliance. In response to international criticism of Duterte's drug war policies, he withdrew the Philippines from the International Criminal Court.

Under Duterte, the Philippines turned inward; China was its only window—or bridge—to the outside world. Conversely, Marcos has pursued a more outward orientation and leveraged international partnerships beyond China.

Malaysia

CHENG-CHWEE KUIK

(Nonresident scholar, Carnegie China)



Source: Getty Images

Anwar Ibrahim was sworn in as Malaysia's tenth prime minister in November 2022. Under his leadership, Malaysia has viewed China positively and taken steps on several fronts to develop closer relations with Beijing. In late March 2023, four months into his premiership, [Anwar flew to Hainan to address the Boao Forum for Asia before arriving in Beijing](#) for bilateral exchanges. [In September, he made another visit to China, this time to Nanning, to attend](#) an annual event for cooperation between China and the Association of Southeast Asian Nations (ASEAN), the China-ASEAN Expo. The two visits were driven primarily by diplomatic and economic imperatives: maximizing high-level leader interactions and securing billion-dollar business deals.

During both visits, Anwar [spoke favorably](#) of China's global initiatives and expressed support for the Belt and Road Initiative (BRI). His administration announced a second 5G network in Malaysia, which could be open for participation by China's Huawei. The Anwar administration's first year also witnessed the implementation of mutual visa-free policies between the two countries, increased inflows of Chinese investment into Malaysia's manufacturing sector (including semiconductors), and steady progress on BRI-related development and infrastructure projects in Malaysia. In 2024, the two countries are celebrating the fiftieth anniversary of their establishment of diplomatic ties in May 1974. (Malaysia was the first ASEAN state to establish diplomatic ties with China.)

Many of these steps and developments are a continuation or enhancement of Malaysia's decades-long policy of pragmatic engagement with its powerful neighbor, rather than a new direction set by Anwar. Policy continuity stems from internal and external factors. Domestically, Malaysia's successive governing elites rely on growth and development-based performance as their primary pathway to enhance and consolidate their authority to rule the multiethnic, multireligious country. This domestic logic necessitates not just economic pragmatism but also diplomatic pragmatism. This dual approach prompts Malaysian elites to see a rising China as a source of strength to leverage upon, rather than a threat to balance against. China provides opportunities to maximize economic benefits, ensure a stable external environment, and promote a more integrated and productive region. Hence, [notwithstanding overlapping claims over the southern part of the South China Sea](#), Malaysia and China have partnered throughout the post-Cold War era on a range of

regional and international issues, most notably [East Asian integration](#). Externally, there are structural logics that compel Malaysia, like many other regional states, to pursue a neutral, “[equidistance](#)” policy vis-à-vis China and the United States, not least to avoid the dangers of entrapment within a possible great power conflict.

This is not to say that leadership does not matter for Malaysian policy. Leadership remains a significant factor, primarily in terms of diplomatic style and skill. Anwar, for instance, has been deferential toward China. He has avoided openly criticizing Beijing on the issue of Xinjiang, avoided a confrontational approach on the South China Sea, [repeatedly expressed that Malaysia “has no problem with China,”](#) and [publicly commented on the West’s “Chinaphobia” problem](#). Some of these deferential acts may have gone too far (such as his public statements about China’s three global initiatives).

However, as a seasoned statesman, Anwar has been prudent in striking a balance between crucial domestic interests and external considerations. Selective deference has been displayed together with selective defiance (for example, Malaysia [officially rebuking China](#) when the August 2023 edition of the map of China indicated a ten-dash line in the South China Sea). Equally important, the Anwar administration’s efforts in enhancing the Sino-Malaysian partnership have also been pursued concurrently with efforts to expand cooperation with other key partners (including [upgrading defence cooperation with the United States](#), [elevating relations with Japan to Comprehensive Strategic Partnership](#), [strengthening multi-domain cooperation with South Korea](#), [partnering with the European Union on Global Gateway projects](#), and [working with Canada on cybersecurity, trade, clean technologies and other sectors](#)).

Cambodia

LAK CHANSOK

(Senior lecturer, Royal University of Phnom Penh)



August 2023

Parliament elects Hun Sen’s son, Hun Manet, as new Prime Minister



Source: Getty Image

Hun Manet, the eldest son of longtime Cambodian leader Hun Sen, became the country’s second postwar prime minister on August 22, 2023. For the past eight months, Manet has demonstrated competent and versatile statecraft, welcomed face-to-face diplomacy, embraced continuity with his father’s domestic and foreign policies, and aimed for peace, diplomacy, and socioeconomic development.

Since assuming office in August, Manet has embarked on a series of strategic engagements with numerous foreign dignitaries and business leaders. These efforts have accentuated his strategic hedging policy: a multidimensional approach that strategically seeks to diversify diplomatic relations, leverage economic diplomacy, safeguard national interests, minimize and mitigate potential risks, and ensure flexibility on the global stage.

China was, indeed, the first foreign country to which Manet paid an official visit. This visit had significant implications for the two nations' bilateral ties. First, the visit demonstrated China's level of significance for Cambodia's interests, underscoring the two nations' ambitions to invigorate a "high-level, high-quality, and high-standard community with a shared future." Second, the visit's success can be attributed to the deep political and strategic trust between the two leaders, underscoring the robust ties between the two countries to ensure "national sovereignty, security, and development." Third, both leaders reaffirmed their strong commitment to elevating their Comprehensive Strategic Partnership, extending cooperation beyond the bilateral sphere.

The success of the recent visit to Cambodia by Wang Yi, senior cadre of the Politburo of the Chinese Communist Party, reaffirms Manet's intent to continue embracing China as one of Cambodia's partners. The visit came amid growing concerns over two China-funded projects—Ream Naval Base and Funan Techno Canal—in the country. During the visit, Wang and Cambodian leaders reiterated their commitment to maintaining the "ironclad" friendship between the two leaders and fostering the Comprehensive Strategic Partnership between the two nations. Both leaders expressed their firm intent to develop the Diamond Hexagon cooperation framework, enhance strategic synergy between Cambodia's Pentagonal Strategy and China's Belt and Road Initiative (BRI), deepen sectoral cooperation, and promote a rules-based international order that could contribute to regional peace, stability, and development.

Cambodia's continued strategic alignment with China has been seen as a "pragmatic" foreign policy choice for the country's quest for long-term peace, political stability, security, and economic prosperity. Key factors—including geographical proximity, civilizational connectivity, economic interdependence, and convergent strategic interests—substantiate the logic of Cambodia's ties with China. Based on alignment in these areas, both sides continue to support each other's mutual benefit by prioritizing the other's core interests.

The backbone of Sino-Cambodian relations primarily lies in political trust and convergent strategic and economic interests. Cambodia has been a staunch supporter of China's initiatives in international forums. Since 2013, Cambodia has reaffirmed its support of China's mutually beneficial BRI projects and other proposals, including the Global Development Initiative, Global Security Initiative, and Global Civilization Initiative. On economic cooperation, China remains Cambodia's most important trading partner and source of foreign investment. In the first half of 2023, the two nations' trade volume reached approximately \$7 billion, and China's new investment alone accounted for around 65 percent of the total investment in Cambodia, representing around \$1.1 billion in combined registered capital. In tandem, Chinese tourism has contributed to Cambodia's economic growth, with nearly 550,000 tourists in 2023 ranking third in foreign tourism to Cambodia.

Thailand

THITINAN PONGSUDHIRAK

*(Professor of political science and international relations,
Chulalongkorn University)*



August 2023

Srettha Thavisin takes office



Source: Getty Images

Thailand has an enviable regional position in Asia as a longstanding U.S. treaty ally with historically close and intimate relations with China. Except for a blip in the 1970s when China supported the Communist Party of Thailand, ties between Bangkok and Beijing have gone from strength to strength, aided by the remarkable enmeshment of overseas Chinese in Thailand's hierarchical society and their phenomenal business success in the Thai economy.

The Srettha government—widely seen as democratically legitimate despite its [controversial dealmaking](#) to take office—has tried to generate policy momentum and improve investor confidence. In contrast to the former government under Prayut Chan-o-cha, the Srettha government's democratic credentials allow it be less beholden to China. This is not to say that Bangkok has turned away from Beijing to embrace Washington. Democratic credibility merely gives Srettha more options and space to engage. It can be expected that Thailand will toe the West's preferred positions on major conflicts, such as the Russia-Ukraine war and the Hamas-Israel conflict. Thai foreign policy posture may be omnidirectional, but it is also seen as relatively more open and liberal because it no longer suffers from the autocracy complex of Prayut.

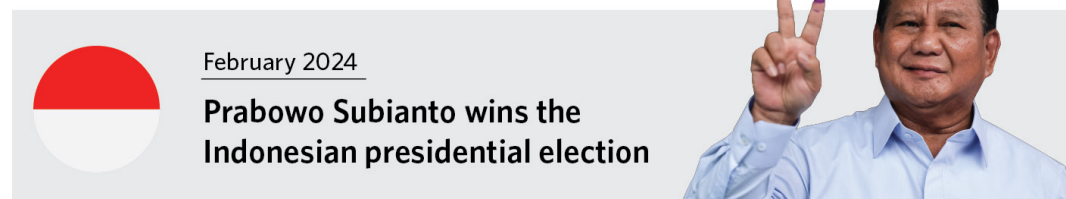
So far, Srettha's approach to China has been evenhanded. Srettha attended the Belt and Road Forum last October, where he met Chinese President Xi Jinping for the first time. Three months later, the Srettha government implemented a mutual visa-free agreement with China. Srettha has also welcomed Chinese investment in Thailand, with a focus on electrical vehicles. His government is banking on Chinese tourists to return to pre-pandemic levels—in 2019, the country recorded 39 million [visitors](#), among which 11 million visitors were from China. Other Sino-Thai engagements have included joint [military exercises](#) and even [outer space cooperation](#).

This trend of solid bilateral engagement can be expected to continue. In other words, none of what Thailand was doing with China under the Prayut government will cease under the Srettha administration. On the contrary, the Bangkok-Beijing relationship appears to be moving from strength to strength. The difference now is that Thailand can move in other directions at the same time.

Indonesia

LINA A. ALEXANDRA

*(Head of Department of International Relations,
Centre for Strategic and International Studies (CSIS), Jakarta)*



Source: Getty Images

The legislative and presidential elections held this year on Valentine’s Day—February 14, 2024—turned the page for Indonesia. After a decade with Joko Widodo in power, Prabowo Subianto will officially assume the presidency in October 2024. The incoming president, known as a blunt and often emotional individual, especially during his time as defense minister, has raised questions regarding the direction of Indonesian foreign policy ahead.

At this stage, we do not know much about Prabowo’s intended foreign policy direction. Nonetheless, there are some hints about how he might run the course. First, in terms of leadership style, Prabowo will likely be more interested in attending regional and international forums and engagements, rather than shy away from them as his predecessor has. Based on his personality, he will likely be more outspoken and could even criticize relevant countries if Indonesia’s national interests or security are perceived to be threatened.

Second, during Prabowo’s November 2023 speech at the Centre for Strategic and International Studies in Jakarta, prior to the campaign period, then candidate Prabowo portrayed his foreign policy vision as based on a “[good neighbor policy](#),” in which Indonesia pursues friendly relations with all nations. He repeated several times the tenet that “one enemy is too many and a thousand friends is too few.”

What will this mean for Indonesia’s foreign policy approach to China? Will there be continuation or change?

On the one hand, during the campaign, Prabowo, whose running mate is Widodo’s son, indicated that his policies would continue those of his predecessor, including engaging China on economic sector. This makes sense from an economic perspective. Indonesia has been able to maintain relatively high growth (averaging growth rates of around [5 percent](#) in 2023) while most countries worldwide have struggled. China is Indonesia’s [biggest trading partner and second-largest source of investment](#). For this reason, Prabowo is likely to maintain the status quo and sustain Indonesia’s strong relations with China.

On the other hand, Prabowo is obviously interested in further developing Indonesia's military capabilities. This is not new, either. With its expanding economic capabilities, Indonesia has aspired to complete its [Minimum Essential Force plan](#) by 2024 and then move its defense posture to the next stage¹. Because the United States and European countries have traditionally been major arms suppliers, maintaining good relations with the West is equally important for Indonesia's defense goals.

Prabowo is likely fully aware of the challenges and risks posed to Indonesia's national security and welfare by the heightening strategic rivalry between the United States and China. Indonesia benefits from stable, if not friendly relations, among major powers. As the saying goes, "when the elephants fight, the grass suffers." Hence, under the new presidency, there is much hope that Indonesia will, at a minimum, maintain its good relations with all great powers. More significantly, Indonesia may become more proactive in introducing initiatives that bring these powers together for the benefit of all countries.

Vietnam

DIEN NGUYEN AN LUONG

(Associate fellow, ISEAS Yusof-Ishak Institute)



Since March 2024

**Major dismissal of
high-ranking Vietnamese officials**



Source: Getty Images

In the wake of the [sudden resignation](#) of President Vo Van Thuong in March 2024, a flurry of diplomatic activity has unfolded between Hanoi and Beijing. Three senior Vietnamese officials visited China within the span of three weeks. Vuong Dinh Hue, the [now ousted](#) chairman of the National Assembly who was among the four "pillars" of Vietnam's leadership, embarked on a weeklong visit to China on April 7, 2024. During his visit, [Hue met with Chinese President Xi Jinping](#) in Beijing, where they discussed enhancing cooperation on trade and development projects. This visit came closely on the heels of a meeting between Vietnamese Foreign Minister [Bui Thanh Son](#) and his Chinese counterpart, Wang Yi, in Guangxi a week earlier, and a March visit to China by [Le Hoai Trung](#), who oversees the Vietnamese Communist Party's external relations.

While Trung's visit may have been planned prior to the recent shakeup of Vietnam's leadership, subsequent trips by Hue and Son seemed designed as part of Hanoi's efforts to assure Chinese leaders that the abrupt defenestration of a second president in just over a year would not cause instability. These diplomatic overtures occurred against the backdrop of [brewing tensions in the flashpoint South China Sea](#), in which Hanoi has been one of the

most [vociferous critics](#) of Beijing's growing assertiveness. These developments underscore a fundamental principle of Vietnam's foreign policy: any government must try to get along with and stand up to China at the same time. This delicate balance is expected to persist despite the relentless political upheaval in Vietnam. In late April 2024, Hue was ousted [from parliamentary leadership](#). Three weeks later, [Truong Thi Mai](#), who was a permanent member of the Communist Party Central Committee's Secretariat and fifth in Vietnam's leadership hierarchy, also got the axe. Both Hue and Mai were apparently defenestrated after the party cryptically accused them of "[violations and shortcomings](#)." Before long, in May 2024, Vietnam named [Tran Thanh Man](#), Hue's deputy, as his successor and installed [To Lam](#), the minister of public security, as the new president.

In Vietnam's political system, characterized by collective leadership, the removal of high-profile individuals does not typically signal a seismic shift in its bilateral ties with China, which are underpinned by a complex web of economic interdependence, security concerns, and deep-rooted ideological similarities. China has remained Vietnam's [largest trading partner](#), playing a critical role in its manufacturing sector and agricultural exports. Ideologically, Vietnam's socialist-oriented model closely aligns with China's, with both governments sharing a fear of being overthrown in a so-called [color revolution](#) instigated by foreign powers. This ideological affinity has led Vietnam to adopt [Chinese-style governance practices](#), including tightening controls on the internet and civil society, and a focus on building a strong state-led economy. Seen in this light, it is essential for observers to grasp the [complex dynamics](#) of Vietnam's ties with China: the Vietnamese Communist Party regards Beijing as an ideological ally, the government sees it as a capricious partner, and the general population views it as a [constant threat](#).

To be sure, Vietnam and the Philippines have remained outliers in Southeast Asia that favor alignment with the United States over China if forced to choose between the superpowers. The [ISEAS–Yusof Ishak Institute survey](#), polling individuals from the private and public sectors, as well as academics and researchers, offers insight into the prevailing attitudes that shape policy on regional issues in Southeast Asia. In the most recent survey, 50.5 percent of Southeast Asians now prefer China, with the United States close behind at 49.5 percent. This is the first time China has edged past the United States in preference since the survey's inception in 2020. However, the United States remains the preferred ally for the Philippines and Vietnam, with 83.3 percent and 79 percent support, respectively.

While these findings shed light on regional sentiment, it is crucial to distinguish between perception and policy. The question of preferred alignment is largely hypothetical, designed to measure the level of trust or distrust toward Beijing and Washington. The reality of Vietnam's foreign policy suggests that, despite distrust toward China, it is unlikely that Vietnamese policymakers would choose Washington over Beijing when faced with a critical decision. Ultimately, the enduring economic, ideological, and strategic ties between Hanoi and Beijing suggest that Vietnam's foreign policy toward China is likely to remain consistent, balancing cooperation with caution.

Singapore

LAM PENG ER

(Principal research fellow, East Asian Institute)



Source: Getty Images

On May 15, 2024, Lawrence Wong Shyun Tsai [officially succeeded](#) Lee Hsien Loong as prime minister of Singapore. Singapore's careful succession planning will ensure continuity in domestic public policy and foreign relations, including its close partnership and strong friendship with China. In Singapore's unique political system, Lee Hsien Loong has become a senior minister and a de facto mentor who remains in the cabinet. Lee will also remain secretary general of the perennial party in power, the People's Action Party.

Though the political baton has been handed over to Wong, the key appointment holders—including the foreign minister, defense minister, and minister of trade and industry—will remain at their posts until at least the next general election. Simply put, the city-state's foreign policy orientation will be marked by continuity notwithstanding the advent of a new prime minister.

That said, the city-state's political continuity does not mean that the administration will merely and complacently maintain cordial relations with China. Rather, Singapore seeks to enhance its partnership with China in the years ahead.

Singaporean elite perceptions of China

According to the Singapore-based Institute of Southeast Asian Studies' [State of Southeast Asia 2023 Survey Report](#), 70.7 percent of Singaporean elites (comprising bureaucrats, corporate leaders, journalists, and academics) perceive that China is the most influential economic power in this region. However, 33.2 percent of Singaporean elites perceive China has the most political and strategic influence in Southeast Asia. Arguably, Singaporean elites have a pragmatic view that Singapore and the other member states of the Association of Southeast Asian Nations (ASEAN) must maintain good relations with both United States and Chinese superpowers, which are both vitally important to Southeast Asia. To be sure, the great power transition in the Asia-Pacific is uncertain and potentially perilous to the small and medium powers in Southeast Asia who wish to avoid the potential crossfire of competing major powers. Singapore, with a new captain and pilot abroad, must navigate turbulent regional and global politics and economics while seeking to maintain good relations with all great powers and its ASEAN neighbors.

Singapore's relations with China are based on three important state-to-state projects: the Suzhou Industrial Park, the Sino-Singapore Tianjin Ecocity, and the China-Singapore Chongqing Connectivity Initiative. Other recent bilateral projects include the Singapore-China (Shenzhen) Smart City Initiative, which promotes cross-border digital trade and data flows. According to [Singapore Ministry of Trade and Industry](#), the city-state has been China's largest foreign investor since 2013 and representing 15.3 percent of Singapore's cumulative direct investment abroad as of 2021. Besides economic cooperation, the Singapore Armed Forces and the Chinese People's Liberation Army have conducted periodic joint military exercises.

Since 1996, Singapore has [trained](#) more than 55,000 Chinese officials and cadres on good governance and sharing aspects of its governance model, including the rule of law and anticorruption. Besides elite training, people-to-people relations between the city-state and China are strong. Both countries are among one another's favorite [tourist destinations](#).

The Sino-Singapore relationship is not one based primarily on nostalgia and a mawkish view of shared culture and ethnicity simply because [75 percent](#) of Singaporeans are of Chinese ethnic origins. After all, Singapore is a multiethnic, plural society and cannot conduct its foreign policy according to the ancestral preferences of its citizens from India, China, the Malay Archipelago, and Europe. In a nutshell, the Sino-Singapore relationship is a time-tested and mutually beneficial relationship.

Both countries should continue to engage bilaterally, and multilaterally within the ASEAN framework and ASEAN-led multilateral processes such as the ASEAN Regional Forum, ASEAN Plus Three, the East Asian Summit, and the ASEAN Defense Ministers Meeting Plus. China and Singapore should promote the Regional Comprehensive Economic Partnership and boost the ASEAN-China Free Trade Area (ACFTA).

One caveat to the otherwise positive assessment of Sino-Singapore relations is that it is not possible for the two nations, as sovereign states with their own core national interests, to have foreign policy alignment at all times. Both countries should appreciate past cooperation and build a future-oriented, multifaceted partnership that can withstand any occasional difference in outlook. Regardless of who is at the helm in either country over the next decade, Sino-Singapore relations will grow from strength to strength because of deep, mutual interests.

¹The Indonesian Defense posture is projected to be capable of conducting joint operations and having a deterrent effect in order to reduce the intensity of threats to the sovereignty as well as the authority of the Republic of Indonesia. The achievement of Indonesia's defense posture is marked by the enhancement of TNI personnel professionalism, the increase in quantity and quality of TNI's defense equipment across the three dimensions (land, sea, and air), the establishment of a national defense component, as well as the enhancement of security in border areas and outermost islands (Presidential Decree No. 5, 2010).

SECTION 2

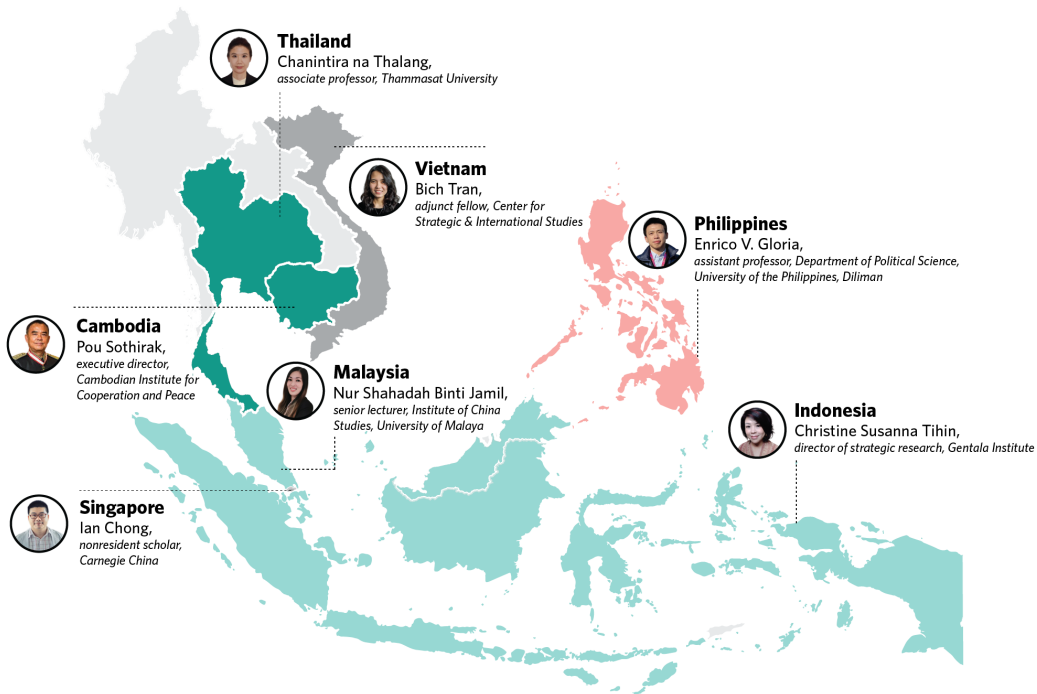
Has Xi's Diplomacy Been Effective in Southeast Asia?

Chong Ja Ian, Enrico V. Gloria, Nur Shahadah Binti Jamil, Pou Sothirak, Chanintira na Thalang, Christine Susanna Tjhin, and Bich Tran

For the first issue of Carnegie China's "China Through a Southeast Asia Lens" series, we invite scholars from seven Southeast Asian countries to discuss how effective Chinese president Xi Jinping's diplomacy has been at improving China's relations with their countries, and ask them to choose one among the five levels: very positive, positive, neutral, negative, or very negative. Below are their takes.

As Chinese President Xi Jinping reengages diplomatically with state leaders in Southeast Asia, how effective has Xi's diplomacy been at improving China's relations with your country?

very negative negative neutral positive very positive



Singapore

Neutral

IAN CHONG (*Nonresident Scholar, Carnegie China*)



A highlight of China's charm offensive was the [meeting](#) between Xi and Singapore's Prime Minister Lee Hsien Loong during the 2022 APEC summit in Bangkok. The same week, Lee also [engaged](#) China's then premier Li Keqiang during ASEAN meetings in Phnom Penh. Lee met again with Xi and new Premier Li Qiang during the 2023 Boao Forum. These events signified a restart of direct high-level political meetings between the two states. [Public readouts](#) suggest an evolutionary development in bilateral ties based on a mutual orientation toward deepening existing economic cooperation and moving forward negotiations already underway. This despite an apparent [elevating of relations](#) to a grand-sounding "all-round high-quality future-oriented partnership." Such contact likely sets the tone for official Singapore-China relations going forward.

China's recent efforts to win hearts and minds in Singapore are not limited to meetings between top leaders, however. Chinese state-affiliated media available in Singapore, along with like-minded outlets, have been [highlighting affinity](#) between the two states and the [compatibility](#) of their interests. Such narratives often revolve around ethnic and cultural similarities between the majority ethnic Chinese populations in the two countries, sometimes even noting shared ethnic origins. The newly appointed Chinese ambassador to Singapore has made it a point to reach out to various community organizations, businesses, and Mandarin-language media outlets, and then publicizing such efforts on [social media](#).

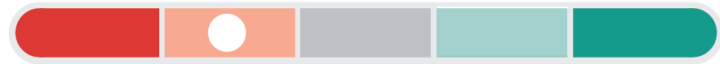
Despite Beijing's best attempts, the results of this charm offensive remain mixed especially among the public. Official agreements and commercial contact aside, [opinion polling](#) suggests Beijing's [broad popularity](#), but separate [surveys](#) also show that elites remain cautious about Beijing's intentions and the effects of its prominence on Singapore's interests. Singapore's Malay and South Asian ethnic minorities are less sure about the increasing prominence of Chinese culture, which may obscure their visibility and entrench existing inequalities. The Singapore state also maintains [reservations](#) about potential Chinese [influence](#) and [information](#) operations, even if it is [hesitant](#) to identify such concerns publicly possibly due to concerns about punishment. Such sentiments indicate that while Beijing is working hard at winning over Singapore and Singaporeans, China and its representatives in the city-state need to continue working on such initiatives before fuller effects materialize.

Philippines

Negative

ENRICO V. GLORIA

(Assistant Professor, Department of Political Science, University of the Philippines, Diliman)



China's diplomacy toward the Philippines had a great start this year, beginning with President Ferdinand Marcos Jr.'s official state visit to China. The visit was momentous, as far as Chinese diplomacy is concerned. Marcos was the first state leader hosted by Beijing after fully opening up its borders after three years of strict coronavirus controls, signifying the continued importance of the Philippines in China's neighborhood diplomacy. Investment pledges, representing Beijing's continued commitment to improving economic ties with Manila, also accompanied the historic visit. They focused on areas of cooperation that could serve to widen the gamut of bilateral relations beyond their territorial disputes.

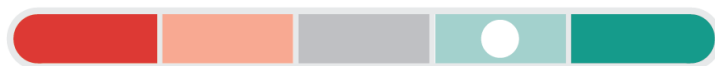
But what grabbed the attention of most observers, especially in Manila, was the promise to establish a direct line of communication between the countries' two foreign ministries with respect to concerns in the South China Sea. This is a first for Philippines-China relations and represents continued efforts from both sides to explore diplomatic and peaceful ways to address tensions in the area.

Nonetheless, such promising bilateral initiatives were overtaken by recent reports of Chinese aggression toward the Philippines in the South China Sea. This included an incident of what seemed to be a [military-grade laser](#) used against the Philippine Coast Guard's BRP *Malapascua* that caused temporary blindness to the crew. While the specific facts of the incident continue to be disputed, this event has sounded the alarm in Manila. For one, it validated the merits of the current steps undertaken by the Marcos administration to proactively revitalize the Philippines-U.S. alliance. While the top leadership in Beijing has undoubtedly shown its willingness and continued commitment to maintain good relations with Manila, China's actions on the ground continue to provide little evidence of its sincerity.

Malaysia

Positive

NUR SHAHADAH BINTI JAMIL (*Senior Lecturer, National University of Malaysia*)



Beijing's charm offensive approach in Malaysia is unique in the sense that it is carried out through various fronts of public diplomacy—with emphasis on cultural diplomacy but heavily backed with its phenomenal economic might.

China has been Putrajaya's largest trading partner for fourteen consecutive years with bilateral trade between the two countries, reaching a **record** high of \$203.6 billion in 2022. Despite the downward pressure from the global economy and multiple challenges posed by the pandemic, bilateral trade **increased** by 19.7 percent year-on-year. In addition, China has been Malaysia's largest foreign investor in the manufacturing sector since 2016 and has invested heavily in various Malaysian infrastructure projects under the Belt and Road Initiative.

As a result, in order to secure these economic and development benefits, the Malaysian government tends to be more accommodative toward China's quest in acquiring and projecting its soft power in the country. For instance, Putrajaya has allowed China to **establish** several new Confucius Institutes across the country in recent years. These Confucius Institutes are not truly independent in nature: they are affiliated to the Hanban, or the Office of Chinese Language Council International, which is an agency in the State Council of China that reports directly to the Chinese Ministry of Education.

However, while China's economic diplomacy has earned Beijing considerable influence in Malaysia at the moment, such influence has not been translated into Malaysians' support for its principles nor values, and to certain extent, its policies. In fact, its cultural appeal remains rather limited among Malaysians, especially among non-ethnic Chinese Malaysians. What narrows Chinese soft power here are China's own political system, ideology, and (most importantly) an element of distrust toward China.

In addition, several issues are irritants in the bilateral relationship, with the potential to tarnish or undermine the positive image Beijing is trying to build. These issues include the South China Sea dispute and the issue of Uighurs in Xinjiang. The two issues show dissonance between the image Beijing aspires to project and its actions. Therefore, if China does not address these shortcomings in a proper manner, it will be difficult for it to sell its cultural products and values abroad, including in Malaysia.

Cambodia

Very Positive

POU SOTHIRAK (*Executive Director, Cambodian Institute for Cooperation and Peace*)



The diplomatic relationship between Cambodia and China can be characterized as very positive after Cambodian Prime Minister Hun Sen visited Beijing in February. After the visit, Cambodia secured a \$44 million grant for a \$4 billion express railway project. Cambodia has also welcomed the return of Chinese tourists after three years of absence due to the coronavirus pandemic. Cambodia is quite supportive of China-led stances and initiatives, such as China's peace plan for Ukraine, and has benefited from China's Belt and Road Initiative.

During the September handover ceremony of the new Morodok Techo National Stadium built by China, Hun Sen said that the friendship between [Cambodia and China](#) has gone from one of trusted friends to one of comprehensive strategic partners with a “stronger than steel” friendship.

Cambodia supports the process of continuing China's growing role in the region. And likewise, Beijing appreciates the partnership it receives from Phnom Penh. However, both sides should make sure that what is good for the two sides is good for regional interests as well, ensuring that mutual interests are mutually respected.

As far as the reengagement with Southeast Asia is concerned, the visit by Chinese President Xi Jinping in November to Bali to attend the G20 summit and to Bangkok for the Asia-Pacific Economic Cooperation Economic Leaders' meeting, as well as the visit of Chinese Premier Li Keqiang to the ASEAN summit in Phnom Penh that same month, provided a fresh opportunity to renew Xi's vision of a “community of common destiny” and to uplift China's influence in the global arena amid a disturbing geopolitical environment.

Thailand

Very Positive

CHANINTIRA NA THALANG (*Associate Professor, Thammasat University*)



The military and diplomatic ties have been very positive on the leadership level. Thai-Chinese relations have been developing over a long period, since Vietnam invaded Cambodia in 1978. The 1997–98 Asian financial crisis represented another positive milestone. The two countries' relations developed even further following the 2014 coup, when the Thai military ousted then prime minister Yingluck Shinawatra's government, hurting Thailand's relations with the West.

Thailand appreciates that China does not interfere with its internal affairs. As Panithan Wattanayagorn, the government's security adviser, said in 2017, "the Chinese have been more sophisticated in approaching Thailand. It is beyond a charm offensive, it had achieved another level in a very progressive approach to the relationship in terms of politics."

Indonesia

Positive

CHRISTINE SUSANNA TJHIN (*Director of Strategic Research, Gentala Institute*)



The general trend of bilateral relations has progressed, despite the pandemic-related slowdown. Similar to his predecessors, Indonesian President Joko Widodo has practiced a China policy focused heavily on economics. Although the bilateral trade deficit is often criticized, it is decreasing, and China (along with the United States and India) remains equally important contributors to Indonesia's exports and overall trade surplus.

From the early stages of the BRI from 2012 to 2015, China was barely among the top ten investors in Indonesia, but nowadays, China has climbed into top five. Last year, Indonesia received the highest foreign direct investment inflows in its history, and China ranked second behind Singapore as the largest investor. With the end of China's Zero COVID policy, optimism among Indonesian businesses is palpable.

Sociopolitical relations have also progressed, albeit at a slower pace. The very active Confucius Center in Al-Azhar University Jakarta, the Sino-Indonesia Friendship Library in Central Java Grand Mosque, and the increasing availability of scholarships for Muslim students are a few anecdotes of China's soft power drives. These factors, combined with Indonesia's own domestic complexities and China's relative discipline to avoid becoming publicly involved in or commenting on Indonesia's politics, have contributed to the relative silence of Indonesian officials and elites regarding Xinjiang issues—to the dismay of human rights proponents and some Muslim groups.

Regardless of the long-held suspicion and concern over China's security apparatus, including its maneuvers in the South China Sea, security cooperation has been helpful for Indonesia's own quest for military modernization. Security and high-tech development, which were highlighted during China's recent political events, will be an important arena to watch. Technology transfer alongside Chinese investments has been favorable for Indonesia, as seen in high-speed rail construction and vaccine diplomacy.

Institutionally, instead of further optimizing the foreign affairs ministry's role, Widodo set up a "one door" mechanism through the informal appointment of special envoys to China. The ramifications of such a "centralized" mechanism and its potential risks to the relationship in the long term are worth debating. So far, however, China has been effective in adapting to it.

Vietnam

Neutral

BICH TRAN (*Adjunct Fellow, Center for Strategic & International Studies*)



Despite the symbolism and outcomes of Xi's meeting with Vietnamese leader Nguyen Phu Trong in October, China's diplomacy efforts with Vietnam have been neutral at improving relations. The two leaders attached different meanings to their meeting. Xi chose Trong as the first foreign leader to meet after being reelected as the General Secretary of the Communist Party of China to showcase the relevance of socialism to international audiences and to consolidate the party's legitimacy at home. Trong went to China for his first overseas trip since being reelected as the General Secretary of the Communist Party of Vietnam simply to fulfill a promise that he made to Xi. The thirteen agreements signed during Trong's visit might look impressive, but that number is still fewer than previous years.

In early February, China started allowing its travel agencies to organize outbound tours to twenty countries. The list did not include Vietnam but seven other Southeast Asian countries. Vietnam was only added to the list in mid-March. China might well remember that Vietnam was one of the first countries to close its border with China at the beginning of the COVID-19 outbreak.

Vietnam border control officers have also refused to stamp Chinese passports that feature the nine-dash line and issued a separate visa on arrival for their holders. More importantly, China has not changed its policy toward the South China Sea. Although there has not been any major incident since China's intrusion into Vietnam's waters in 2019, China's coercive behavior could return.

SECTION 3

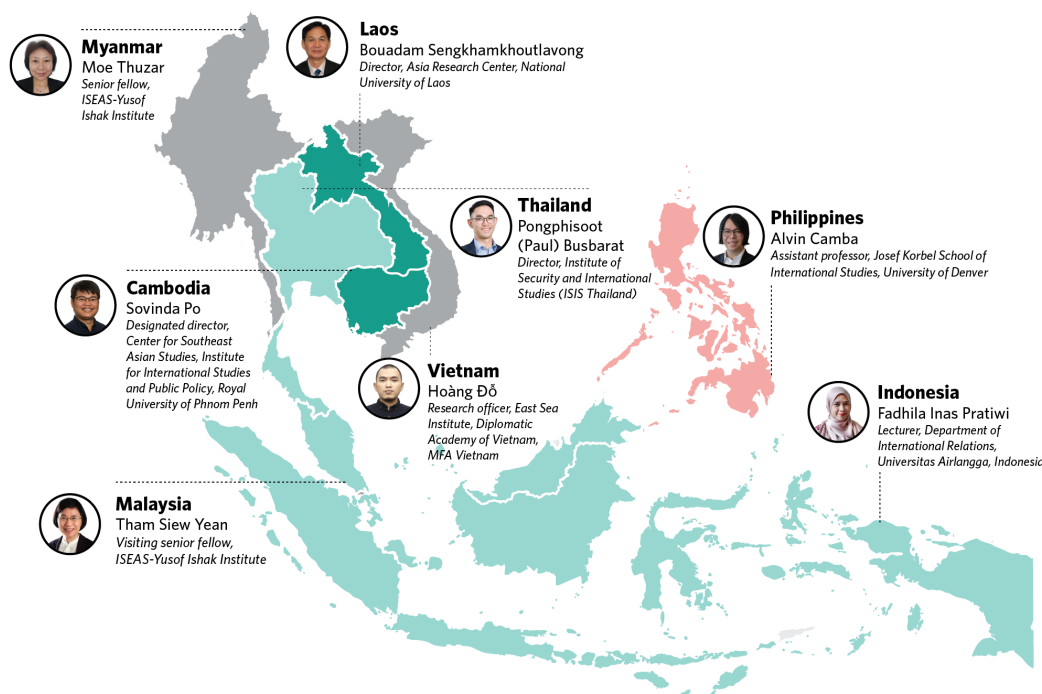
How Has China's Belt and Road Initiative Impacted Southeast Asian Countries?

Pongphisoot (Paul) Busbarat, Alvin Camba, Fadhila Inas Pratiwi, Sovinda Po, Hoàng ĐỖ, Bouadam Sengkhamkhoutlavong, Tham Siew Year, and Moe Thuzar

In the second issue of Carnegie China's "China Through a Southeast Asia Lens" series, scholars from eight Southeast Asian countries provide their takes on the impact of China's Belt and Road Initiative (BRI) in their countries for the past decade. They choose from among five levels of impact: very positive, positive, neutral, negative, or very negative. Below are their responses.

How Has China's Belt and Road Initiative Impacted Southeast Asian Countries?

very negative negative neutral positive very positive



Thailand

Positive

PONGPHISOOT (PAUL) BUSBARAT (*Nonresident Scholar, Carnegie China*)



A decade ago, when President Xi Jinping introduced the BRI, Thailand was among its primary supporters. This enthusiasm was partly due to Thailand's closer ties with China following the 2014 military coup. Beijing's commitment to the non-interference principle meant that its engagement with Thailand's military regime became an implicit political endorsement.

The scope of BRI projects is vast, making it challenging to pinpoint which ones are formally associated with the BRI, aside from the notable Thai-Chinese high-speed railway project. The initiative's projects range from infrastructure development, special economic zones, to promoting cultural activities.

However, there have been persistent concerns in Thailand about the financial viability of some BRI projects and the potential for the country to fall into a "debt trap," as seen in other BRI partner nations. The terms of loans and concerns about sovereignty were critical discussion points. These issues caused a prolonged discussion and negotiations between Thailand and China on the high-speed railway project before the Thai government decided to finance the rail with domestic funds. At the same time, China was granted a concession to construct the tracks and operate the train.

Environmental concerns also accompany large infrastructure projects like high-speed railways. There have been worries about the ecological impact of some BRI projects in Thailand, especially in sensitive areas, mainly due to deforestation and community displacement. The construction of the high-speed railway, especially near the ancient city of Ayutthaya, has raised concerns regarding the potential physical and visual damage to historical sites. Many worry that constructing the elevated track and station near certain ancient sites might risk UNESCO delisting Ayutthaya as a World Heritage Site.

Overall, BRI projects in Thailand over the past ten years have yielded both noteworthy opportunities and challenges, and the impact of these projects and associated activities in Thailand has been positive. These projects have helped fortify Thailand's economic relationship with China, thereby enhancing the country's economic growth and solidifying its role as a regional hub. Nonetheless, issues such as trade deficits, environmental implications, and community impact remain significant areas of concern.

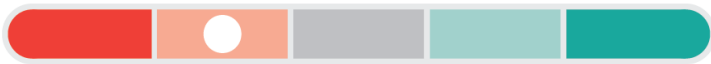
Although most of the projects are ongoing, the prominence of the BRI is expected to wane as China faces an economic downturn. China's new Global Development Initiative (GDI)—which will emphasize pandemic response, food security, and the digital economy—will likely be central to Thai-Chinese cooperation in the future. The GDI complements Thailand's drive to upgrade its economy by promoting investment in high-tech, digital, and green industries.

Thailand's political and economic elites generally welcome China's economic role in the kingdom. They see its role as beneficial to Thailand's economic development, thereby buttressing the government's political legitimacy.

Philippines

Negative

ALVIN CAMBA (*Assistant Professor, Josef Korbel School of International Studies, University of Denver*)



BRI projects depend on the political calculus of the administration in power. While the Philippines officially joined the BRI during the presidency of Benigno Aquino III, the government did not pursue any major BRI projects at that time—at most, engineering, procurement and some construction contracts between Chinese firms and Philippine conglomerates. Aquino III capitalized on contracting Philippine projects to local oligarchs, who would have been marginalized had he invited Chinese firms.

In contrast, large-scale BRI projects were only agreed upon and implemented during the administration of Rodrigo Duterte. BRI brought development finance for the Chico River Pump Irrigation Project and the New Centennial Dam, as well as state-facilitated direct investments, such as Ant Financials' joint venture with Globe Telecom to form Mynt, and the Mindanao Islamic Telephone Company partnership with China Telecommunications to launch Dito Telecommunity. Duterte used these projects to strengthen his elite networks. When President Bongbong Marcos became president in 2022, he canceled the three early-stage railway projects in Luzon and Mindanao. Marcos has yet to agree to any new BRI projects.

BRI projects have benefited a select number of Philippine government-sponsored elites. During Duterte's time, the Chico River Pump Irrigation project served the Cagayan elites. The New Centennial Dam was designed to help the population of the National Capital Region and the Philippine Army. Dito Telecommunity helped Dennis Uy. And Mynt benefited the Ayala family.

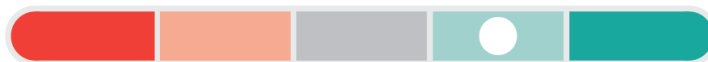
While the Philippines has economically benefited from the construction activities and local employment, these large-scale BRI projects have not altered the Philippine economy toward a more robust and long-term developmental model. Chinese medium-sized enterprises in services, which have indirectly benefited the most from BRI, have become joint venture partners to Philippine businesses. However, services are already the strongest sector in the Philippines, meaning that investment, employment, and revenue gains will only marginally increase.

The BRI has also indirectly funneled so-called illicit Chinese capital in the Philippines. During Duterte's administration, improved Philippine-China relations led to a better environment for private firms and people-to-people exchanges. Chinese foreign direct investment (FDI) increased in services, finances, real estate, wholesale and retail, and other sectors. However, many of these foreign firms and investors were directly and indirectly working with online gambling firms, which are criminal enterprises according to China. Online gambling investments reached its apex in 2019, resulting in 250-300 online gambling and service firms setting up shop and importing 500,000 legal and semilegal Chinese workers. As online gambling and other illicit sectors expanded, security concerns heightened around Chinese labor imports, hacking, economic infrastructure, and commercial transactions. Money laundering, sex work, and violence increased as Philippine government officials benefited from side payments. Since Marcos took office, many of these firms have left, but some still remain hidden in the cities and special economic zones.

Indonesia

Positive

FADHILA INAS PRATIWI (*Lecturer, Department of International Relations, Universitas Airlangga, Indonesia*)



Over the past decade, China has made massive investments in Indonesia through the BRI, spanning various sectors such as infrastructure and mining. The BRI framework has solidified China's position as one of Indonesia's largest trading partners. Evaluating whether the BRI has lived up to expectations involves two perspectives.

First, from an economic standpoint, Chinese investments have the potential to bolster Indonesia's economic growth, particularly when directed toward infrastructure development. The Indonesian government's priority is connecting Java Island to the eastern regions, which can significantly improve economic growth and regional connectivity. However, Indonesia's growing reliance on Chinese investment may pose a risk to its economy, as increased Chinese investment may lead to rising debts. Presently, there are seventy-one BRI-related programs with a total valuation of \$20.3 billion, and the government should be cautious to avoid falling into a debt-trap situation, like in Sri Lanka.

Second, social issues are hindering the BRI implementation. Certain BRI projects, such as the Morowali Industrial Park (IMIP) in Central Sulawesi, raise concerns about worker safety. The IMIP, which spans a 3,200-hectare site and produces 3 million tons of stainless steel, has experienced issues with misinformation regarding the influx of Chinese workers. This has resulted in tensions between Indonesian and Chinese workers, with recent racial tensions escalating and leading to the tragic deaths of one Chinese and one Indonesian worker. Such incidents highlight the necessity for both governments to closely monitor these projects and foster an atmosphere that prioritizes the safety and well-being of workers to prevent future incidents.

Currently, the Indonesian government is anticipating further Chinese investment in the new Indonesian capital city, named Nusantara (IKN), with a \$32 billion contract, as well as the Rempang Island eco-city project valued at \$11.5 billion. Both investments have their pros and cons. While IKN is crucial for Indonesia's development, it raises concerns about overreliance on Beijing's investment and potential anti-Chinese sentiments in Indonesia. As for the Rempang Island project, despite its promise to create 35,000 jobs, it requires the relocation of 7,500 indigenous people. This situation led to conflict between the local population and Indonesia government.

A decade of BRI projects in Indonesia has brought about positive impacts, but there are several areas that require improvement, including transparency, accountability, and risk management. These three aspects are crucial to ensure that investments benefit both the government and the people. Investments have expanded beyond highways, high-speed train projects, and mining industries, with the Indonesian government now anticipating Chinese investments in urban development. This aligns with President Joko Widodo's ambition to accelerate the country's infrastructure development. However, it is imperative to acknowledge that China's massive investments carry potential risks that could affect Indonesia's economy in the future. Furthermore, the social well-being of the Indonesian people must remain a top priority during these extensive projects, as it is the state's duty to protect and ensure the safety of its citizens.

Cambodia

Very Positive

SOVINDA PO (*Designated Director, Center for Southeast Asian Studies, Institute for International Studies and Public Policy, Royal University of Phnom Penh*)



The tenth anniversary of the BRI is a significant milestone, demonstrating the success and fruitful cooperation between China and Cambodia. Since its establishment, the BRI has helped Cambodia develop and improve its infrastructure. Cambodia has been able to connect the capital city to the rural areas of the country, and the newly improved infrastructure has helped boost the local and national economy.

The BRI projects have focused on all types of infrastructure such as highway, roads, and bridges. One of the most notable projects is the Phnom Penh-Sihanoukville Expressway, which has reduced travel time for drivers from five to six hours down to two hours. The expressway has also facilitated the local tourism. People from the capital city can enjoy their short break over the weekend at the coastal city like Sihanoukville province. They can depart in the morning and return home in the evening. This just one-day round trip has encouraged thousands of people to visit Sihanoukville province.

BRI has also promoted the transnational transfer of money between China and Cambodia with the use of QR code technology. While this practice has encouraged cross-border trade, it has also pushed Chinese tourists to spend more money in Cambodia just by scanning the QR code and paying on their WeChat or Alipay.

The BRI has been progressive in its development approach. At the moment, the BRI projects have paid much attention to the high labour standards, skill transfer to the local workers, and green development. It is highly expected that more BRI projects will flow into Cambodia because Cambodia still has a high demand for physical infrastructure, particularly rural roads and bridges.

Moving forward, BRI projects in Cambodia need to take local voices into consideration; pay more attention to local and national governance, where corruption and abuses can be minimized; and create more green spaces by prioritizing forests, ponds, lakes, and rivers. Local job opportunities should be tailored to benefit the local community.

Vietnam

Neutral

HOÀNG ĐỖ (Research Officer, East Sea Institute, Diplomatic Academy of Vietnam, MFA Vietnam)



There are a few BRI projects in Vietnam. Many had been announced previously and later incorporated into BRI by China, including the Cát Linh – Hà Đông project (railway 2A) signed in 2008 and the Vĩnh Tân power station in 2007 (usually considered in Vietnam as co-funded projects by China rather than exclusively BRI). The number of listed projects by China has increased in the past ten years.

Officially, Vietnam welcomes BRI, with high-level leaders highlighting its potential. Recently, Prime Minister Phạm Minh Chính emphasized cooperation to ensure that the BRI is high-quality, and Minister of Planning and Investment Nguyễn Chí Dũng referred to Vietnam-China cooperation under the BRI as a “catalyst” for regional development. It is also worth noting these following distinctions in Vietnam’s official statements: (i) BRI is usually mentioned alongside the “Two Corridors, One Belt” (TCOB) framework proposed by Vietnam in 2004 (before BRI) and TCOB was cited in the 2017 MOU as a standalone initiative; (ii) some use the term “China’s ODA” or “China’s loans” instead of BRI; (iii) many highlight the need to make BRI high-quality, low-risk, serving regional common interests, and adhering to international law.

Views from other sectors, including academia or media, are more diverse. Some commend the BRI on its delivery of public goods and greater local revenues (especially related to the train project, which boasted twelve stations and 53 billion VND in revenue in 2021 and the first nine months of 2022). It is also considered a way for TCOB to meet Vietnam’s infrastructure needs and a tool to reduce bilateral political tension and carry out Vietnam’s “hedging” strategy. The BRI’s smaller scope of investment and lack of conditionality is one of its attractions. On the other hand, some cite economic problems such as slow progress, higher financial costs than expected, and non-transparent bidding processes. There are also political concerns raised from BRI projects in other countries, such as the risk of a debt trap, retaliation, and dual-use purposes of facilities. Finally, there are potential social issues such as environmental damage related to nonrenewable power plants, labor safety issues, and China’s possession of local assets.

Some contend that the BRI’s progress could be stalled because of the GDI and the Global Security Initiative (GSI), as well as its strategic rivalry with the United States. But the BRI is expected to continue and expand. As long as Xi is in power, the BRI will be considered a trademark of China’s foreign policy and a feature of China’s rise. China has made efforts

to overcome the BRI's limits, such as establishing channels to address local grievances and moving toward a greener BRI. Going forward, the BRI could be incorporated into other China's initiatives, including the GDI and GSI.

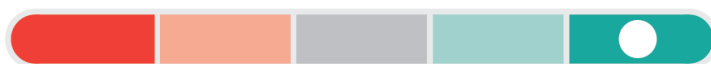
Vietnam's officials have also expressed desires for the BRI to be more transparent, win-win, and greener, as well as contribute to more balanced trade. They want Vietnam to be a center of connection. More technology transfer and higher level of investment are also critical. Except for the sky train and power plants, other potential areas in Vietnam for investment could be critical minerals and border linkages.

Hoàng Đỗ acknowledges the inputs of Nguyễn Đăng Dương & Nguyễn Nhật Linh from the East Sea Institute's China Research Team.

Laos

Very Positive

BOUADAM SENGKHAMKHOUTLAVONG (*Director, Asia Research Center, National University of Laos*)



Lao People's Democratic Republic (Lao PDR) is an important BRI partner among ASEAN member states. By joining the Initiative, the country aims to improve its social and economic cooperation with China, enhance sustainable development goals, develop from a land-locked to a land-linked country, and provide various job opportunities, higher incomes, and better living standards to its people.

The first BRI infrastructure project, the Lao PDR–China Railway (LCR), began in 2016 and was completed in 2021. The mega-construction project cost approximately \$6 billion and was built by Chinese state-owned contractors, which bore 70 percent of all construction costs. The railway line runs approximately 1,000 kilometers from Kunming City in China to Vientiane. The development of the railway increases international logistic networks and reduces transportation costs and time. It can generate positive economic returns, minimize trade costs, and serve as a key land transportation route in the Indo-China peninsulas. The LCR project has further strengthened and deepened the relationship between the two nations. The project serves as a significant strategic connection between the two countries, aligning it with the BRI as a component of the gradual implementation of the Laos-China Economic Corridor. The project is generating both direct and indirect benefits not only for Laos and China, but also for neighboring countries.

According to a report by the Laos-China Railway Company, the transportation of passengers and goods has seen significant growth, with “China’s Responsibility” serving as a catalyst for economic dynamism. From December 2021 to April 2022, the cumulative number of passengers transported was 14.43 million. As of May 2022, the aggregate volume of goods transported had surpassed 20 million metric tons. Of this, the cross-border freight volume exceeded 4 million tons, with a corresponding value of 17.7 billion yuan (\$2.5 billion). In the first quarter of 2023, there was a significant year-on-year increase of 274.4 percent in the import and export freight volumes of the Laos-China Railway.

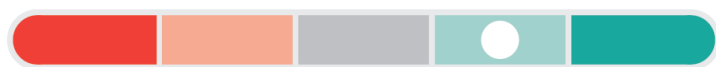
The Laos-China Railway serves as a symbol of prosperity, happiness, and friendship, showcasing the robust vitality and impact of the collaborative efforts in constructing the BRI. It stands as a tangible manifestation of the endeavor to establish a global community with a shared future for humanity.

International cooperation is considered as a significant strategy for Lao PDR to develop the country in different areas. Both parties can increase their cooperation in economic connectivity and political strength by implementing the BRI. Most importantly, the BRI can help turn Lao PDR from a land-locked country to a land-linked hub connecting Thailand, Cambodia, Malaysia, and Singapore.

Malaysia

Positive

THAM SIEW YEAN (*Visiting Senior Fellow, ISEAS-Yusof Ishak Institute*)



China is an important trade and investment partner of Malaysia. While China has been Malaysia’s largest trade partner for fourteen consecutive years, its importance as an investment partner emerged only after the launch of the BRI in 2013. China’s share in total inward flows of FDI increased from a mere 0.8 percent in 2013 to 12.6 percent in 2016. It further increased to 17 percent in 2017 as investments from China increased while overall inward flows fell. China thus proved to be an important investment partner as investments from other countries dipped. China’s share reached a peak in 2019, at 27 percent, but subsequently fell to 4.9 percent in 2022 due to a rebound in FDI from other countries.

Human resource development from employee training is perceived to be the main contribution from seven case studies of BRI projects. These are namely: Malaysia-China Kuantan Industrial Park (MCKIP); Digital Free Trade Zone; D&Y Textile; Alliance Steel; Jinko’s solar investments in Penang; China Railway Rolling Stock Corp.’s Rolling Stock Center (CRCC) in Batu Gajah, Perak; and Geely’s automotive investments in Proton, the

national auto company. The BRI also encompassed Huawei and ZTE's investments in the telecommunication sector as well as Longyi's solar investments in Sarawak in East Malaysia. However, many Malaysians perceived the development of linkages with the domestic economy as sparse, since there was limited local sourcing of inputs for production. A recent survey on the social impact and community perceptions of two BRI projects in Malaysia, namely MCKIP and CRCC, found that the two projects were viewed positively in terms of job creation and stimulating the local economies. But there were also concerns over land rights, regulatory frameworks for joint ventures, labor rights and employment practices, public consultation, transparency and communication, community investment, as well as language and cultural issues.

Moving forward, there will be less need for investments in mega-infrastructure projects. Instead, Malaysia welcomes the shift in investments toward "small but beautiful projects," especially for green and digital projects that are in line with Malaysia's current priorities. This has already been expressed by Prime Minister Dato' Seri Anwar Ibrahim in his meeting with Xi in March. Thus, Malaysia continues to welcome FDI from China in common sectors of interest for both countries. However, compliance with environmental, social, and governance standards will be increasingly important, as Malaysia is prioritizing sustainability concerns for all FDI projects in the country, regardless of the source of investment.

Myanmar

Neutral

MOE THUZAR (*Senior Fellow, ISEAS-Yusof Ishak Institute, Singapore*)



Since the BRI's launch, Myanmar's position has moved from diversifying dependence during the military-backed Union Development and Solidarity Party (USDP) administration from 2012 to 2016, to more positive albeit cautious support during the National League for Democracy (NLD) government from 2016 to 2021. After the February 2021 coup, the State Administration Council (SAC) military regime embraced the BRI, seeking to restart or accelerate projects stalled or delayed during the NLD's term. In August, the SAC chairman mentioned the implementation of the railway for Kyaukphyu deep seaport project, a key feature of China's infrastructure investments in Myanmar even before the BRI.

China's BRI projects in Myanmar focus on hydropower, cross-border industrial zones, and connectivity, such as the high-speed railway networks and the Kyaukphyu deep seaport. These projects have grappled with delays, barring the Myanmar-China oil and gas pipeline that started operations in 2013. Delays are primarily attributed to concerns surrounding China's perceived debt trap. The coronavirus pandemic added to the delays, though China has sought to restart some high-profile projects.

Though the USDP government did not reject the BRI, the launch was shadowed by Myanmar's decision in 2011 to suspend the billion-dollar Myitsone dam project, which coincided with the USDP's attempts to diversify its economic diplomacy as part of the overall political opening and economic liberalization. The NLD government was more receptive to the BRI, inaugurating the China-Myanmar Economic Corridor in 2017. In 2019, it signed thirty-three memoranda of understanding during Xi's visit to Myanmar. The NLD government renegotiated several projects to safeguard against potential repercussions related to excessive foreign debt. The Myanmar public was concerned about environmental damage, land seizures, and forced relocations and the paucity of public consultations. But not all were opposed. The promise of jobs and access to international markets remains tempting, even more so after the 2021 coup.

Elite perceptions of the BRI were largely positive during the NLD administration. In the ISEAS-Yusof Ishak Institute's [2019 State of Southeast Asia survey](#), Myanmar respondents viewed the initiative as providing necessary infrastructure development and were optimistic that the BRI would benefit the region and ASEAN-China relations. However, [differing narratives](#) and [analyses](#) of debt-trap diplomacy probably caused Myanmar respondents to request that their government proceed cautiously. The Myanmar respondents [in 2020](#) expressed little or no confidence in the BRI's new approach toward offering fairer deals. This continued and deepened after the 2021 coup. Myanmar respondents in [2021](#), [2022](#), and [2023](#) were concerned about China's economic dominance and political influence.

Myanmar's domestic politics [shape](#) attitudes toward China. The BRI trajectory in Myanmar remains intertwined with the country's political landscape. The conflict in Myanmar that erupted after the 2021 coup has disrupted any potential benefits of Chinese infrastructure investments and deepened [negative public sentiment](#) toward China. The continued feasibility of the BRI now seems at risk, as SAC troops and the forces resisting military rule frequently clash near BRI project sites. Thus, while China seeks to protect its investments and long-term interests in Myanmar, China's engagement with the SAC may come at a high cost and yield low returns.

Moe Thuzar acknowledges the inputs of Kyi Sin, research officer for the Myanmar and Thai Studies Programmes, for this piece.



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