



Regional Responses to U.S.-China Competition in the Indo-Pacific

STUDY OVERVIEW AND CONCLUSIONS

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Preface

What are influence and competition for influence? What are the United States and China competing for in the Indo-Pacific? How can we measure influence? How do countries in the Indo-Pacific view the United States, China, and U.S.-China competition? How could the United States work more effectively with allies and partners? In this report, we attempt to answer these questions as part of a broader study of how U.S. allies and partners are responding to U.S.-China competition. The other reports in this series are available at www.rand.org/US-PRC-influence.

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This report should be of value to the national security community and interested members of the general public, especially those with an interest in U.S.-China competition in the Indo-Pacific. Comments are welcome and should be sent to the project leader, Bonny Lin. Research was completed in September 2019.

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Summary

The U.S. Department of Defense's 2018 *National Defense Strategy* highlights the unique advantages that America's strong and enduring alliances and partnerships offer the United States in long-term, strategic competition with China. This report is part of a series of reports—sponsored by U.S. Pacific Air Forces—that focuses on two sets of questions. First, how do countries in the Indo-Pacific, particularly Southeast Asia, view the United States, China, and U.S.-China competition for influence in their respective territories? Second, how could the United States work more effectively with allies and partners? This overview report addresses these questions and also tackles three more fundamental prior questions: What are influence and competition for influence? What are the United States and China competing for in the Indo-Pacific? How can we measure and assess relative influence?

Research Approach

We define *influence* as the ability of one actor to shape the behavior of another actor. In U.S.-China competition for influence, the United States and China are each using available means to shape third-country behavior and choices to align with their own interests. Both seek *partner alignment*, or continuous partner support on major issues. In competition, U.S. influence relative to Chinese influence—what the United States can offer allies and partners in comparison with what China can offer—is more important than absolute U.S. influence. We conceptualize relative influence as dependent on the extent to which the partner shares U.S. (or Chinese) interests and the relative capabilities or resources that the United States (or China) can use to incentivize or coerce the partner.

Differing values, objectives, and visions drive U.S.-China competition in the Indo-Pacific. The U.S. vision is based on maintaining regional freedom and openness and ensuring security and stability. The People's Republic of China (PRC) vision is a China-centric one that involves expanding Chinese power, fostering greater regional integration and dependence on China, limiting the role of outside powers, and bringing Southeast Asia under Beijing's leadership. We assess that, because of overlapping U.S. and Chinese objectives, competition is likely to be most intense in six Southeast Asian countries: Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam.

We develop a basic framework with 14 variables to measure and assess relative U.S.-China influence across countries. The framework includes eight specific shared interests and six variables that measure the relative diplomatic, economic, and military capabilities and resources the United States or China could use to convince partners to side with them.

Table S.1. Regional Perspectives of Relative U.S. and Chinese Influence (2018)



We apply the framework to the six Southeast Asian countries identified above and three other U.S. allies and partners (Australia, Japan, India). Table S.1 displays results coded based on primary and secondary sources, datasets, and interviews with U.S., allied, and partner government officials and academic experts. Each variable captures where the partner is on a range between stronger U.S. influence on one end (blue) and stronger Chinese influence on the other end (red). In Southeast Asia, the United States has the most relative influence in Singapore,

followed by the Philippines. The United States has comparable influence with China in Indonesia and less influence than China in Malaysia, Thailand, and Vietnam. The United States has more influence than China in Australia, Japan, and India.

Findings and Conclusions

The United States and China Have Different Strengths and Approaches to Competition

- Regional countries view the United States as having more diplomatic and military influence than China. China, however, has more economic influence.
- Southeast Asian countries rank economic development over security concerns and are generally more worried about Chinese economic influence than Chinese military threats.
- China can leverage its economic influence for a variety of goals, including to weaken U.S. military influence. In contrast, there is little evidence that Southeast Asian countries believe that U.S. military influence is a counterweight to Chinese economic influence.
- Regional countries have more shared interests with the United States, but Beijing has more tools it is willing to use against Southeast Asia, including more incentives (“carrots”) and coercive capacity (“sticks”).
- Regional countries prefer to not choose between the United States and China and may not side with the United States if forced to pick. Partner alignment is likely to be weak and incomplete.

The United States Could Work More Effectively with Allies and Partners

- While direct, bilateral cooperation should remain the primary effort, the United States should do more to coordinate with Australia, Japan, and India in Southeast Asia.
- Coordinating with allies and partners to engage third countries provides four main benefits to the United States: (1) pools resources, (2) facilitates division of labor that leverages unique allied and partner strengths and relationships, (3) counters PRC influence in countries with which the United States cannot fully engage, and (4) achieves U.S. objectives without asking regional countries to explicitly align themselves with the United States (which regional countries are wary of doing).

There are five main challenges to effective coordination: (1) government biases and processes favor bilateral efforts instead of cooperation in engaging third countries; (2) the dominant narrative portrays U.S.-China competition in bilateral terms and does not take into account allied and partner contributions; (3) regional countries seek unique and separate relationships with the United States, and there are divergences in interests between the United States, allies, and partners; (4) Chinese influence in allies and partners could undermine their ability and willingness to coordinate with the United States; and (5) differing U.S., allied, and partner planning and budget cycles complicate efforts to develop coordinated or joint plans.

Recommendations

For the U.S. Government at Large

- Develop a list of U.S. objectives and priority countries for competition with China for each region (including the Indo-Pacific) to enable whole-of-government competition.
- Develop targeted non-military means to counter Chinese economic influence in the Indo-Pacific. This could include options to impose costs on China for use of coercive measures and coordinating messaging with allies and partners that China is an unreliable economic partner and will not hesitate to use economic coercion to achieve its goals.
- Improve public messaging on the economic benefits and value that U.S. military and security cooperation bring to regional countries.
- Improve U.S. public messaging on U.S.-China competition by increasing messaging on allied and partner contributions and combined efforts.

For the Joint Force

- Increase defense activities with Indonesia, Malaysia, Thailand, and Vietnam, four countries in which Chinese influence is growing. Activities should include the following:
 - Work with Indonesia to highlight China’s problematic behavior in the Natuna Sea and elsewhere; reexamine the legal issues regarding the United States providing crew lists to Indonesia, a major irritant in the U.S.-Indonesia military relationship.
 - Work with Vietnam not only as a key partner, but also to strengthen Hanoi’s ability to provide security and offset Chinese influence in its neighborhood, particularly in Cambodia and Laos.
- Establish a minimum requirement within the Department of Defense to consult and share U.S. engagement objectives, plans, and activities in the Indo-Pacific with Australia, Japan, and India.
- Expand institution capacity building efforts to deepen shared security interests.
- Avoid framing activities with regional countries mainly in U.S.-China competition terms; consider creative ways to design engagements to achieve similar objectives while avoiding the optics of requiring the partner to choose between the United States and China.

For the U.S. Air Force and Pacific Air Forces

- Initiate a pilot project to develop common five-year security cooperation plans between the U.S. Air Force and the Royal Australian Air Force for Indonesia or Malaysia and between the U.S. Air Force and the Japan Air Self-Defense Force for the Philippines or Vietnam. Common five-year security cooperation plans for third country partners allow allied Air Forces to plan strategically and allocate resources longer-term. This enables moving beyond cooperation on an engagement-by-engagement basis.
- Encourage Indonesia to increase its military activities in the South China Sea and areas such as the Natunas by conducting operations and participating in multilateral air and maritime activities.

- Propose new avenues of U.S. Air Force engagement with Malaysia through its membership in the Five Power Defense Arrangements, whose other members include Singapore, Australia, New Zealand and the United Kingdom.
- In Thailand, strive to maintain preferential access and use of U-Tapao—one of the largest airfields in Southeast Asia.
- Leverage senior U.S. engagements with the Vietnamese Ministry of National Defense to emphasize the importance of routinizing service-to-service cooperation.
- For Australia, develop options to expand the Enhanced Air Cooperation component of the Force Posture Initiatives and consider conducting rotational deployments of U.S. bombers to northern Australia.

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Abbreviations

ASEAN	Association of Southeast Asian Nations
BRI	Belt and Road Initiative
CAATSA	Countering American Adversaries Through Sanctions Act
CASS	Chinese Academy of Social Sciences
CPTPP	Comprehensive and Progressive Agreement on Trans-Pacific Partnership
DoD	U.S. Department of Defense
FDI	foreign direct investment
FONOP	Freedom of Navigation Operation
GDP	gross domestic product
HA/DR	humanitarian assistance and disaster relief
Indo-PACOM	U.S. Indo-Pacific Command
IPSR	Indo-Pacific Strategy Report
ISIS	Islamic State of Iraq and Syria
LMC	Lancang Mekong Cooperation
NASA	National Aeronautics and Space Administration (U.S.)
NDS	National Defense Strategy
NSC	National Security Council
NSS	National Security Strategy
OSD	Office of the Secretary of Defense
PACAF	Pacific Air Forces
PAF	RAND Project AIR FORCE
PLA	People's Liberation Army
PRC	People's Republic of China
RCEP	Regional Comprehensive Economic Partnership
ROK	Republic of Korea
SCS	South China Sea
SIPRI	Stockholm International Peace Research Institute
TPP	Trans-Pacific Partnership
UN	United Nations
VEO	violent extremist organization

1. Introduction

The U.S. Department of Defense's (DoD's) 2018 *National Defense Strategy* (NDS) highlights the unique advantages that America's strong and enduring alliances and partnerships offer the United States in long-term, strategic competition with China—the United States is not competing with China on its own, but can draw on allied and partner resources, capabilities, and strengths that far exceed what China can bring to bear.¹ How effectively the United States works with allies and partners will be critical to determining U.S. success. To enable closer cooperation, the United States will need to understand how allies and partners view the United States and China and how they are responding to U.S.-China competition and adjusting their approaches accordingly.

The Indo-Pacific stretches from the west coast of the United States to India and is a primary theater for U.S.-China competition. Southeast Asia is one of the most important regions within the Indo-Pacific for U.S.-China competition. Southeast Asia borders China and connects the Indian Ocean, the South China Sea, and the East China Sea.² It is the third-most-populous region in the world (after South Asia and East Asia) and, if combined as a whole, the countries that make up the Association of Southeast Asian Nations (ASEAN) could rank as the fifth-largest economy in the world. Southeast Asia's political, economic, cultural, and social diversity—including a mix of democracies and other political systems—challenges the United States to work with allies and partners despite potential differences.³

Given the importance of the Indo-Pacific and Southeast Asia, this study defined and applied a framework to comparatively assess U.S.-China competition for influence in nine countries from throughout the region. We analyzed six countries in Southeast Asia (Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam). We also examined three other key U.S. allies and partners (Australia, Japan, and India) that are active in Southeast Asia and geographically surround the region from the west, east, and south. Figure 1.1 shows the Indo-Pacific region and the nine countries in the study.

¹ DoD, *2018 National Defense Strategy of the United States of America: Sharpening the American Military's Competitive Edge*, Washington, D.C., January 2018a.

² Michael R. Pompeo, "Remarks on 'America's Indo-Pacific Economic Vision,'" U.S. Embassy and Consulates in webpage, July 30, 2018.

³ Prashanth Parameswaran, "ASEAN's Role in a U.S. Indo-Pacific Strategy," Wilson Center, September 2018b.

Figure 1.1. The Indo-Pacific Region and Countries Examined in This Study



This study begins to fill a gap in the literature on U.S.-China competition by connecting larger U.S. and Chinese objectives for the Indo-Pacific with how the region views competition. In the existing literature, a good portion of the work has examined what overall approach the United States should take to compete against China and captures the complexity of competition.⁴ There is a parallel body of work that examines China’s approach toward the region and the range of tactics China has embraced to compete below the level of armed conflict.⁵ These studies, however, do not assess how competition affects specific allies or partners or compare levels of U.S. or Chinese influence across countries. Although there is substantial literature on how

⁴ For select works on U.S. goals and overall competition, see Michael J. Mazarr, Jonathan S. Blake, Abigail Casey, Tim McDonald, Stephanie Pezard, and Michael Spirtas, *Understanding the Emerging Era of International Competition: Theoretical and Historical Perspectives*, Santa Monica, Calif.: RAND Corporation, RR-2726-AF, 2018a; Mira Rapp-Hooper and Rebecca Lissner, “The Open World: What America Can Achieve After Trump,” *Foreign Affairs*, May/June 2019. For select works focused on the Indo-Pacific, see Patrick M. Cronin, Abigail Grace, Daniel Kliman, and Kristine Lee, *Contested Spaces: A Renewed Approach to Southeast Asia*, Washington, D.C.: CNAS, 2019; Richard Fontaine, Patrick Cronin, Mira Rapp-Hooper, and Harry Krejsa, *Networking Asian Security: An Integrated Approach to Order in the Pacific*, Washington, D.C.: CNAS, 2017.

⁵ Select recent works include Lyle J. Morris, Michael J. Mazarr, Jeffrey W. Hornung, Stephanie Pezard, Anika Binnendijk, and Marta Kepe, *Gaining Competitive Advantage in the Gray Zone: Response Options for Coercive Aggression Below the Threshold of Major War*, Santa Monica, Calif.: RAND Corporation, RR-2942-OSD, 2019; Ross Babbage, *Winning Without Fighting: Chinese and Russian Political Warfare Campaigns and How the West Can Prevail*, Washington, D.C.: Center for Strategic and Budgetary Assessments, 2019.

individual countries view U.S.-China competition,⁶ there are fewer studies that compare across a larger number of countries.⁷

⁶ For example, see John Blaxland and Greg Raymond, “Tipping the Balance in Southeast Asia? Thailand, the United States and China,” Australian National University, Strategic and Defence Studies Centre, November 2017; Benjamin Zawacki, *Thailand: Shifting Ground Between the U.S. and a Rising China*, London: Zed Books Ltd., 2017; Brantly Womack, “Managing the Vietnam-China-United States Triangle,” *Vietnam National University (VNU) Journal of Science*, Vol. 32, No. 1S, 2016, pp. 1–12; Lye Liang Fook, “Singapore-China Relations: Building Substantive Ties Amidst Challenges,” *Southeast Asian Affairs*, 2018, pp. 321–340.

⁷ Evan S. Medeiros, Keith Crane, Eric Heginbotham, Norman D. Levin, Julia F. Lowell, Angel Rabasa, and Somi Seong, *Pacific Currents: The Responses of U.S. Allies and Security Partners in East Asia to China’s Rise*, Santa Monica, Calif.: RAND Corporation, MG-736-AF 2008; Aaron L. Connelly, *Southeast Asian Perspectives on US-China Competition*, Sydney, Australia: Lowry Institute, 2017a; David Shambaugh, “U.S.-China Rivalry in Southeast Asia: Power Shift or Competitive Coexistence?” *International Security*, Vol. 42, No. 4, Spring 2018, pp. 85–127; Ashley J. Tellis, Alison Szalwinski, and Michael Wills, eds., *Strategic Asia 2020: U.S.-China Competition for Global Influence*, Washington, D.C.: National Bureau of Asian Research, 2020.

2. Research Scope, Design, and Methodology

Before delving into the research, in this chapter we define the scope of this study and describe our research design and methodology.

Focused on Peacetime Competition for Influence in Southeast Asia

U.S. long-term strategic competition with China is complex and encompasses many interrelated domains. According to one study, the United States is challenging China in five main areas: “control over the Indo-Pacific rimland, trade and the economy, China’s quest for alternative technical standards, the pursuit of technological dominance, and Chinese military advancement.”⁸ A separate study identifies a list of factors driving U.S.-China competition, including pursuit of power and security; status, standing, and prestige; economic prosperity and power; control and access to resources; territorial or sovereign claims; values and ideology; and the ability to shape the international order through rules, norms, and institutions.⁹

A problem many U.S. strategists face is how to analyze U.S.-China competition, since competition covers the spectrum of issues the United States and China diverge on. Similar to how military conflicts often have multiple battlegrounds, it may be more useful to deconstruct competition into subordinate dimensions, recognizing that competition in each subordinate area could involve different actors, interactions, and dynamics.

There are at least three broad ways to divide overall U.S.-China competition: global versus regional competition, functional versus geographic competition, and peacetime competition versus crisis or conflict:

- *Global versus regional*: Competition at the global level is linked to competition at the regional level but may be affected by additional factors, such as the role of global institutions and international agreements. Global or regional competition could involve a clash of different ideologies and values, as well as different ways—including through diplomatic, economic, or military means—to pursue greater international or regional leadership or power. Some aspects of competition, such as technological competition, may be more comprehensively assessed from a global or bilateral perspective. U.S.-China competition is likely to vary by region given the history, dynamics, and countries involved; the relative importance of different regions to the United States and China; and existing avenues for U.S. and Chinese influence.
- *Functional versus geographic*: Aside from dividing competition by geography, U.S.-China competition is also cross-cutting in terms of issue sets or functional lanes.

⁸ Ashley J. Tellis, “The Return of U.S.-China Strategic Competition,” in Tellis, Szalwinski, and Willis, 2020, p. 2.

⁹ Mazarr et al., 2018a.

Functional competition could involve military-technical competition on weapon systems and competition within particular domains, such as space, cyber, and nuclear.

- *Peacetime versus contingency*: The intensity of U.S.-China competition may also vary depending on the state of bilateral relations. Competition could be less intense when the United States and China are maintaining normal relations compared with if the two are locked in a crisis or conflict.¹⁰

In this report, we analyze U.S.-China peacetime competition for influence within specific countries in the Indo-Pacific region, with a focus on Southeast Asia. While we focus on military influence, security is just one dimension of competition and is linked to political and economic competition. We thus also evaluate U.S. and Chinese diplomatic and economic influence.

Research Design and Methodology

We use five related and main research questions to analyze U.S.-China competition for influence in Southeast Asia:

1. What are influence and competition for influence?
2. What are the United States and China competing for in the Indo-Pacific? In which countries do we expect competition to be most intense?
3. How can we measure and assess influence?
4. How do regional countries view U.S. versus Chinese influence in their respective countries? How might that differ from the Chinese view?
5. How could the United States work more effectively with allies and partners in Southeast Asia?

In Chapter 3, we begin by tackling the difficult conceptual questions of what is influence and what is competition for influence. To do so, we combined knowledge of the existing deterrence literature with conversations and interviews with U.S., allied, and partner officials and experts.

In Chapter 4, we explore why the United States is competing with China and what the United States and China are competing for. We discuss the U.S. vision for the region, as well as corresponding U.S. objectives and how these compare with China's vision and goals. Given the divergences in U.S. and Chinese goals, there is likely to be greater U.S.-China competition in countries that the United States and China both view as important for their respective goals. To assess U.S. and Chinese objectives, we analyzed official U.S. and Chinese government documents and data on U.S. and Chinese activities. We also engaged in consultations with U.S. officials responsible for the Indo-Pacific region.

Identifying and ranking U.S. and Chinese priorities for Southeast Asia allowed us to select six regional countries for in-depth study: Indonesia, Malaysia, the Philippines, Singapore,

¹⁰ This definition of peacetime competition for influence is similar to "competition below armed conflict" in DoD, *Joint Concept for Integrated Campaigning*, Washington, D.C., 2018b, and DoD, *Competition Continuum*, Joint Doctrine Note 1-19, Washington, D.C., June 2019a. We did not explore how the United States can cooperate with China to advance U.S. interests.

Thailand, and Vietnam. As we explain in Chapter Four, these six countries are more important for the United States and China than the other four countries in Southeast Asia.

In Chapter 5, we develop a basic framework that uses 14 variables to assess relative U.S.-Chinese influence across countries in the Indo-Pacific. These variables measure relative U.S.-China diplomatic, economic, and military influence by examining each partner's shared interests with the United States or China and the relative capability or resources the United States or China can bring to bear to shape the partner's decisionmaking. These variables are linear and represent a range, with stronger U.S. influence on one end and stronger Chinese influence on the other end. Each variable is designed to capture where the partner falls within this range.

In Chapter 6, we apply the framework to assess relative U.S. and Chinese influence in two ways: how regional countries view U.S.-China competition and how China views competition in each of the regional countries. Given the difficulty of assessing and measuring influence, combining the regional and Chinese perspectives provides a more comprehensive view of competition than looking at either perspective by itself.

For both perspectives, we analyzed influence in the six Southeast Asian countries mentioned above and in three other key U.S. allies and partners active in Southeast Asia: Australia, Japan, and India.¹¹ Understanding relative U.S. and Chinese influence in the six Southeast Asian countries captures the competition on the ground. Examining influence in Australia, Japan, and India is important because their ability and willingness to work with the United States in Southeast Asia (or in the Indo-Pacific region at large) to compete with China could be limited if China is able exert significant influence on them.

To understand how regional countries view competition, we traveled to and conducted research in all nine countries. In each country, we interviewed a broad range of experts, including regional government officials (civilian and military), academics, and media representatives, as well as U.S. and allied defense officials. We also analyzed official documents, including strategy and defense papers and related academic reports. This qualitative analysis was supplemented by quantitative data collection and analysis of relevant U.S. and Chinese activities and agreements.

To understand the Chinese perspective on competition, we examined Chinese writings from 2016 to 2019 from two major sources: reports issued by leading Chinese research organizations relevant to U.S.-China competition; and Southeast Asia and academic literature published by leading Chinese scholars or in top Chinese journals.

In Chapter 7, we build on the previous chapters to explore how the United States could work more effectively with allies and partners in Southeast Asia. We offer a way to prioritize U.S. investment in Southeast Asia. We also discuss the advantages and challenges of working with

¹¹ Please see the accompanying RAND regional reports in this series, available at www.rand.org/US-PRC-influence. For more detailed discussion of data, methods, and sources, please see Appendix B. New Zealand is not covered in this overview report but was assessed in the broader study.

Australia, Japan, and India in Southeast Asia and how the United States, particularly DoD, could improve its efforts to coordinate with allies and partners in third countries.

In Chapter 8, we conclude the report by summarizing the main findings and identifying key recommendations.

3. What Are Influence and Competition for Influence?

Competition for influence is a frequently used but ill-defined term. In this chapter, we first review what influence is and then define U.S.-China competition for influence as focused on shaping partner choices to support desired objectives.

Influence: Ability to Shape the Behavior of Other Actors

Before delving into the competition for influence, it is useful to understand what influence is. Political scientists such as Robert Dahl have defined influence as the ability of one actor to shape the behavior of another actor. In the sixth edition of *Modern Political Analysis*, Dahl and Stinebrickner present seven different forms of influence: inducement (rewards or incentives), power (sanctions), force (use of actual force), coercion (threats of use of force), persuasion (use of words or communication to move actors), manipulation (use of false or misleading communication), and authority (the perception that the actor wielding the influence is proper, right, or morally good).¹² Influence can be direct, indirect, potential, or actual.¹³ Subsequent scholars have expanded on this definition to include not only intentional efforts by an actor to shape the behavior of another actor but also unintentional effects that actors wielding influence may have on their targets.¹⁴

Competition for Influence: Competition over Partner Alignment

In U.S.-China competition, the United States and China are each using available forms of influence to shape the behavior and choices of partners to align with their own respective interests. We define what the United States and China seek from partners as *partner alignment*, or continuous partner support on major issues through positions, actions, or activities. On the security side, for example, major issues could include whether the partner chooses to grant the United States or China military access. (Chapter 4 will provide more discussion of some of the major issues that the United States and China are competing over.) Long-term, strategic competition is less over the partner making a *single* decision in support of the United States or China and more over the partner *repeatedly* supporting the United States or China across *a range* of decisions over time. Alignment does not require the partner to support the United States or China on every decision and is instead measured by support on *major* decisions.

¹² Robert A. Dahl and Bruce Stinebrickner, *Modern Political Analysis*, 6th ed., Upper Saddle River, N.J.: Prentice Hall, 2003, pp. 38–43, 60.

¹³ Robert A. Dahl, *Who Governs? Democracy and Power in an American City*, New Haven, Conn.: Yale University Press, 1961.

¹⁴ For example, see David Baldwin, *The Paradoxes of Power*, New York: Basil Blackwell, 1989.

Focused on Partners and Partner Alignment

It is important to emphasize that the focus of competition is the partner country, not China. This distinction is crucial because partners will make choices based on their own domestic and foreign policy interests and objectives. While specific U.S. or Chinese policies or activities could impact a partner's calculus, the U.S.-China dynamic may not be the primary factor driving their decisionmaking.

Partners are likely to weigh the relative benefits offered by the United States and China and the potential costs of going against U.S. or Chinese desires. This means that the United States needs to consider not only what it can offer, but also how it can better meet partner needs than China and how the United States can help deter or counter potential Chinese threats.

This focus on partners means that some U.S. options—such as economic coercion or use of military force—that may be useful to deter adversaries from aggression might be less appropriate to use in the Indo-Pacific.¹⁵

Potential U.S. or Chinese partners in the Indo-Pacific may have little desire to clearly align with either the United States or China across the board. Unlike the Cold War, during which many countries faced acute or existential security or external threats and needed closer alignment with the United States, China, or the Soviet Union for protection, countries now generally face less hostile internal and external environments. This relative security provides partners more leeway to choose how and when they want to side with the United States or China, including on a case-by-case basis.

We expect partner alignment in the current U.S.-China competition environment to be weaker and incomplete compared with alignment during the Cold War. For example, partners today might support the United States on most issues, support China on some issues against U.S. desires, take some positions that support both U.S. and Chinese interests, or adopt independent positions that are not aligned with either.

No Single, Clear, Final Victory, but Successive “Wins”

This understanding of competition for influence means that there is not a single, clear, and final “victory” or end point in the competition. Instead, competition is about how the United States and China can use influence to maintain partner alignment across a range of decisions and over time.

¹⁵ It is best to not conflate U.S. efforts to deter China from aggression (where China is the primary target for deterrence) with U.S. efforts to compete with China for influence (the partner is the primary target for influence). For discussion of the mixed effect of sanctions against allies and partners, see “A Harmful U.S. Sanctions Strategy?” *Foreign Affairs*, June 11, 2019; Jacob L. Lew and Richard Nephew, “The Use and Misuse of Economic Statecraft: How Washington Is Abusing Its Financial Might,” *Foreign Affairs*, November/December 2018.

Relative Influence as the Means to Compete: Interests and Capabilities

Because partner alignment is expected to be weaker and it is difficult to fully anticipate the set of key issues that the United States or China may ask partners to choose sides on, the United States will need to develop and sustain a range of means to shape partner decisionmaking and counter potential efforts by China to pressure the partner. China can be expected to do the same.

In this report, we thus focus on influence as the *means* by which the United States and China compete with each other to achieve their respective objectives, including partner alignment. We propose conceptualizing influence as dependent on (1) *the extent of shared interests*—defined to include objectives, values, beliefs, and ideology—between the partner and the United States or China and (2) *the capability of the United States or China to incentivize and coerce* the partner to act in U.S. or Chinese interests.¹⁶

Shared interests is a passive or unintentional means by which the United States or China could exert influence. When a partner that has shared interests with the United States (or China) acts in its own interests, it is likely that the partner's activities will benefit the United States (or China) without need for U.S. (or Chinese) efforts to convince the partner to do so. U.S. partners could have similar objectives as the United States or be inspired by the United States. It is possible for partners to have values and interests shared with both the United States and China.

The second way in which we conceptualize influence accounts for the fact that the United States (or China) can also actively and intentionally attempt to shape partner choices through available diplomatic, economic, and military capabilities and resources. On the incentives end, the United States could, for example, offer political support, economic benefits, or military training or aid. Partners may also support the United States based on their assessments of potential future or long-term benefits, rather than specific things that the United States has offered. On the coercive end, China could seek to deter or compel countries to take or refrain from specific actions. Threats could be in the form of diplomatic or economic sanctions, as well as use of military force. Partners could also support China based on, for example, their assessments of potential Chinese punishment, even in the absence of explicit threats from China.

Relative Influence Key to Competition

Because partners can choose to support the United States, China, or both, U.S. influence relative to Chinese influence is more important than considering U.S. influence in isolation or absolute terms. In other words, the focus should be on assessing the extent to which a partner has more shared interests with the United States *compared* with those shared with China instead of only examining the partner's shared interests with the United States. Similarly, whether the United States has more ability than China to incentivize or punish the partner is more important to competition than considering U.S. capabilities in isolation.

¹⁶ *Influence* is a term widely used in the recent literature on competition with China or Russia, but seldom defined to allow for similar measurements across countries.

More relative U.S. influence could persuade partners to support the United States, but does not guarantee that partners will do so in every case or situation. Partners may have competing objectives and priorities that drive their decisions, independent of U.S. or Chinese influence. Even without Chinese competition, partners are unlikely to be completely aligned with the United States. Instead of viewing U.S. influence as an end by itself (equating influence with success in achieving U.S. objectives), it may be more useful to understand influence as the range and effectiveness of tools the United States has available to obtain partner support.

In practice, the United States and China are not likely to seek to influence every decision taken by the partner and may only have the resources and bandwidth to seek to shape major partner decisions. It is also possible, that in some cases, one country has superior influence resources but chooses not to employ them on a given issue because the issue does not matter much to its strategic position vis-à-vis the other. Although we seek to quantify and assess specific sources of influence, diplomacy and relationship building are needed to translate shared interests and relative capabilities into specific areas of actual influence.

Summary

Competition for influence is dynamic, continuous, and complex. Table 3.1 contrasts how this conceptualization of peacetime competition for influence between the United States and China differs from understandings of how the United States might fight against China in a military conflict. While both situations focus on interests and capabilities, competition is about shaping the partner's choices to favor the United States (instead of China), and conflict is about how much more interest or capability the United States has vis-à-vis China. Beyond the means, there are significant differences in goals, target country, and desired end states.

Table 3.1. Comparing U.S. Peacetime Competition for Influence with Military Conflict with China

	Peacetime Competition for Influence	Military Conflict
U.S. Goal	Encourage partner alignment (continuous partner support for the United States) on major issues, including convincing partners to not side with China in ways that may undercut U.S. interests or positions.	Defeat China politically and militarily.
Primary U.S. Target	Partner	China
U.S. Means	Extent of shared partner interests with the United States (compared with China) and relative U.S. capability incentivize or coerce the partner (compared with China).	Balance of interests and balance of capabilities between the United States and China.
U.S. Desired End State	No single, clear, and final victory. Instead, the United States continuously seeks partner support ("wins") on major decisions.	Clear U.S. political and military victory over China.

4. What Are the United States and China Competing for in the Indo-Pacific?

In this chapter, we examine U.S. and Chinese approaches toward Southeast Asia to understand what the United States and China are competing for. We discuss the current, divergent U.S. and Chinese visions and objectives for the region, illustrating some of the major issues the United States or China may want partner support on. We then use U.S. and Chinese objectives to identify current U.S. and Chinese priority countries. We conclude by overlaying U.S. and Chinese priorities to predict where we might see more intense U.S.-China competition.

Divergent U.S. and Chinese Visions and Objectives for Southeast Asia

The United States and China have divergent visions for Southeast Asia and the Indo-Pacific region at large. The U.S. vision, most recently articulated by the Trump administration and building on the U.S. pivot and rebalance to the Asia-Pacific during the Obama administration, is based on maintaining regional freedom, openness, security, and stability. This includes ensuring freedom of access to common domains, preventing China from dominating and establishing an exclusive sphere of influence, and protecting and safeguarding U.S., allied, and partner interests. The Chinese vision for Southeast Asia, however, is based on a China-centric model that involves expanding Chinese power, fostering greater regional integration and dependence on China, and bringing Southeast Asia under Chinese leadership. Chinese goals for Southeast Asia are also heavily shaped by domestic considerations, including concerns over sovereignty and territorial integrity, economic development, and maintaining a stable and secure external environment. Not all U.S. goals clash with Chinese ones (and there is room for cooperation), but the United States and China are competing in Southeast Asia to advance different visions for the region and to pursue varied goals.

In the sections below, we first identify U.S. and Chinese objectives in Southeast Asia and then discuss how to associate each objective with a subset of Southeast Asian countries. We engage in this exercise because there is no publicly available information on how the U.S. or Chinese governments prioritize partners in the region, despite the considerable importance both countries attach to Southeast Asia.¹⁷ Understanding U.S. and Chinese priorities is useful for analyzing competition.

¹⁷ On the U.S. side, there is baseline consensus that select countries have more geopolitical weight. RAND consultations, however, found that different U.S. government offices either sought to prioritize most Southeast Asian countries as important or developed their own lists of priorities that did not always match the priorities in other offices.

For each U.S. or Chinese objective, we use the existing literature to identify five Southeast Asian countries that are most important for the United States or China to work with and where the United States or China have devoted significant resources. We associate five countries per objective, because there are a total of ten ASEAN countries, and selecting half of them is a simple way of dividing the region.

For the U.S. side, we attach different weights to U.S. objectives and further narrow the list of priority countries corresponding to each objective from five countries to three countries. We engaged in this additional step based on discussions with U.S. defense officials; it represents our best assessment for U.S. priority countries on the defense and security side. We include the more basic U.S. assessment (no weighting of objectives and five countries per objective) in the appendix for reference.¹⁸

It is important to note that U.S. and Chinese objectives involve enduring (e.g., geography) and variable (e.g., political and economic conditions) factors.¹⁹ As a result, priority countries for particular goals could change over time. Our analysis uses the most basic approach (with as few assumptions as possible) to identify priority countries for the United States and China in 2018.²⁰ Where possible, we rely on data from past activities, engagements, and developments, and we identify the countries that are most supportive of U.S. or Chinese objectives. Our approach for identifying U.S. priority countries is thus focused on maintaining current U.S. advantages, positions, and strengths. It is not focused on maximizing U.S. advantages based on projected, possible future developments.²¹ We take a similar approach for China.

U.S. Objectives and Priorities for Southeast Asia

This section draws from official strategy and policy documents drafted by the Trump administration to lay out the U.S. vision and objectives for Southeast Asia. The three main documents are the 2017 White House *National Security Strategy* (NSS), the 2018 DoD NDS, and the 2019 DoD *Indo-Pacific Strategy Report* (IPSR).²²

¹⁸ Please see Appendix A.

¹⁹ U.S. and Chinese objectives may also change over time.

²⁰ Where possible, we include analysis of events and activities up to September 2019.

²¹ For example, for the U.S. goal to “maintain economic trade and investment,” we prioritize the Southeast Asian countries that have the most trade and investment with the United States in 2018. We do not identify countries for trade and investment based on projections of which countries could become the largest regional economies in the next 10, 20, or 30 years. Similarly, for the U.S. goal of “freedom of the net,” we prioritize maintaining the freedoms that already exist—working more closely with Southeast Asian countries that currently have more internet freedom. We do not prioritize countries based on which ones could have the most potential future internet users or which countries the United States could have the most potential future improvements in internet freedom. Calculations of future potential for each objective require more assumptions and analyses that were beyond the scope of this study.

²² The White House, *National Security Strategy of the United States of America*, Washington, D.C.: The White House, December 2017; DoD, 2018a; DoD, *Indo-Pacific Strategy Report: Preparedness, Partnership, and Promoting a Networked Region*, Washington, D.C., June 2019b.

Free and Open Indo-Pacific

The U.S. vision for a free and open international order and Indo-Pacific contains a number of subordinate goals. These include respect for sovereignty and independence of all nations; peaceful resolution of regional disputes; free, fair, and reciprocal trade; and adherence to international rules and norms.²³ The U.S. vision for the Indo-Pacific also involves ensuring that all countries have free access to common domains in space, cyberspace, air, and maritime.²⁴ The United States recognizes that Chinese activities and behavior challenge many elements of the U.S. vision and, to protect the U.S. vision for the region, has prioritized U.S.-China long-term strategic competition.²⁵

A significant U.S. focus in Southeast Asia is the South China Sea (SCS). The United States supports the peaceful resolution of maritime disputes in the SCS and maintaining access to and freedom of navigation through its waters. China's expansive nine-dashed-line claims in the SCS and continued militarization of disputed features have put China at odds with its neighbors, challenged the sovereignty of other nations, and undermined regional stability.²⁶ While China maintains that its activities do not and will not threaten the flow of maritime trade, the United States and countries in the region are concerned that growing Chinese presence and military deployments could afford China the option to control or check trade flows. Although the United States does not side with any SCS claimant, the United States is concerned about Chinese efforts to coerce other claimants and is helping Southeast Asian countries resist Chinese threats.

To address these concerns about Chinese activities in the SCS, the United States could prioritize the three countries with the most extensive maritime disputes with China: Malaysia, the Philippines, and Vietnam. We add Indonesia and Singapore to this list because Indonesia is pushing back against China's claims near the Natuna Islands and because Singapore is a strong supporter of maintaining access to the SCS and freedom of navigation.²⁷ Of these five countries, the three most active partners for the United States to work with are the Philippines, Singapore, and Vietnam.

Two of the goals for a free and open Indo-Pacific are economic: the United States seeks free, fair, and reciprocal economic relationships and to expand U.S. trade and investment opportunities.²⁸ For Southeast Asia, the United States could prioritize countries that are more economically free and countries that trade with and invest the most in the United States. The

²³ IPSR (DoD, 2019b), p. 4.

²⁴ NSS (The White House, 2017), p. 41.

²⁵ NSS (The White House, 2017), pp. 2–3; NDS (DoD, 2018a, pp. 1–4); IPSR (DoD, 2019b), pp. 7–10.

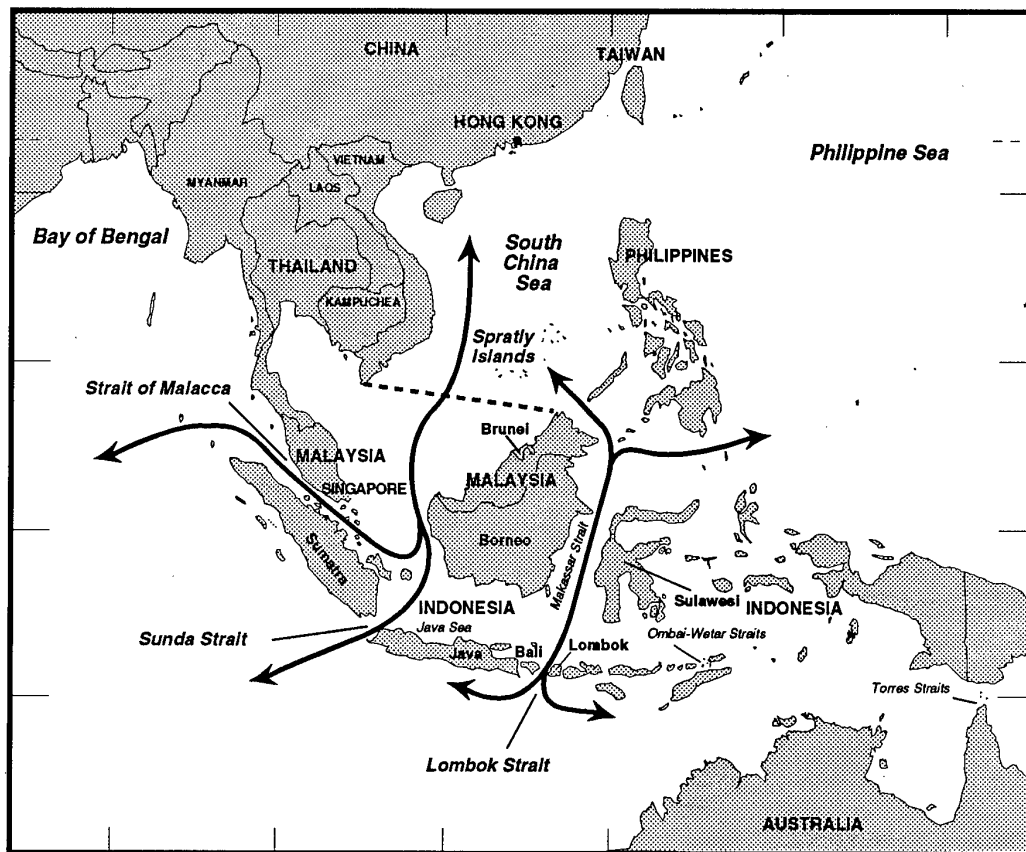
²⁶ IPSR (DoD, 2019b), p. 8. The nine-dashed line refers to the demarcation line that China uses for its claims on the SCS.

²⁷ Tom Allard and Bernadette Christina Munthe, "Asserting Sovereignty, Indonesia Renames Part of South China Sea," *Reuters*, July 14, 2017; Karlis Salna, "Indonesia Seeks to Assert Authority in Waters in South China Sea," *Bloomberg*, February 22, 2019; Bhavan Jaipragas, "Singapore Will Not 'Roll Over' for China," *South China Morning Post*, July 19, 2017.

²⁸ NSS (The White House, 2017), pp. 19–20.

Heritage Foundation ranks the top economically free countries in Southeast Asia as (in order) Singapore, Malaysia, Thailand, Indonesia, and Brunei.²⁹ We calculated U.S. bilateral trade and reciprocal foreign direct investment in each country.³⁰ The United States trades and invests the most with (in order) Singapore, Thailand, Malaysia, Vietnam, and Indonesia.

Figure 4.1. Strategic Chokepoints in Southeast Asia



SOURCE: John H. Noer and David Gregory, *Chokepoints: Maritime Economic Concerns in Southeast Asia*, Washington, D.C.: National Defense University Press, 1996, p. 3.

For Southeast Asia, the main concerns for ensuring free access to common domains relate to activities in the maritime and cyberspace domains. In addition to access to the SCS, Southeast Asia has three main maritime chokepoints—the Malacca, Lombok, and Sunda Straits—through which a significant portion of U.S. and regional trade transits. Figure 4.1 illustrates these

²⁹ Heritage Foundation ranks economic freedom based on four metrics: rule of law, government size, and regulatory efficiency, and open markets. See Terry Miller, Anthony B. Kim, and James M. Roberts, *2019 Index of Economic Freedom: 25th Anniversary Addition*, Washington, D.C.: Heritage Foundation, 2019.

³⁰ We use trade data from the UN Comtrade Database and data on U.S. outbound foreign direct investment (FDI) or partner FDI to United States from the U.S. Bureau of Economic Analysis. There are no data on FDI from Brunei and Burma to the United States.

chokepoints. A general U.S. goal for the region is to ensure that these chokepoints remain free and open. To accomplish this, the United States could prioritize working with the countries bordering the maritime chokepoints: Indonesia, Malaysia, the Philippines, and Singapore.³¹ Vietnam could also be added to this list, given its location next to maritime trade that passes between the Spratly Islands and east coast of Vietnam. Among these five countries, the three most important are Indonesia, Malaysia, and Singapore, given their locations.

A free and open internet, which supports global exchange of information and service, is also a priority and under threat. Some ASEAN countries have limited the free flow of information on the internet, curbing access to websites and social media. China has contributed to this negative trend by implementing cybersecurity restrictions that other countries can replicate, providing training to foreign officials, and exporting surveillance technology.³² To counter this, the United States could prioritize supporting countries that have a more free and open internet. Freedom House's top countries for internet freedom in Southeast Asia (in order) are the Philippines, Singapore, Malaysia, Indonesia, and Cambodia.³³ Singapore is a leader in cybersecurity in the region and a key cyber partner for the United States.³⁴ The four remaining countries (along with Thailand) are among the five ASEAN countries that are most likely to allow Huawei to help build their domestic fifth generation (5G) mobile communication networks.³⁵ Focusing on these five countries would allow the United States to support regional cyber efforts as well as counter China's 5G involvement. The top three countries for the United States for cyber are Malaysia, the Philippines, and Singapore.

Along with maintaining free and open common domains, the U.S. vision involves strengthening regional institutions.³⁶ This refers to supporting ASEAN centrality, deepening U.S. relations with ASEAN, and working with ASEAN to promote a free and open Indo-Pacific. The 2019 ASEAN rotating chair is Thailand. Vietnam is slated to be the next chair in 2020. Beyond these two countries, the United States should also work with three active ASEAN founding members: Indonesia, the Philippines, and Singapore. Balancing these criteria, the top three ASEAN partners for the United States to work with are Indonesia, Thailand, and Vietnam.

³¹ Noer and Gregory, 1996.

³² Freedom House, *Freedom on the Net 2018: The Rise of Digital Authoritarianism*, October 2018, p. 6; Nithin Coca, "The Rapid Rise of Censorship in Southeast Asia," *The Diplomat*, January 19, 2018.

³³ Freedom House uses three main metrics to assess freedom of the internet: obstacles to access to internet sites and webpages, limits on content, and violations of user rights. See Freedom House, 2018.

³⁴ According to one assessment, Singapore, followed by Malaysia and then Australia, are the top three countries most committed to cybersecurity in the Asia-Pacific. See International Telecommunications Union, *Global Cybersecurity Index (GCI) 2018*, Geneva: International Telecommunications Union, 2019, p. 28.

³⁵ For China's assessment of countries open to its 5G involvement, see "Southeast Asia Open to Huawei over 5G," *China Daily*, August 6, 2019; for U.S. concerns over Chinese 5G involvement, see Robert Williams, "Securing 5G Networks: Challenges and Recommendations," Council on Foreign Relations, July 15, 2019.

³⁶ NSS (The White House, 2017), p. 40; IPSR (DoD, 2019b), pp. 46–48.

Finally, the NSS articulates the need to promote U.S. values.³⁷ This includes support for political freedom and responsible governance. For Southeast Asia, this could mean that the United States should provide additional support for countries that are more politically free, but it does not rule out U.S. ability to work with countries that are less politically free. Based on Freedom House rankings of political freedom, the top five most free countries (in order) are Indonesia, the Philippines, Singapore, Malaysia, and Burma.³⁸

Regional Security and Stability

The vision of a free and open Indo-Pacific region also entails specific U.S. defense goals for promoting security and stability in Southeast Asia. The first is ensuring a favorable regional balance of power—that is, a military balance of power that is advantageous to securing U.S., allied, and partner interests in the region.³⁹ This includes preventing China from establishing dominance or an exclusive sphere of influence. For this goal, the United States may want to work with the most militarily capable countries. Measuring military strength is complex; we rely on data on defense budget, personnel size, and equipment and assess that Indonesia, Malaysia, Thailand, Singapore, and Vietnam have the most capable militaries.⁴⁰ Of these five, Indonesia, Singapore, and Vietnam are the most militarily capable.

A second U.S. defense objective is to “defend allies from military aggression and bolster partners against coercion.”⁴¹ The Philippines and Thailand are allies, and the IPSR identifies Indonesia, Malaysia, Singapore, and Vietnam as key partners.⁴² The United States could prioritize working with these two allies and four partners. Among the four partners, the United States has the closest relationship with Singapore and could prioritize Indonesia and Vietnam, given that both are taking strong stances against Chinese activities in the SCS.

The NDS also lays out the need to counter terrorism and prevent violent extremist organizations (VEOs) from engaging in operations against the United States, allies, and partners.⁴³ For Southeast Asia, the three most important countries to work with are Indonesia, Malaysia, and the Philippines, where the United States seeks to counter the Islamic State of Iraq and Syria (ISIS) and other VEO threats. Thailand could be added, given the terrorism and

³⁷ NSS (The White House, 2017), pp. 40–42; IPSR (DoD, 2019b), pp. 46–48.

³⁸ Freedom House rankings are based on scoring political rights and civil liberties. The aggregate freedom score for Burma and Thailand is the same (30/100), but Thailand was ranked as having worse protections of political rights than Burma. See Freedom House, “Freedom in the World Countries,” webpage, Freedom House, undated.

³⁹ NDS (DoD, 2018a), p. 1.

⁴⁰ Lowy Institute, *Asia Power Index 2019*, Sydney: Lowy Institute, 2019, pp. 20–28; International Institute for Strategic Studies, “Chapter Six: Asia,” in *The Military Balance 2019*, London: Routledge, 2019, pp. 222–319.

⁴¹ NDS (DoD, 2018a), p. 4.

⁴² IPSR (DoD, 2019b), pp. 30, 36–39.

⁴³ NDS (DoD, 2018a), p. 4.

insurgency in its southern region.⁴⁴ The final addition is Singapore because of its counterterrorism capability and involvement in the U.S.-led Global Coalition to Defeat ISIS.⁴⁵

A final U.S. defense objective not explicitly stated in U.S. strategy documents is to deny China military basing and access. Chinese military bases in Southeast Asia could enhance China's ability to project military power and strengthen China's control over the SCS, complicating efforts to maintain free and open common domains. China is reportedly interested in establishing military bases or dual-use facilities that could have military uses in Burma and Cambodia.⁴⁶ China's desire to circumvent the Malacca Strait and have direct access to the Indian Ocean, either by land through Burma or by sea via construction of the Kra Canal through Thailand, is also concerning.⁴⁷ Countries corresponding to this objective are Burma, Cambodia, and Thailand.

Combining U.S. Objectives and Priorities

Based on the above discussion, the United States could prioritize countries by looking across U.S. objectives and calculating the total number of objectives for which each country is a priority. Countries relevant to more U.S. objectives should be more important overall to the United States. Table 4.1 lists the objectives and top three corresponding countries. Given the NDS, DoD is likely to weigh maintaining SCS access and security, maintaining a favorable balance of power, defending allies, and bolstering partners the most. Table 4.1 thus weighs these objectives as twice as important and lists two checkmarks for these objectives. The table shows the total number of overall objectives and defense-related objectives each country is associated with. (As mentioned above, please see Appendix A for a more basic table with five countries per objective and no weighing of objectives.)

The table shows that Singapore, Indonesia, the Philippines, and Vietnam are the most important to the United States. Singapore stands out as the country that is relevant to most U.S.

⁴⁴ Maximillian Morch, "The Slow Burning Insurgency in Thailand's Deep South," *The Diplomat*, February 6, 2018; Sunai Phasuk, "A Bloody Ramadan in Thailand's Deep South: Insurgents Bomb Crowded Market," Human Rights Watch, June 10, 2019.

⁴⁵ U.S. House of Representatives, Armed Services Committee, *Statement of Admiral Harry B. Harris Jr, U.S. Pacific Command, Before the House Armed Services Committee on U.S. Pacific Command Posture*, Washington, D.C.: Government Printing Office, February 14, 2018, p. 15.

⁴⁶ Shaun Turton, "China's Belt and road Ports Raise Red Flags Over Military Plans: Cambodia Shows How Beijing's 'String of Pearls' Threatens U.S. Ties," *Nikkei Asian Review*, July 23, 2019; Jeremy Page, Gordon Lubold, and Rob Taylor, "Deal for Naval Outpost in Cambodia Furthers China's Quest for Military Network," *Wall Street Journal*, July 22, 2019; and Indo-Pacific Defense Forum, "China's Control of Burma Port Could Lead to Militarization," May 30, 2018.

⁴⁷ If China established significant alternative routes to avoid the Malacca Strait, it could make the Malacca Strait more vulnerable to Chinese military targeting. While construction of the Kra Canal could benefit other countries and redirect traffic from the Malacca Strait, there is concern that major Chinese involvement in its construction could give China the ability to control traffic through the canal and establish a military presence. For example, see Indo-Pacific Defense Forum, "Canal Conundrum: Thailand Could Sacrifice Its Sovereignty for Questionable Gains from Chinese-Built Waterway," January 28, 2019.

objectives in the region. Malaysia and Thailand fall in between, relevant to a handful of U.S. objectives. In contrast, Brunei and Laos are not critical to U.S. goals.

Because adding the number of objectives is the most straightforward, but not necessarily the most precise, way to assess a country's overall importance to the United States, we caution against taking the totals from Table 4.1 as providing a clear, specific ordering of countries. Instead, we recommend grouping the countries into three priority tiers based on the overall totals: Singapore, Indonesia, the Philippines, and Vietnam in the high tier; Thailand and Malaysia in the middle tier; and Burma, Cambodia, Brunei, and Laos in the low tier. This tiering based on overall objectives applies even if we focus only on defense or security objectives.

Table 4.1. U.S. Objectives and Corresponding Priority Countries (2018)

	Singapore	Indonesia	Philippines	Vietnam	Thailand	Malaysia	Burma	Cambodia	Brunei	Laos
Free and open Indo-Pacific										
Maintain SCS access and security*	✓✓		✓✓	✓✓						
Maintain economic freedom	✓				✓	✓				
Maintain trade and investment	✓				✓	✓				
Maintain free, open common domains										
Maritime chokepoints*	✓	✓				✓				
Freedom on the net*	✓		✓			✓				
Strengthen and work with ASEAN		✓		✓	✓					
Maintain political freedom	✓	✓	✓							
Regional security and stability*										
Maintain favorable balance of power	✓✓	✓✓		✓✓						
Defend allies			✓✓		✓✓					
Bolster partners	✓✓	✓✓		✓✓						
Counter VEOs		✓	✓			✓				
Deny Chinese access					✓		✓	✓		
Overall total	11	8	7	7	6	5	1	1	0	0
Defense total*	8	6	6	6	3	3	1	1	0	0
Overall priority	High				Medium		Low			

NOTE: *Defense total* refers to the total for defense-related objectives marked with an asterisk.

Chinese Objectives and Priorities for Southeast Asia

In this section, we use a similar approach to assess Chinese objectives and priorities for Southeast Asia. There is no Chinese equivalent of a publicly available official national security strategy. There are two authoritative reports that lay out China's main foreign policy and defense goals: the 2019 defense white paper *China's National Defense in the New Era* and the 2017

foreign policy white paper *China's Policies on Asia-Pacific Security Cooperation*.⁴⁸ Chinese leadership statements, speeches, and major foreign policy concepts also shed light on top objectives. The following section starts by examining China's vision for the Indo-Pacific region followed by other key objectives that relate to Southeast Asia.

Community of Shared Future for Mankind

China's vision for the Indo-Pacific region and the international order is based on the concept of a "community of shared future for mankind" or "community of common destiny." Beijing has developed this vision, which was first proposed by Chinese President Xi Jinping in 2013, and linked it to several key domestic and foreign policy goals, including achieving the "China Dream" of rejuvenating the Chinese nation and restoring China's power and influence in its neighborhood and beyond.⁴⁹ The community of shared future seeks to elevate China's international role and dispel concerns about China's rise by constructing "a new type of international relations" that emphasizes multilateralism, development, mutual learning, and seeking common ground.⁵⁰ This vision, as expressed in *China's Policies on Asia-Pacific Security Cooperation* (2017), avoids discussion of power imbalances between China and countries in the Asia-Pacific and seeks to discourage balancing behavior.⁵¹ Within the Indo-Pacific region and Southeast Asia, this vision requires regional deference to China and Chinese leadership through greater regional integration and increased Chinese international cooperation and involvement in (and role in shaping) multilateral organizations and initiatives.⁵² As some Chinese analysts note, and from a historical perspective, no major global power has risen without first taking a leadership role in its region.⁵³ Chinese media repeatedly accuse the United States of acting

⁴⁸ State Council of the People's Republic of China, *China's National Defense in a New Era*, Beijing, July 2019; State Council of the People's Republic of China, *China's Policies on Asia-Pacific Security Cooperation*, Beijing, January 2017.

⁴⁹ China first referred to the "community of shared future for mankind" as "community of common destiny." For a brief description of the concept's evolution, see Cao Desheng, "Xi's Discourse on Mankind's Shared Future," *China Daily*, October 15, 2018. For more on China's vision for the international order, see Michael J. Mazarr, Timothy R. Heath, and Astrid Stuth Cevallos, *China and the International Order*, Santa Monica, Calif.: RAND, 2018.

⁵⁰ Wang Qishan, "Upholding Peace and Cooperation and Building a Community with a Shared Future for Mankind," address by H.E. Wang Qishan Vice President of the People's Republic of China at the Opening Ceremony of the Eighth World Peace Forum in Beijing, Ministry of Foreign Affairs of the People's Republic of China, July 9, 2019.

⁵¹ State Council of the People's Republic of China, 2017.

⁵² "At the 27th Collective Study Session of the CCP Political Bureau, Xi Jinping Stresses the Need to Push Forward the System of Global Governance," Xinhua, October 13, 2015; Xi Jinping, "Full Text of Xi Jinping Keynote at the World Economic Forum," *CGTN*, January 17, 2017.

⁵³ 马荣久 [Ma Rongjiu], "中美权力转移与亚洲地区体系 [U.S.-China Power Transition and Asian Regional System]," 当代亚太 [*Journal of Contemporary Asia-Pacific Studies*], editorial email, Vol. 1, 2014, pp. 21–34.

unilaterally and pushing for a clash of civilizations instead of mutual understanding and common ground.⁵⁴

Chinese experts view the United States as shifting to a more hostile approach toward China that represents a fundamental break from previous U.S. policy toward China.⁵⁵ Citing the 2017 NSS and 2018 NDS, Chinese experts are tracking the U.S. identification of China as its main threat and strategic competitor in the Indo-Pacific region. To Chinese analysts, the United States has embraced a “Cold War” mentality and is using economic and security means to counter China.⁵⁶ China’s official 2019 defense white paper pointed out that “international strategic competition is on the rise,” that the United States “has provoked and intensified competition among major countries,” and that there are now greater “uncertainties to regional security” in the Indo-Pacific region.⁵⁷ China views the United States as strengthening alliances, leveraging the Quad (United States, Japan, Australia, and India), and seeking out new partners (particularly Vietnam and Indonesia) to check China’s growing regional influence.⁵⁸ There is concern that the United States intends to complicate China’s security environment by sharpening tensions in the SCS, increasing anti-Chinese sentiment in the region, and disrupting Chinese efforts to foster closer cooperation with regional countries. The United States is becoming more active in the region, including engaging in more presence operations, exercises, and other activities.⁵⁹

China’s Belt and Road Initiative (BRI) has become the centerpiece of realizing China’s global vision. Launched by Xi in 2013, BRI has three main components: a Maritime Silk Road, a

⁵⁴ For example, see Morag Hobbs and He Zhuoyan, “We Need a Change of Mindset to Create a Community of Common Destiny: Alistair Michi,” *People’s Daily Online*, May 15, 2019.

⁵⁵ Chu Shulong and Lu Jun, for example, describe the Trump administration’s approach toward China as a causing the relationship to enter “a new historic era” that is different from the past 40–50 years of U.S.-China relations since the two countries normalized relations. Chu Shulong and Lu Jun, “美国对华战略及中美关系进入新时期 [U.S. Strategy Towards China and China-U.S. Relations Enter New Stage],” *Contemporary International Relations*, No. 3, 2019.

⁵⁶ 韦宗友 [Wei Zongyou], “虚与实: 特朗普政府的印太战略构想 [Illusion or Reality: The Trump Administration’s Indo-Pacific Strategy Concept],” 解码特朗普外交 [Decoding Trump’s Foreign Policy], Shanghai: Fudan University, 2019; 童真 [Tong Zhen], “聚焦大国挑战: 特朗普政府军事战略 [Concentrating Great Power Challenges: The Trump Administration’s Military Strategy],” 解码特朗普外交 [Decoding Trump’s Foreign Policy], Shanghai: Fudan University, 2019.

⁵⁷ State Council of the People’s Republic of China, 2019.

⁵⁸ 赵明昊 [Zhao Minghao], “‘印太战略’与中美地缘政治竞争 [‘Indo-Pacific Strategy’ and U.S.-China Geopolitical Competition],” *China Focus Online*, August 22, 2018.

⁵⁹ For example, an editorial op-ed in the hawkish Chinese news outlet, *Global Times*, suspected in early 2019 that the United States “may conduct more military provocations against China in the Taiwan Straits and the South China Sea” and that it remained to be seen “whether Washington will add military pressure on Beijing in 2019.” The op-ed stated that “Washington is strategically on guard against Beijing. It is trying to stop China’s ‘expansion’ through tactical harassments and warnings.” Yao Jianing, “China Should Expect More U.S. Provocations,” *Global Times*, January 4, 2019; see also 李骁 [Li Xiao] and 薛力 [Xue Li], “21 世纪海上丝绸之路: 安全风险及其应对 [The 21st Century Maritime Silk Road: Security Risks and Countermeasures],” *太平洋学报 [Pacific Journal]*, Vol. 23, No. 7, 2015, pp. 50–64.

land-based Silk Road Economic Belt and economic corridors, and a Digital Silk Road. For the Maritime Silk Road, China has major port projects underway in Burma, Cambodia, and Malaysia. China is also interested in port projects in Thailand and Indonesia.⁶⁰ For the land component, major PRC efforts include (1) a high-speed railway that connects Laos, Thailand, Malaysia, and Singapore and (2) the China-Myanmar Economic Corridor, which involves infrastructure (roads and railroads) and preferential economic policies (such as industrial zones and tax breaks).⁶¹ For the Digital Silk Road, China has installed fiber-optic cables, surveillance systems, and telecommunications equipment abroad. China spent the most money on these activities in the following countries (in order): Malaysia, the Philippines, Cambodia, Thailand, and Burma.⁶²

Chinese cooperation with ASEAN and the Lancang-Mekong Cooperation (LMC) effort are also associated with China's vision for a "community of shared future."⁶³ Because ASEAN works by consensus, China could seek greater leverage over ASEAN by working with countries that have closer relations with China or are more economically dependent on China, particularly those not involved in SCS disputes with China. These include Burma, Cambodia, and Laos. Similar to the United States, China is also likely to prioritize working with the current ASEAN chair (Thailand) and with the upcoming ASEAN chair (Vietnam).

Initiated in 2016, the LMC is built around cooperation between China and five of its mainland Southeast Asia neighbors (Burma, Cambodia, Laos, Thailand, and Vietnam) along a key river that runs from China—the portion of the river running through China is called the Lancang, and the portion that flows through Southeast Asia is called the Mekong. The LMC effort is a more geographically confined effort and separate from BRI, but it includes many elements that are similar to BRI. The LMC effort involves a range of economic and social cooperation projects between China and Burma, Cambodia, Laos, Thailand, and Vietnam.⁶⁴

⁶⁰ Veerle Nouwens, "China's 21st Century Maritime Silk Road: Implications for the UK," RUSI Occasional Paper, February 2019.

⁶¹ Shintya Felicitas, "China Belt and Road Initiative: Pan-Asia Railway Gains Momentum," Asia Fund Managers, May 29, 2019; Mitsuru Obe and Marimi Kishimoto, "Why China Is Determined to Connect Southeast Asia by Rail," *Nikkei Asian Review*, January 9, 2019; Sudha Ramachandran, "China-Myanmar Economic Corridor Ambitions Meet Hard Reality," Jamestown Foundation, *China Brief*, Vol. 18, No. 15, September 19, 2018; Thomas S. Eder, "Mapping the Belt and Road Initiative: This Is Where We Stand," Mercator Institute for China Studies, July 6, 2018; Clare Hammond, "The Grand Plan for the China-Myanmar Economic Corridor," *Frontier*, September 26, 2018.

⁶² Sheridan Prasso, "China's Digital Silk Road is Looking More Like an Iron Curtain," Bloomberg, January 10, 2019.

⁶³ "Xi Calls for Building of China-Cambodia Community of Shared Future," Xinhua, January 21, 2019; State Council of the People's Republic of China, 2017.

⁶⁴ China recently identified six directions for LMC: "jointly building LMC Economic Development Belt, carrying out cooperation on production capacity, enhancing innovation cooperation, giving priority to improvement of people's livelihood, deepening environmental protection, and upholding openness and inclusiveness" ("LMC Identifies Six Development Directions: Chinese FM," Xinhua, December 17, 2018).

Sovereignty and Territorial Integrity

In addition to China's vision for the Indo-Pacific region, Chinese domestic and foreign policy goals are also important for assessing China's approach toward Southeast Asia and the relative importance of individual Southeast Asian countries. Two of China's three main core interests, or the key national interests guiding Chinese strategy and policy, are relevant to Southeast Asia.⁶⁵

The first is protecting sovereignty and territorial integrity, which includes countering perceived separatist threats. With respect to Southeast Asia, this involves "safeguard[ing] border security and stability." The 2019 defense white paper identifies strengthening security along China's border with Burma and maintaining general stability and safety along the border areas as important Chinese goals.⁶⁶ This means that China could prioritize the countries bordering it by land: Burma, Vietnam, and Laos. The white paper also refers to "defend[ing] important waters, islands, and reefs in the East China Sea, the South China Sea, and the Yellow Sea."⁶⁷ This would apply to countries involved in SCS disputes with China (Brunei, Malaysia, Vietnam, the Philippines) and, to a lesser extent, Indonesia near Natuna Island.

Economic Development

A second core interest of sustaining China's economic and social development also applies to Southeast Asia. Similar to the United States, this involves promoting trade and investment. We calculated total Chinese bilateral trade and foreign direct investment (FDI) with each partner.⁶⁸ China trades and invests the most with (in order) Singapore, Malaysia, Vietnam, Thailand, and Indonesia. Chinese scholars also identify these countries as the ones with the most economic potential and the countries that China wants to partner with given their economic importance (and related geopolitical importance).⁶⁹

Maritime trade is crucial for China's economic growth, particularly energy imports. In contrast to U.S. concern over three maritime chokepoints in Southeast Asia, China is particularly focused on the Malacca Strait and views its dependence on the Malacca Strait for transit of its maritime goods and energy supply as a major vulnerability.⁷⁰ China could prioritize the countries

⁶⁵ State Councilor Dai Bingguo, "Closing Remarks for U.S.-China Strategic and Economic Dialogue," Washington, D.C., July 28, 2009; Michael D. Swaine, "China's Assertive Behavior, Part One: On 'Core interests,'" *China Leadership Monitor*, No. 34, Winter 2011.

⁶⁶ State Council of the People's Republic of China, 2019.

⁶⁷ State Council of the People's Republic of China, 2019.

⁶⁸ Trade data from United Nations, "UN Comtrade Database," webpage, undated. Data on Chinese outbound FDI or partner FDI to China from the Chinese Ministry of Commerce.

⁶⁹ 韦红 [Wei Hong] and 尹楠楠 [Yin Nannan], "'21 世纪海上丝绸之路' 东南亚战略支点国家的选择 [The Choice of Strategic Pivotal States in Southeast Asia for '21st Century Maritime Silk Road]," *社会主义研究 [Socialism Studies]*, No. 6, 2017, pp. 124–132.

⁷⁰ Since at least the early 2000s, Chinese scholars have identified China's dependence on the Malacca Strait as a vulnerability and sought alternative routes. As of early 2017, 80 percent of China's oil imports passed through the Malacca Strait (ChinaPower, "How Much Trade Transits the South China Sea?" October 27, 2017).

close to the Malacca Strait—Indonesia, Malaysia, Singapore, and Thailand⁷¹—and Burma to transport energy to China via land from the Indian Ocean.⁷² Thailand may also be prioritized because of Chinese interest in constructing a canal across the isthmus of Kra in Thailand.⁷³

Secure and Stable External Environment

A final major goal for China is maintaining a secure and stable external environment to sustain PRC economic growth and military modernization. At a minimum, this involves addressing the fear that the United States may seek to limit China's development by organizing an anti-China alliance or coalition to encircle or contain China.⁷⁴ Despite public Chinese denials,⁷⁵ China could also seek regional hegemony, expansion, or to establish a sphere of influence in its neighborhood.

To accomplish either goal, China will need to deepen and build partnerships, expand its military access, and weaken U.S. alliances and partnerships. China does not have military alliances in Southeast Asia, but it does seek strong partnerships. There is no definitive, clear hierarchy of China's strategic partnerships, but China does group countries into broad categories that help indicate their importance.⁷⁶ China labels some of its most important strategic partners as Comprehensive Strategic Cooperative Partners. In Southeast Asia, there are five such countries: Burma, Cambodia, Laos, Thailand, and Vietnam. China is likely to seek to deepen its partnership with these five countries.

Another important tier, likely below the previous one, is Comprehensive Strategic Partners. Indonesia and Malaysia fall into this category. We add the Philippines and Singapore to this category of partners that China is seeking to build stronger relations with given the importance China has attached to both countries. China sees an opening to deepen relations with the

⁷¹ There is some Chinese concern that, of the three countries bordering the Malacca Strait, Singapore may be more supportive of the United States than China and that China may not be able to count on Singapore as much as Malaysia or Indonesia to keep the Malacca Strait open. See 韦 [Wei] and 尹 [Yin], 2017.

⁷² 杜正艾 [Du Zhengai], “精选‘一带一路’建设战略支点国家的意义与建议 [Recommendations for Selecting Pivotal States for Belt and Road Initiative],” *People's Daily Online*, July 26, 2016.

⁷³ B. A. Hamzah, “Alleviating China's Malacca Dilemma,” *Institute for Security and Development Policy*, March 13, 2017.

⁷⁴ The 2019 PRC defense white paper, for example, notes increasing competition in the Indo-Pacific region and “the US is strengthening its Asia-Pacific military alliances and reinforcing military deployment and intervention, adding complexity to regional security” (State Council of the People's Republic of China, 2019).

⁷⁵ State Council of the People's Republic of China, 2019.

⁷⁶ While China initially used these different partnership categories to delineate a clear hierarchy among its diplomatic partners, these categories have become less consistent over time. Nevertheless, the Chinese government continues to use these categories as one way to portray the importance of the partnership to China. See “A Quick Guide to China's Diplomatic Levels,” *South China Morning Post*, January 20, 2016; Scott Kastner and Phillip Saunders, “Exploring China's Strategic Partnerships: Characteristics, Motivations, and Consequences,” International Studies Association, working paper, 2014; Feng Zhongping and Huang Jing, “China's Strategic Partnership Diplomacy: Engaging with a Changing World,” European Strategic Partnerships Observatory, Working Paper 8, June 2014.

Philippines under President Rodrigo Duterte.⁷⁷ Although China's relationship with Singapore hit a rocky patch in 2016, the two countries have reaffirmed their strong friendship since then, and China is expanding its relationship with Singapore.⁷⁸

The corresponding ASEAN countries for the last two PRC goals (expand PRC military access and weaken U.S. alliances and partners) were discussed in the U.S. section above.

Combining Chinese Objectives and Priorities

Table 4.2 lists the PRC objectives and corresponding priority countries. Thailand is important to the most number of Chinese objectives, followed closely by Burma and Malaysia. Brunei is the least important to China. The remaining six countries fall in between. We group the countries into three priority tiers based on the totals: Thailand, Burma, and Malaysia in the high tier; Vietnam, Indonesia, Cambodia, Singapore, Laos, and the Philippines in the middle tier; and Brunei in the low tier.⁷⁹

This ranking of countries for China overlaps with the priority lists generated by Chinese experts, though there are significant variations between the different Chinese lists because Chinese experts used different criteria to rank countries.⁸⁰ Table 4.2 corresponds most closely to a 2017 article that identifies Malaysia as the most important maritime Southeast Asian country for China and Thailand as the most important peninsula Southeast Asian country.⁸¹ Other studies also view Thailand and/or Malaysia as one of the top two most important, particularly for BRI.⁸²

⁷⁷ 马博 [Ma Bo], “杜特尔特‘疏美亲中’政策评析：国家利益与个人偏好 [An Analysis of Duterte's ‘Distancing from the U.S., Moving Closer to China’ Policy: National Interests and Personal Preference],” 国际论坛 [International Forum], No. 4, 2017, pp. 31–39, 80.

⁷⁸ Fook, 2018, pp. 321–339.

⁷⁹ Similar to the U.S. table, there is not a clear divide or gap between the high and middle tiers based on overall objectives. Instead, we use the defense objectives to divide the high tier (each country meeting seven defense objectives) from the middle tier (countries meeting five or fewer defense objectives).

⁸⁰ One way to assess Chinese prioritization of countries in the region is to analyze the Chinese literature on which countries China should focus in terms of BRI investment. A 2017 study, for example, ranks China's most important partners for BRI based on three criteria: (1) whether countries have geopolitical resources or importance, including in terms of economic development and growth potential and regional political influence; (2) whether countries have significant shared interests with China; and (3) whether countries have relative internal domestic stability (韦 [Wei] and 尹 [Yin]). Based on these factors, the study recommends Malaysia, Cambodia, and Laos as the key pivotal states for China's BRI. A 2016 study examined two factors: geostrategic importance or influence of countries and strength of the partner's strategic relationship with China. It recommended Vietnam, Malaysia, Indonesia, Cambodia, and Burma as the top priorities. Wang Yonghui 王勇辉 [Wang Yonghui], “21 世纪海上丝绸之路东南亚战略支点国家的构建 [21st Century Maritime Silk Road and Establishing Southeast Asia Pivotal States],” 世界经济与政治论坛 [Forum of Economics and World Politics], No. 3, 2016, pp. 61–73.

⁸¹ 薛力 [Xue Li], “‘一带一路’与中国对东南亚外交 [One Belt, One Road' and China's Diplomacy in Southeast Asia],” 世界知识 [World Affairs], No. 21, 2017, p. 73.

⁸² 马博 [Ma Bo], “‘一带一路’与印尼全球海上支点的战略对接研究 [Strategic Connections Between Belt and Road Initiative and Indonesia's Global Maritime Fulcrum],” 国际展望 [Global Review], No. 6, 2015, pp. 33–50; 杜

Table 4.2. PRC Objectives and Corresponding Priority Countries (2018)

	Thailand	Burma	Malaysia	Vietnam	Indonesia	Cambodia	Singapore	Laos	Philippines	Brunei
Community of shared future										
Belt and Road Initiative										
Maritime Silk Road*	✓	✓	✓		✓	✓				
Silk Road Economic Belt/ Economic Corridor*	✓	✓	✓				✓	✓		
Digital Silk Road*	✓	✓	✓			✓			✓	
China-ASEAN cooperation	✓	✓		✓		✓		✓		
Lancang-Mekong cooperation	✓	✓		✓		✓		✓		
Sovereignty and territorial integrity										
Safeguard border security and stability*		✓		✓				✓		
Defend SCS claims*			✓	✓	✓				✓	✓
Economic development										
Trade and investment	✓		✓	✓	✓		✓			
Flow of maritime trade and energy*	✓	✓	✓		✓		✓			
Secure and stable external environment*										
Deepen key PRC partnerships	✓	✓		✓		✓		✓		
Build other PRC partnerships			✓		✓		✓		✓	
Expand access	✓	✓				✓				
Weaken U.S. alliances	✓								✓	
Weaken U.S. partnerships			✓	✓	✓		✓			
Overall total	10	9	8	7	6	6	5	5	4	1
Defense total*	7	7	7	4	5	4	4	3	4	0
Overall priority	High			Medium						Low

NOTE: *Defense total* refers to the total for defense-related objectives marked with an asterisk.

Two countries that stand out the most from Table 4.2 compared with existing Chinese studies are Indonesia and Burma. Table 4.2 identifies Indonesia as mid-level priority for China, but most Chinese experts identify Indonesia as the top or one of a handful of most important countries for Southeast Asia given its overall diplomatic, economic, and military strength. This difference in Table 4.2 captures both Chinese interest and existing relations and progress—while China seeks greater partnership with Indonesia, Indonesia welcomes but remains cautious of Chinese cooperation. China faces more hurdles in Indonesia than in Malaysia or Thailand.⁸³

哲元 [Du Zheyuan], “一带一路建设与中国周边三环外交体系的构建 [The Belt and Road Initiative and the Construction of China’s Peripheral Tri-Ring Diplomacy System],” 东南亚研究 [Southeast Asian Studies], No. 1, January 2018, pp. 48–64, 151; Du, 2016; 韦 [Wei] and 尹 [Yin], 2017; 王勇辉 [Wang Yonghui], 2016.

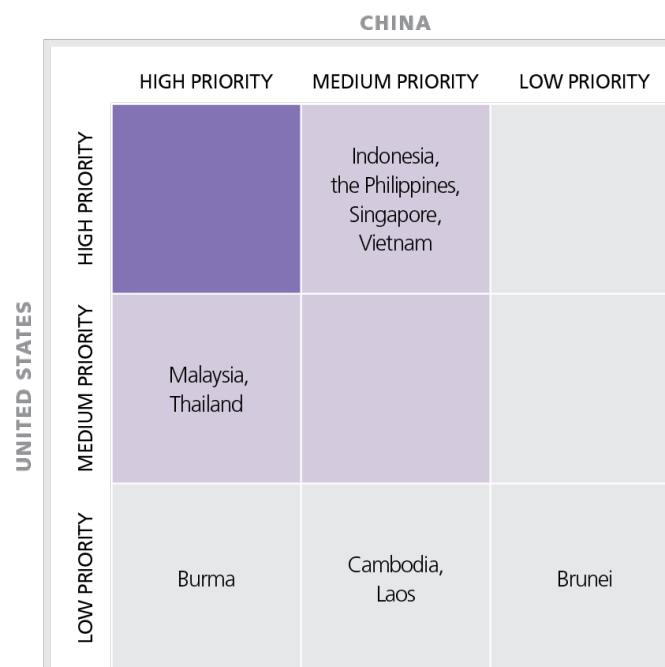
⁸³ 马 [Ma], 2015.

Some Chinese studies rank Burma as among the top most important countries, but Burma does not consistently appear in the top tier across most studies. Burma is not prioritized in Chinese reports that focus on Southeast Asian countries with the greatest political or economic influence. Chinese scholars are also cautious of internal instability issues in Burma. Nevertheless, Chinese experts recognize Burma's strategic and military importance: it connects China to the Indian Ocean and is a bridge between Southeast Asia and South Asia. China also has strong relations with Burma, and Burma is dependent on China.⁸⁴

Using Overlapping Priorities to Assess Intensity of U.S.-China Competition

To understand the intensity of U.S.-China competition across Southeast Asia, we combine and examine the overlap between U.S. and Chinese priority countries from Tables 4.1 and 4.2. Figure 4.2 plots each ASEAN country based on its importance to the United States and China.

Figure 4.2. Assessing Intensity of U.S.-China Competition (2018)



As displayed in Figure 4.2, there are no countries that fall in the dark purple box as high priorities for both the United States and China. This means that there are no countries that both the United States and China value significantly (i.e., as necessary for most of both countries' objectives) *and* that are actively supporting or participating in most U.S. and Chinese efforts. This is because some of the U.S. and Chinese objectives discussed above conflict, and the top partners that the United States identify as important to meet its goals are unlikely to be the same

⁸⁴ 杜[Du], 2018; 王勇辉 [Wang Yonghui], 2016.

partners China views as critical. However, if we expand the high tier by adding one additional country each for the United States and China (the highest-ranked middle-tier country), Thailand and Vietnam would be in the dark purple box.

Figure 4.2 shows that there is likely to be substantial competition in six countries in the light purple boxes: Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam. Given the importance of these countries to both the United States and China, in the subsequent chapters we assess relative U.S.-China influence in these six countries, as well as how the United States can partner with Australia, Japan, and India in these countries.

In contrast, Figure 4.2 shows that there is likely the least U.S.-China competition in Brunei and slightly more competition in Burma, Cambodia, and Laos (in the gray boxes).

5. How Can We Measure and Assess Influence?

Having explored what competition is and what the United States and China are competing for, in this chapter we present a basic framework with 14 variables to measure and assess relative U.S. versus Chinese influence across countries. We conclude the chapter by providing ways to conceptualize what “winning” the competition for influence could involve.

Framework for Measuring and Assessing Relative Influence

Building on the conceptualization of influence discussed in Chapter 3, we use 14 variables to examine relative U.S.-Chinese influence systematically across countries. This framework includes eight indicators of shared interests and six measures of relative capabilities to capture three types of influence: diplomatic and political influence, economic influence, and military and security influence. Table 5.1 on the following page presents these variables.

The framework conceptualizes each variable as linear and as a range between stronger relative U.S. influence on one end to stronger relative Chinese influence on the other end, with both countries having similar influence in the middle. The variables do not assume a zero-sum relationship. It is possible, for instance, for a country to have strong diplomatic and political ties with both the United States and China (or for the country to have weak diplomatic and political ties with both the United States and China). If that is the case, the United States and China would have similar influence.

Shared Interests

We propose using eight variables to assess shared diplomatic, economic, and security interests (displayed in gray text in Table 5.1). Four interlinked variables measure shared diplomatic interests. The partner’s diplomatic and political ties with the United States versus China is an indicator of the overall diplomatic direction or orientation of the partner. It includes how much the country prioritizes the United States versus China as a strategic partner and the overall closeness of bilateral ties between the partner and the United States versus China. How partners assess U.S. and PRC visions for the region, including what overall U.S. and PRC agendas are, is also likely to impact the partner’s willingness to support either country. Even if partners have strong ties to the United States and support the U.S. vision for the region, partners are also likely to consider how much they can rely on the United States: China is located in the region and there is little doubt that China will continue to play a major role, whereas the United States has the option of disengaging. The framework thus includes a variable for assessing U.S. staying power and strategic commitment to the Indo-Pacific region to account for the possibility that partners may have significant interest in aligning with the United States but are wary of

doing so because of concerns about U.S. commitment to the region. Finally, public opinion regarding the United States and China may constrain the ability of the partner to move closer to or further away from either major power.

Table 5.1. Variables for Assessing Relative U.S.-China Influence

Source of Influence	Type	Description
Diplomatic and political		
Diplomatic and political ties	Shared interest	How diplomatically and politically important the United States or China is to the partner and the extent of diplomatic ties
Support for U.S. versus Chinese vision for the region	Shared interest	How the partner's views of the ideal regional order aligns with the U.S. vision for the region and U.S. values versus assessed Chinese vision and values for the region
Views of U.S. commitment to the region	Shared interest	How confident (or not confident) the partner is about U.S. commitment or staying power in the region
Public opinion	Shared interest	Relative public perceptions of favorability of the United States versus China
Economic		
Economic dependence	Relative capability	The partner's current economic dependence on the United States versus China, measured by aggregating trade, investment, and tourism
Economic opportunity	Relative capability	How much the partner believes the United States versus China can provide future economic benefits
Threat perceptions of the United States versus China (economic)	Relative capability	How much the partner views U.S. or Chinese economic influence as potentially threatening, subversive, or coercive
Willingness to work with the United States versus China based on economic threat perceptions	Shared interest	Whether the partner's economic threat perception encourages it to work more with the United States or China to balance against the other economically
Military and security		
Threat perceptions of the United States versus China (military)	Relative capability	How much the partner views the United States or China as a military or security threat
Willingness to work with the United States versus China based on military threat perceptions	Shared interest	Whether the partner's military threat perception encourages it to work more with the United States or China to balance against the other militarily
Support for major U.S.-led security efforts	Shared interest	How much the partner generally supports the United States on security issues through its participation in or opposition to major U.S.-led international or regional security efforts
Military cooperation	Relative capability	How much the partner is working closely with the United States versus China militarily
U.S. versus Chinese military capability	Relative capability	How the partner views U.S. versus Chinese military capability
Perception of U.S. willingness to aid Vietnam in conflict with China	Shared interest	How confident (or not confident) the partner is about U.S. willingness to come to its military defense in a potential conflict involving China

NOTE: Variables measuring shared interests are displayed in gray, and variables measuring relative capability are displayed in black.

We include two variables that measure for shared interests based on threat perceptions. Partners could align more with the United States if they view China as a greater threat. We separate threat perceptions into two dimensions: *economic* threat perceptions of the United States versus China and *military* threat perceptions of the United States versus China. For each type of threat perception (which the framework uses as proxies for coercive capability, described below), the framework *pairs* the threat perception with a variable that measures if the country is more willing to work with the United States or China to counter the perceived economic or military threat.⁸⁵ This accounts for the possibility that countries, for example, could view China as an economic threat but hesitate to overtly counter or balance against China economically (but could instead seek options such as diversifying trade and investment relations). Countries could seek to bandwagon with China or feel that they have no choice but to continue to depend on China economically.

In addition to the above variables that measure the partner's desire to work with the United States to counter Chinese coercion, we include two other variables that measure shared military and security interests. The first takes into account the partner's participation in or opposition to major U.S.-led international or regional security efforts.⁸⁶ This variable captures the possibility that partners may be wary of security efforts aimed at countering China but still be willing to participate in key U.S.-led security efforts in the Indo-Pacific and beyond. The second variable is a measure of the partner's confidence in U.S. willingness to provide military aid in a potential conflict with China. This is a critical variable because even if the United States has significant military capabilities, partners may not be willing to depend on the United States if they do not believe America will come to their aid.

Relative Capability

We use six economic and military factors to assess relative U.S. and Chinese capabilities (displayed in black text in Table 5.1).⁸⁷ The first is how dependent the partner is on trade,

⁸⁵ The "Threat perceptions of the United States versus China (economic)" variable is paired with the "Willingness to work with the United States versus China based on economic threat perceptions." Similarly, "Threat perceptions of the United States versus China (military)" is paired with the "Willingness to work with the United States versus China based on military threat perceptions." This pairing can be thought of as first-order effects (e.g., fear of the PRC military gives China direct coercive influence) and second-order effects (e.g., fear of the PRC military could make countries more willing to work with the United States to resist coercion).

⁸⁶ This variable is not a measure of partner participation in or opposition to UN-led international efforts. It is a measure of partner involvement in U.S.-led coalitions or major U.S. initiatives.

⁸⁷ Because the United States and China can use economic or military means to diplomatically reward or penalize partners, we do not add an additional variable for diplomatic capability. There are, however, ways both countries could use only diplomatic means to persuade partners. They could establish or elevate diplomatic ties, support partner domestic or foreign policy initiatives, and support partners for leadership roles in multilateral institutions. They could also cancel diplomatic exchanges and cooperation and downgrade or cut diplomatic ties. The existing diplomatic and political ties variable captures potential that the United States or China could use diplomatic ties to shape partner preferences. For a discussion of using diplomatic ties as a tool of statecraft, see Brandon J. Kinne, "Dependent Diplomacy: Signaling, Strategy, and Prestige in the Diplomatic Network," *International Studies*

investment, and (to a much lesser extent) tourism from the United States compared with China. This is an indicator of how much economic benefit the United States has already provided to the partner and a measure of how much benefit the United States could potentially scale back. The difference between the partner's economic dependency on the United States and its dependency on China measures how much more (or less) economic influence the United States has.

Related to this variable is how much economic opportunity countries believe the United States or China could provide in the future. Partners are likely to consider not only current economic benefits, but also potential future benefits and opportunities. This variable captures the concern that partners may have of increasing future economic dependency on China given projections that the Chinese economy will continue to grow faster than the U.S. economy.⁸⁸

The framework includes a variable to measure the partner's economic threat perceptions of the United States versus China. This includes whether partners view the United States or China as more capable of using or more willing to use economic coercion against them, including using economic power to undermine the partner's security and national interests. This is a proxy for measuring relative U.S. versus PRC economic capability to coerce partners or the perceived size of the economic "stick" the United States or China could wield to try to influence partner positions, actions, or activities. This variable does not measure whether the United States or China would be successful in using economic coercion. Nor does this variable measure how partners would respond to the threat—the shared interests section above included a variable to capture willingness to work with the U.S. versus China based on the economic threat perceptions variable.

On the military side, the framework uses three variables to measure relative military or security capabilities. First, we include a threat perception variable that captures how much the partner views the United States or China as a military threat. Similar to the economic threat variable, this is a proxy to help measure relative U.S. versus Chinese military capability to coerce partners. We include a second variable that measures military cooperation or the extent of current military activities, exchanges, and agreements between the partner and United States versus China. This variable accounts for military ties and the incentives the United States or China have provided to the partner and what the United States or China could scale back.

Quarterly, Vol. 58, No. 2, June 2014, pp. 247–259; for concerns about cutting diplomatic ties to signal U.S. displeasure, see H. Allen Holmes, "The Importance of Maintaining Diplomatic Relation," *World Politics Review*, September 10, 2009.

⁸⁸ We code this variable based on projected economic size and growth rates of the United States versus China. Additional factors to consider for economic potential include assessments about market access, willingness to share technology, competitive threats to existing industries, and complementarity between the partner's economy and the U.S. or Chinese economy.

The third and final military capability variable is one that assesses current overall U.S. versus Chinese military capability.⁸⁹ This is a factor partners are likely to take into account when judging the ability of the United States or China to use military capability to incentivize or coerce countries. To the extent that partners view the United States as a security provider against China, a larger relative U.S. military capability is more reassuring (in addition to confidence in U.S. willingness to aid the country in potential conflict).

Overall, these 14 variables provide a basic framework for assessing influence. The framework does not contain all potential factors, but includes the most important factors.⁹⁰ It also does not include secondary factors that could affect the ability of the United States or China to exercise influence in the partner country.⁹¹ As noted above, diplomacy and relationship building are still needed to translate shared interests and relative capabilities into specific areas of actual influence.

“Winning” the Competition for Influence

Although there is unlikely to be a clear-cut, final victory in U.S.-China competition for influence, there are still ways for the United States to conceptualize what “winning” the competition for influence could involve. We propose focusing on the means to compete as key to “winning.” In other words, the United States should focus on determining sufficient levels of relative U.S. influence vis-à-vis China.

There are at least three notional ways to think about sufficient U.S. influence.⁹² The first is to dominate or maximize U.S. influence to ensure that the United States has the most means available to persuade the partner to support the United States. One argument for this approach is that China seeks to expand its influence and its influence is still growing. Therefore, the United States should limit China’s influence as much as possible now to maintain U.S. advantage. This approach adopts a zero-sum mentality to U.S.-China competition.

The second is to have the controlling share of influence, such that China is not able to have more influence than the United States. This approach recognizes that China’s influence could

⁸⁹ We do not include a variable for future U.S. versus China military capability because of the difficulty of projecting and measuring future military capability. Unlike economic projections, there are fewer regional projections of future military capabilities.

⁹⁰ The framework, for example, does not use size of ethnic Chinese population in each country as a measure of Chinese influence. This is because the ethnic Chinese populations have varied relationships with mainland China and such a simplistic measure could be more misleading than useful.

⁹¹ For example, three factors could affect the ability of foreign countries to exercise influence in partner countries. The first two are (1) partner political or legal restrictions on foreign political donations and (2) partner political or legal restrictions on foreign direct investment, foreign ownership, or foreign control of companies. The existence of these policies could limit the ability of the United States or China to leverage its economic capacity to influence the partner. The third factor is corruption or potential for influence buying. The more corrupt a government and society is, the more potentially permissible and easier for foreign countries to use economic means to “buy” influence.

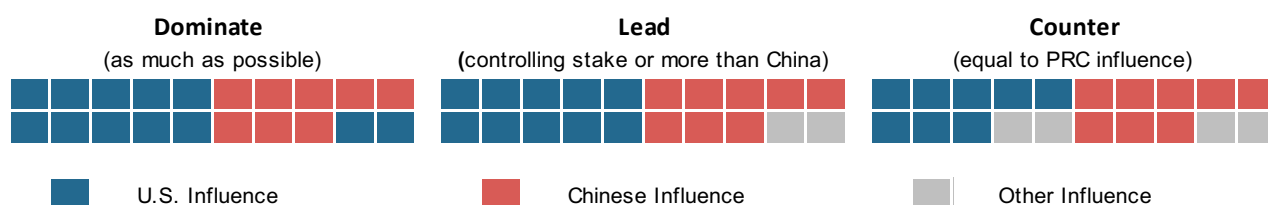
⁹² The U.S. literature lacks clarity on what winning competition for influence involves. Some documents conflate concepts of winning or shift between one concept of winning and another.

grow, but the U.S. goal is not to limit China's influence at every turn. Instead, the United States can achieve its objectives by maintaining an edge over China.

The third way is to counter Chinese influence, or have influence approximately equal to China's. This approach is most cognizant of U.S. resource constraints and is focused on preventing China from using its influence to coerce partners into adopting positions against their will. This approach assumes that if partners were to choose freely (with PRC influence offset by U.S. influence), the United States would be the partner of preference. However, others could argue that merely matching China's influence neither ensures that the United States is able to advance U.S. objectives nor guarantees the United States the ability to block Chinese efforts. This approach is underappreciated in current discussions about competition with China.

Figure 5.1 depicts these graphically from a bilateral U.S.-China perspective. It portrays U.S. influence in blue, Chinese influence in red, and other influence in gray. There are a total of 20 cells in each column, eight of which represent Chinese influence. To dominate, the United States could seek to control as much of the remaining 12 cells as possible. To lead, the United States may want to control half the total cells available (ten cells). To counter PRC influence, having the same number of cells (eight cells) as China may be sufficient.

Figure 5.1. Notional Ways to Conceptualize Sufficient U.S. Versus Chinese Influence



Each option presents a different way of thinking about competition, with corresponding advantages and disadvantages. The United States does not have to embrace the same approach across the board, and it is likely impossible for the United States to maximize influence across the board. One way to consider which approach to embrace is based on U.S. objectives. For example, the United States could choose a mixed approach of maximizing and leading in countries that are of top priority. In countries that are of lesser importance, the United States could have more-defined objectives to counter select Chinese influence, such as Chinese economic influence, and lead in other areas.

6. How Do Regional Countries View U.S. Versus PRC Influence?

In this chapter, we apply the framework to assess relative U.S. versus Chinese influence in nine countries in the Indo-Pacific: six countries in Southeast Asia (Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam) and three key U.S. allies and partners outside Southeast Asia (Australia, Japan, and India). We first present how the regional partner views relative U.S. and Chinese influence. We then examine the same variables from the perspective of Chinese experts to identify similarities and differences.

Regional Views of Relative U.S. and Chinese Influence

How the partner country assesses U.S. and Chinese influence is most important, because the partner makes the decision to support the United States or China. We examine regional perspectives through analysis of partner government documents, interviews with officials and experts in the partner country, and dissection of partner activities, positions, and agreements. For example, to evaluate U.S. and Chinese influence in Australia, we use Australian views and data on Australian activities.

Framework Variables and Coding

To examine the 14 variables described in Chapter 5, we use qualitative assessments for ten of the variables and quantitative data for four of the variables.⁹³ The most difficult to measure are the ten qualitative variables: diplomatic and political ties, support for U.S. versus Chinese vision for the region, views of U.S. commitment, threat perceptions of U.S. versus China (economic or military), willingness to work with the United States or China based on threat perceptions (economic or military), economic opportunity, perceptions of U.S. willingness to aid country in conflict with China, and U.S. versus PRC military capability. For these variables, we account for views of the top leaders, views of the government bureaucracy, and views of the public.⁹⁴

We include four quantitative variables for influence. To code public opinion, we drew from Pew, the ISEAS–Yusof Ishak Institute (ISEAS),⁹⁵ and available regional polls and used interviews to understand public opinion, particularly when there were discrepancies in the

⁹³ For detailed description of sources and coding per variable, see Appendix B.

⁹⁴ The study used leadership statements, speeches, and positions to identify views by the top political leaders. Official government documents as well as interviews with partner government officials shed light on leadership and government views. Public opinion polls and interviews with local scholars, academics, and media representatives provided information on public perspectives. In some of the countries, these three groups have different perspectives and the study weighed each perspective equally in evaluating the country's overall position.

⁹⁵ ISEAS, formerly the Institute of Southeast Asian Studies, is a Singaporean research institution.

polling data. For economic dependence, we collected trade data from UN Comtrade data and FDI and tourism data from the United Nations, United States, China, and the nine countries. For trade, we examined the country's reliance on total trade (imports and exports) with the United States compared with total trade with China.⁹⁶

We code military cooperation based on partner military activities and agreements. This variable aggregates six measures: whether the United States or China has a major military base or facility in the country, relative U.S. versus Chinese arms sales to the country, whether the country has acquisition and cross-servicing agreements with the United States versus China, whether the country has defense co-production and co-development agreements with the United States versus China, whether the country has information sharing agreement with the United States versus China, and the quantity and quality of military exercises between the country and the United States or China.

The final quantitative variable measures the partner's support for or opposition to major U.S. security initiatives or efforts. It includes whether countries supported major U.S. North Korea-related efforts, including efforts to disrupt North Korean ship-to-ship transfers; participated in SCS patrols, operations, or major exercises with the United States in SCS international waters; engaged in Taiwan Strait transits; support U.S. Freedom of Navigation Operations (FONOPs); participated in major U.S.-led military operations (Operation Enduring Freedom, International Security Assistance Force, Operation Iraqi Freedom, and Operation Inherent Resolve); and participated in the Global Coalition to Defeat ISIS.

Given the mix of qualitative and quantitative variables, we use five categories and corresponding colors to capture the broad differences in influence:

- *Significantly more U.S. influence* (blue): The United States has significantly more influence than China. For quantitative variables, this is coded as at least 20 percent U.S. advantage in influence compared with China.
- *More U.S. influence* (light blue): The United States has moderately more influence than China. For quantitative variables, this is coded as a 3 percent to 20 percent U.S. advantage.
- *Similar U.S. and PRC influence* (gray): The United States has similar levels of influence as China. This could be because the United States and China have equally strong influence on the partner. It could also be the case if the United States and China both

⁹⁶ We explored the possibility that dependence on China (or the United States) as an export market could give China (or the United States) more influence over the partner compared to how much partners import from either country. Partners can generally find alternative suppliers for most imports. We conducted additional calculations that placed more weight (weighing exports as approximately 1.5 times and 2 times as important as imports) on the partner's exports to the United States or China compared to imports and these calculations did not change any of the color coding for economic dependency. If, however, exports are three times more important for countries than imports, the color coding for India changes from gray to light blue. For a discussion of how countries may value exports to other countries more than imports, see Albert Hirschman, *National Power and the Structure of Foreign Trade*, Berkeley: University of California Press, 1945.

have limited influence. For quantitative variables, this is coded as the United States has influence within 3 percent of Chinese influence.

- *More PRC influence* (light red): China has moderately more influence than the United States. For quantitative variables, this is coded as 3 percent to 20 percent PRC advantage.
- *Significantly more PRC influence* (red): China has significantly more influence than the United States. Quantitatively, this is coded as at least 20 percent PRC advantage.

These five colors align with the three notional ways depicted in Figure 5.1 of determining sufficient levels of U.S. versus Chinese influence. Blue is an indicator of significantly more U.S. influence or that the United States could have dominant influence. Light blue shows that the United States has a lead in influence. Gray indicates that the United States is countering Chinese influence. Light red shows that China is leading in influence, and red indicates that China could have dominant influence.⁹⁷

Overall Regional Views of Influence

Table 6.1 presents regional assessments of U.S. versus Chinese influence in 2018. The countries are split into two groups: the six Southeast Asian countries and three allies and partners outside Southeast Asia. Within each group, countries are presented in order of more overall U.S. influence across all the categories. In Southeast Asia, the United States has the most relative influence in Singapore, followed by the Philippines.⁹⁸ The United States has comparable influence with China in Indonesia and less influence than China in Malaysia, Thailand, and Vietnam. The United States has more influence than China in Australia, Japan, and India and significantly more influence in Japan and Australia.

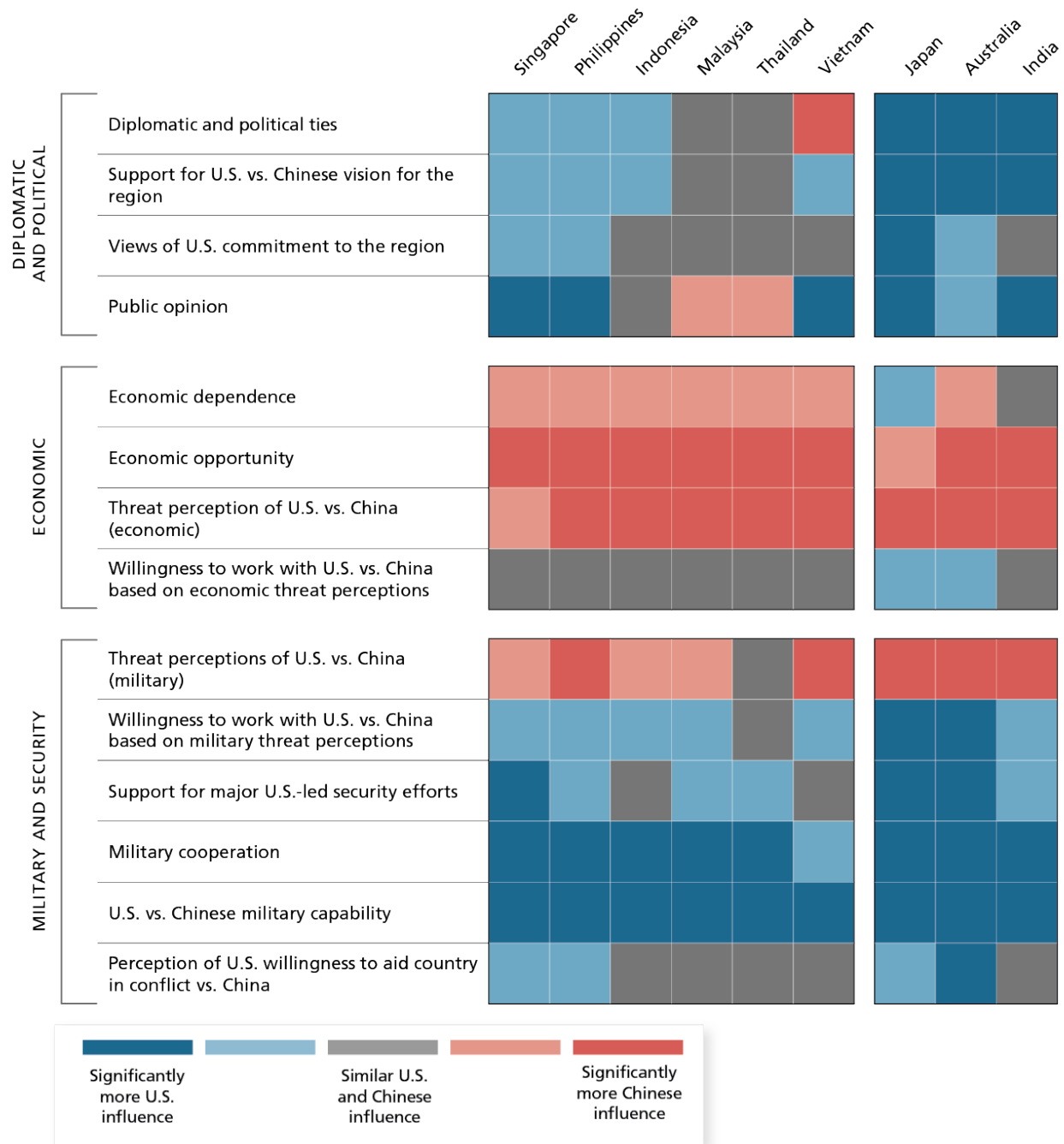
In terms of types of influence, the United States has more shared interests with countries in the study, but relatively less capability to incentivize or coerce. Across the eight indicators of shared interests, most countries have more shared interests with the United States than China. Malaysia and Thailand are the exceptions: these countries have about as much shared interests with the United States as with China. Across the six indicators of capabilities, the United States has as much capability to incentivize or coerce as China in Japan, Singapore, and Thailand.⁹⁹ China has more capability in the remaining countries. China has the most capability against Vietnam than other countries in the study.

⁹⁷ See Appendix B for how to interpret each color for every variable.

⁹⁸ We assess overall influence by assigning values to each of the cells, with blue as 2, light blue as 1, gray as 0, light red as -1, and red as -2. We then add up all the variables in each category (diplomatic and political; economic; and military and security). Since there are six military variables (two more than the four variables each for diplomatic and economic), we multiply the sum of the military variables by 4/6. We then add this weighted military sum to the sum of the diplomatic and economic variables. Using this approach, the totals for Indonesia, Malaysia, Thailand, and Vietnam are -0.33, -2.67, -2.67, and -2.67, respectively. In contrast, the totals for Singapore and the Philippines are 5.67 and 3.33, respectively. Japan, Australia, and India are 11.67, 7.33, and 4.67, respectively.

⁹⁹ Thailand makes this list (as well as the list for the PRC perspective) mainly because there is less of a perception in Thailand of the PRC military threat.

Table 6.1. Regional Perspectives of Relative U.S. and Chinese Influence (2018)



Diplomatic and Political Influence

The United States has more overall diplomatic and political influence (across all the diplomatic and political variables) than China in six of the nine countries: Australia, India, Indonesia, Japan, the Philippines, and Singapore. For the first subvariable diplomatic ties, countries generally have stronger diplomatic ties with the United States. The exceptions are

Malaysia, which seeks a more nonaligned foreign policy, and Thailand, which has strong ties with both the United States and China. China also continues to have stronger and significant diplomatic and political ties with Vietnam given their Communist Party-to-Party connection.¹⁰⁰ Seven countries are more supportive of the U.S. vision for the region than the Chinese alternative. Thailand and Malaysia are as amenable to China's vision as the United States'.¹⁰¹ There is, however, concern among ASEAN countries that the U.S. strategy toward the region emphasizes defense over economic priorities and regional countries desire a more balanced U.S. approach to the region.¹⁰² Similarly, there are varying perceptions of U.S. commitment to the Indo-Pacific region. Japan, Australia, Singapore, and the Philippines were relatively more confident, whereas the remaining countries were more uncertain.¹⁰³ Public opinion toward the United States is favorable across the board, but Malaysia and Thailand have even more favorable views of China.¹⁰⁴

The United States has the most diplomatic and political influence across all the indicators in Japan, one of the United States' strongest allies. Australia is second, though there is more concern in Australia about U.S. commitment to the Indo-Pacific region and the direction of the current U.S. leadership, including increasing worries about U.S. reliability and predictability and concerns that "America first" could involve more selective U.S. involvement abroad.¹⁰⁵ This concern about U.S. commitment to the region is echoed through Southeast Asia. While regional experts believe that the United States wants to remain involved in the region, there is a perception that U.S. engagement with Southeast Asia has decreased during the Trump Administration.¹⁰⁶

India, Singapore, and the Philippines are diplomatically and politically aligned with the United States, but each tries to balance its diplomatic ties with the United States and China to a certain extent. As the world's oldest democracy and the world's largest democracy, respectively,

¹⁰⁰ For more discussion, please see the accompanying report in this series on Vietnam: Grossman, 2020.

¹⁰¹ Although Indonesia is pushing for an alternative regional order to accommodate competing interests, we assess that Indonesia is still more supportive of the U.S. vision than the Chinese alternative.

¹⁰² Author interviews with officials in Bangkok, Kuala Lumpur, and Manila, April–May 2019.

¹⁰³ For polling data that measure U.S. regional commitment and reliability, see Government of Japan, Ministry of Foreign Affairs, "Opinion Poll on Japan in ASEAN Countries," webpage, March 2019b.

¹⁰⁴ Malaysia and, to some degree, Thailand, hold positive views of China in large part because of the assimilation and influence of Chinese culture and the view that China is a more reliable economic partner than the United States. See Bhavan Jaipragas, "I'd Side with Rich China over Fickle US: Malaysia's Mahathir Mohamad," *South China Morning Post*, March 8, 2019.

¹⁰⁵ See also James Curran, "'Americanism, Not Globalism': President Trump and the American Mission," Lowy Institute, July 3, 2018; Connely, 2017a; and Ashley Townshend, "America First: U.S. Asia Policy Under President Trump," United States Studies Centre, March 16, 2017. We also heard these views in interviews with analysts and officials in Sydney and Canberra in January 2019.

¹⁰⁶ Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpananupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019, p. 16.

the United States and India have significant shared values. Though India embraces strategic autonomy or nonalignment, it shares an interest in a free and open global rules-based international order.¹⁰⁷

Similarly, Singapore is one of the United States' closest partners. It sees the U.S. regional presence as playing an indispensable role in ensuring its ability to navigate a regional security environment that is increasingly complicated by China's growing power and more assertive behavior. There is strong support in the Philippines, among the elites and general public, for close relations with the United States and maintaining the alliance. Since 2016, there has been some loosening of bilateral ties as Philippine President Duterte pursues an "independent foreign policy" and "open alliances" with China and Russia.

Indonesia is more aligned diplomatically and politically with the United States. Similar to the United States, Indonesia regards China as a nation that seeks dominance over the region, and is often willing to violate international norms in pursuit of such dominance. It has a deeply fraught relationship with China, dating back to events of 1965 that have yet to be truly addressed by Indonesia's military establishment or society in general. Indonesia, like many countries in Southeast Asia, would prefer a strategy that corrals China into compliance with global norms rather than adopting a confrontational approach with China. Jakarta seeks to balance its security partnerships among as wide a field as possible.¹⁰⁸

Indonesia spearheaded the ASEAN effort to develop its own vision for the Indo-Pacific. Jakarta proposed an alternative vision that blends the objectives outlined in the U.S. Indo-Pacific strategy with interests such as development and prosperity to provide a regional order that is inclusive and does not force countries to choose between the United States or China.¹⁰⁹ The main differences between the ASEAN vision and the U.S. Indo-Pacific strategy are ASEAN's addition of the word *inclusive* and avoidance of the word *free*, both of which signify a desire to work with China by not emphasizing political openness and good governance.¹¹⁰ There is, however, still significant convergence between the U.S. and ASEAN visions.¹¹¹

Vietnam has strong diplomatic and political ties with China and has growing relations with the United States, but Vietnam seeks to maintain foreign policy independence and avoid aligning

¹⁰⁷ See Sunil Khilnani, Rajiv Kumar, Pratap Bhanu Mehta, Lt. Gen. (Retd.) Prakash Menon, Nandan Nilekani, Srinath Raghavan, Shyam Saran, and Siddharth Varadarajan, *NonAlignment 2.0: A Foreign and Strategic Policy for India in the Twenty First Century*, 2012, p. 8.

¹⁰⁸ This means the United States is competing not only against China (as well as fellow rival Russia)—but also against its own allies and partners, such as Australia, South Korea, Japan, Singapore, India and several European nations. See Defense Ministry of the Republic of Indonesia, *Defense White Paper 2015*, 2015, pp. 77–95.

¹⁰⁹ Evan Laksmana, "Indonesia's Indo-Pacific Vision is a Call for ASEAN to Stick Together Instead of Picking Sides," *South China Morning Post*, November 20, 2018b.

¹¹⁰ ASEAN, "ASEAN Outlook on the Indo-Pacific," webpage, undated-a; Amitav Acharya, "Why ASEAN's Indo-Pacific Outlook Matters," Australian Strategic Policy Institute, August 12, 2019.

¹¹¹ Morgan Ortagus, "The United States Welcomes the 'ASEAN Outlook on the Indo-Pacific,'" U.S. Department of State, press statement, July 2, 2019; Rory Medcalf, "Indo-Pacific Visions: Giving Solidarity a Chance," *Asia Policy*, Vol. 14, No. 3, July 2019, pp. 79–95.

with either power. Specifically, Vietnam seeks cooperation to create “intertwined strategic interests” and avoid “conflicts, confrontation, isolation, and dependence.”¹¹² Vietnam quietly supports the principles underlying the U.S. Indo-Pacific strategy, including a rules-based order, peaceful resolution of disputes, and free and open common domains (freedom of navigation and overflight).¹¹³

The United States has similar or slightly less diplomatic and political influence than China in Malaysia and Thailand, mainly due to concerns about U.S. commitment to the region and more favorable public views of China in Malaysia and Thailand.¹¹⁴ Thailand remains a treaty ally of the United States, but decades of tumultuous domestic political dynamics, military coups, and a foreign policy preference for balancing relations with great powers have stressed the alliance. Malaysia has a strong nonaligned approach to foreign affairs and wishes to cooperate with both the United States and China.

Economic Influence

With the exception of Japan, China has more aggregate economic influence (across all the economic variables) than the United States in all countries in the study. Countries across the region are highly concerned about China’s economic power and ability to use economic means for coercive or ulterior purposes against their interests. China has a larger array of economic tools to use. These include using economic agreements or infrastructure projects (and associated benefits) to gain favor; economic restrictions and retaliation on flow of goods, investment, and people (tourism, students); donations to or economic pressure on political and business elites; and limiting access to Chinese markets to pressure businesses and media outlets.

There is little interest in the region to counter China economically, despite concern over Beijing’s economic influence. Countries recognize that they will need to work with China, particularly given China’s current and likely future economic importance. Most seek to deepen economic ties with China to support domestic development goals. At the same time, there is a

¹¹² Lt. Gen. Tran Thai Binh (Institute of Defense Strategy), “Fundamentals of the National Defense Strategy in the New Situation,” *National Defense Journal*, June 10, 2014.

¹¹³ For example, see the statement by Vietnamese President Tran Dai Quang: “India-Vietnam Joint Statement During State Visit of President of Vietnam to India,” Indian Ministry of External Affairs, March 3, 2018; see also Le Duc Cuong, “On the US Indo-Pacific Strategy,” *National Defence Journal*, July 1, 2018.

¹¹⁴ Both Thailand and Malaysia still have a strong favorable public opinion of the United States. Pew data from 2014 show that 73 percent of Thais had a positive view of China and 74 percent had a positive view of the United States. Pew data from 2015 show that 78 percent of Malaysians had a positive view of China and 54 percent of Malaysians had a positive view of the United States. See Pew Research Center, “Global Indicators Database,” webpage, undated. Another poll from around 2014 suggested that both countries have more favorable views of China than the United States (Yun-han Chu, Yu-tzung Chang, and Min-hua Huang, “How East Asians View the Influence of United States vs. a Rising China,” Asian Barometer, Brookings Institution, 2016). A 2016 Malaysia poll suggests that Malaysians have similar positive views of the United States and China (Wan Saiful Wan Jan “Malaysians’ Response to Big China Presence Shows Concerns,” *The Straits Times*, April 27, 2017). On whole, the different polling data suggest that it is likely that both countries have slightly more favorable views of China than the United States.

strong desire to increase economic connectivity with the United States, Japan, and other actors to diversify and reduce economic reliance on China.

In 2018, two out of the nine countries—Japan and Australia—have demonstrated some willingness to either push back against Chinese economic influence or limit some economic activities with China because of associated security threats.¹¹⁵ Japan and Australia have both strengthened scrutiny of PRC inbound investments and technology transfer in their countries to reduce potential national security risks.¹¹⁶ Japan is the more active of the two in this regard, with Japan expanding infrastructure and other investments in Southeast Asia to counter Chinese influence.

There are, however, limits to Japan's willingness to work against China economically. Japan recognizes that it, along with other countries in the Indo-Pacific region, is economically dependent on China (particularly for exports of intermediate and primary goods). U.S.-China trade disputes or any slowing of China's economy could negatively impact Japan.¹¹⁷ Japan was initially reluctant to embrace China's BRI, but has reversed course in order to try to positively shape BRI activities.¹¹⁸

India has significant economic concerns about China and is an example of a country with contradictory approaches to dealing with Chinese economic influence. Bilaterally, New Delhi is uneasy over the degree and composition of India's trade with China: rising dependence of Indian industries on Chinese imports; Indian exports of natural resources to China; and Indian imports of higher end manufacturing goods from China. Domestically, India is worried that Chinese companies or telecom equipment could be used for espionage and intelligence gathering.¹¹⁹ Regionally, India has not joined China's BRI and has publicly opposed the initiative.¹²⁰ New Delhi views BRI as a way for China to use commercial means to advance its ambitions in South Asia, at the cost of Indian interests.¹²¹ Despite these concerns, however, India believes the

¹¹⁵ In 2020, India also became more willing to limit growing PRC economic influence in India.

¹¹⁶ Ashley Feng and Sagatom Saha, "Quad Restrictions: Addressing PRC Investment Concerns in the Indo-Pacific," Jamestown Foundation, *China Brief*, Vol. 18, No. 17, 2018.

¹¹⁷ Government of Japan, Ministry of Economy, Trade and Industry, *White Paper on International Economy and Trade, 2019*, July 16, 2019; Jiji Kyodo, "Japan Keeping Wary Eye on Impact from Slowing China Economy, White Paper Says," *Japan Times*, July 23, 2019.

¹¹⁸ Masafumi Iida, "Japan's Reluctant Embrace of BRI?" German Institute for International and Security Affairs Working Paper, Session No. 3, October 2018; "China No Match for Japan in Southeast Asia Infrastructure Race," *Japan Times*, June 23, 2019.

¹¹⁹ Khilnani et al., 2012, p. 15.

¹²⁰ India's Ministry of External Affairs (MEA) has criticized the absence of "universally recognized international norms" in the awarding of contracts. In addition, the MEA notes that the set of BRI projects in Pakistan "ignores [India's] core concerns on sovereignty and territorial integrity." Part of this is because BRI projects in Pakistan are located in or near disputed territories that India claims. See Government of India, Ministry of External Affairs, "Official Spokesperson's Response to a Query on Participation of India in OBOR/BRI Forum," May 13, 2017.

¹²¹ India regards port projects in Gwadar (Pakistan), Chittagong (Bangladesh), Kyauk Pyu (Myanmar), and Hambantota (Sri Lanka) as potential basing or access sites for the People's Liberation Army Navy (PLAN). Indeed, Indian planners have already been taken by surprise when PLAN submarines have unexpectedly surfaced in Sri

Chinese market offers economic opportunity and India may be able to leverage potential Chinese infrastructure investment in India to its own benefit.¹²² As of 2018, India was still reducing barriers for foreign countries, including China, to invest more in India to support its own internal development.¹²³

Australia shares India's concerns domestically and in its neighborhood, including the Pacific Islands.¹²⁴ Seventy-nine percent of Australians believe that China's infrastructure projects are part of China's plans for regional domination. Seventy-four percent worry that Australia is too economically dependent on China.¹²⁵

Southeast Asian countries are generally concerned with China's economic influence, including BRI. With the exception of Singapore (for which we have no data), over 75 percent of the regional experts in the remaining five ASEAN countries believe that their country should be cautious or avoid negotiating BRI projects with China.¹²⁶ Vietnamese experts, for example, are worried about BRI projects in locations significant to national defense and security.¹²⁷ There is also concern that BRI projects in Laos and Cambodia undermine Hanoi's ties to both countries.¹²⁸ Thai authorities have similarly voiced frustration about coercive PRC business practices.¹²⁹

Among ASEAN members, Indonesia likely has the highest economic threat perception of China. There is a widespread public perception that Chinese firms are buying up huge segments of the economy, striking extortionate deals that will burden Indonesia with unsustainable high-interest debt, and bringing in vast numbers of Chinese workers rather than hiring locally. Given Indonesia's colonial history of foreign conquest through economic dependency, Jakarta is

Lanka and Pakistan (Colombo and Karachi, respectively). See Darshana M. Baruah, "India's Answer to the Belt and Road: A Road Map for South Asia," Carnegie India, working paper, August 2018.

¹²² Khilnani et al., 2012, pp. 14, 15.

¹²³ See Feng and Saha, 2018. However, as border tensions flared between India and China and COVID-19 impacted the country, India began limiting foreign investments in 2020 to prevent opportunistic takeovers of Indian companies. Aftab Ahmed and Aditya Kalra, "Exclusive: India Foreign Investment Rules Aimed at China to Include Hong Kong—Sources," *Reuters*, April 20, 2020.

¹²⁴ Jane Golley and James Laurenceson, "Australia and the BRI: Cooperate, Compete or Challenge," Asia Society, undated.

¹²⁵ Natasha Kassam, "Lowy Institute Poll 2019," Lowy Institute, June 26, 2019.

¹²⁶ Tang Siew Mun et al., 2019, p. 20.

¹²⁷ Bui Duc Anh (Political Academy, Defense Ministry), "Impacts of Vietnam-China Economic Ties on Vietnamese Security and Defense," *Tap chi Cong san [Communist Review]*, October 25, 2016.

¹²⁸ Vien Dong, "Laos Is No Longer a Backyard of Vietnam?" Voice of America, June 5, 2016; YẾN VÕ, [Đặc khu kinh tế Boten ở Lào và bài học nhân tiền "Boten Special Economic Zone in Laos and the Immediate Lessons,]" *Bao Tieng Dan [Voice of People Media]*, June 5, 2018.

¹²⁹ Government officials and scholars in Southeast Asia, and in particular Thailand, are concerned about the opaque nature of Chinese BRI investments and the possibility of corruption. The terms of most BRI contracts are not available to the public, for example. Furthermore, the flow of money and profits of such deals is typically kept under wraps. Thai authorities have expressed concern that such lack of transparency can create opportunities for corruption between local officials, Thai investors, and the Chinese entities overseeing the BRI projects.

particularly wary about growing Chinese economic influence. This has generated caution on Jakarta's end, but has not stopped Indonesia from embracing BRI or other Chinese economic opportunities that support Indonesia's domestic development.

No similar statistics exist for Singapore, but there are signs that Singapore is at least moderately concerned about Chinese economic influence. There is discussion of influence through local business associations and businessmen, and concern that China's importance as a market for media readership could sway reporting by Singaporean media outlets.¹³⁰

Singapore has less concern about China as an economic threat than other countries in the study because Singapore sees China as a huge economic opportunity—both as a destination for Singaporean investment and as a partner in need of Singaporean expertise and support for broader regional efforts, such as BRI, Asian Infrastructure Investment Bank (AIIB), and the Regional Comprehensive Economic Partnership (RCEP). Because of its wealth and service sector expertise, Singapore has less to fear than its less developed neighbors from Chinese economic leverage—the greater threat to Singapore would come from an escalating trade war or, worse, from Chinese economic collapse or catastrophe. Singapore was an early supporter of BRI and AIIB, and regional experts see significant opportunity for Singapore to serve as a potential financial and third-country partnership hub for BRI.¹³¹

With the exception of Japan and India, most countries are more economically dependent on China than the United States when taking into account bilateral trade, investment, and tourism. Looking at each economic indicator separately shows that China has more bilateral trade with all ten ASEAN countries than the United States does. The largest difference, as a percentage of the country's total bilateral trade, is with Australia (21 percent more Chinese trade than U.S. trade in 2018) and the smallest trade difference is with India (5 percent more Chinese trade than U.S. trade in 2018).¹³² The United States provides more FDI to the nine countries in the study, except for Vietnam. U.S. FDI ranged from 61 percent more than China in Japan to 2 percent less than China in Vietnam. All six ASEAN countries invested more in China than in the United States, while Australia, Japan, and India invested more in the United States. This varied from Japan investing 24 percent more FDI in the United States compared with investing in China and Singapore providing 8 percent more FDI to China than to the United States. Finally, there are more Chinese tourists than U.S. tourists. The largest difference is in Vietnam, where there is 26 percent more Chinese tourism (as a percentage of total tourism) than U.S. tourism. The smallest is in the Philippines, where Chinese tourism is 3 percent more.

¹³⁰ See Cooper and Chase, 2020. See also Russell Hsiao, "A Preliminary Survey of CCP Influence Operations in Singapore," *China Brief*, July 16, 2019; and "Chinese Embassy Responds to Report on Influence Operations in Singapore," *The Straits Times*, July 19, 2019.

¹³¹ See Cooper and Chase, 2020; Phidel Vineles, "Making the Belt and Road Work for Southeast Asia," East Asia Forum, July 13, 2019; Mukhtar Hussain, "Singapore Has Role in BRI's Investment in Southeast Asia," *The Straits Times*, August 21, 2019.

¹³² We use UN trade data from the most recent year available. Most of the trade data are from 2018; we use 2017 data for Vietnam, and 2016 data for Cambodia and Laos.

In 2018, countries viewed China as providing more economic opportunity and potential future growth. There is a widespread expectation that China will overtake the United States as the largest economy in the next ten to 15 years and play a critical role in driving regional economic growth.¹³³ At the same time, there is frustration and anxiety over the U.S. withdrawal from the Trans-Pacific Partnership (TPP), U.S. protectionism (including threats of U.S. tariffs), and the U.S.-China trade war. The TPP was viewed as a primary vehicle to reduce economic dependence on China. ASEAN countries, Japan, Australia, and India are pushing to conclude the RCEP to strengthen free trade and shield the region from U.S. protectionism and the negative impacts of the U.S.-China trade war.¹³⁴ The RCEP includes China but not the United States. It would deepen economic ties between the countries involved. There is expectation that trade with China will continue to increase. The U.S.-China trade war has increased China's resolve to strengthen intra-Asia economic ties,¹³⁵ and some assess that the uncertainty associated with the U.S.-China trade dispute may encourage regional countries to further embrace a more certain BRI.¹³⁶ A 2019 Indonesia study, for example, notes that since the United States is "retreating from the global arena," China is capable of stepping up, and BRI could help sustain Indonesia's desire for foreign investment and infrastructure development. Suspicions of Chinese motives behind BRI, as well as problems associated with BRI projects (i.e., environmental issues, bringing in Chinese workers), are not good reasons to not join BRI.¹³⁷ Across ASEAN, most experts view China as having significantly more economic influence than the United States; this is most salient in Brunei, Cambodia, Indonesia, Laos, Malaysia, and Thailand.¹³⁸

¹³³ Experts project that China will overtake the United States in terms of market exchange rates by 2030 and that China will be the single biggest contributor to global growth. China has already overtaken the United States as the largest economy in terms of purchasing power parity. See Janet Henry, "The World in 2030," *HSBC*, September 2018; Lowy Institute, 2019, p. 39; William Martin, "The US Could Lose Its Crown as the World's Most Powerful Economy as Soon as Next Year, and It's Unlikely to Ever Get It Back," *Business Insider*, January 10, 2019.

¹³⁴ Eryk Bagshaw, "Australia Leads Secret Trade Negotiations That Will Sideline US," *Sydney Morning Herald*, June 26, 2019; Tan Dawn Wei, "Moderate Progress After Latest Round of Ministerial Talks for RCEP Trade Pact," *The Straits Times*, August 3, 2019; Faisal Pervaiz, "Asian Free Trade Proposal Is Broad in Scope, Narrow in Focus," *Stratfor*, March 25, 2019; Takashi Terrada, "RCEP Negotiations and the Implications for the United States," National Bureau of Asian Research, December 20 2018.

¹³⁵ Greg Earl, "Economic Diplomacy: China Dependency and a Notable Departure," *The Interpreter*, August 15, 2019; Amanda Lee, "Trade War Will Drive Chinese Investment in ASEAN to US\$500 Billion by 2035, Think Tank Says," *South China Morning Post*, October 25, 2018.

¹³⁶ Kelvin Lau, "Belt and Road Shines Through the U.S.-China Trade Dispute," *Standard Chartered*, November 21, 2018.

¹³⁷ Yose Rizal Damuri, Vidhyandika Perkasa, Raymond Atje, and Fajar Hirawan, *Perceptions and Readiness of Indonesia Towards the Belt and Road Initiative: Understanding Local Perspectives, Capacity, and Governance*, Jakarta, Indonesia: Center for Strategic and International Studies Indonesia, May 23, 2019, p. 40.

¹³⁸ In these six countries, the difference between the percentage of the experts that viewed China as having the most economic influence and the percentage of the experts that viewed the United States as having the most economic influence was over 70 percent (most viewed China as having significantly more economic influence). See Tang Siew Mun et al., 2019, p. 21.

Relative to the other countries in the study, Japan is the least economically dependent on China and the most active in seeking alternative markets to prevent economic overreliance on China. Japan likely assesses that China, given its current and projected economic growth potential, could offer Japan more economic opportunity than the United States, but Japan is wary of fully embracing all the opportunities that China could offer. Instead, Japan has pushed for signing the Comprehensive and Progressive Agreement on Trans-Pacific Partnership (CPTPP) in early 2019, renamed after the United States pulled out of the TPP. CPTPP currently involves 11 countries, with additional countries interested in joining. Japan is still holding out for the possibility that the United States may join in the future. In March 2019, Japan also signed a significant trade agreement with the European Union reducing tariffs and facilitating trade.¹³⁹ All these efforts would help Japan diversify its economic and trade relationships and prevent Japan from becoming overly economically dependent on China.

Military and Security Influence

The United States has more military and security influence across the region than China. With the exceptions of Malaysia and Thailand, which have low military threat perceptions of both China and the United States, most countries view China but not the United States as a military threat. Countries, however, generally avoid actions that are clearly aimed at countering China militarily and are wary of possible Chinese economic reprisals.¹⁴⁰ Countries in the region generally have closer military ties and cooperation with the United States than China and have participated in or supported major U.S.-led international and regional security efforts. However, approximately half of the countries are uncertain whether the United States would come to their aid in a potential military conflict with China.¹⁴¹

Japan is wary of China's coercive military behavior in the Indo-Pacific region and China's conventional military challenge and use of gray zone tactics, including increased airborne intrusions into Japan's Air Defense Identification Zone, increased intrusions into the waters

¹³⁹ "Abe and Canada's Justin Trudeau Extol TPP Trade Pact Without U.S.," *Japan Times*, April 29, 2019; Cory Baird, "Japan's Busy Year on Trade Likely to Shake Up the Economy for Years to Come," *Japan Times*, November 4, 2018.

¹⁴⁰ The Philippines and Malaysia, for example, have at times showed little appetite to publicly condemn Chinese transgressions or coercion against their maritime assets in the SCS because of fears of possible PRC economic reprisal. See, for example, Lyle J. Morris, "Time to Speak Up about the South China Sea," *East Asia Forum*, March 14, 2019.

¹⁴¹ Looking at public opinion, for example, a 2018 Gallup poll shows that in 2017 Australia and the Philippines were most confident that the United States would defend their country (both at 76 percent). The public in the Republic of Korea (ROK) were similarly confident, at 69 percent. The Japanese were less confident, at 50 percent. In contrast, only 33 percent of those surveyed in Indonesia and 25 percent of those surveyed in Thailand believe that was the case—there were slightly higher beliefs among the publics in both countries that believed that the United States would not defend their country. See Stafford Nichols and Zacc Ritter, "U.S. Defense Promise Still Credible in Asia-Pacific," *Gallup*, July 17, 2018.

around the Senkakus, and continuing high levels of cyber intrusions.¹⁴² In response, Japan has stepped up defense cooperation with the United States and efforts to work with ASEAN to maintain a free and open Indo-Pacific.¹⁴³ Japan and the Philippines are the two countries in the study that do not have major bilateral military exercises with China. Despite close relations with the United States, concerns of allied abandonment persist, and only half of the Japanese public believe that the United States would come to Japan's defense.¹⁴⁴

China does not directly threaten Australia militarily, but Australia views China's artificial island building and militarization in the SCS as raising serious concerns about China's strategic intentions.¹⁴⁵ Maintaining a rules-based regional and international order is of major importance to Australia. There is also growing concern about Chinese military activity: 77 percent of Australians believe that Australia should do more to resist Chinese military activities in its own region, even if it affects the economic relationship, and 55 percent believe that China establishing a military base in a Pacific island country would be a critical threat to Australia.¹⁴⁶ Most Australians believe they can avoid choosing between the United States and China.¹⁴⁷

The Philippines has historically shown high levels of distrust toward China and has an ongoing territorial dispute with China in the SCS. The current Philippine leader's more accommodating rhetoric toward China on the SCS highlights a reluctance to face China head-on, not a changed threat perception. Manila continues to support U.S. FONOPs and has participated, albeit in limited capacity, in some major U.S. military activities in the SCS.¹⁴⁸

India views China as its most powerful, significant long-term security challenge.¹⁴⁹ New Delhi also sees Beijing as providing significant support to Pakistan, complicating India's

¹⁴² Government of Japan, Ministry of National Defense, *Defense of Japan 2018*, white paper, 2018; Government of Japan, Ministry of Foreign Affairs, *Trends in Chinese Government and Other Vessels in the Waters Surrounding the Senkaku Islands, and Japan's Response*, 2019.

¹⁴³ See Government of Japan, Ministry of National Defense, *Guidelines for Japan-U.S. Defense Cooperation (Provisional Translation)*, April 27, 2015; Government of Japan, Ministry of National Defense, *Vientiane Vision: Japan's Defense Cooperation Initiative with ASEAN*, 2016.

¹⁴⁴ See Sheila Smith, *Japan Rearmed: The Politics of Military Power*, Cambridge, Mass.: Harvard University Press, 2019; and Nichols and Ritter, 2018.

¹⁴⁵ Australia's 2017 Foreign Policy White Paper notes, "Australia is particularly concerned by the unprecedented pace and scale of China's activities" and "opposes the use of disputed features and artificial structures in the South China Sea for military purposes." Government of Australia, Department of Foreign Affairs and Trade, *2017 Foreign Policy White Paper*, 2017, pp. 46–47.

¹⁴⁶ Kassam, 2019.

¹⁴⁷ Eighty-two percent of Australians characterize China as more of an economic partner than a military threat. Approximately 81 percent of Australians see it as possible to maintain good relations with the United States and China at the same time, down slightly from 87 percent in 2013. Alex Oliver, "2018 Lowy Institute Poll," Lowy Institute, June 20, 2018.

¹⁴⁸ The Philippines, for example, sent one patrol boat to the May 2019 high-profile U.S., Japan, India, Philippine naval exercise in the SCS. See Ankit Panda, "US, India, Japan, Philippine Navies Demonstrate Joint Presence in South China Sea," *The Diplomat*, May 11, 2019.

¹⁴⁹ Khilnani et al., 2012, p. 13.

strategic environment.¹⁵⁰ In India's eyes, China is too threatening to be considered a friend but too dangerous to be treated as an overt enemy. China's military superiority has made Indian planners risk-averse about taking positions that could provoke full-scale warfare.

Vietnam's top assessed external security threat is China. The threat comes from Beijing's claims and activities in the SCS and its efforts in places such as Cambodia, where China is potentially expanding its military presence. Beijing's massive military modernization—along with expansion of the Chinese Coast Guard and maritime militia—has significantly enhanced the People's Liberation Army's (PLA's) ability to conduct joint operations against Vietnamese interests. Vietnam, however, does not expect military support from Washington (or Moscow) in a crisis or conflict with China. Vietnam seeks to resist Chinese coercion without provoking China in the process. As a result, Vietnam is cautious of aligning too closely with the United States.¹⁵¹

Indonesia and Malaysia are less explicit about their views, but their concerns about China as a military threat are reflected in their national security objectives, as well as actions. One of Indonesia's top defense objectives is maintaining sovereignty and territorial integrity.¹⁵² China's SCS claims and its use of gray zone tactics are a threat to Indonesia's Natuna Islands. Indonesia seeks to maintain maritime security and develop a defense force for the Natunas.¹⁵³ Similarly, Malaysia's 2020 Defence White Paper defines Malaysia as a "maritime nation with continental roots" and prioritizes the country's ability to defend its core area (includes its territorial waters as well as the air space above them), an extended area (includes the Malaysian Maritime Zone, strategic waterways, airspace and critical lines of communication), and forward area.¹⁵⁴ Malaysia's military activities and buildup in the SCS are indicators of its efforts to defend its claims against China.¹⁵⁵ Both countries seek to defend their territory while avoiding perceptions of aligning against China. Malaysia is uncertain of U.S. willingness to aid it in a potential conflict with China. Similarly, Indonesia has significant doubts and is not counting on U.S. aid.¹⁵⁶

¹⁵⁰ China has been Pakistan's largest source of military hardware for more than 65 years, supplying 40 percent of the nation's arms during this period. See Jonah Blank, Richard Girven, Arzan Tarapore, Julia Thompson, and Arthur Chan, *Vector Check: Prospects for U.S. and Pakistan Air Power Engagement*, Santa Monica, Calif.: RAND Corporation, RR-2107-AF, 2017, pp. 36–49.

¹⁵¹ See Grossman, 2020.

¹⁵² Defense Ministry of the Republic of Indonesia, 2015, p. 38.

¹⁵³ Defense Ministry of the Republic of Indonesia, 2015, p. 42.

¹⁵⁴ See Government of Malaysia, Ministry of Defence, "Defence White Paper: A Secure, Sovereign, and Prosperous Malaysia," 2020, p. 39.

¹⁵⁵ Ridzwan Rahmat, "Malaysia Flexes Missile Capabilities in South China Sea Amid Fresh Tensions," *Jane's*, July 16, 2019; Alex Vuving, "Tracking Malaysia's Force Build-Up in the South China Sea," *Asia Maritime Transparency Initiative*, October 20, 2017.

¹⁵⁶ Indonesians do not trust U.S. security promises and are also concerned that that United States does not sufficiently take into account Indonesian interests.

Thailand is a long-standing U.S. treaty ally, and its defense relationship with the United States has withstood fluctuations in the political relationship. Thailand's military threat perceptions of China have decreased as it has grown closer to China economically and militarily. Bangkok's main defense priority is addressing internal security challenges.¹⁵⁷ Thailand seeks security from both the United States and China and for each to balance the other's influence.¹⁵⁸ While U.S.-Thai relations are currently improving, the dip in overall bilateral relations after the 2014 Thai military coup has increased uncertainty, particularly among the public, about whether the United States would defend Thailand.¹⁵⁹ Though Thailand and Malaysia have participated in U.S. military operations beyond the Indo-Pacific, both are concerned that U.S. FONOPs could aggravate the security situation in the SCS.¹⁶⁰

One indicator of Chinese military influence in the region is how many bilateral exercises the PLA conducted with regional militaries from 2002 to 2018. Figure 6.1 displays PLA military exercises by service with countries in the Indo-Pacific region.¹⁶¹ The figure shows that Thailand engaged in more military exercises with China than any other country in the region. Thailand is also the only country in the region that has exercised with the PLA Navy, Army, and Air Force. The number of U.S. military exercises with Thailand, however, remains significantly higher than Thailand's military engagements with China.

¹⁵⁷ Kingdom of Thailand, Minister of Defence, "Defence White Paper," 2013, pp. 6–7.

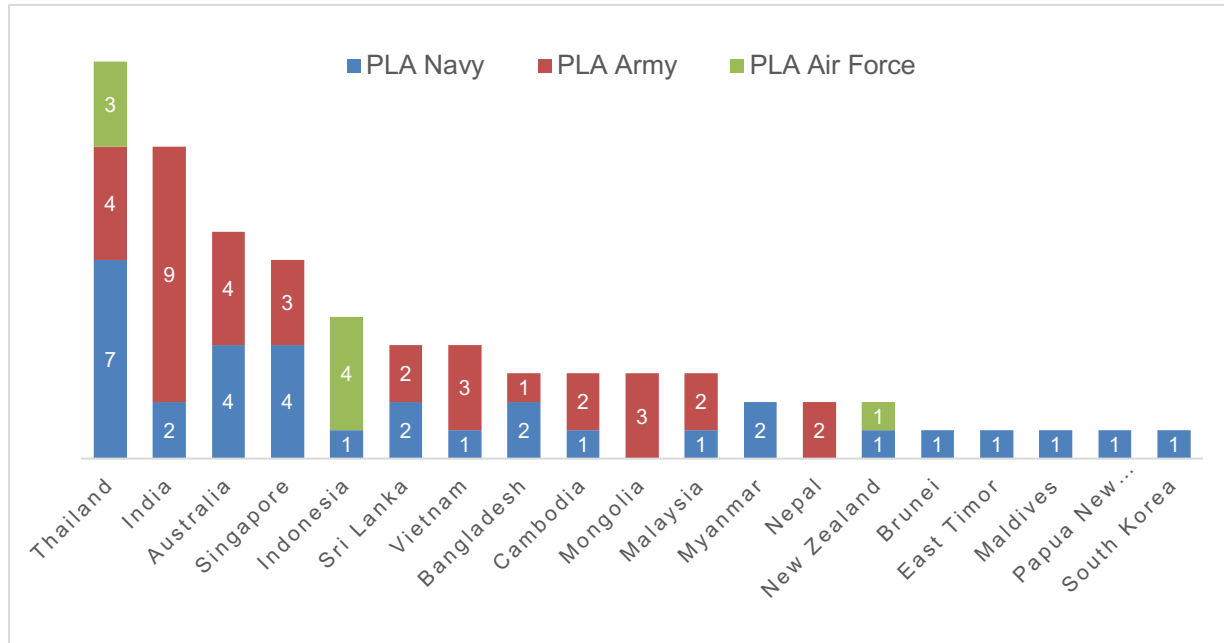
¹⁵⁸ Surveys of Thai military elites, for example, have showed that the military does not see any imminent external security threats. There was, however, greater general threat perception of the United States instead of China because of concerns that the United States interferes in Thai politics by siding with select Thai political actors. See Blaxland and Raymond, 2017; Zawacki, 2017.

¹⁵⁹ According to a 2018 Gallup poll, 25 percent of those surveyed in Thailand believed that the United States would come to Thailand's aid, and 26 percent believed the United States would not defend their country. Nichols, and Ritter, 2018.

¹⁶⁰ "Mahathir Tells U.S.: No Warships in ASEAN Waters but Small Patrol Boats Are Fine," *The Straits Times*, November 15, 2018.

¹⁶¹ Because Figure 6.1 focuses on Chinese military exercises with countries in the Indo-Pacific, it does not include Chinese exercises with Pakistan. It is worth noting that China conducts significant amount of exercises with Pakistan and more than the countries displayed in Figure 6.1 According to one estimation, China engaged in 16 exercises with Pakistan from just 2002 to 2014 alone. See Andrew Scobell, Bonny Lin, Howard J. Shatz, Michael Johnson, Larry Hanauer, Michael S. Chase, Astrid Stuth Cevallos, Ivan W. Rasmussen, Arthur Chan, Aaron Strong, Eric Warner, and Logan Ma, *At the Dawn of the Belt and Road: China in the Developing World*, Santa Monica, Calif.: RAND Corporation, RR-2273-A, 2018, pp. 141–142; for more on the China-Pakistan relationship, see Andrew Small, *China-Pakistan Axis: Asia's New Geopolitics*, New York: Oxford University Press, 2015.

Figure 6.1. PLA Bilateral Service Military Exercises in the Indo-Pacific (2002–2018)



SOURCE: Updated 2019 data set derived from Kenneth Allen, Phillip C. Saunders, and John Chen, *Chinese Military Diplomacy, 2003–2016: Trends and Implications*, Washington, D.C.: National Defense University, 2017.

Finally, countries in the region assess that the United States possesses a significantly stronger military than China and is likely to maintain its military edge in the near future. The Australian Lowy Institute, for example, examined defense spending, composition and training of armed forces, weapons, capabilities, and posture and concluded that the United States is ahead of China by nearly 30 points out of 100.¹⁶² There is concern, however, that beyond the near future the U.S. military edge will erode as the Chinese military becomes more powerful.¹⁶³

Chinese Views of Relative U.S. and Chinese Influence

Having examined regional perspectives on U.S.-China competition, in this section we explore how China views competition in the same countries. We use a range of publicly available Chinese reports and academic writings to capture Chinese views of the region and what Chinese experts see as the regional views of U.S. versus Chinese influence.¹⁶⁴ While these sources are useful in assessing general Chinese perceptions of whether the United States or China has more influence, it is difficult to disentangle the extent of either country's influence (and especially difficult to differentiate between moderate versus significant influence). We are

¹⁶² Lowy Institute, 2019, pp. 20–28.

¹⁶³ One Australian study estimates that, by 2030, the United States may continue to spend more on defense than China. See Lowy Institute, 2019, p. 40.

¹⁶⁴ Please see the Appendix B methodology section.

also concerned that Chinese sources may be biased toward portraying Chinese strengths, China's positive relationships with its neighbors, and the perverse influences of U.S. "militarism."¹⁶⁵ As a result, we simplify the coding for influence into three colors: blue for greater U.S. influence, gray for similar U.S. and PRC influence, and red for greater Chinese influence.¹⁶⁶ For each variable, we coded for what we assessed was either the more widespread or median position of Chinese scholars. There was not sufficient information from Chinese sources for us to code the variable "Perception of U.S. willingness to aid country in a conflict with China." We coded this variable as not available (N/A).

Table 6.2 presents the results, with the same ordering of countries as in Table 6.1. Chinese perceptions of China's relative economic influence are similar to regional views. There is more divergence on coding of specific variables for diplomatic and military influence, particularly for Malaysia, the Philippines, and Vietnam. Some of the differences are caused by the salient factors that Chinese scholars focus on—for example, poor Chinese reputation and image abroad caused by tourist activities and questionable practices of Chinese firms negatively influencing scholars' assessments of regional public attitudes toward China. For Vietnam, Chinese writings at times group Vietnamese efforts to militarily balance against China with Vietnamese efforts to politically hedge, which affects their assessment of the state of China-Vietnam diplomatic and political ties.¹⁶⁷ For the Philippines, a portion of the divergence is explained by the Chinese focus on Duterte—his views, his positions, and how he has significantly improved Manila's relationship with Beijing—as well as how the Philippines is responding to China. There is some discussion, but less Chinese focus on, the Philippine government and public.¹⁶⁸

¹⁶⁵ An example of a relatively optimistic assessment of China's security environment: one report assessing China's relationship with nearly 30 countries in its periphery rated all of their relationships with China as normal or better with the exception of Japan. The report had five ratings for a country's relationship with China: very good, relatively good, normal, relatively poor, and very poor. Japan was the only country that had a rating that was between normal and relatively poor. Even Singapore, the Philippines, and Vietnam, which the author characterizes as seeking to balance China politically and militarily more than other ASEAN countries, were rated as having relationships with China that are between normal and relatively good. See 王雷 [Wang Lei], "中国周边安全形势评估 [Assessment of the Security Environment in China's Periphery]," in 张宇燕 [Zhang Yuyan], ed., 全球政治与安全报告 [Annual Report on International Politics and Security], Beijing: Social Sciences Academic Press, 2019, pp. 68–85.

¹⁶⁶ Even with a simplified coding for the PRC perspective, we are more confident about assessments of influence from the regional perspective (Table 6.1) than the PRC perspective (Table 6.2).

¹⁶⁷ One Chinese Academy of Social Sciences annual report, for example, notes that within Southeast Asia, Singapore, Vietnam, and the Philippines harbor the most concerns regarding China and are trying to politically and militarily balance against China while also continuing to engage China economically (王雷 [Wang Lei], 2019, pp. 75–76).

¹⁶⁸ In contrast, the regional perspective weighed Duterte's view as one-third of the overall Philippine view. It weighed the Philippine government and the public's views equally and as the remaining two-thirds.

Table 6.2. PRC Perspectives of Relative U.S. and Chinese Influence (2018)

		Singapore	Philippines	Indonesia	Malaysia	Thailand	Vietnam	Japan	Australia	India
DIPLOMATIC AND POLITICAL	Diplomatic and political ties	Significantly more U.S. influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Significantly more U.S. influence	Significantly more U.S. influence	Similar U.S. and Chinese influence
	Support for U.S. vs. Chinese vision for the region	Significantly more U.S. influence	Significantly more U.S. influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Significantly more U.S. influence	Significantly more U.S. influence	Similar U.S. and Chinese influence
	Views of U.S. commitment to the region	Significantly more U.S. influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Significantly more U.S. influence	Significantly more U.S. influence	Similar U.S. and Chinese influence
	Public opinion	Significantly more U.S. influence	Significantly more U.S. influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence
ECONOMIC	Economic dependence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more U.S. influence	Significantly more Chinese influence	Similar U.S. and Chinese influence
	Economic opportunity	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence
	Threat perception of U.S. vs. China (economic)	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence
	Willingness to work with U.S. vs. China based on economic threat perceptions	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Significantly more U.S. influence	Significantly more U.S. influence	Similar U.S. and Chinese influence
MILITARY AND SECURITY	Threat perceptions of U.S. vs. China (military)	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Similar U.S. and Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence	Significantly more Chinese influence
	Willingness to work with U.S. vs. China based on military threat perceptions	Significantly more U.S. influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence
	Support for major U.S.-led security efforts	Significantly more U.S. influence	Significantly more U.S. influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Similar U.S. and Chinese influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence
	Military cooperation	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Similar U.S. and Chinese influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence
	U.S. vs. Chinese military capability	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence	Significantly more U.S. influence
	Perception of U.S. willingness to aid country in conflict vs. China	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Significantly more U.S. influence

Similar U.S. and Chinese influence

Significantly more Chinese influence

Table 6.2 shows that Chinese experts believe that United States has the most overall influence across all categories in (in order) Japan, Australia, and Singapore. China has the most influence in Malaysia. The United States and China have similar influence in India, Indonesia, the Philippines, Thailand, and Vietnam.

In terms of types of influence, Chinese writings suggest that countries in our study have more shared interests with the United States with the exception of Malaysia and Thailand, which have

similar shared interests with the United States and China. The United States has the most shared interests with Japan, Australia, and Singapore and the least with Malaysia. Across the six indicators of capabilities, China has more capability to incentivize or coerce in most countries aside from India, Japan, and Thailand. China has the most capability against Vietnam.

Diplomatic and Political Influence

Chinese analysts believe that the United States has more overall diplomatic and political influence in Australia, Japan, and Singapore. In terms of diplomatic ties, Chinese sources identify Japan as having one of the closest diplomatic and political relationships with the United States within the region. The United States and Japan both stress the importance of a rules-based order. Japan is concerned with growing Chinese influence and does not wish to see its diplomatic influence in Southeast Asia supplanted by Chinese power.¹⁶⁹ Similarly, Australia has strong diplomatic ties with the United States, attributable to Australia's identity as a liberal, Western state.¹⁷⁰ Singapore prioritizes its diplomatic ties with the United States.¹⁷¹ In contrast, Chinese sources see Duterte as moving the Philippines to a more hedging, neutral position by downplaying the SCS dispute, abandoning previous attempts to bring territorial disputes to ASEAN, and refusing to seize upon the favorable SCS ruling handed down by the Hague's Permanent Court of Arbitration in 2016.¹⁷² Chinese sources view the remaining countries in Southeast Asia as largely on a similar page as the Philippines: attempting to balance their diplomatic ties with the United States and China. Countries see American influence as a necessary counterweight to China, but are wary of choosing sides.

Chinese sources generally cast the U.S. vision for the Indo-Pacific as requiring ASEAN to work together to actively limit and contain Chinese influence. This view, according to Chinese experts, is not shared by ASEAN. Although regional countries value U.S. diplomatic and political influence to check Chinese assertiveness, there is concern that too much American

¹⁶⁹ 吴怀中 [Wu Huanzhong], “安倍政府印太战略及中国的应对 [Japan's Indo-Pacific Strategy and China's Response],” 现代国际关系 [Contemporary International Relations], No. 1, 2018, pp. 13–21, 62–63.

¹⁷⁰ 周方银 [Zhou Fangyin] and 王婉 [Wang Wei], “澳大利亚视角下的印太战略及中国的应对 [Australia's View of the Indo-Pacific Strategy and the Chinese Response],” 现代国际关系 [Contemporary International Relations], No. 1, 2018, pp. 29–36, 52; 沈予加 [Chen Yujia], “澳大利亚对‘一带一路’倡议的态度及原因探析 [Australia's Attitude Towards the Belt and Road Initiative and Its Reasons],” 太平洋学报 [Pacific Journal], No. 8, 2018, pp. 87–98.

¹⁷¹ 李忠林 [Li Zhonglin], “美国—新加坡海洋安全合作新态势 [The New Trends in US-Singapore Maritime Security Cooperation],” 国际论坛 [International Forum], 2018b, pp. 46–52, 80–81; 张宇权 [Zhang Yuquan] and 冯甜恬 [Feng Tianyu], “新加坡对华对冲战略的实践与失衡 [The Practice and Imbalance of Singapore's 'Hedging Strategy' Against China],” 中山大学学报(社会科学版) [Zhongshan Daxue Journal (Social Sciences)], No. 3, 2019, pp. 129–136.

¹⁷² 仇振武 [Qiu Zhenwu] and 刘金源 [Liu Jinyuan], “双层博弈视野下杜特尔特政府南海政策刍议 [Two-Level Games and South China Sea Policy of the Philippines],” 亚太安全与海洋研究 [Asia-Pacific Security and Maritime Affairs], No. 6, 2018, pp. 34–46, 121; 马博 [Ma Bo], 2017.

influence could produce a U.S. containment strategy that “hijacks” ASEAN for U.S. objectives at the expense of regional interests.¹⁷³ Southeast Asia seeks to preserve ASEAN as the primary platform for regional economics, politics, and security and does not want either the United States or China to have the power to unilaterally shape the region.¹⁷⁴

Chinese experts assess that Southeast Asian countries generally welcome BRI, China’s flagship initiative for the Indo-Pacific, but have concerns that it may reduce the influence of ASEAN and global multilateral institutions by increasing economic dependence on China.¹⁷⁵ Chinese experts largely sidestep discussions of tensions in the SCS when assessing regional preferences for China’s vision for the Indo-Pacific.

Chinese experts view Australia, Japan, the Philippines, and Singapore as leaning toward the U.S. vision of the region to safeguard their interests against growing Chinese economic and military power. For the Philippines, even though Duterte has rebalanced Philippines relations to lie in between the United States and China, Manila is still supportive of the U.S. desire to limit Chinese power and is dependent on the United States as a provider of security.¹⁷⁶ The Chinese literature points out the tensions between the U.S. vision for the Indo-Pacific region and U.S. objectives and actions—such as “America first,” withdrawing from the TPP and the Paris Agreement, and the growing economic protectionism and threat of tariffs. Chinese experts note that countries such as Japan, for example, are reassessing their overreliance on the United States

¹⁷³ 马博 [Ma Bo], “论越南的‘南海问题国际化’方略 [On the Policy of Vietnam’s Internationalization of the South China Sea Issue],” 海南大学学报(人文社会科学版) [*Humanities and Social Sciences Journal of Hainan University*], No. 4, 2018, pp. 7–16; 杨思灵 [Yang Siling] and 高会平 [Gao Huiping], “中印冲突与合作的条件——基于情势变更理论的分析 [The Conditions for Conflict and Cooperation of China and India: Analysis from Perspectives of Scenario Change],” 印度洋经济体研究 [*Indian Ocean Economic and Political Review*], No. 6, 2018, pp. 1–24, 135; 余珍艳 [Yu Zhenyan], “‘21 世纪海上丝绸之路’ 战略推进下中国-印度尼西亚海洋经济合作: 机遇与挑战 [Opportunities and Challenges of China-Indonesia Marine Economic Cooperation with the ‘21st Century Maritime Silk Road’ Strategy],” 战略决策研究 [*Journal of Strategy and Decision-Making*], No. 1, 2017, pp. 61–81, 103–104; 周方治 [Zhou Fangye], “‘一带一路’ 建设与中泰战略合作: 机遇、挑战与建议 [One Belt One Road and Sino-Thai Strategic Cooperation: Opportunities, Challenges and Recommendations],” 南洋问题研究 [*Southeast Asian Affairs*], No. 4, 2016, pp. 67–78; Chinese Academy of Social Sciences, 东盟发展报告 (2017) [*Annual Report on ASEAN’s Development (2017)*], Beijing: Social Sciences Academy Press, 2017a.

¹⁷⁴ Chinese Academy of Social Sciences, 美国研究报告 (2018) [*Annual Report on Research of U.S.A. (2018)*], Beijing: Social Sciences Academic Press, 2019d; Chinese Academy of Social Sciences, 全球政治与安全报告 (2019) [*Annual Report on International Politics and Security (2019)*], Beijing: Social Sciences Academic Press, 2019c.

¹⁷⁵ 张贵洪 [Zhang Guihong], “‘一带一路’ 倡议与印太战略构想的比较分析 [Belt and Road Initiative vs. Indo-Pacific Strategy],” 现代国际关系 [*Contemporary International Relations*], No. 2 (2019a): 26–34, 65.

¹⁷⁶ 李途 [Li Tu], “美菲同盟对菲南海争端的影响论析 [U.S.-Philippine Alliance and Its Influence on Sino-Philippine South China Sea Disputes],” 东南亚研究 [*Southeast Asian Studies*], No. 5, 2018, pp. 54–74, 155.

and are actively working to expand regional free trade and improve relations with China to counter some of these U.S. tendencies.¹⁷⁷

Chinese sources assess that other regional countries are ambivalent, uncertain, or concerned with both visions. Vietnam, for example, sees some alignment between the U.S. vision and its views toward the region, but is uncertain that supporting the U.S. vision will consistently advance Vietnamese interests.¹⁷⁸ Similarly, Thailand is open to elements of the U.S. vision, but is unwilling to openly support a U.S. vision that appears to be confronting China.¹⁷⁹ Indonesia and Malaysia are concerned with both the U.S. and Chinese visions for the region. They worry that both countries would like to see multilateral institutions, such as ASEAN, either serve U.S. or PRC interests or be sidelined in favor of U.S. or PRC political and economic agendas.¹⁸⁰

Chinese experts note that most states in Southeast Asia are uncertain about U.S. commitment to the region. Traditional U.S. allies Japan and Australia and close partner Singapore are more confident that the United States will remain an important actor in the region, but even they have some doubts.¹⁸¹ Other Southeast Asian states are less certain. There is concern that the Trump administration will likely put U.S. interests and U.S. domestic objectives before foreign policy and that Southeast Asia may not be a priority.¹⁸² Chinese media have translated and cited similar regional survey results (as those referenced for coding the regional perspectives) to show that there is greater uncertainty within ASEAN about U.S. commitment to the region.¹⁸³

¹⁷⁷ Institute of International Studies (China), 人民网: 复旦大学年度中日关系战略报告书发布 [*People Net: Fudan University Annual Report on China-Japan Relations and Strategy*], Shanghai: Fudan University, March 18, 2019; 李途 [Li Tu], 2018.

¹⁷⁸ 罗会钧 [Luo Huizhen], “美越防务安全合作及其对中国的影响 [The US-Vietnamese Cooperation of Defense and Security and Its Influence on China],” 国际安全研究 [*Journal of International Security Studies*], No. 3, 2017.

¹⁷⁹ Chinese Academy of Social Sciences, 泰国研究报告 (2018) [*Annual Report on Research of Thailand (2018)*], Beijing: Social Sciences Academic Press, 2018c; 宋效峰 [Song Xiaofeng], “马来西亚在构建中国—东盟命运共同体中的角色分析 [The Role of Malaysia in Building of China-ASEAN Community of Common Destiny],” 东南亚纵横 [*Crossroads: Southeast Asian Studies*], No. 6, 2017b, pp. 69–75.

¹⁸⁰ 丁辉 [Ding Hui] and 汤祯滢 [Tang Zhenying], “印度尼西亚对印太战略的反应—印度尼西亚‘印太政策’辨析 [Indonesia’s Response to the Indo-Pacific Strategy—An Analysis on Indonesia’s ‘Indo-Pacific Policy’],” 东南亚纵横 [*Crossroads: Southeast Asian Studies*], No. 4, 2018, pp. 38–45.

¹⁸¹ Chinese experts, for example, have cited studies to suggest that Japan is more actively engaging partners like Vietnam in Southeast Asia as a hedge against uncertainties in U.S. commitment to the Indo-Pacific. See 王森 [Wang Sen] and 刘美武 [Liu Meiwu], “越日‘伙伴关系’发展评析: 内容、动因与特征 [An Analysis of the Development of Vietnam-Japan ‘Partnership’: Drivers, Content, and Features],” 国际关系研究 [*Journal of International Relations*], No. 2, 2019, pp. 88–114, 158.

¹⁸² 邱普艳 [Qiu Puyan], “‘一带一路’背景下的中越经济合作: 现状与展望 [“The China-Vietnam Cooperation Against the Background of the ‘Belt and Road’ Initiative: Status Quo and Prospect],” 和平与发展 [*Peace and Development*], No. 4, 2018, pp. 78–93, 128–129; 王鹏程 [Wang Pengcheng] and 胡旻 [Hu Yang], “特朗普涉印度尼西亚政策评析及其对华影响 [Comments on the Indonesian Policy after Trump’s Inauguration and Its Impact on China],” 东南亚纵横 [*Crossroads: Southeast Asian Studies*], No. 5, 2018, pp. 50–58.

¹⁸³ 傅聪聪 [Fu Congcong], “国际关系预测: 东南亚国家对中美的外交政策趋于分化 [Southeast Asian Countries Increasingly Split on China-US Relations],” 国际政治科学 [*Quarterly Journal of Political Science*], 2018; “调查

Chinese sources believe that the United States is a more attractive partner than China. Chinese analysts explain that most Southeast Asian countries have a more positive view of the United States than China. Liberal, democratic values are attractive to many countries, particularly Australia, India, Indonesia, the Philippines, and Thailand.¹⁸⁴ Chinese analysts are aware of regional public opinion polls, but tend to focus on how China should improve its image in the region.¹⁸⁵ Malaysia is an exception, because Chinese experts believe that Malaysians have a positive view of China and that their views of the United States have deteriorated because of U.S. leadership comments regarding Muslims.

Economic Influence

Chinese sources assess that ASEAN countries prioritize economic development as their top national objective, often over foreign policy concerns, and economic development is a primary driver of bilateral relations with China. Likely mirror imaging China's own development experience, Chinese experts point out that authoritarian governments seek the benefits of Chinese trade to shore up their position domestically, while democratic leaders see trade with China as key to development and increasing their chances for reelection.¹⁸⁶ In other words, China

显示：东盟日益质疑美国承诺 将更靠近中国 [Study: ASEAN Increasingly Doubts American Promises, Will Lean Toward China],” 参考消息 [Reference News], January 8, 2019.

¹⁸⁴ 周方银 [Zhou Fangyin] and 王婉 [Wang Wei], 2018; 丁辉 [Ding Hui] and 汤祯滢 [Tang Zhenying], 2018; 黄凤志 [Huang Fengzhi] and 谢斌 [Xie Bin], “‘中国在南海问题上面临的‘新加坡考验’——根源、限度及启示 [‘Singapore Test’ in China’s South China Sea Strategy: Roots, Limitations and Enlightenment], 太平洋学报 [Pacific Journal], No. 6, 2019, pp. 91–101; Chinese Academy of Social Sciences, 澳大利亚发展报告 (2016–2017) [Annual Report on Development of Australia (2016–2017)], Beijing: Social Sciences Academic Press, 2017c.

¹⁸⁵ 者贵昌 [Zhe Guichang], “‘一带一路’建设背景下中国与泰国金融合作的机遇与挑战 [Opportunities and Challenges of Financial Cooperation Between China and Thailand under the Background of ‘the Belt and Road’ Initiative],” 东南亚纵横 [Crossroads: Southeast Asian Studies], No. 1, 2017, pp. 36–42; 仇振武 [Qiu Zhenwu] and 刘金源 [Liu Jinyuan], 2018; 王勇辉 [Wang Yonghui], “印尼对‘一带一路’倡议的负面认知与我国的应对 [Indonesia’s Negative Perception of the ‘Belt and Road Initiative’ and Suggestions for Chinese Response],” 国际论坛 [International Forum], No. 4, 2018, pp. 10–15, 76; 李益波 [Li Yibo], “安静的合作：美马军事关系的演进及前景 [Quiet Cooperation: The Evolutions and Prospects of U. S.-Malaysia Military Relations],” 太平洋学报 [Pacific Journal], No. 5, 2016.

¹⁸⁶ 李益波 [Li Yibo], 2016; 马博 [Ma Bo], 2017; 王峥 [Wang Zheng], “瑕疵双边关系理论和南海争端下的中菲与中马关系比较研究 [Defective Bilateral Relations Theory and Comparative Study of China-Philippines Relations and China-Malaysia Relations with the South China Sea Disputes],” 亚太安全与海洋研究 [Asia-Pacific Security and Maritime Affairs], No. 2, 2017, pp. 75–92, 128–129; 王桀 [Wang Wei], 贾晨昕 [Jia Chenxi], and 吴信值 [Wu Xinzhi], “中国面向东盟‘两区’建设问题与突破路径探讨 [Discussion on China’s ‘Two Areas’ Construction with ASEAN: Current Problems and Strategies],” 亚太经济 [Asia-Pacific Economic Review], No. 2, 2019, pp. 122–128; 余建川 [Yu Jianchuan], 王鹏程 [Wang Pengcheng], and 胡旻 [Hu Yang], “特朗普涉印度尼西亚政策评析及其对华影响 [Comments on the Indonesian Policy after Trump’s Inauguration and Its Impact on China],” 东南亚纵横 [Crossroads: Southeast Asian Studies], No. 5, 2018, pp. 50–58; 杨荣命 [Yang Rongming], “冲突与合作——中越南海争端的历史、现状与对策研究 [Conflicts and Cooperation—Studies on the History, Status Quo and Countermeasures of Sino-Vietnamese Disputes over the South China Sea],” 海南师范大学学报 (社

views relative economic influence as the “center of gravity,” or the most important element of competition in Southeast Asia.

Chinese experts believe that economic leverage should allow China to: (1) influence the domestic politics and foreign policies of trading partners and (2) encourage countries to think twice before significantly increasing military cooperation with the United States. Beijing should therefore be able to shift the regional competition for influence away from the military domain toward economic development and progress, where China has an advantage.

Chinese scholars are cognizant of the fact that its economic influence has provoked a backlash against PRC activities, undermining some regional interest in cooperation with Beijing. Regional elites and their publics are concerned about excessive Chinese economic influence. Chinese sources note that these fears are strongest in Indonesia, Malaysia, Thailand, and Vietnam, where Chinese companies bring Chinese nationals rather than hire local labor and are viewed as competing with local firms. Throughout the region, concerns regarding the questionable quality of PRC projects (and associated negative environmental impacts) are compounded with fears that PRC economic activities may contribute to local corruption and political subversion.¹⁸⁷ One expert writes that despite China’s economic advantage, it has still not won the trust or confidence of regional countries and that Beijing has not been able to break the U.S. hold on the region. He notes that it may not be easy for countries to choose between economic development and protecting their maritime claims and rights.¹⁸⁸

Chinese analysts are aware that countries worried about becoming overly dependent on Beijing are searching for alternative means to diversify their trade and investment. Vietnam, for example, has begun to cooperate with Japan more closely on economic issues and views Japan as an established, constructive, and reliable partner. Similarly, Indonesia views BRI as not just an economic initiative, but as part of China’s larger geopolitical approach toward the region. As a result, Jakarta is building economic ties with more partners as part of its Global Maritime Fulcrum strategy. Thai elites are also concerned about both Chinese economic influence and the potential threats to local firms posed by Chinese companies. Thai business owners see Japanese

会科学版) [*Journal of Hainan Normal University(Social Sciences)*], No. 1, 2018, pp. 106–13; 宋效峰 [Song Xiaofeng], 2017b.

¹⁸⁷ 赵昌 [Zhao Chang] and 许善品 [Xu Shanpin], “从租借达尔文港看澳大利亚的中美平衡外交策略 [Australia’s Balanced Diplomacy Toward China and the US from the Perspective of the Renting Out of the Port Darwin],” 和平与发展 [*Peace and Development*], No. 2, 2017, pp. 57–73, 119; 李金明 [Li Jinming], “‘杜特尔特经济学’ 与中菲关系的改善 [‘Dutertenomics’ and Improvement of Sino-Philippine Relations],” 东南亚研究 [*Southeast Asian Studies*], No. 6, 2017, pp. 137–151, 157; 韦红 [Wei Hong] and 李颖 [Li Ying], “[日本构建与印尼’ 心心相印’ 伙伴关系研究: 路径与策略 [A Study on the Construction of Japan of ‘Heart-to-Heart’ Relationship with Indonesia: Approach and Strategy],” 东南亚研究 [*Southeast Asian Studies*], No. 1, 2019, pp. 74–93, 156–157; 唐小松 [Tang Xiaosong] and 景丽娜 [Jing Lina], “中国对东盟的公共外交: 现状、动因与方向 [Chinese Public Diplomacy Toward ASEAN: Current State, Main Motivations and Future Direction],” 东南亚研究 [*Southeast Asian Studies*], No. 4, 2017, pp. 38–51, 153–154.

¹⁸⁸ 李途 [Li Tu], 2018.

and Taiwanese businesses as their preferred economic partners, whereas mainland Chinese businesses are the least favorite.¹⁸⁹

These regional efforts to reduce dependency on China, however, do not mean that countries have any desire to participate in efforts to economically contain or isolate China. According to Chinese experts, PRC trade and investment is simply too important to cut off, giving Beijing substantial economic capabilities to influence countries in the Indo-Pacific. While Chinese experts viewed the TPP as a mechanism to counter China economically, the U.S. departure from TPP and move away from globalization have strained U.S. relations with close allies and partners and undermined U.S. credibility. This offers China advantages and the opportunity to step up and lead.¹⁹⁰

Chinese sources note that Beijing seeks to provide significant economic opportunities to the region, more than the United States. The RCEP and China's massive investments in infrastructure and connectivity will bind the Indo-Pacific region even closer to China. Given China's geographic proximity and PRC investments in infrastructure and reduction of economic barriers to trade, it will be easier and more cost-effective for regional countries to trade and invest with China than the United States.¹⁹¹ Even if countries are wary of Chinese influence, they have much to gain from cooperating with Beijing economically, and it is in their interest to maintain strong economic ties with Beijing.

Military and Security Influence

According to Chinese scholars, regional countries have varied defense relations with the United States. Australia, Japan, and Singapore have the strongest defense ties with the United States across the board.¹⁹² Chinese analysts generally assess lower levels of willingness on part of Southeast Asian countries to work with the United States militarily to balance against growing Chinese military power. Thailand remains a U.S. ally, but Chinese analysts recall Thailand's failure to approve the Studies of Emissions and Atmospheric Composition, Clouds and Climate

¹⁸⁹ 王森 [Wang Sen] and 刘美武 [Liu Meiwu], 2019; 王勇辉 [Wang Yonghui], 2018; 张锡镇 [Zhang Xizhen], “中泰关系近况与泰国社会厌华情绪 [Sino-Thai Relationship Status and Negative Responses Towards China in Thai Society],” 东南亚研究 [Southeast Asian Studies], No. 3, 2016, pp. 22–27.

¹⁹⁰ 彭波 [Peng Bo], “彭波：放眼亚太，能让 TPP 重焕生机的只有中国 [Looking to the Asia-Pacific, Only China Can Revive TPP],” 观察者 [The Observer], March 2, 2017; “退出 TPP 公信力受损 李显龙质疑美国贸易政策 [Withdrawing from TPP a Major Blow to Credibility: Lee Hsian-long Questions US Trade Policy],” Xinhua, October 27, 2017.

¹⁹¹ Chinese Academy of Social Sciences, ‘一带一路’跨境通道建设研究报告 (2017–2018) [Annual Report on ‘The Belt and Road’ Trans-Border Gateways Construction (2017–2018)], Beijing: Social Sciences Academic Press, 2018f; Chinese Academy of Social Sciences, 2017a; Chinese Academy of Social Sciences, ‘一带一路’建设发展报告 (2017–2018) [Annual Report on Development of ‘The Belt and Road’ Construction (2017–2018)], Beijing: Social Sciences Academic Press, 2019; Chinese Academy of Social Sciences, 日本研究报告 (2018) [Annual Report on Research of Japan (2018)], Beijing: Social Sciences Academic Press, 2018b.

¹⁹² Even for Singapore, however, China perceives it has some opportunity to reduce Singapore's willingness to support U.S.-led regional efforts: See 张宇权 [Zhang Yuquan] and 冯甜恬 [Feng Tianyu], 2019.

Coupling by Regional Surveys (SEAC4RS) in 2012, an environmental study by NASA that proposed using a former American air base in Thailand, as an example of Chinese influence. Chinese experts note that Bangkok was concerned about the study's military implications and was cautious of providing U.S. forces support that might upset China. Thailand was also concerned about taking any actions that might be seen as "selling" Thai sovereignty.¹⁹³

Similarly, Chinese sources focus on Duterte's willingness to downplay developments in the SCS and to question the Philippine alliance with the United States. Chinese analysts point out that Duterte signaled his good intentions to China by shifting bilateral exercises with the United States from more sensitive topics such as island-seizing to less controversial counterterrorism training. At the same time, Chinese analysts are aware that Duterte faces substantial internal pressure from his government and his citizens to do more to stand up against China in the SCS and to continue to maintain the U.S.-Philippine alliance. He is likely to have to strike a balance and provide some compromise.¹⁹⁴

Even though the United States remains the leading military power and has stronger military capabilities than China, China sees obstacles in translating U.S. military power into regional influence. First, as mentioned above, China believes that Southeast Asian countries prioritize economic development over external security concerns, so U.S. ability to aid these countries with their external security will not be the most important issue for these countries.

Second, Chinese sources believe that Southeast Asian countries are wary of U.S. regional security efforts and reliability and want to keep some distance in order to best protect their own interests and manage both the United States and China.¹⁹⁵ Equidistance between the United States and China shields countries from assuming risks by too closely aligning with either power. Chinese experts assess that the U.S. push for "America first" and "reciprocity" could cause Washington to impose requirements on allies and partners, which could make U.S. support and aid for them more conditional and less certain.¹⁹⁶ Chinese analysts note that even as Japan, Australia, and India have expressed some interest in working with the United States in a

¹⁹³ For example, see "新闻分析:美国想在泰国建兵站只为搞维护? [News Analysis: U.S. Wants to Construct a Military Base in Thailand for Maintenance?]," Xinhua, January 4, 2018.

¹⁹⁴ Chinese analysts recommend that China take advantage of Duterte's pro-China position to improve China-Philippine relations and manage tensions in the SCS. If Duterte suffers a domestic political setback or steps down from power, the positive trajectory between China and the Philippines could be reversed. See 李忠林 [Li Zhonglin], "菲律宾杜特尔特政府的南海政策及前景 [Duterte Administration's Policy on the South China Sea and Its Prospect]," 太平洋学报 [Pacific Journal], No. 6, 2018a, pp. 57–67; 李途 [Li Tu], 2018; 仇振武 [Qiu Zhenwu] and 刘金源 [Liu Jinyuan], 2018.

¹⁹⁵ 傅聪聪 [Fu Congcong], 2018.

¹⁹⁶ 杨晓萍 [Yang Xiaoping] and 秦子瑜 [Qin Ziyu], "新时期美印战略关系:威胁感知与利益权衡 [New Period of US-India Relations: Balance of Threats and Interests]," 亚太安全与海洋研究 [Asia-Pacific Security and Maritime Affairs], No. 3, 2019, pp. 94–107, 104.

quadrilateral setting, India has not allowed Australia to attend its Malabar naval exercises for fear of upsetting China.¹⁹⁷

Third, China believes that there are divergences between the United States and its allies that China can use to weaken the alliances. For Japan, for example, this includes different views of World War II history, the Senkakus, and regional cooperation. Prior to Duterte's rise to power in the Philippines, some Chinese analysts had recommended more Chinese activities to counter the Philippines to demonstrate Chinese strength to the region and to pressure the U.S.-Philippine alliance.¹⁹⁸ Such tactics were seemingly validated by Duterte's election and the sudden shift in Manila's policy, with Chinese sources noting that Duterte was unsatisfied with security guarantees laid out by the United States.¹⁹⁹

Chinese sources document the varied regional responses to growing Chinese military power. In their view, regional countries generally seek to avoid conflict with China and to avoid provoking China. Chinese military capabilities have, however, encouraged some countries (Australia, India, Indonesia, Japan, Singapore, and Vietnam) to bolster ties with the United States to offset Chinese military strength.²⁰⁰ These same countries have been careful to avoid portraying increased engagement with the United States as strategic alignment against China. Malaysia is avoiding close coordination with the United States in the SCS. Similar to the Philippines, Malaysia views directly contesting Chinese military power as either too risky or simply not feasible.²⁰¹ Thailand, on the other hand, is seen as cooperating with the United States, because it does not have a territorial dispute with China and can engage with the United States without worrying about upsetting its larger neighbor.²⁰² Of the ASEAN countries, the Philippines, Singapore, and Vietnam are the ones China sees as giving some support for U.S. efforts in the

¹⁹⁷ Chinese Academy of Social Sciences, 澳大利亚发展报告 (2017–2018) [*Annual Report on Development of Australia (2017–2018)*], Beijing: Social Sciences Academic Press, 2018a.

¹⁹⁸ 凌胜利 [Ling Shengli], “楔子战略研究: 回顾与评价—兼论对中国的政策启示 [A Study of the Wedge Strategy: A Critical Review—And Their Meanings for China's Policy 2015],” 国际关系研究 [*Journal of International Relations*], 2015.

¹⁹⁹ 李忠林 [Li Zhonglin], 2018a.

²⁰⁰ 谢超 [Xie Chao], “中印洞朗危机后印度的对华政策及其美国因素 [India's Policy towards China and the American Factor after the Dong Lang Crisis],” 和平与发展 [*Peace and Development*], No. 6, 2018, pp. 45–60, 132; 罗会钧 [Luo Huizhen], 2017; 丁 [Ding] and 汤 [Tang], 2018; Chinese Academy of Social Sciences, 越南国情报告 (2017) [*Annual Report on Vietnam's National Situation (2017)*], Beijing: Social Sciences Academy Press, 2017d; 王珊 [Wang Shan] and 孟晓旭 [Meng Xiaoxu], “安倍执政后期日本政治走势与中日关系 [Political Tendency in Japanese Politics in the Later Part of Abe's Administration and Sino-Japan Relations],” 现代国际关系 [*Contemporary International Relations*], No. 2, 2019.

²⁰¹ 王峥 [Wang Zheng], 2017; 潘倩昀 [Pan Qianyun], “中国南海安全战略思考-- 以中菲南海争端为例 [Thoughts on South China Sea Security: The Example of the China-Philippines Dispute],” 南方论刊 [*Nan Fang Lun Kan*], No. 8, 2017, pp. 16–18.

²⁰² 宋清润 [Song Qingrun], “‘亚太再平衡’战略背景下的美泰军事同盟 [The US-Thai Military Alliance and the ‘Rebalance to Asia’],” 国别和区域研究 [*Journal of Area and International Studies*], No. 4, 2017a, pp. 94–107.

region with respect to the SCS.²⁰³ Overall, Chinese experts believe that China’s growing military capabilities may have encouraged some military cooperation with the United States, but that they have also deterred countries from cooperating extensively with the United States to counter China.

Comparing Regional and PRC Perspectives

Given the subjective nature of measuring influence, in this section we combine the regional and Chinese perspectives to highlight two main findings on the competition for influence.

More Overall U.S. Influence, More U.S. Diplomatic and Military Influence

The first main finding is that the United States has generally more diplomatic and military influence and—if influence can be simply aggregated across categories—the United States has more overall influence than China in at least three, if not five, out of the nine countries in the study (Australia, Japan, Singapore, and potentially India and the Philippines).²⁰⁴

Table 6.3 compares regional and Chinese assessments of diplomatic, economic, and military influence.²⁰⁵ Before discussing the two perspectives, it is important to re-emphasize that assessments of regional views are more granular and differentiated because we were able to interview regional experts. In contrast, there is more room for error in assessing PRC views based on publicly available reports. Both perspectives show that the United States has a level of diplomatic influence similar to or greater than China across all nine countries. China has more economic influence than the United States in at least six, if not eight, countries. Both the regional and PRC perspectives agree that the United States and China have similar levels of economic influence in Japan, though the PRC perspective views the United States and China as having similar economic influence in Australia and India, too. The regional and PRC perspectives both view that the United States as having more military influence than China in Australia, India, Japan, and Singapore. Regional countries, however, viewed the United States as having more military influence across all nine countries.

²⁰³ For the PRC perspective, we coded the variable “support for major U.S.-led security efforts” based on Chinese perceptions of regional support for freedom of navigation in the SCS. China focuses the most on developments in the SCS than other U.S.-led security efforts with ASEAN countries.

²⁰⁴ The next chapter shows that aggregating influence across all categories may provide an overly simplistic perspective, since the United States and China use diplomatic, economic, and military influences in different ways, both symmetrically and asymmetrically.

²⁰⁵ Influence per category is calculated in two ways by assigning values to each color and aggregating the values. For the regional view, significantly more U.S. influence is coded as 5 or above, moderate U.S. influence as 2–4, similar U.S. and PRC influence as –1 to 1, moderate PRC influence as –2 to –4, and significantly more PRC influence as –5 and less. For the PRC view, more U.S. influence is coded as 3 or above, similar U.S. influence as –3 to 3, and more PRC influence as –3 and less.

Table 6.3. Comparing U.S. and PRC Influence by Type

	<i>Significantly More U.S. influence</i>	<i>Moderately More U.S. Influence</i>	<i>Similar U.S. and PRC Influence</i>	<i>Moderately More PRC Influence</i>	<i>Significantly More PRC influence</i>
Diplomatic Influence (Regional View)	Australia, India, Japan, the Philippines, Singapore	Indonesia	Malaysia, Thailand, Vietnam		
Diplomatic Influence (PRC View)	Australia, Japan, Singapore		India, Indonesia, Malaysia, the Philippines, Thailand, Vietnam		
Economic Influence (Regional View)			Japan	Australia, India, Singapore	Indonesia, Malaysia, the Philippines, Thailand, Vietnam
Economic Influence (PRC View)			Australia, India, Japan	Indonesia, Malaysia, the Philippines, Singapore, Thailand, Vietnam	
Military Influence (Regional View)	Australia, Japan, Malaysia, the Philippines, Singapore, Thailand	India, Indonesia, Vietnam			
Military Influence (PRC View)	Australia, India, Japan, Singapore		Indonesia, Malaysia, the Philippines, Thailand, Vietnam		

Table 6.4 aggregates influence across the three categories and shows that, from both perspectives, there is agreement that there is more overall U.S. influence in Australia, Japan, and Singapore, and similar influence in Indonesia.²⁰⁶ There are divergent views about India, Malaysia, the Philippines, Thailand, and Vietnam. China is more confident than the region is about its influence over India and the Philippines. In contrast, China is less confident about its ability to influence Malaysia, Thailand, and Vietnam than the region is. Overall, Table 6.4 shows that four countries—Indonesia, Malaysia, Thailand, and Vietnam—may be most vulnerable to PRC influence or coercion.

²⁰⁶ Overall influence is calculated the same way as in Table 6.3 (with different calculations for the regional versus PRC view), by assigning values to each color and aggregating the values.

Table 6.4. Comparing Overall U.S. and PRC Influence

	<i>Significantly More U.S. influence</i>	<i>Moderately More U.S. Influence</i>	<i>Similar U.S. and PRC Influence</i>	<i>Moderately More PRC Influence</i>	<i>Significantly More PRC influence</i>
Regional View	Australia, Japan, Singapore	India, the Philippines	Indonesia	Malaysia, Thailand, Vietnam	
PRC View	Australia, Japan, Singapore	India, Indonesia, Malaysia, the Philippines, Thailand, Vietnam			

Significant Shared U.S. Interests, Relatively Limited U.S. Capabilities

The second main finding is the disconnect between shared interests and capabilities: the United States has more shared interests with regional countries, but China has more capability and willingness to incentivize or punish regional countries to align with PRC interests. Regional analysts assessed that the United States has more shared interests with most countries in the study except for Malaysia and Thailand, countries that had similar shared interests with the United States and China. Chinese writings mirror this finding, but also add that Indonesia has as much shared interests with China as the United States. There is agreement among the regional and Chinese perspectives that China has more capability to incentivize or coerce in most countries.

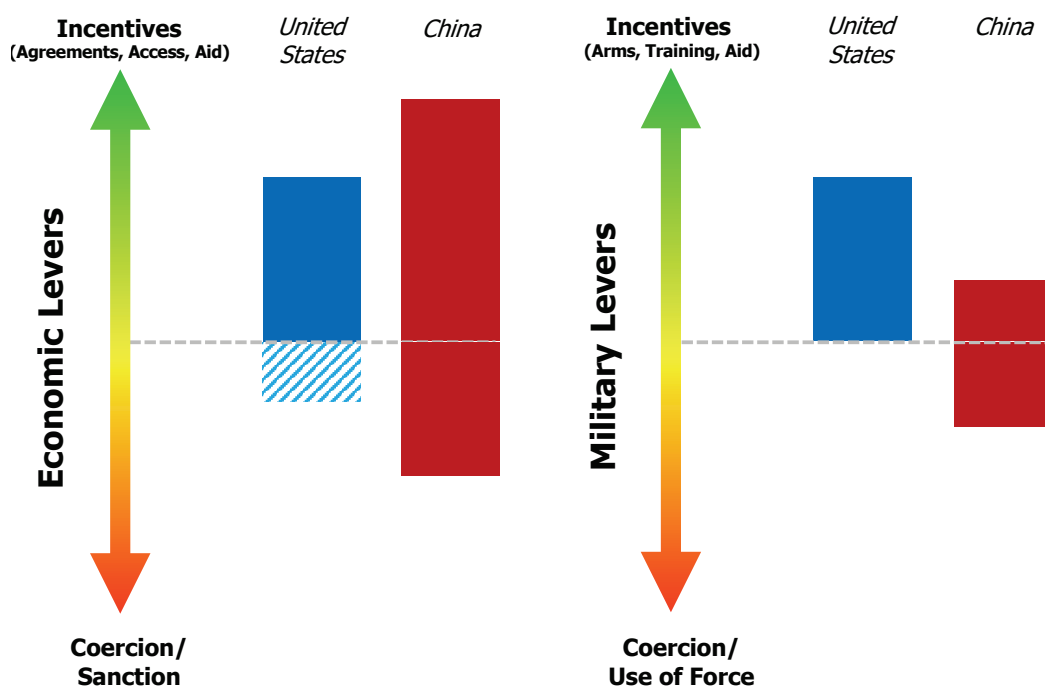
Figure 6.2 displays notional perceptions of U.S. and Chinese capacity to incentivize or coerce based on countries in the study. Economically, China has provided more incentives (trade, investment, and tourism) than the United States, and countries believe that China offers more potential economic opportunity. At the same time, countries are more concerned that Beijing could use its economic influence for coercive or subversive means.

There is some concern among regional concerns over growing U.S. protectionism, and uncertainty over whether the United States may impose tariffs on allies and partners. The United States has raised steel and aluminum tariffs on New Zealand and other countries, considered additional tariffs on imports from Australia, and threatened tariffs on Japanese automobiles.²⁰⁷ Countries that buy Russian military equipment are also aware of the U.S. threat to sanction them under the Countering American Adversaries through Sanctions Act (CAATSA), though

²⁰⁷ David Parker, “New Zealand Disappointed Over U.S. Steel Tariff Move,” *Beehive.govt.nz*, May 2, 2018; Ana Swanson, Maggie Haberman, and Jim Tankersley, “Trump Administration Considered Tariffs on Australia,” *New York Times*, June 2, 2019; David Shepardson and Jeff Mason, “Trump Not Considering U.S. Tariffs on Japanese Autos ‘at This Moment,’” *Reuters*, August 16, 2019.

Washington has not yet acted on such threats against India, Indonesia, or Vietnam. Because the United States has not carried out most of the threats, we use blue stripes instead of solid blue.

Figure 6.2. Perceptions of U.S. and PRC Ability to Incentivize or Coerce Southeast Asia (Notional, 2018)



The blue stripes are also a marker for the fact that the United States has imposed sanctions on countries in the region because of their human rights violations and in accordance with long-standing and publicized U.S. values and principles. The Global Magnitsky Act authorizes the United States to impose visa bans and targeted sanctions against individuals responsible for serious human rights violations or acts of significant corruption.²⁰⁸ This means that, at times, the United States has sanctioned allies and partners despite the political or strategic desire to maintain good relations. This is different from China’s ability to flexibly use economic coercion to gain advantage on a case-by-case basis. As one report assesses, Washington “relies on formal, published sanctions, trade controls, and investment restrictions,” and Beijing “prefers approaches that do not legally link a foreign policy dispute to the coercive measure, creating public deniability and greater optionality for escalation and de-escalation.”²⁰⁹

China has more military tools at its disposal. The United States currently provides more military incentives—in terms of training, equipment, and services—to partners than China, but

²⁰⁸ “The U.S. Global Magnitsky Act,” Human Rights Watch, September 13, 2017.

²⁰⁹ Peter Harrell, Elizabeth Rosenberg, and Edoardo Saravalle, “China’s Use of Coercive Economic Measures,” Center for a New American Security, June 11, 2018, p. 2.

China is expanding its military engagements and activities in the region. Regional countries view the United States as a security provider, but there are concerns and uncertainty over whether the United States would support them in a potential conflict with China. On the coercive end, partners are aware of China's ability to use military coercion, including gray zone and conventional military means, to advance its interests. This is particularly the case for countries involved in territorial disputes with China. The United States has not used military coercion against any of the allies and partners in the study since 1975.

It is important to note that even though China is willing to use economic and military coercion, China recognizes that these means could also have an opposite effect of encouraging countries to balance against China. In all the countries in the study, Beijing has combined limited use of coercion with efforts to emphasize the benefits of working with China.²¹⁰

²¹⁰ Ketian Zhang, "Cautious Bully: Reputation, Resolve, and Beijing's Use of Coercion in the South China Sea," *International Security*, Vol. 44, No. 1, Summer 2019b, pp. 117–159.

7. How Could the United States Work More Effectively with Allies and Partners?

Given the above assessment of relative U.S. and Chinese influence, in this chapter we explore two ways the United States could work with allies and partners in Southeast Asia. We first analyze how the United States can work directly with Southeast Asia. We then explore how the United States can partner with Australia, Japan, and India to exert more influence in the region.

Direct, Bilateral Cooperation

U.S. bilateral cooperation with ASEAN countries is the most direct and assured way of maintaining or increasing U.S. influence in the region. Bilateral cooperation should remain the primary U.S. line of effort in Southeast Asia. Working with extra-regional actors such as Australia, Japan, and India in Southeast Asia is a secondary, supplementary line of effort.

Prioritizing Countries for U.S. Engagement

In the previous chapter, we assessed relative U.S. versus Chinese influence in six countries in Southeast Asia to provide a baseline for determining which countries the United States should invest the most in. We identified four countries—Indonesia, Malaysia, Thailand, and Vietnam—as most vulnerable to Chinese persuasion or pressure. The United States could prioritize increasing investments and efforts in these four countries to counter Chinese influence while maintaining the course in the Philippines and Singapore.

To further prioritize among these four countries, the United States could consider at least three additional questions: (1) what countries are likely to have the most geopolitical weight? (2) what could the United States lose if it does not check PRC influence? and (3) what could the United States gain if it did more?

Indonesia and Vietnam have more potential geopolitical weight to balance against China. Both countries have more military capabilities compared to Thailand and Malaysia.²¹¹ Indonesia has the largest economy (\$3.25 trillion) and will maintain its lead in the future. Vietnam currently lags behind Malaysia and Thailand in terms of GDP,²¹² but Vietnam is projected to

²¹¹ Lowy Institute, 2019; International Institute for Strategic Studies, 2019.

²¹² A case could be made that Malaysia and Thailand are more economically important to the United States in the near term. Currently, the United States has the most bilateral trade with Vietnam (\$51 billion), followed by Thailand (\$43 billion), Malaysia (\$39 billion), and Indonesia (\$29 billion). The United States has similar levels of FDI in Indonesia, Malaysia, and Thailand (approximately \$15 billion) and significantly less in Vietnam (\$2 billion). Regional analysts believe that Malaysia, Thailand, and Vietnam will likely be the main beneficiaries of the U.S.-

overtake its two neighbors by 2050.²¹³ In the near term, from 2019 to 2023, Vietnam has the highest projected GDP growth rate (6.5 percent) compared with Indonesia (5.3 percent), Malaysia (4.6 percent), and Thailand (3.7 percent).²¹⁴ In terms of population size, Indonesia (263 million) is 2.5 times the size of Vietnam (97 million), and both countries have significantly larger populations than Thailand (69 million) and Malaysia (32 million).²¹⁵ Compared with Thailand and Vietnam, Indonesia is also located farther from China, providing it with more geostrategic space to challenge China. Table 7.1 presents the figures described above for easy comparison and to show that Indonesia and Vietnam have the most geopolitical weight.

Table 7.1. Select Measurements of Geopolitical Weight

	Indonesia	Malaysia	Thailand	Vietnam
Military Capability	1st	4th	3rd	2nd
Population	263 million (1st)	32 million (4th)	69 million (3rd)	97 million (2nd)
GDP (PPP, \$)	3.25 trillion (1st)	933 billion (3rd)	1.24 trillion (2nd)	649 billion (4th)
Projected Annual GDP Growth (2019–2023)	5.30% (2nd)	4.60% (3rd)	3.70% (4th)	6.50% (1st)

SOURCES: Organisation for Economic Co-operation and Development, 2018; Central Intelligence Agency, undated; International Institute for Strategic Studies, 2019; Lowy Institute, 2019.

NOTE: PPP = purchasing power parity.

In Table 7.2, we explore potential losses and gains on the security side if the United States does not check growing PRC influence or if the United States increases its investment to counter PRC influence. The table assumes only changes in U.S. or PRC influence, not any other changes in the partner's relations with the United States or China or changes in overall regional dynamics.

On the losses side, increased Chinese influence could make Indonesia reluctant to play a larger regional role against China. There is a risk that Indonesia could retreat to a deep nonaligned position and not use its geopolitical weight to push back against coercive Chinese activities. While Indonesia is likely to deepen defense ties with the United States to balance against China, greater Chinese economic involvement in Indonesia could encourage Jakarta to be more sensitive to and limit military activities with the United States that could be perceived as

China trade war as firms move part of their supply chains to Southeast Asia to avoid higher U.S. tariffs. In terms of countering Chinese economic influence, Malaysia, followed by Indonesia, has attracted the most BRI cumulative contracts since 2013. See Chong Koh Ping, "Jump in Chinese BRI Investment in S-E Asia: Report," *The Straits Times*, August 14, 2019.

²¹³ PricewaterhouseCoopers, *The Long View: How Will the Global Economic Order Change by 2050?* London, February 2017, p. 5.

²¹⁴ Organisation for Economic Co-operation and Development, *Economic Outlook for Southeast Asia, China, and India 2019: Towards Smart Urban Transportation*, Paris, France, 2018, p. 1.

²¹⁵ Central Intelligence Agency, "CIA World Factbook," website, undated.

targeting China. Indonesia is unlikely to relinquish its rights or claims around Natuna Island regardless of Chinese pressure.

Table 7.2. How Changing U.S. Influence Could Affect Security Dynamics

	Potential Losses if PRC Influence Grows Unchecked	Potential Gains if the United States Increases Investment
Indonesia	- Retreats deep into nonalignment, which de facto serves Chinese interests even without any explicit favoring of Beijing. - Limits defense and security cooperation with the United States out of fear of Chinese economic reprisal.	- Becomes a leading regional actor and important U.S. partner. - Becomes more active and capable in contesting Chinese activities around its Natuna Islands. - Provides the United States with limited, rotational military access. - Catalyzes ASEAN to play a more active regional role.
Malaysia	- Leans more toward China. - Allows China to construct dual-use facilities or ports. - Reaches a joint development agreement and compromise with China that shelves or resolves its dispute with China in the SCS. - Opposes U.S. FONOPs and military exercises in the SCS. - Increases dependence on Chinese telecommunications technology that allows for greater PRC intelligence penetration. - Limits defense and security cooperation with the United States.	- Becomes a closer U.S. partner in the region, particularly for cybersecurity and counterterrorism. - Provides the United States with limited, rotational military access. - Becomes more capable of resisting Chinese claims in the SCS.
Thailand	- Leans more toward China. - Allows China to construct dual-use facilities or ports. - Opposes U.S. FONOPs and military exercises in the SCS. - Increases reliance on PRC military equipment due to low threat environment, reducing interoperability with the United States. - Increases dependence on Chinese telecommunications technology that allows greater PRC intelligence penetration. - U.S.-Thai alliance is downgraded, and Thailand limits U.S. military access.	U.S.-Thai alliance is strengthened and U.S. maintains military access in Thailand.
Vietnam	- Leans more toward China as Chinese influence strengthens hand of ideological communists over nationalistic factions within Vietnam's policymaking circles. - Becomes more cautious and less active in contesting Chinese claims in the SCS—Vietnam ceases to be one of the most active SCS claimants resisting the PRC.	- Becomes a closer U.S. partner in the region, particularly for maritime security. - Becomes more active and capable in contesting Chinese claims in the SCS.

In Malaysia and Thailand, there is room for China to make significant inroads against U.S. interests and for both countries to lean more toward China. Since both countries have relatively lower military threat perceptions of China and embrace BRI, there is potential that both could allow China to construct and operate major civilian infrastructure facilities that could be

employed for military purposes in the event of a regional crisis or conflict. While Thailand seeks to maintain its defense ties with the United States, greater Chinese influence (particularly if coupled with another military coup or internal unrest in Thailand that further complicates the U.S.-Thai relationship) could afford China the ability to pressure Thailand to limit or downgrade its military alliance with the United States, including limiting U.S. military access or imposing additional requirements for U.S. military access. Thailand could choose to remain on the sidelines in any U.S.-China crisis or confrontation given its close ties with both countries.

In the SCS, both Malaysia and Thailand already have reservations about an expanded U.S. military presence, with particular concerns about large U.S. warships and exercises in the region. Because Thailand is not an SCS claimant, China could pressure Thailand to oppose U.S. FONOPs and military exercises in the SCS within ASEAN. China could also try to pressure Thailand or Malaysia to deny U.S. port access or refueling for vessels participating in FONOPs. It is not impossible to imagine Malaysia adopting a similar position to at least politically oppose U.S. pressure and military activities in the SCS if Kuala Lumpur is able to reach some joint development and access agreement or compromise with China that shelves or resolves its maritime disputes with China and gives Malaysia some guarantee from China that it will limit Chinese deployments in the SCS.²¹⁶

Thailand, and Malaysia to some extent, could also increase purchase of Chinese military platforms and equipment—especially as China begins exporting more capable platforms at lower cost—which would reduce interoperability with the United States.²¹⁷ Both countries are likely to continue to prioritize U.S. equipment, though their assessed low threat environments may not justify purchases of many higher end, more capable U.S. weapons. Finally, both countries are open to Chinese construction of their 5G network, which risks greater Chinese intelligence penetration.

Similarly, greater Chinese influence could tilt Vietnam in China's favor. Chinese provision of economic and social benefits to Vietnam could strengthen the hand of ideological communists over nationalistic factions within Vietnam's policymaking circles. The U.S. security relationship with Vietnam is more nascent than its relationships with the other three countries, and there is

²¹⁶ To date, Malaysia has embraced four maritime joint development efforts with its neighbors despite competing claims. See Qi Huaigao, Xue Song, Jolene H. Y. Liew, Evi Fitriani, Ngeow Chow Bing, Aaron Jed Rabena, Bui Thi Thu Hien, and Hong Nong, *Cooperative Research Report on Joint Development in the South China Sea: Incentives, Policies & Ways Forward*, Beijing: Fudan University, May 27, 2019, pp. 13–14.

²¹⁷ Since 2013, Thailand has been one of the largest importers of Chinese arms in Southeast Asia (second only to Burma). Malaysia is considering purchasing the Sino-Pakistani produced JF-17 fighter, and partnerships between Malaysian companies and Chinese defense companies for commercial gain could expand into the military realm. Thailand sees China as a more reliable arms supplier than the United States. China has been willing to not only provide equipment, but also build major maintenance, repair, and overhaul facilities in Thailand to support Chinese equipment. See Stockholm International Peace Research Institute (SIPRI), "SIPRI Arms Transfer Database," website, undated; Ankit Panda, "Is Malaysia Inching Towards Purchasing the Sino-Pakistani JF-17 Fighter?" *The Diplomat*, March 27, 2019; Jon Grevatt, "AVIC Partners Malaysia on Y-12 Production," *Jane's*, March 26, 2019; Olli Suorsa, "Thailand Takes Advantage of China's Arms Market," *The National Interest*, October 4, 2018.

less for Vietnam to scale back. Vietnam is cautious about Chinese involvement in its 5G network, and it is not clear that Vietnam would allow such Chinese involvement regardless of U.S. or Chinese pressure, though it may be hard for Vietnam to resist the economic benefits associated with China providing such a service. For Vietnam, greater Chinese influence could make Hanoi more cautious about challenging Chinese claims in the SCS. Greater Chinese influence does not mean that Vietnam will relinquish its claims in the SCS or support less U.S. involvement in the region, but it could mean that Vietnam would no longer be one of the SCS claimants most active in resisting Chinese activities.²¹⁸ This could be a significant potential loss, because, without an active Vietnam, other regional claimants may be even less willing to take a stand.

On the gains side, nonalignment and maintaining independent foreign policies are factors that strongly shape Indonesian and Vietnamese foreign policy and limit their ability and willingness to move significantly closer to the United States. Even with increased U.S. influence, the United States should not expect to have permanent military basing in either country. Nor should there be any expectation that either country would be willing to join a military alliance with the United States. It is possible for Indonesia to move closer to the United States as a regional leader and important partner. Given the large number of U.S.-Indonesian military engagements, it will be difficult but possible for Indonesia to provide the U.S. access to select locations during joint exercises or training. It is unlikely that Indonesia will allow any type of rotational deployment that could be perceived as aimed at China. Unless Vietnam's relations with China deteriorate significantly, Vietnam is likely to continue to adopt incremental, lower-key approaches to increasing defense and security cooperation with the United States, but could become an important partner for the United States on maritime security. The United States could help both countries increase their capabilities to detect and respond to Chinese intrusions into their claimed territories. This, in turn, could empower them to be more active in contesting Chinese activities in the SCS. Both countries, however, remain cautious of the range of economic and military capabilities China can bring to bear against them in an SCS crisis or confrontation, and there may be limits on how much they are willing to challenge China on the maritime side.

Malaysia is unlikely to become a U.S. ally, but Washington could continue to strengthen its partnership with Kuala Lumpur. Malaysia, given its cybersecurity experience, could be a critical partner for the United States on cyber issues in the region. The United States could work with Malaysia to explore ways to reduce risks for countries planning to allow Chinese 5G involvement in their telecommunications networks. Malaysia is currently an important partner for U.S. counterterrorism efforts and could continue to play an important role. Investing more in Malaysian capabilities could make Malaysia more capable of resisting Chinese pressure in the

²¹⁸ While Vietnam is opposed to joint maritime development, it is not clear whether Vietnam believes that it is possible to reach an agreement or compromise with China in the SCS that meets its interests and Chinese interests. Thus far, Vietnam has not developed a policy for joint development of SCS resources. See Qi et al., 2019, pp. 17–18.

SCS but would not guarantee that Malaysia will be more active in doing so. This would require significantly more awareness among the Malaysian public that the territorial dispute is more about access to key natural resources, including energy and fisheries, that are critical to Malaysia's development than about control of disputed islands or features. Although still very unlikely, the United States may have a better chance in securing some form of limited, rotational military access in Malaysia than in Vietnam given the strength of U.S.-Malaysian defense relations and Malaysia's general and past willingness to support U.S.-led security initiatives. This military access would have to be very scoped and not aimed against China.

Finally, the United States likely has the least to gain with Thailand. The United States could strengthen its alliance with Thailand to maintain U.S. military access. Thailand, however, is likely to be the least willing among these four countries to participate in any efforts aimed against China. Thailand is not an SCS claimant and is unlikely to take a stronger position against China in the SCS.

Recommended U.S. Priorities for Cooperation

Based on the above analysis, we recommend prioritizing DoD efforts in the six main Southeast Asian countries into three tiers: highest (Indonesia, Thailand), high (Malaysia, Vietnam), and middle (the Philippines, Singapore). The remaining four ASEAN countries (Burma, Brunei, Cambodia, and Laos) would fall into a fourth, low tier.

As the discussion above shows, there is no easy, clear-cut way to prioritize the four countries in the top two tiers. A balanced approach for the highest tier could involve picking one country with the most potential gains (Indonesia) and one country where the United States wants to avoid the most losses (Thailand). Indonesia has and is likely to maintain significantly more geopolitical weight (military capabilities and economic size) than the other three countries, and there is room for greater partnership. China has made significant inroads in Thailand, and there could be significant losses for the United States if Chinese influence continues to grow unchecked.

For the top two tiers, the United States should be proactive in countering Chinese advantage. The United States should seek to maintain the U.S. position of strength in the Philippines and Singapore, the middle tier. China has significant advantage in most of the countries in the low tier (Burma, Cambodia, Laos)—which we do not focus on—and it would be difficult to roll back Chinese influence.

Competing for Influence

Having defined U.S. priority countries for cooperation, in this section we examine how the United States should understand the relationships among diplomatic, economic, and military influence, with a focus on the latter two types of influences. We find that China's economic influence can strengthen its military influence and counter U.S. military influence. In contrast, there is little evidence to suggest that U.S. military influence currently counters PRC economic influence. Both U.S. and PRC military influence can support their respective economic power.

Economic Influence Central to Competition

There is some support for the Chinese view that economic competition is the center of gravity for competition in Southeast Asia. Chinese experts believe that economic dependency “buys” Beijing influence on the domestic and foreign policy of partners and deters partners from seeking closer military relations with the United States. We did see evidence of this logic at play, as ASEAN experts noted the primacy of domestic economic development over external security threats. Regional experts expressed concerns that segments of their business communities lobby regional governments on behalf of the Chinese government and that individual political leaders cater to Chinese interests in domestic politics and foreign policy, seeking the economic support that China can provide to the leader or in support of the leader’s policy agendas (sometimes at the cost of undermining national security). Current and former regional officials have noted the need to balance trade and security interests, and the desire for substantive but less sensitive military engagements with the United States that do not attract Chinese criticism.

Regional countries that increase diplomatic and political ties to China and receive significant Chinese economic deals have been willing to boost military ties with China as a show of goodwill and cooperation. Philippine President Duterte’s turn toward China for economic development was accompanied by cooperation in the security realm. In October 2016, Manila and Beijing signed 13 deals worth \$13.5 billion, and the two sides agreed to a memorandum for coast guard cooperation.²¹⁹ Shortly after that, Manila asked that the 2017 U.S.-Philippine Balikatan military exercise focus on counterterrorism, not external defense or maritime security, and limited the size of the exercise.²²⁰ A similar pattern occurred in Malaysia when then-Prime Minister Najib Razak prioritized economic development and sought to strengthen economic ties with China. Kuala Lumpur engaged in its first bilateral military exercise with China in December 2014 (“Peace and Friendship 2014”), approximately half a year after China pledged to increase bilateral trade between China and Malaysia.²²¹ In 2016, as China pledged \$34 billion in deals to strengthen Malaysia’s economy ahead of elections, Kuala Lumpur agreed to buy four littoral mission ships from China, marking Malaysia’s first major defense deal with China.²²²

²¹⁹ Prashanth Parameswaran, *Managing the Rise of China’s Security Partnerships in Southeast Asia*, Washington, D.C.: Wilson Center, July 19, 2019e, pp. 4–5; Prashanth Parameswaran, “What’s Behind the New China-Philippines Coast Guard Exercises,” *The Diplomat*, March 15, 2017; Pia Ranada, “PH, China Sign Coast Guard Cooperation Pact, 12 Other Deals,” *Rappler*, October 21, 2016; Ben Blanchard, “Duterte Aligns Philippines with China, Says U.S. Lost,” *Reuters*, October 20, 2016.

²²⁰ The United States has been able to overcome this limitation, and the 2019 U.S.-Philippine Balikatan exercise focused on maritime security, amphibious capabilities, and multinational interoperability. See “U.S., Philippines Scale Back Next Month’s Military Drills, No More ‘War Games,’” *Reuters*, April 24, 2017; Kyle Rempfer, “U.S., Filipino and Aussie Forces Conduct Premier Military Exercise, but Don’t Mention CHINA,” *Military Times*, April 11, 2019.

²²¹ Tang Siew Mun, “A Political Reading of Najib’s Visit to China,” ISEAS, November 1, 2016.

²²² “Duterte in China: Xi Lauds ‘Milestone’ Duterte Visit,” *BBC News*, October 20, 2016; Joseph Sipalan, “Malaysia’s Najib Risks Backlash at Home After Deals with China,” *Reuters*, November 6, 2016; Tang 2016.

There is also concern that China’s growing economic involvement in the region, including investment in infrastructure, could also limit U.S. military activities and access. For example, Chinese e-commerce giant Alibaba is investing in a “Smart Digital Hub” through Thailand’s Eastern Economic Corridor initiative, which aims to attract investment in infrastructure and digital e-commerce in Thailand. Alibaba seeks to build its Smart Digital Hub near U-Tapao Rayong Pattaya International Airport to form a regional logistics hub and customs platform for its operations.²²³ Alibaba, through its ties with the Chinese state, could potentially in the not-so-distant future request that the U.S. Air Force curb or cease operations from the U-Tapao Royal Thai Navy Airfield under the guise of “inappropriate military operations near a civilian economic transit hub.”²²⁴

Figure 7.1. Directionality of U.S. and PRC Economic and Military Influence

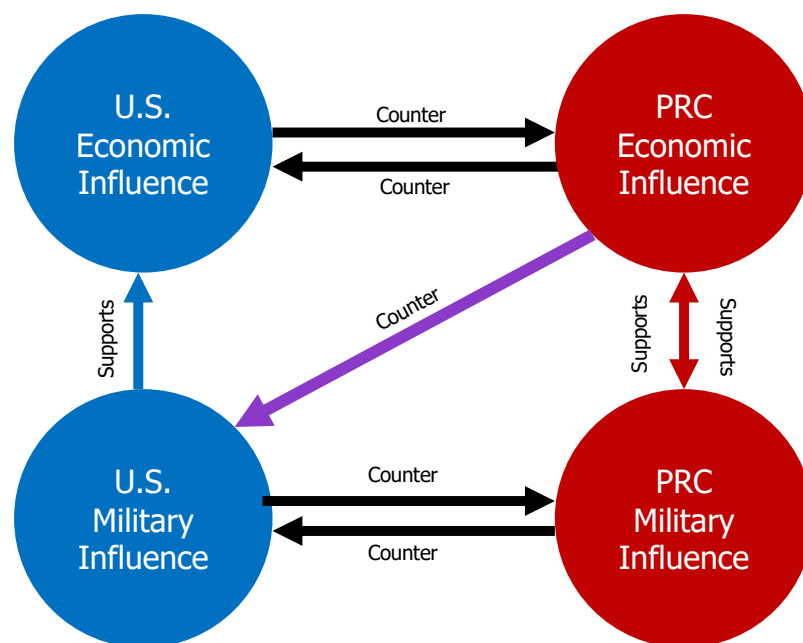


Figure 7.1 focuses on how the United States and China use economic and military power and displays the symmetric and asymmetric ways in which China uses its economic strength to its advantage. China uses economic influence to compete with U.S. economic influence. Beijing also leverages its economic weight to asymmetrically reduce or limit U.S. military influence. At the same time, China’s economic influence supports and facilitates military cooperation with regional countries. On the security side, China seeks to use its military influence to compete

²²³ Eastern Economic Corridor, “EEC-Alibaba Group Join Forces to Promote Thai Products,” press release, September 15, 2019.

²²⁴ This scenario was suggested as a possibility by U.S. officials. Author interview with U.S. Embassy officials in Bangkok, April 23, 2019.

against U.S. military influence and to support its economic investment and influence abroad through providing a safer or more stable investment climate.

No Evidence That U.S. Military Influence Counters PRC Economic Influence

In contrast, the United States tends to use its economic and military influences symmetrically (to counter Chinese economic and military influence respectively). There is no evidence to suggest that partners believe U.S. military influence counters Chinese economic influence. Closer military ties with the United States or more U.S. military capabilities are not the main factors partners take into consideration when evaluating economic agreements or projects with China. Conversations with regional experts suggest that partners are more likely to assess the economic activity on its own merit, including the benefit closer economic cooperation could bring to the partner and whether the activity could increase China's economic leverage to the extent that it threatens the partner's sovereignty, security, or national interest. Regional experts have made the case that they have little alternative but to rely on China for economic development, particularly with the U.S. withdrawal from TPP, and they welcome more U.S. investment and trade to help diversify their economies. In other words, regional countries see U.S. economic means (not military means) as a counter to China's economic influence. China, however, offers the region more trade and investment and future economic opportunities.

Regional experts did not mention any concern that signing more economic deals or moving closer to China economically would or could jeopardize their military or security relationship with the United States. As displayed in Figure 6.2, part of this is because the United States provides military incentives, such as training and aid, to ASEAN countries and does not use military coercion against regional countries to dissuade them from closer economic cooperation with China. DoD also does not link or scale the provision of military incentives or security cooperation with how much countries cooperate with China militarily.

There was, however, general anxiety that intensifying U.S.-China competition may require countries to choose sides. Countries are torn between supporting the United States for diplomatic alignment and security interests and working with China for economic development. Countries want to avoid having to make this decision. If forced to choose, it is far from certain that ASEAN countries would choose the United States, given their focus on internal social and economic development.

The above suggests that the United States needs to increase economic investment in the region to counter Chinese economic influence. The United States should not rely on U.S. military influence to counter Chinese economic influence. It will be very difficult for DoD to lead from behind in the economic competition.

U.S. Military Influence Can Strengthen U.S. Diplomatic and Political Influence

Regional experts noted that strengthening U.S. military ties and relationships with the region could enhance U.S. diplomatic and political influence. Similarly, restricting or limiting military

engagements has a negative diplomatic and political effect. This is particularly the case in countries with significant military involvement in politics. Thailand's drift toward China, for example, was accelerated by the U.S. sanctions imposed on the military junta after the 2014 Thai military coup. The continuation of limitations on engagement between U.S. Army Special Forces and Indonesia's counterpart (Kopassus) remains a low-grade irritant, despite the resumption of many ties since 2010 after more than a decade of sanctions due to human rights violations. Former members of the Kopassus and other retired military officers often take on top policymaking roles once they enter civilian life, and the gradual aging-out of the cadre responsible for abuses in East Timor and Aceh should pave the way to a closer relationship in the future.

If the United States seeks to rely significantly on military influence to compete with China in Southeast Asia and the Indo-Pacific at large, the United States needs to consider ways to insulate U.S. military ties from changes or disruptions in the overall diplomatic or political relationship.

Working with Allies and Close Partners in Third Countries

In addition to working directly and bilaterally with ASEAN countries, the United States can also cooperate with allies and partners located outside of Southeast Asia to coordinate efforts to counter Chinese influence in the region. In this section, we first describe the potential costs and benefits of working with extra-regional allies and partners and then discuss how the United States is currently working with allies and partners. We focus on how the United States can work with Australia, Japan, and India in Southeast Asia.

Advantages and Challenges of Working with Allies and Partners

The U.S. National Defense Strategy recognizes that a major strategic advantage the United States has over China is its network of allies and close partners. Working with extra-regional allies and partners in Southeast Asia offers the United States several main advantages. First, it allows pooling of U.S., allied, and partner resources so that China is not just competing bilaterally with the United States. The next section will show that combining economic resources could theoretically reverse China's economic advantages.

Second, U.S. allies and partners have different strengths and relationships with ASEAN countries that the United States could draw from. ASEAN countries, for example, generally view Japan more favorably and see Japan as more reliable and contributing more to regional development than the United States.²²⁵ Table 7.3 shows that Southeast Asian countries have the most confidence that Japan will do the right thing and contribute to global prosperity compared with their assessments of the United States, India, the European Union, or China.

²²⁵ Government of Japan, Ministry of Foreign Affairs, 2019b.

Table 7.3. Regional Confidence That Countries Will “Do the Right Thing” to Contribute to Global Peace, Security, Prosperity, and Governance (2018)

	United States	Japan	India	EU	China
	% of Total Respondents	% of Total Respondents	% of Total Respondents	% of Total Respondents	% of Total Respondents
Brunei	20	53	22	29	27
Burma	24	62	29	25	21
Cambodia	42	87	17	58	21
Indonesia	22	62	16	45	19
Laos	10	45	14	31	41
Malaysia	18	68	18	48	25
The Philippines	45	83	23	60	11
Singapore	20	51	20	39	21
Thailand	14	61	19	46	24
Vietnam	45	69	26	38	6

SOURCE: Calculated from Tang Siew Mun et al., 2019.

A separate 2018 survey of the region commissioned by the Japanese Ministry of Foreign Affairs also shows that respondents in most ASEAN countries (except for Malaysia, the Philippines, and Singapore) view Japan as the most reliable friend. Malaysia is the only country in which a larger percentage of respondents viewed China as more reliable than Japan. Respondents in the Philippines and Singapore viewed the United States as the most reliable friend.²²⁶

Third, U.S. allies and partners may not have the same domestic or foreign policy limitations as the United States when engaging with regional countries. For example, while the United States has placed economic sanctions and banned arms sales to Burma, U.S. allies and partners such as Japan and India continue to engage with Burma, support Burma’s domestic reforms, and invest significantly in the country.²²⁷ Similarly, Australia has continuously engaged the Indonesian Special Forces when U.S. engagements remained constrained by provisions of U.S. law.

Finally, coordinating efforts with allies and partners may also help the United States partially overcome two limitations on deepening bilateral ties with ASEAN countries: (1) the general desire among regional countries to balance the United States and China and not take sides and (2) the time and resource constraints regional countries have to engage with the United States and other foreign countries. Several countries are receptive to incremental improvements in defense ties with the United States but feel the need to balance engagements with the United

²²⁶ The February 2018 Japanese survey compared how ASEAN countries viewed 19 countries: Japan, the United States, the United Kingdom, France, Germany, Italy, Canada, Russia, China, India, Brazil, Mexico, South Africa, Australia, ROK, Indonesia, Kingdom of Saudi Arabia, Turkey, and Argentina. See Government of Japan, Ministry of Foreign Affairs, 2019b.

²²⁷ Government of Japan, Ministry of Foreign Affairs, “Foreign Minister KONO Meets with the Union Minister for the Office of the Union Government of Myanmar Min Thu,” webpage, July 9, 2019c; Wade Shepard, “China and Japan’s ‘New Great Game’ Intensifies in Myanmar,” *Forbes*, January 29, 2018.

States with engagements with China.²²⁸ Indonesia, for example, is interested in having diverse military relationships and ties with a large number of countries. Instead of relying only on incrementally improving U.S. efforts to achieve U.S. objectives, the United States could leverage allies and partners to work jointly toward similar goals to achieve results on a shorter timeline. There is already progress in this area as the United States works with allies and partners to increase the maritime capabilities of Southeast Asian countries.

Coordinating can also help overcome the limitations on bandwidth (both time and resources) the regional country has for additional U.S. engagements, efforts, or activities. Some regional countries have expressed desire to either reduce the number of engagements with the United States to focus on quality instead of quantity (because of budget and time constraints) or expressed concern that increasing engagements with the United States could come at the cost of doing less with other U.S. allies or partners. Instead of trying to engage in more activities with a partner to increase its military capabilities, the United States could work with allies and partners to build a more robust program of activities in which the United States offers one piece of the program and allies offer additional pieces that build on U.S. efforts.

Despite these considerable benefits, several challenges exist with regard to working with allies and partners in third countries. First, the United States will need to spend significant energy and resources on closer coordination or joint planning with allies and partners. There is some degree of natural alignment of activities between the United States, its allies, and its close partners, but there are also areas of overconcentration of efforts and gaps where more effort is needed. As we discuss in the next section, current mechanisms provide limited coordination and are most useful in deconflicting military engagements and activities in terms of scheduling and location. There are opportunity costs of coordinating and planning with allies and partners—for example, effort and resources spent on coordinating with Australia and Japan on military training for any specific partner could come at the cost of time and money the United States could spend on working directly and bilaterally with the partner. The United States may want to prioritize which countries to coordinate or jointly plan for, instead of doing so for all countries.

Second, pooling U.S., allied, and partner resources to counter China in a third country works if the third country (and to some extent China) believes that allied and partner influence is substitutable for U.S. influence, and vice versa. Currently, there is no evidence that this is the case for ASEAN countries. Our discussions with Southeast Asian experts revealed that while they appreciate deepening different bilateral relationships, they do not aggregate U.S., allied, and partner influence together and compare that joint influence with Chinese influence. Instead, they continue to view competition through a bilateral lens.

For instance, regional experts assess trade and FDI from a bilateral perspective and view China as having more economic influence. Table 7.4, however, shows that this Chinese

²²⁸ There remains, however, a significant qualitative difference in partner military engagements with the United States (generally of higher quality and training value) compared to China.

economic advantage erodes as we add in Australian, Indian, and Japanese trade and investment to the U.S. side of the equation.²²⁹ In other words, narratives of China's economic strength (or threat) are based on bilateral calculations.²³⁰ This partial, bilateral narrative should be supplemented, if not replaced, by an approach and view that incorporates the capabilities of allies and partners.²³¹

Table 7.4. U.S., Allied, and Partner Trade and Foreign Direct Investment Versus Chinese Trade and Foreign Direct Investment (2018)

Trade and FDI	Singapore	Philippines	Indonesia	Malaysia	Thailand	Vietnam	Brunei	Cambodia	Burma	Laos	Japan	Australia	India
<i>U.S. vs. China</i>	-4%	-8%	-9%	-8%	-6%	-9%	-12%	-19%	-29%	-42%	9%	-11%	0%
<i>U.S., Japan vs. China</i>	1%	3%	0%	-1%	9%	-1%	7%	-13%	-24%	-40%	9%	-1%	3%
<i>U.S., Japan, Australia vs. China</i>	3%	4%	2%	3%	11%	0%	11%	-12%	-23%	-40%	13%	-1%	4%
<i>U.S., JPN, AUS, IND vs. China</i>	7%	5%	6%	5%	13%	1%	15%	-12%	-20%	-39%	14%	2%	4%



Significantly more
U.S. influence

Similar U.S. and
PRC influence

Significantly more
PRC influence

Third, Southeast Asian countries as well as U.S. allies and partners want to preserve separate and unique bilateral relationships with the United States, Australia, India, Japan, and other countries. ASEAN experts voiced the need to ensure that combined U.S., allied or partner efforts do not crowd out direct bilateral engagement and cooperation with the United States. Allies and partners also shared that it may not be easy to align their activities with the United States, given differing interests as well as government processes.

Fourth, China may be able to exert varied influence to discourage U.S. allies and close partners from working closely with the United States to compete against China. The above section's analysis of relative U.S. versus Chinese influence in Australia, Japan, and India showed

²²⁹ The trade and FDI figures are calculated using a similar method as calculating the economic dependency variable, but we exclude tourism. The figure is made up of 65 percent trade (difference in the partner's trade with U.S. vs. China), 20 percent inward FDI (difference in U.S. versus PRC FDI into the partner), and 10 percent outward FDI (difference in partner's FDI in the United States vs. the partner's FDI in China). We then multiply the sum by 100/95. For data sources, please see Appendix B.

²³⁰ The table does not include other key economic players (such as South Korea or the European Union) not covered in the study. Their inclusion would shift the economic picture even more in U.S., allied, and partner favor.

²³¹ This would be challenging if the U.S. coalition remains loose, especially if partner alignment is weak and incomplete.

that Japan and Australia are significantly aligned with the United States and may be willing to support a range of U.S. efforts. Even these two countries, however, recognize the economic opportunities that China provides and may be cautious of any economic efforts against China. Australia is the most vulnerable of these three countries to Chinese economic pressure. In contrast, India has supported some, but not the majority, of U.S.-led security efforts and is deepening military relations with the United States. India remains wary of too close an alignment with the United States, is uncertain of U.S. long-term commitment to the Indo-Pacific, and is uncertain of U.S. willingness to aid it in a conflict against China.

Overall, the above discussion suggests that coordinating or combining U.S., allied, and partner efforts in third countries should be a secondary line of effort that supports but does not replace direct U.S. bilateral cooperation with countries. Given resource constraints, there are likely to be some trade-offs between closer U.S. bilateral cooperation with countries versus greater U.S., allied, and partner coordinated or combined efforts with the countries.

Existing U.S. Mechanisms to Coordinate with Allies and Partners

The United States has significant engagements and dialogues with Australia, Japan, and India to share objectives and activities for bilateral cooperation and to coordinate efforts in third countries, including in Southeast Asia. The U.S. National Security Council (NSC) convenes periodic consultations that cover issues at the highest political and strategic level. The U.S. State Department leads and DoD participates in the U.S.-Australia-India-Japan Consultations (the Quad) and the associated trilateral dialogues (U.S.-Australia-Japan and U.S.-India-Japan). These engagements are intended to facilitate diplomatic, economic, and security coordination, including discussion of economic investment, quality infrastructure, regional disaster response, cybersecurity, maritime security, counterterrorism, and nonproliferation.²³² On the defense and security side, State and DoD co-lead joint diplomatic and security (2+2) dialogues with all three countries. DoD has structured defense engagements with each country led by the Office of the Secretary of Defense (OSD) and U.S. Indo-Pacific Command. In addition to these bilateral engagements, DoD brings Australia and Japan as well as other allies and partners together to discuss security cooperation in larger forums.

On the defense and security side, our discussions with U.S. and allied officials in Southeast Asia and the United States indicated that the United States is very good at deconflicting activities with allies, is working on coordinating efforts, and is not yet jointly planning defense efforts in the region or specific countries. The United States is very successful in sharing information about planned engagements and ensuring that U.S. defense activities do not conflict in terms of scheduling or location with allied efforts. U.S. coordination with allies—where the United States and allies work together from the beginning to ensure potential efforts are complementary, minimize duplication or unnecessary overlap, and adjust respective efforts to build upon each

²³² U.S. Department of State, “U.S.-Australia-India-Japan Consultations (“the Quad”),” webpage, May 31, 2019.

other—has proven more difficult. Joint planning is one step above coordination. It could, for example, involve developing one joint plan for military engagements and training between the United States and an ally for a third country partner.

Three factors complicate the U.S. ability to coordinate or plan with allies and partners in third countries. First, varied planning and budgeting cycles mean that the United States and its allies and partners are developing their respective engagement plans on different timelines. Second, institutional mismatch, including the lack of equivalent counterparts, and the large number of U.S. offices and actors involved have made it difficult for insiders and outsiders to keep track of U.S. policy processes and considerations. Allies shared that they are often brought in at different times in the U.S. process—sometimes in the beginning and sometimes in the middle—but are usually well briefed at the end, when the United States has already decided on its plan or courses of action. When they do provide inputs during the U.S. planning process, it is not clear whether they are providing it to the right points of contact and whether those inputs are reflected in U.S. plans.

Third, while there a myriad of touchpoints and coordination mechanisms, working with allies and partners in third countries is not a priority. For most U.S. offices responsible for engaging with allies and partners, the priority remains strengthening the direct, bilateral relationship with the ally or partner. Typically, there is little bandwidth left to engage allies and partners on cooperation in third countries. Given the traditional focus of U.S. government offices on direct, bilateral relationships, it is not always clear who should take the lead or responsibility for cooperation that crosses bilateral lanes.

Given the natural alignment of U.S. and allied interests, there is some expectation that the range of U.S. and allied activities will converge and that U.S. Embassy teams in the region will help facilitate coordination on the ground. Our interviews with U.S. and allied officials on the ground suggest that this view is overly optimistic. U.S. Embassy teams are often flooded with requests to support senior leader visits, engage the host nation, and push through bilateral initiatives. They do not have any more bandwidth than their counterparts in D.C. and Hawaii. Allied embassy teams are often stretched even thinner than their U.S. counterparts. Depending on the country, allied defense officials may be responsible for more than one service and responsible for more than one Southeast Asian country. Embassy teams are much more focused on execution and implementation. While embassy teams may have more knowledge of what the partner needs and what may work with the partner, they are not as plugged in to the debates and discussions in their respective headquarters given the time differences and geospatial distance.

Coordination on the ground varies significantly. There is currently no specific, defined requirement for how frequently U.S. officials must meet with allies and partners to share engagement plans and efforts. Similarly, there no requirements from the allied and partner side. Oftentimes, embassy officials are able to push for many bilateral initiatives without engaging

other allies or close partners. As one U.S. official commented, how much U.S. officials engage with allies and partners is largely based on “personality.”²³³

Working More Effectively with Australia, Japan, and India

Despite the difficulty of coordinating with allies and partners, in this section we explore how to work more effectively with Australia, Japan, and India. Table 7.5 displays how the United States, Australia, Japan, and India currently prioritize their efforts to bilaterally engage partners in Southeast Asia. Australia, Japan, and India concentrate more time and resources on countries of higher priority and may be more willing to coordinate with the United States on these countries. At the same time, the United States will have to be sensitive to any reluctance allies and partners may have about working with the United States in third countries where they have especially strong relationships out of fear that such collaborative efforts may dilute their own bilateral relationships. For the United States, the table utilizes priority countries based on Table 4.1 in Chapter 4.

Table 7.5. Priority Security Cooperation Countries for U.S., Australia, Japan, and India

	United States	Australia	Japan	India
Top	Indonesia, the Philippines, Singapore, Vietnam	Indonesia, Malaysia, Singapore	The Philippines, Vietnam	Burma, Indonesia, Singapore, Vietnam
Middle	Malaysia, Thailand	The Philippines, Thailand, Vietnam	Indonesia, Malaysia, Thailand, Singapore	Malaysia, the Philippines, Thailand
Low	Brunei, Burma, Cambodia, Laos	Brunei, Burma, Cambodia, Laos	Burma, Brunei, Cambodia, Laos	Brunei, Cambodia, Laos

Australia prioritizes Indonesia, Malaysia, and Singapore as its top countries for security cooperation. Australia regards strengthening its defense ties with Indonesia as a high priority in the context of its regional outreach.²³⁴ The Australia-Indonesia defense relationship includes strategic dialogues, service talks, and training and exercises involving their navies, armies, and air forces.²³⁵ Australia-Indonesia defense cooperation covers a wide range of topics, including counterterrorism, maritime security, humanitarian assistance and disaster relief (HA/DR), intelligence exchanges, and peacekeeping operations. Maritime security is a high priority and

²³³ Our interviews in Southeast Asia suggest significant variation in how frequently meetings occur on the ground between the United States, allies, and partners to deconflict and coordinate activities. In one Southeast Asian country, an allied official shared with us that Australian, Japanese, and U.S. defense officials have not been in a room together to share the substance of their engagement plans for over a year. When asked if coordinating between all three countries were important, the official responded that it was and would be happy to do so. However, there were no requirements from headquarters to do so and, given bandwidth issues, coordinating was not a priority. Although this represents an outlier case, it does show the need for establishing set practices or standards across the Southeast Asia for working with allies and partners.

²³⁴ Evan Laksmana, “Reinforcing Indonesia-Australia Defense Ties: The Case for Maritime Recalibration,” Lowy Institute, October 2, 2018a.

²³⁵ Government of Australia, Department of Defence, *2016 Defense White Paper*, Canberra, 2016a, p. 125.

includes enhancing maritime domain awareness, strengthening maritime border protection, and improving information sharing.²³⁶ Singapore and Malaysia are also important security partners for Australia, both bilaterally and in the context of the Five Power Defense Arrangements, which include Australia, Malaysia, New Zealand, Singapore, and the United Kingdom.

Japan's top defense priorities are the Philippines and Vietnam.²³⁷ The Philippines is important because of its status as a U.S. ally, its efforts to contest Chinese claims in the SCS, and its proximity to Taiwan. Japanese President Shinzo Abe also has a strong personal connection with President Duterte.²³⁸ Japan views Vietnam as one of the partners most willing to contest Chinese claims in the SCS and ensure that the sea remains an open international waterway. Japan has significantly elevated ties with Vietnam in the recent years and the 2018 "Joint Vision on Japan—Vietnam Defense Cooperation" will further deepen defense cooperation and exchanges.

Closely following this top tier, Japan also prioritizes Indonesia, Malaysia, Thailand, and Singapore. In 2015, Japan inaugurated 2+2 talks involving foreign and defense ministers with Indonesia, its first such meeting with any Southeast Asian country.²³⁹ Japan has long-standing and regular defense engagements with Thailand and values Thailand as a U.S. ally. Japan is increasingly concerned with Chinese efforts to pull Thailand into its orbit. Singapore was the first Southeast Asian nation to sign a memorandum of understanding on defense cooperation and exchanges with Japan in 2009, and the two countries have regular service-to-service exchanges. Japan has more limited defense relationships with the remaining countries in the bottom tier.

Despite its Act East Policy, India's defense activities in Southeast Asia remain limited.²⁴⁰ India's firmest security partnership in the region is with Singapore. Singapore is the only nation that India permits to conduct regular exercises of its own air force (rather than bilateral or multilateral exercises) in Indian airspace. India values Indonesia for its geostrategic weight and to balance Chinese outreach to Indonesia. The most robust area of India-Indonesia security cooperation is on the maritime side. Vietnam is one of India's longest-running security partners. Military engagement between the two nations rests partly on the foundation of shared

²³⁶ See Government of Australia, Department of Foreign Affairs and Trade, "Joint Declaration on Maritime Cooperation Between the Government of Australia and of the Government Republic of Indonesia," February 2017b; and Government of Australia, Department of Foreign Affairs and Trade, "Plan of Action for the Implementation of Joint Declaration on Maritime Cooperation Between the Government of Australia and of the Government Republic of Indonesia," March 2018.

²³⁷ This assessment is based on RAND interviews with Japanese foreign and security policy experts. Officially, the *Defense of Japan 2018* discussion of cooperation and exchanges with Southeast Asia begins with Indonesia, moves on to Vietnam, and then discusses Singapore and the Philippines before turning to Thailand, Cambodia, Myanmar, Laos, Malaysia, and Brunei (Government of Japan, Ministry of National Defense, 2018).

²³⁸ Richard Javad Heydarian, "The Golden Era of Japan-Philippine Relations has Arrived," *The National Interest*, June 16, 2019.

²³⁹ Reiji Yoshida, "Japan, Indonesia Hold First Two-Plus-Two Talks, Agree to Work Toward Transfer of Defense Weapons," *Japan Times*, December 17, 2015.

²⁴⁰ For a more detailed discussion, see Jonah Blank, Jennifer D. P. Moroney, Angel Rabasa, and Bonny Lin, *Look East, Cross Black Waters: India's Interest in Southeast Asia*, Santa Monica, Calif.: RAND Corporation, RR-1021-AF, 2015.

Soviet/Russian platforms. India sees Vietnam as key to keeping China off-balance in the SCS.²⁴¹ India attaches significant weight to Burma given its geography as the gateway between South Asia and Southeast Asia. New Delhi is concerned with growing Chinese influence and has deepened its defense and security ties with Burma.²⁴² Similar to Vietnam, the Philippines is also becoming more important to India in terms of engaging in partners active in countering Chinese activities in the SCS. Malaysia and Thailand are also in the middle tier in terms of importance.

Start by Coordinating with Australia and Japan

Given the difficulties associated with coordinating with allies and partners in third countries, it might be useful to initiate pilot planning projects with allies and partners at the U.S. major command level to help identify best practices to inform the larger DoD enterprise. Working together on a concrete effort for a third country that extends beyond a particular exercise or engagement—such as developing and executing a common five-year security cooperation plan—will help specify shared objectives, planning and execution timelines, and how different engagements and efforts should complement and build on each other. It may be easiest to begin such coordination efforts with Australia and Japan, with a focus on their priority countries identified in Table 7.5. This could involve a pilot planning project between the United States and Australia in Indonesia or Malaysia and a pilot planning project between the United States and Japan in the Philippines or Vietnam. This effort could be resourced by the United States, Australia, and Japan and play to respective strengths, access opportunities, and relationships that already exist. It could start at the major command level within U.S. Indo-Pacific Command, such as through U.S. Pacific Air Forces (PACAF). These initial pilot projects, if successful, could allow the United States to readily incorporate additional allies and partners such as the United Kingdom, France, India, and others.²⁴³

²⁴¹ Iskander Rehman, “The Indo-Vietnamese Strategic Partnership,” *BBC World’s Vietnam*, September 16, 2009.

²⁴² Ankit Panda, “India, Myanmar Conclude Defense Cooperation Agreement,” *The Diplomat*, July 30, 2019.

²⁴³ Appendix D expands the scope beyond Australia, Japan, and India to analyze which U.S. allies and partners are top security providers to Southeast Asian countries. It provides a useful tool for considering—based on current levels of efforts—which additional allies and partners to work with in specific countries.

8. Conclusions and Recommendations

We used five related research questions to analyze U.S.-China competition for influence in the Indo-Pacific, with a focus on Southeast Asia. This conclusion revisits these questions to summarize key findings and identify relevant recommendations.

What Are Influence and Competition for Influence?

Influence is the ability of one actor to shape the behavior of another actor, including through direct, indirect, intentional, and unintentional means. We define U.S.-China competition for influence as the United States and China each using available means to shape the behavior and choices of partners to align with their own respective interests. The United States and China seek *partner alignment*: continuous partner support for the United States or China on major issues through positions, actions, or activities. In other words, the partner, not China, is the main target of U.S. efforts to compete with China. In competition, relative U.S. influence compared with China is more important than absolute U.S. influence. We conceptualize relative influence as dependent on the extent of the partner's shared interests with the United States (or China) and relative U.S. (or Chinese) capabilities to incentivize or coerce the partner.

Partners may have different goals and interests, and the United States should not assume or expect—even in the absence of competition with China—that partners will align completely with the United States. The United States should not require partner support for every decision, but should focus on partner support on critical decisions.

For Southeast Asia as well as other countries in the Indo-Pacific, there is a strong desire to avoid choosing between the United States and China or appearing to align clearly with one country against the other. We expect partner alignment to be weak and incomplete. This means that partners are likely to limit the number of significant or high-profile activities they conduct with the United States and may seek to balance U.S. engagements with similar activities with China. Partners may also seek to balance clear support for the United States on one issue with support for China on a different issue. U.S. experts need to be cognizant of this dynamic and avoid a zero-sum mentality in which partners are either with the United States or on the opposite team.

- **Recommendation:** The United States should avoid framing defense engagements and security cooperation with regional countries in U.S.-China competition terms only. Some regional countries may be more receptive to an approach that centers on building partnership capacity through peacetime transfers of hardware, enabling technologies, and software (training, exercises, professional military education, institution-building), with a nominal focus on shaping the regional environment to deal with a range of threats (such

as transnational threats, natural disasters, and nontraditional security challenges), but that could also be useful to countering China militarily.

- **Recommendation:** While there is value in periodic, high-profile symbolic displays of bilateral cooperation, DoD should also consider creative ways to design engagements and exercises to achieve shared objectives while avoiding the optics of requiring the partner to choose the United States or China. This could include, for example, exercising with ASEAN partners in non-military locations (not on allied or partner bases), outside East Asia, or in multinational contexts unrelated to China. The United States could also consider leveraging less sensitive activities such as counterterrorism, anti-piracy, and HA/DR to facilitate U.S. military access to remote or otherwise closed off locations.

What Are the United States and China Competing for in the Indo-Pacific?

Differing values, objectives, and visions for the region drive U.S.-China competition in the Indo-Pacific. The U.S. vision is based on maintaining regional freedom, openness, and access as well as ensuring security and stability. The Chinese vision is a China-centric one that involves expanding Chinese power, fostering greater regional integration and dependence on China, limiting the role of outside powers, and bringing Southeast Asia under Beijing's leadership.

Based on identifying overlapping U.S. and Chinese objectives, we assessed that U.S.-China competition for influence is likely to be most intense in six (out of ten) countries in Southeast Asia: Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam. In these countries, the United States should expect more Chinese resistance and may have to invest more effort to counter Chinese influence and maintain advantage.

We focused on identifying U.S. priorities because of the lack of clarity and lack of consensus within DoD and the U.S. government on how to prioritize countries for U.S.-China competition, including in Southeast Asia. It will be important for the U.S. government—namely the NSC and the Department of State—to identify and rank U.S. objectives in Southeast Asia and other regions, including prioritizing which countries matter most in U.S.-China competition. This will provide the necessary guidance to DoD and the interagency to enable whole-of-government efforts to compete with China. Without clear guidance from NSC or State, there is risk that different departments or agencies may develop their own priorities, producing a fragmentary, disjointed U.S. approach.

- **Recommendation:** NSC or State should take the lead working with departments and agencies to identify, narrow, and rank a top list of U.S. objectives for competition with China in each region to enable whole-of-government competition against China.

How Can We Measure and Assess Influence?

We developed a basic framework with 14 variables to measure and assess relative U.S.-China influence across countries. The framework includes variables that measure the extent of shared interests between the partner and the United States (or China) and variables that assess the

relative diplomatic, economic, and military capabilities and influence resources the United States (or China) could use to convince partners to side with them.

On the diplomatic and political side, the framework includes four variables: how diplomatically and politically important the United States or China is to the partner, how much the partner supports the U.S. or Chinese vision for the Indo-Pacific region, partner perceptions of U.S. commitment to the region, and partner public opinion about the United States and China.

On the economic side, the framework includes four variables that measure how economically dependent the partner is on the United States or China, how much the partner views the United States or China as key to future economic opportunities, how much the partner views the United States or China as an economic threat, and how willing the partner is to work with the United States or China to counter perceived economic threats.

On the military and security side, the framework includes six variables that evaluate the partner's military threat perceptions, the partner's willingness to work with either country based on assessed military threats, the partner's military cooperation with and support for the United States or China, the partner's assessments of U.S. versus Chinese military capability, and the partner's perceptions of U.S. willingness to aid it in a potential crisis or conflict.

The framework conceptualizes each variable as linear. Each variable seeks to capture where the partner is on a range between stronger relative U.S. influence on one end to stronger relative Chinese influence on the other end. The middle of the range is where the United States and China have similar influence.

How Do Regional Countries View U.S. Versus PRC Influence?

Applying the framework to the six Southeast Asian countries identified above and three other allies and partners (Australia, Japan, and India), we find that regional countries view the United States as having more overall influence than China in most of the countries considered in the study, mainly in the form of more diplomatic and military influence. At the same time, China has more economic influence in almost all the countries.

Regional countries view China as having more economic influence and as willing to use it to counter U.S. military influence. Southeast Asian countries generally prioritize internal economic development over external security concerns and are more concerned with Chinese economic influence than Chinese military threat. ASEAN countries emphasize the need to balance between economic and security interests, and, as a result, some have been cautious of closer military cooperation with the United States. In contrast, there is no evidence that Southeast Asian countries believe that U.S. military influence serves as a counterweight against Chinese economic influence.

Regional countries have more shared interests with the United States, but China has more tools—both incentives (“carrots”) and coercive capacity (“sticks”)—than the United States to pursue its objectives. The United States mainly relies on shared interests and incentives to

encourage allies and partners to work with it, though there are increasing regional concerns that the United States may be willing to use more coercive economic means. Currently, there is an unequal playing field in which regional countries feel that they have more to lose if they do not work with China.

- **Recommendation:** The United States should develop more targeted means to counter Chinese economic influence. The United States should avoid relying on using DoD military influence to counter Chinese economic influence.
 - While not the focus of this study, the United State could consider three lines of efforts: (1) build resiliency in allies and partners against Chinese economic coercion (e.g., restrict Chinese investments in specific sectors; appropriate U.S. funds to support companies targeted by China);²⁴⁴ (2) help allies and partners decrease economic dependency on China (e.g., diversify trade and investment through increased U.S., allied, and partner trade); and (3) deter China’s use of economic coercion or pressure and impose costs on China for use of such measures. This third line of effort is most challenging, under-explored, and should receive greater attention. It involves moving beyond the use of formal sanctions and the use of existing international institutions to resolve trade disputes. One possibility is to establish a mechanism between the United States and close allies and partners to coordinate economic pressure against China if China economically threatens specific countries. For example, if China drastically reduces tourism against an ally, the United States and close allies could each temporarily reduce visas to Chinese citizens to pressure Beijing. At the minimum, the United States could coordinate messaging with allies and partners that China is an unreliable economic partner and will not hesitate to use its economic coercion to achieve strategic and political goals.²⁴⁵
- **Recommendation:** The U.S. government, particularly DoD and State, should improve public messaging on the economic benefits and value of U.S. military and security cooperation for regional countries. This includes highlighting, for example, how U.S. HA/DR efforts have saved lives and prevented significant economic loss, how U.S. military presence and counterterrorism efforts contribute to stability conducive to investment and trade, and how cooperation on cyber defense and security has significant spillover economic benefits. For some maritime Southeast Asian countries, increasing maritime domain awareness and maritime capabilities will enable these countries to better defend and secure key natural resources—both energy and fishery—from Chinese exploitation. This public messaging effort would help address regional concerns and undercut Chinese messaging that more U.S. military involvement in the region could be destabilizing and that the U.S. military is mainly focused on countering China in the SCS or containing China.

²⁴⁴ For a discussion of some of these options, see Harrell, Rosenberg, and Saravalle, 2018, pp. 35–40.

²⁴⁵ It may not be easy for any single country to bear the full economic costs of confronting China to support another country, but the costs would be more bearable if shared between multiple actors. This option increases the costs to China for using economic coercion. Most of the previous options decrease the cost for U.S. allies and partners to resist China but do not directly impose costs on China.

- **Recommendation:** DoD should expand institution capacity building efforts. U.S. support to partner countries through institutional capacity building is a unique advantage the U.S. military has to deepen shared security interests. Where possible, DoD should seek to engage in institutional capacity building efforts to include logistics (maintenance, sustainment), strategic policy, acquisition and procurement, human resources management, and other areas, such as cyber, that will help partner countries strengthen their existing institutions and align with more methods, processes, and mindsets similar to those DoD embraces. This is a U.S. comparative advantage over China that should be strengthened.
- **Recommendation:** DoD engagement plans and security cooperation assessments should incorporate analysis of not only how doing more with allies and partners could advance U.S. objectives, but also explore whether being more selective and strategic in security cooperation, including withholding or limiting military support, could also advance U.S. interests.

How Could the United States Work More Effectively with Allies and Partners?

We examined two ways that the United States works with allies and partners: either directly and bilaterally or by cooperating to engage third countries. U.S. bilateral cooperation with allies and partners should remain the primary U.S. effort and is the most assured way to compete with China. Cooperating with allies and partners in third countries, however, provides four potential benefits to the United States: It allows the United States to (1) pool resources to China's disadvantage, (2) facilitate division of labor that leverages unique strengths and relationships allies and partners have with third countries, (3) counter Chinese influence in countries where the United States may not be able to fully engage, and (4) achieve U.S. objectives without asking regional countries to engage in significantly more activities with the United States or explicitly align with the United States (which regional countries are wary of) by ensuring that U.S., allied, and partner efforts build on each other. The United States should devote substantially more attention to working with allies and close partners such as Australia, Japan, and India in third countries.

To gain the most advantage from coordinating with Australia, Japan, and India in third countries, the United States will have to overcome five challenges: (1) internal U.S. government manpower, resource, and institutional biases and processes that favor bilateral cooperation and overlook cooperation in third countries; (2) the dominant narrative that portrays U.S.-China competition in bilateral terms that does not take into account allied and partner contributions; (3) that regional countries seek to preserve unique and separate bilateral relationships with the United States, and there are divergences in interests between the United States, allies, and close partners; (4) Chinese influence over allies and partners that could undermine their ability to coordinate with the United States; and (5) varied U.S., allied, and partner planning and budget cycles that complicate efforts to develop coordinated or joint plans.

- **Recommendation:** Increase U.S. military engagement and security cooperation efforts with Indonesia, Malaysia, Thailand, and Vietnam, four countries where Chinese influence is growing. Among these four, Indonesia provides the most potential upsides as one of the most geopolitically important countries in Southeast Asia. Conversely, the United States has the most to lose in Thailand. Beyond these four countries, DoD should continue to invest in the Philippines and Singapore. It will be harder to roll back Chinese advantage in Burma, Cambodia, and Laos. Specific recommendations for the six Southeast Asian countries covered in the study include the following:
 - Encourage Indonesia to increase its activities and presence in the region, including increased participation in multilateral air and maritime activities and conducting operations in the South China Sea and areas such as the Natunas; work with Indonesia to highlight China’s problematic behavior in the Natuna Sea and elsewhere; reexamine the legal issues regarding the United States providing crew lists to Indonesia, a major irritant in the U.S.-Indonesia military relationship.
 - Leverage Malaysia’s membership in the Five Power Defense Arrangements, whose other members include Australia, New Zealand, Singapore, and the United Kingdom, by proposing new avenues of engagement with the U.S. Air Force.
 - For Thailand and the Philippines, maintain and increase DoD engagement activities, particularly exercises such as Cope Tiger and Cobra Gold (Thailand) and Balikatan (the Philippines). In Thailand, also strive to maintain preferential access and use of U-Tapao—one of the largest airfields in Southeast Asia and a strategically important site which the U.S. Air Force routinely uses as a regional hub and transit point.
 - For Singapore, strengthen DoD cooperation and collaboration on research and development of advanced capabilities; and further enhance U.S.-Singapore cooperation in the areas of advanced cyber, artificial intelligence, and command, control, communications, computers, intelligence, surveillance, and reconnaissance (C4ISR).
 - For Vietnam, allow the Vietnamese Communist Party leadership to arrive at its own conclusions about Chinese behavior—pressuring Hanoi to make a choice as U.S.-China competition increases is likely to be counterproductive; work with Vietnam not only as a key partner, but also to strengthen Hanoi’s ability to offset Chinese influence in its neighborhood, particularly in Cambodia and Laos;²⁴⁶ and leverage senior U.S. engagements with the Vietnamese Ministry of National Defense to impress upon the Vietnamese military the importance of routinizing service-to-service cooperation so that such engagements do not experience periodic complications.
- **Recommendation:** To improve coordination and identify best practices, DoD should initiate a pilot planning project in which the United States and select allies collaborate to develop and implement a common five-year joint security cooperation plan. We

²⁴⁶ Appendix D shows Vietnam as a top security provider to both Cambodia and Laos. Vietnamese interlocutors implied that Washington tends to overlook the importance of mitigating the negative effects on governance that China’s BRI might pose on Hanoi’s neighbors, including Cambodia, Laos, and Thailand. A greater American focus on battling China for influence in Indochina would be welcomed by Hanoi as Vietnam is feeling increasingly encircled by countries where China has significant influence.

recommend a pilot planning project between the United States and Australia in Indonesia or Malaysia and a pilot planning project between the United States and Japan in the Philippines or Vietnam. This effort could be resourced by the United States, Australia, and Japan and play to respective strengths, access opportunities, and existing relationships. It could start at the major command level, such as through PACAF. These initial pilot projects, if successful, could allow the United States to readily incorporate additional allies and partners such as the United Kingdom, France, India, and others.

- **Recommendation:** Establish a minimum requirement within DoD to consult and share U.S. engagement objectives, plans, and activities in the Indo-Pacific with Australia, Japan, and India. These consultations could support and mirror the structure of the U.S.-Australia-India-Japan Consultations and supporting trilateral dialogues. This could, at a minimum, include annual quadrilateral meetings (U.S.-Australia-India-Japan), annual trilateral meetings (U.S.-Australia-Japan; U.S.-India-Japan), and two meetings per year for bilateral consultations with relevant Australian, Japanese, and Indian counterparts. This requirement should be embraced by at least teams responsible for Australia, Japan, and India at OSD, Indo-PACOM J5, and Indo-PACOM component commands (PACAF, U.S. Army Pacific, U.S. Pacific Fleet, Marine Forces Pacific) and by U.S. Embassy defense teams throughout the Indo-Pacific region. This could start at the working level and be elevated as appropriate.
- **Recommendation:** Additional specific recommendations for Australia, Japan, and India include the following:
 - For Australia (and New Zealand), invest DoD and U.S. Air Force efforts to better understand Australia’s bilateral engagement program, particularly in training. Australia (and New Zealand, Canada, and the United Kingdom) may be particularly useful in providing countries with English-language professional military training. Beyond Southeast Asia, DoD should continue to encourage Australia and New Zealand to take a leading role in the “inner islands” in the Pacific, namely Melanesia and Polynesia. The United States can also deepen its bilateral military cooperation and relationship with Australia in a number of ways, including through developing options to expand the Enhanced Air Cooperation component of the Force Posture Initiatives, and it can consider conducting rotational deployments of U.S. Air Force bombers to northern Australia.
 - Frame U.S.-Japan security cooperation in Southeast Asia around nonstate actors and assistance designed to deal with transnational threats. The United States can leverage Japan’s interest and expertise on non-kinetic activities such as logistics, maintenance, and training and exercises. The United States should also consider engaging with Japan in planning and exercising HA/DR operations focused on responding to crises in Southeast Asia.
 - Encourage India’s growing cooperation and engagement with U.S. allies such as Australia and Japan and emerging partners in the Indo-Pacific region such as Indonesia and Singapore, and seek opportunities to collaborate with India in cyber and electronic warfare. More opportunities for Indian professional military and civilian education will help build longer-term U.S.-India ties and identify emerging opportunities. The U.S. government should share satellite and other information with India about China’s problematic behavior in disputed Himalayan areas, such as the Doklam Plateau, and elsewhere as needed. DoD should also facilitate Indian

participation in existing U.S.-led security cooperation forums and continue to invite Indian liaison officers to Indo-PACOM.

- **Recommendation:** Prioritize quality over quantity when designing U.S. engagements with allies and partners to avoid bandwidth challenges on either the U.S. or allied and partner end. This should occur at all levels to deepen and routinize engagements and to convince allies and partners that the United States plans to remain a Pacific power that is ready to assist them.
- **Recommendation:** Improve U.S. public messaging by messaging about more allied and partner contributions and combined activities and efforts. Underscore the relative strengths and advantages of combined U.S., allied, and partner influence compared with Chinese influence.

The United States has considerable strengths it can leverage against China either bilaterally or in conjunction with close allies and partners. There is substantial room for the United States to improve its ability to work with regional countries.

Appendix A. Basic Identification of U.S. Objectives

Table A.1. Unweighted U.S. Objectives and Top Five Corresponding Priority Countries (2018)

	Indonesia	Singapore	Malaysia	Philippines	Thailand	Vietnam	Cambodia	Burma	Brunei	Laos
Free and open Indo-Pacific										
Maintain SCS access and security*	✓	✓	✓	✓		✓				
Maintain economic freedom	✓	✓	✓		✓				✓	
Maintain trade and investment	✓	✓	✓		✓	✓				
Maintain free, open common domains										
Maritime chokepoints*	✓	✓	✓	✓		✓				
Freedom on the net*	✓	✓	✓	✓			✓			
Strengthen and work with ASEAN	✓	✓		✓	✓	✓				
Maintain political freedom	✓	✓	✓	✓				✓		
Regional security and stability*										
Maintain favorable balance of power	✓	✓	✓		✓	✓				
Defend allies				✓	✓					
Bolster partners	✓	✓	✓			✓				
Counter VEOs	✓	✓	✓	✓	✓					
Deny Chinese access					✓		✓	✓		
Overall total	10	10	9	7	7	6	2	2	1	0
Defense total*	6	6	6	5	4	4	2	1	0	0
Overall priority	High			Medium			Low			

NOTE: *Defense total* refers to the total for defense-related objectives marked with an asterisk.

Appendix B. Detailed Framework Variable Coding

Table B.1. Color Coding of Framework Variables

Variable	Coding
Diplomatic and political	
Diplomatic and political ties	• Blue: Partner has significantly closer diplomatic ties with the United States than China and prioritizes its relationship with the United States. • Light blue: Partner has slightly closer diplomatic ties with the United States than China and places relatively more priority on ties with the United States. • Gray: Partner has similar diplomatic ties with the United States and China and attaches similar weight to relations with the United States and China. • Light red: Partner has slightly closer diplomatic ties with China than the United States and places relatively more priority on ties with China. • Red: Partner has significantly closer diplomatic ties with China than the United States and prioritizes its relationship with China.
Support for U.S. versus Chinese vision for the region	• Blue: Partner views the U.S. vision for the region as highly aligned with its own interests and is concerned that China's vision undermines its interests. • Light blue: Partner views the U.S. vision for the region as generally more aligned with its own interests than China's visions. • Gray: Partner views both visions as similarly aligned with its interests, or the partner views neither vision as aligned with its interests. • Light red: Partner views the Chinese vision for the region as generally more aligned with its own interests than the U.S. vision. • Red: Partner views the Chinese vision for the region as highly aligned with its own interests and is concerned that the U.S. vision undermines its interests.
Views of U.S. commitment to the region	• Blue: Partner is very confident that the United States will remain committed to the region and will at least maintain its current level of attention to the region, and partner can rely on the United States. • Light blue: Partner is cautiously optimistic that the United States will remain committed to the region and will likely maintain its current level of attention to the region; and partner can rely on the United States. • Gray: Partner is uncertain whether the United States will remain committed to the region, is uncertain that the United States will maintain its current level of attention to the region, and is uncertain that it can rely on the United States. • Light red: Partner is relatively pessimistic that the United States will remain committed to the region, believes that the United States will have difficulty maintaining attention toward the region, and does not believe that it can rely on the United States. • Red: Partner does not believe that the United States is committed to the region, believes that the United States is likely to decrease its attention to the region, and does not believe that it can rely on the United States.
Public opinion	• Blue: Partner public opinion significantly favors the United States over China by more than 20 percent. • Light blue: Partner public opinion slightly favors the United States over China by 3 percent to 20 percent. • Gray: Partner public opinion has similar favorability views of the United States and China. • Light red: Partner public opinion slightly favors China over the United States by 3 percent to 20 percent. • Red: Partner public opinion significantly favors China over the United States by more than 20 percent.

Variable	Coding
Economic	
<i>Economic dependence</i>	• Blue: Partner is significantly dependent on trade, investment, and (to a lesser extent) tourism from the United States, compared with China (more than 20 percent). • Light blue: Partner is moderately more dependent on trade, investment, and (to a lesser extent) tourism from the United States, compared with China (3 percent to 20 percent). • Gray: Partner is similarly dependent on trade, investment, and (to a lesser extent) tourism from the United States, compared with China. • Light red: Partner is moderately more dependent on trade, investment, and (to a lesser extent) tourism from China, compared to the United States (3 percent to 20 percent). • Red: Partner is significantly dependent on trade, investment, and (to a lesser extent) tourism from China, compared with the United States (more than 20 percent).
<i>Economic opportunity</i>	• Blue: Partner strongly believes that it will depend more on trade and investment from the United States than China in the next 10–15 years. • Light blue: Partner believes that it is likely to depend more on trade and investment from the United States than China in the next 10–15 years. • Gray: Partner believes that it is likely to depend as much on the United States as on China for trade and investment in the next 10–15 years. • Light red: Partner believes that it is likely to depend more on trade and investment from China than the United States in the next 10–15 years. • Red: Partner strongly believes that it will depend more on trade and investment from China than the United States in the next 10–15 years.
<i>Threat perceptions of the United States versus China (economic)</i>	• Blue: Partner has significant concerns regarding U.S. economic influence and views U.S. economic strength as threatening, subversive, or coercive. • Light blue: Partner has some, but limited, concerns regarding U.S. economic influence and views U.S. economic strength as threatening, subversive, or coercive. • Gray: Partner does not view the United States and China as economic threats or has equal concerns about negative U.S. and Chinese economic influence. • Light red: Partner has some, but limited, concerns regarding Chinese economic influence and views Chinese economic strength as threatening, subversive, or coercive. • Red: Partner has significant concerns regarding Chinese economic influence and views Chinese economic strength as threatening, subversive, or coercive.
<i>Willingness to work with the United States versus China based on economic threat perceptions</i>	• Blue: Partner seeks to work with the United States to counter or mitigate assessed Chinese economic threats and has taken significant measures to reduce economic dependency on China. • Light blue: Partner seeks greater economic cooperation with the United States and has taken some measures to limit or reduce Chinese economic influence in key economic sectors. • Gray: Partner seeks greater economic cooperation with the United States and China and seeks economic diversification to avoid overdependence on either country. • Light red: Partner seeks greater economic cooperation with China and has taken some measures to limit or reduce U.S. economic influence in key economic sectors. • Red: Partner seeks to work with China to counter or balance against assessed U.S. economic threat and has taken significant measures to reduce economic dependency on the United States.

Variable	Coding
Military and security	
<i>Threat perceptions of the United States versus China (military)</i>	• Blue: Partner views the United States as a significant military or security threat. • Light blue: Partner views the United States as a limited military or security threat. • Gray: Partner does not view the United States and China as military or security threats <i>or</i> has equal concerns about both countries. • Light red: Partner views China as a limited military or security threat. • Red: Partner views China as a significant military or security threat.
Willingness to work with the United States versus China based on military threat perceptions	• Blue: Partner seeks increased cooperation with the United States to balance against assessed Chinese military or security threat and has taken actions to directly or indirectly balance against China's military strength. • Light blue: Partner seeks increased cooperation with the United States to strengthen its own military capabilities, has taken some measures to address perceived Chinese military threat, and is cautious of directly balancing against China. • Gray: Partner seeks more military cooperation with the United States and China <i>or</i> partner's willingness to militarily cooperate with the United States <i>or</i> China is not driven by U.S. <i>or</i> China military threat perceptions. • Light red: Partner seeks increased cooperation with China to strengthen its own military capabilities; has taken some measures to address perceived U.S. military threat and is cautious of directly balancing against the United States. • Red: Partner seeks increased cooperation with China to balance against assessed U.S. military or security threat and has taken actions to directly <i>or</i> indirectly balance against U.S. military strength.
Support for major U.S.-led security efforts	• Blue: Partner has participated or supported many key U.S.-led international and regional security efforts. • Light blue: Partner has participated or supported some U.S.-led international and regional security efforts. • Gray: Partner has shown limited or no support to U.S.-led international and regional security efforts. • Light red: Partner has opposed some U.S.-led international and regional security efforts. • Red: Partner has opposed many U.S.-led international <i>or</i> regional security efforts.
<i>Military cooperation</i>	• Blue: Partner has significantly closer military ties with the United States than China and engages in significantly more military activities and cooperation with the United States. • Light blue: Partner has slightly closer military ties with the United States than China and engages in moderately more military activities and cooperation with the United States. • Gray: Partner has similar military ties with the United States and China and attaches similar weight to defense and security cooperation with the United States and China. • Light red: Partner has slightly closer military ties with China than the United States and engages in moderately more military activities and cooperation with China. • Red: Partner has significantly closer military ties with China than the United States and engages in significantly more military activities and cooperation with China.
<i>U.S. versus Chinese military capability</i>	• Blue: Partner believes that the United States currently has a significant military advantage over China in terms of military capabilities. • Light blue: Partner believes that the United States currently has a modest military advantage over China in terms of military capabilities. • Gray: Partner believes that the United States and China have similar military capabilities.

Variable	Coding
Perception of U.S. willingness to aid country in conflict with China	• Light red: Partner believes that China currently has a modest military advantage over the United States in terms of military capabilities. • Red: Partner believes that China currently has a significant military advantage over the United States in terms of military capabilities. • Blue: Partner is confident that the United States will provide military support or aid if partner becomes involved in a potential military conflict with China. • Light blue: Partner is cautiously optimistic that the United States will provide military support or aid if partner becomes involved in a potential military conflict with China. • Gray: Partner is uncertain whether the United States will provide military support or aid if partner becomes involved in a potential military conflict with China. • Light red: Partner is pessimistic that that the United States will provide military support or aid if partner becomes involved in a potential military conflict with China. • Red: Partner does not believe that the United States will provide military support or aid if partner becomes involved in a potential military conflict with China.

NOTE: Variables measuring shared interests are roman, and variables measuring relative capability are italicized.

Variable: Diplomatic and Political Ties

- **Coding method:** Researchers coded based on interviews and analysis.
- **Data sources in addition to interviews:** U.S. Embassy, “Websites of U.S. Embassies, Consulates, and Diplomatic Missions,” webpage, undated; “U.S. Department of State,” webpage, undated; U.S. Department of State, “Press Releases,” webpage, undated; SIPRI, undated; The White House, “Briefings and Statements,” webpage, undated; “The White House: President Barack Obama,” webpage, undated; “The White House: President George W. Bush,” webpage, undated.
- **Notes:** The report does not use United Nations voting as an indicator of diplomatic interests. U.S. interests go beyond issues voted on at the United Nations. Countries vote on a variety of issues in the United Nations that are not of equal strategic importance to the United States. Among the subset of United Nations votes that the U.S. Department of State categorizes as important for the United States, a good proportion relates to Israel and Palestine, and the majority of the issues relate to general development or foreign policy concerns that are not specific to security issues in the Indo-Pacific. In 2017, for example, among the State Department–identified important United Nations votes, there was only one vote—the situation of human rights in Burma—out of 27 votes that was specific to the Indo-Pacific.²⁴⁷

Variable: Support for U.S. Versus Chinese Vision in the Region

- **Coding method:** Researchers coded based on interviews and data from various polling sources.

²⁴⁷ U.S. Department of State, *Voting Practices in the United Nations 2017: Report to Congress*, Washington, D.C., March 2018; and Sarah Rose, “Linking US Foreign Aid to UN Votes: What Are the Implications?” Center for Global Development, May 4, 2018.

- **Data source in addition to interviews:** Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpananupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019.

Variable: Views of U.S. Commitment to the Region

- **Coding method:** Researchers coded based on interviews and data from various polling sources.
- **Data sources in addition to interviews:** Government of Japan, Ministry of Foreign Affairs, 2019b; Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpananupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019.

Variable: Public Opinion

- **Coding method:** Researchers coded based on interviews and polling data on whether the country has favorable views of the United States or China. Calculated as U.S. favorability (percentage) minus PRC favorability (percentage).
- **Data sources in addition to interviews:** Pew Research Center, “Global Indicators Database: Opinion of the United States,” webpage, undated-b; Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpananupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019; Yun-han Chu, Yu-tzung Chang, and Min-hua Huang, Wan Saiful Wan Jan, 2017; Boo Su-Lyn, “Malaysians More Positive About China Now, Studies Show,” *Malay Mail*, April 1, 2017; Johannes Herlijanto, “Public Perceptions of China in Indonesia: The Indonesia National Survey,” *Perspective*, ISEAS–Yusof Ishak Institute, Issue 2017a, No. 89, December 4, 2017; Bruce Stokes, Dorothy Manevich, and Hanyu Chwe, “India and the World,” Pew Research Center, November 15, 2017; Johannes Herlijanto, “Public Perceptions of China in Indonesia: The Indonesia National Survey,” *Belt and Road*, December 5, 2017b; Globe Scan, “Sharp Drop in World Views of US, UK: Global Poll,” July 4, 2017.

Variable: Economic Dependence²⁴⁸

- **Coding method:** Researchers coded based on 65 percent trade (difference in the country’s trade with U.S. versus China), 20 percent inward FDI (difference in U.S. versus PRC FDI into the country), 10 percent outward FDI (difference in country’s FDI in the U.S. versus the country’s FDI in China), and 5 percent tourism (difference in U.S. tourism to the country versus Chinese tourism to the country). Five percent is reflective of the economic importance of tourism to regional countries.²⁴⁹

²⁴⁸ The study also examined trade imbalance, including dependency of particular import or export products. As indicated in the main text, the study also explored placing more weight on partner exports compared to imports.

²⁴⁹ Yuwa Hedrick-Wong, “Asia’s Economic Ties Strengthen Amid Gathering Global Storm,” *Forbes*, September 30, 2018.

- **Data sources in addition to interviews:** Researchers used the most recent year data available (2017 or 2018) and partner reporting for trade. We used U.S. sources for U.S. FDI and partner FDI in the United States and Chinese sources for Chinese FDI and partner FDI in China. United Nations, undated; United Nations Conference on Trade and Development, *World Investment Report 2018: Investment and New Industrial Policies*, Geneva, Switzerland: United Nations Publications, 2018; U.S. Department of Commerce, Bureau of Economic Analysis, “Direct Investment by Country and Industry,” webpage, undated-a; Bureau of Economic Analysis, “Foreign Direct Investment in the U.S.: Balance of Payments and Direct Investment Position Data,” webpage, undated-b; Ministry of Commerce of the People’s Republic of China, *2017 Statistical Bulletin of China’s Outward Foreign Direct Investment*, Beijing, October 2018.

Variable: Economic Opportunity

- **Coding method:** Researchers coded based on projected U.S. and Chinese economic growth rates as well as researcher interviews.
- **Data sources in addition to interviews:** U.S. Department of Commerce, Bureau of Economic Analysis, undated-a, undated-b; American Enterprise Institute, “China Global Investment Tracker,” website, undated; International Monetary Fund, “World Economic Outlook Reports,” multiple years; Transparency International, “Corruption Perceptions Index 2018,” website, 2018; Ministry of Commerce, People’s Republic of China, 2018; PricewaterhouseCoopers, *The Long View: How Will the Global Economic Order Change by 2050?* London, February 2017; Lowy Institute, *Asia Power Index 2019*, Sydney, Australia, 2019; “The World’s Economic Powerhouses Are Going to Look Very Different in Another Decade,” news.au.com, January 20, 2019; Martin, 2019; Janet Henry, “The World in 2030,” HSBC, September 28, 2019.

Variable: Threat Perceptions of U.S. Versus China (Economic)

- **Coding method:** Researchers coded based on interviews, literature review, and polling data.
- **Data sources in addition to interviews:** Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpananupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019; Natasha Kassam, “Lowy Institute Poll 2019,” Lowy Institute, June 26, 2019.

Variable: Willingness to Work with the United States Versus China Based on Economic Threat Perceptions

- **Coding method:** Researchers coded based on interviews and literature review.
- **Data sources:** Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpananupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019; Natasha Kassam, “Lowy Institute Poll 2019,” Lowy Institute, June 26, 2019.

Variable: Threat Perceptions of the United States Versus China (Military)

- **Coding method:** Researchers coded based on interviews, literature review, and polling data.
- **Data sources in addition to interviews:** Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpanupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019; Natasha Kassam, “Lowy Institute Poll 2019,” Lowy Institute, June 26, 2019.

Variable: Willingness to Work with the United States Versus China Based on Military Threat Perceptions

- **Coding method:** Researchers coded based on interviews and literature review.
- **Data sources in addition to interviews:** Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpanupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019; Natasha Kassam, “Lowy Institute Poll 2019,” Lowy Institute, June 26, 2019.

Variable: Support for Major U.S.-Led Security Efforts

- **Coding method:** Researchers coded an aggregate of data collected on how regional countries support or participate in U.S.-led international or regional initiatives: if countries supported major U.S. North Korea–related efforts, including efforts to disrupt North Korean ship-to-ship transfers; participated in SCS patrols, operations, or major exercises with the U.S. in SCS international waters; engaged in Taiwan Strait Transits; support U.S. FONOPs; participated in major U.S.-led military operations (Operation Enduring Freedom, International Security Assistance Force, Operation Iraqi Freedom, and Operation Inherent Resolve); and participated in the Global Coalition to Defeat ISIS.
- **Data sources in addition to interviews:** Various articles from the Council on Foreign Relations, *The Diplomat*, *Reuters*, *The Guardian*, BBC, the *Japan Times*, ASPI, and foreign ministry websites.

Variable: Military Cooperation

- **Coding method:** Researchers coded an aggregate of six measures: if the United States or China has a major military base or facility in the country; relative U.S. versus Chinese arms sales to the country; whether the country has acquisition and cross-servicing agreements with the United States versus a similar agreement with China; whether the country has defense co-production and co-development agreements with the United States compared to similar agreements with China; whether the country has an information sharing agreement with the United States compared to a similar agreement with China; and the quantity and quality of the country’s military training and exercises with the United States compared to with China.
- **Data sources in addition to interviews:** Various articles in the *China Daily* and *People’s Daily*; relevant Chinese embassy websites; Kenneth W. Allen, John Chen, and

Phillip Charles Saunders, *Chinese Military Diplomacy, 2003–2016: Trends and Implications*, Washington, D.C.: National Defense University Press, 2017; Defense Intelligence Agency, *China Military Power: Modernizing a Force to Fight and Win*, Washington, D.C., 2019; U.S. Department of State, “Foreign Military Training and DoD Engagement Activities of Interest,” webpage, undated; Stockholm International Peace Research Institute, SIPRI Arms Transfers Database, undated; accessed July 10, 2019; U.S. Army Pacific, homepage, undated; Pacific Air Forces, homepage, undated; Commander, U.S. Pacific Fleet, homepage, undated; State Council of the People’s Republic of China, *The Diversified Employment of China’s Armed Forces*, Beijing, 2013; State Council of the People’s Republic of China, *China’s Military Strategy*, Beijing, 2015; State Council of the People’s Republic of China, *China’s Policies on Asia-Pacific Security Cooperation*, Beijing, 2017; State Council of the People’s Republic of China, *China’s Foreign Aid*, Beijing, 2014.

Variable: U.S. Versus Chinese Military Capability

- **Coding method:** Researchers coded based on comparisons of current U.S. versus PRC military capability and regional interviews.
- **Data sources in addition to interviews:** Lowy Institute, *Asia Power Index 2019*, Sydney, Australia, 2019; International Institute for Strategic Studies, “Asia,” in *The Military Balance 2019*, London, 2019, pp. 222–319.

Variable: Perception of U.S. Willingness to Aid Country in Conflict with China

- **Coding method:** Researchers coded based on researcher interviews, literature review, and polling data.
- **Data sources in addition to interviews:** Stafford Nichols and Zacc Ritter, “U.S. Defense Promise Still Credible in Asia-Pacific,” Gallup, July 17, 2018; Tang Siew Mun, Moe Thuzar, Hoang Thi Ha, Termsak Chalermpananupap, Pham Thi Phuong Thao, and Anuthida Saelaow Qian, *The State of Southeast Asia: 2019 Survey Report*, Singapore: ISEAS–Yusof Ishak Institute, 2019.

Chinese Perspective

To assess Chinese perspectives on competition, we analyzed Chinese writings from 2016 to 2019 from two major sources: reports issued by the Chinese Academy of Social Sciences (CASS) and academic literature published by leading Chinese scholars.

We prioritized assessments from CASS given CASS’s role in producing authoritative reports to inform PRC decisionmakers. We draw on two CASS Yellow Books (Annual Report on International Politics and Security and Annual Report of ASEAN’s Development)²⁵⁰ and 11 Blue

²⁵⁰ Chinese Academy of Social Sciences, 2019c; Chinese Academy of Social Sciences, 2017a. Yellow Books tend to report on overarching trends, typically at either the regional or global level.

Books (on the Asia-Pacific, Indian Ocean, Oceania, Southeast Asia, Development of “The Belt and Road” Construction, Belt and Road Trans-Border Gateways Construction, U.S.A., India, Vietnam, Australia, and Thailand) reports.²⁵¹ In addition to the CASS reports, the research team examined academic work from leading Chinese journals in either the fields of International Relations, Security Studies, or Indo-Pacific Area Studies.²⁵²

²⁵¹ There were no country-specific Blue Books for Indonesia, Malaysia, Singapore, the Philippines, Burma, Cambodia, or Laos. For the available Blue Books, see Chinese Academy of Social Sciences, 2017b, 2017d, 2018b, 2018f, 2019b, 2019d; Chinese Academy of Social Sciences, 印度洋地区发展报告 (2018) [*Annual Report on the Development of the Indian Ocean Region (2018)*], Beijing: Social Sciences Academic Press, 2018e; Chinese Academy of Social Sciences, 大洋洲发展报告 (2019) [*Annual Report on Development of Oceania (2019)*], Beijing: Social Sciences Academic Press, 2019a; Chinese Academy of Social Sciences, 东南亚地区发展报告 (2017–2018) [*Annual Report on the Development of Southeast Asia (2017–2018)*], Beijing: Social Sciences Academic Press, 2018d; Chinese Academy of Social Sciences, 2019b; Chinese Academy of Social Sciences, 印度国情报告 (2016) [*Annual Report on National Circumstances of India (2016)*], Beijing: Social Sciences Academic Press, 2016; Chinese Academy of Social Sciences, 2017d; 孙有中 [Sun Youzhong] and 李建军 [Li Jianjun], “Annual Report on Development of Australia (2017–2018) [澳大利亚发展报告 (2017–2018)],” Beijing: Social Sciences Academic Press, 2018; Chinese Academy of Social Sciences, 2018c.

²⁵² Journals included the China Institutes of Contemporary International Relations’ (CICIR’s) *Contemporary International Relations* [现代国际关系]; international security journals, such as the *Journal of International Relations* [国际关系研究], *World Economics and Politics* [世界经济与政治], *Peace and Development* [和平与发展], and *International Forum* [国际论坛]; and area studies journals, such as *South Asian Studies* [南亚研究], *Crossroads: Southeast Asia* [东南亚纵横], *Southeast Asian Studies* [东南亚研究], *South and Southeast Asian Studies* [南亚东南亚研究], *South Asian Quarterly* [南亚研究季刊], *Asia-Pacific Security and Maritime Affairs* [亚太安全与海洋研究], *Pacific Journal* [太平洋学报], *Contemporary Asia* [当代亚太], and *Southeast Asian Affairs* [南洋问题研究].

Appendix C. Chinese Views of Current U.S., Allied, and Partner Efforts

In this appendix, we analyze how China views current U.S., allied, and partner efforts. China remains vigilant about potential U.S. efforts to work with allies and partners to check China's influence. There is significant Chinese literature and attention focused on U.S. bilateral relationships with allies and countries. There is also concern over U.S. efforts to cooperate with Australia, Japan, and India.²⁵³ Chinese experts note that U.S. bilateral cooperation with these countries is strong and that these countries generally have strong relations with each other. Australia and India, however, have the weakest bilateral defense relationship, and India is concerned that more cooperation with Australia could damage ties with Beijing, as well as reduce India's own relative influence in the Indian Ocean.²⁵⁴ There is much less discussion on U.S. efforts with Australia, Japan, or India in third countries.

Of these three allies and partners, Chinese experts view Japan as the most active and important U.S. ally operating in Southeast Asia and pay the most attention to its activities in the region. Japan is a significant political, economic, and military player in most countries in Southeast Asia. Chinese experts believe that Japan prioritizes Vietnam, the Philippines, and Indonesia in Southeast Asia. Chinese analysts note that while Japanese military capabilities cannot replace those of the United States, Japan plays a key role in coordinating joint exercises and can expand its security ties by offering military training to Southeast Asian states.²⁵⁵ Economically, Japan is expanding cooperation with ASEAN via traditional means such as the Asian Development Bank, but also newer programs such as the Japan Mekong Connectivity Initiative, which targets Thailand, Vietnam, and the other countries of the Mekong Delta.²⁵⁶ Its involvement in the BRI, CPTPP, and RCEP is part of increased Japanese economic involvement in the region and, in some cases, intended to moderate Chinese economic influence. Japan's emphasis on quality infrastructure offers an alternative to Chinese infrastructure projects. Chinese analysts recognize that there is some synergy between Japan's economic initiatives and BRI, and Japanese companies may collaborate with Chinese counterparts, such as cooperation on railway construction between Japan's Nippon Express and China Railway.²⁵⁷ Militarily, Chinese

²⁵³ 李莉 [Li Li], “印度东进战略与印太外交 [India's Act East Strategy and Indo-Pacific Diplomacy],” *aisixiang.com*, December 13, 2018.

²⁵⁴ Chinese Academy of Social Sciences, 2018a.

²⁵⁵ Chinese Academy of Social Sciences, 2018b.

²⁵⁶ Chinese Academy of Social Sciences, 2018b, 2018f.

²⁵⁷ 韦红 [Wei Hong] and 李颖 [Li Ying], 2019; “中日关系：2018——回归常轨 蹒跚前行 [China-Japan Relations: 2018—Getting Back on Track and Moving Forward],” Fudan University Institute of International Studies, 2019.

experts view Japan as playing a growing role in the region, particularly in the Philippines, where Prime Minister Abe has a strong relationship with President Duterte, captured in the Japan-Philippines “Joint Statement on Bilateral Cooperation for the Next Five Years,” which Chinese analysts note will include developmental assistance, infrastructure projects, and security-related efforts related to counterterrorism and maritime security.²⁵⁸

Compared with Japan, there is much less Chinese attention on Australian activities in Southeast Asia. Chinese experts recognize that Australia has healthy and positive relationships with Southeast Asian countries but have generally not focused on specific Australian activities.²⁵⁹ Chinese media note that Australia’s relationship with ASEAN is not balanced—ASEAN is more important to Australia in terms of trade than Australia is in terms of economic importance to individual countries in the region.²⁶⁰ China views Indonesia as critical to Australia’s influence in Southeast Asia and improved Australia-Indonesia relations would provide Australia with more influence in Southeast Asia, while a downturn in relations could effectively close what Chinese analysts see as Australia’s “door” to the northern Indo-Pacific.²⁶¹ At the same time, Chinese experts are aware that Australia and Indonesia have had a long and complicated history as neighbors and it might not be easy for Australia to adjust its relations with Indonesia to increase influence on ASEAN.²⁶² A priority for China is thus to strengthen relations with Indonesia to check Australian influence in the SCS and Southeast Asia. There is little reference in the Chinese literature about Australian activities in other countries in Southeast Asia.

Currently, China does not view India as a major competitor for influence in Southeast Asia. India’s current activities in the subregion remain limited, though there is potential for India to do more. Within Southeast Asia, Chinese experts view India as most focused on Burma, the country connecting Southeast Asia to South Asia and providing China with access to both regions and the Indian Ocean. Noted Indian activities in Burma include major infrastructure and connectivity projects (such as the Kaladan Multi-Modal Transit Transport Project, the India-Burma-Thailand Trilateral Highway Project, and Border Haats and Rhi-Tiddim Road Project) as well as providing equipment to the Burmese military, including but not limited to rocket launchers, radar, mobile bridges, night vision equipment, military exercise software, and gunboats, supplementing previous agreements that trained Burmese personnel on MiG-35 helicopters and allowed them to

²⁵⁸ Chinese Academy of Social Sciences, 2018b.

²⁵⁹ “为什么美国在东南亚需要澳大利亚? [Why Does America Need Australia in the South China Sea?],” 东盟学院 [College of ASEAN Studies], April 25, 2018.

²⁶⁰ “新闻分析：澳大利亚为何约会东盟 [Analysis: Why Is Australia Pursuing ASEAN?],” Xinhua, March 14, 2018.

²⁶¹ 尚子絮 [Shang Zijie], “澳大利亚与印度尼西亚的战略关系及其地区影响 [Australia-Indonesia Strategic Relation and Its Regional Implications],” 太平洋学报 [*Pacific Journal*], No. 10, 2017, pp. 25–37.

²⁶² “新闻分析：澳大利亚为何约会东盟 [Analysis: Why Is Australia Pursuing ASEAN?],” 2018.

enter Indian institutions for military training.²⁶³ Chinese scholars document—and do not deny or refute—Indian concerns that China seeks greater influence in Burma and Pakistan to preempt greater Indian influence in Southeast Asia and keep India preoccupied with South Asia.²⁶⁴

Along with Burma, Chinese analysts view India as focused on Vietnam as a gateway to the SCS. This is similar to the way China has sought to increase its influence in India's neighborhood by securing ports and potential bases in Sri Lanka, Djibouti, and potentially Burma in the future.²⁶⁵ In particular, China believes that Vietnam could serve as way for India to project power into the SCS (just as China projects power into the Indian Ocean via Burma).²⁶⁶ Chinese experts also note India's increased engagement and outreach to Thailand as part of India's efforts to increase infrastructure connectivity and trade with Southeast Asia, particularly via Burma.²⁶⁷ There is also attention to the growing India-Indonesia relationship, including India's desire to deepen economic cooperation, strengthen maritime cooperation, and engage in joint development of the deep seaport at Sabang with Indonesia. The two countries have begun to cooperate on jointly developing the infrastructure and economies of Sabang Island and the Andaman Islands.²⁶⁸ India has also increased cooperation with Singapore, with India extending an agreement to allow Singapore's Air Force to train in India, and Singapore granting the Indian navy access to Changi Naval Base, providing India with a vital launch point for access to the SCS.²⁶⁹

²⁶³ “印度‘东进’战略迷航 [India's Act East Strategy Gets Lost],” Xinhua, January 16, 2018; “印度将为缅甸空军培训飞行员 抗衡中国在缅影响 [India to Provide Training for Burmese Pilots, Countering Chinese Influence in Myanmar],” 新浪军事 [*Sina Military*], January 5, 2013.

²⁶⁴ 杨晓萍 [Yang Xiaoping] and 秦子瑜 [Qin Ziyu], 2019.

²⁶⁵ 林民旺 [Lin Minwang], “印度政府在南海问题上的新动向及其前景 [New Tendency and Prospect of Indian Government's Policies on the South China Sea Dispute],” 太平洋学报 [*Pacific Journal*], No. 2, 2017, pp. 31–38.

²⁶⁶ 殷永林 [Yin Yonglin], “21 世纪以来印度与越南的经济关系发展研究 [A Study on the Development of India and Vietnam's Economic Relationship Since 21st Century],” 东南亚纵横 [*Crossroads: Southeast Asian Studies*], No. 1, 2017, pp. 80–85.

²⁶⁷ Chinese analysts have also noted that India's desire to further expand the India-Burma-Thailand trilateral highway to Cambodia, Laos, and Vietnam. See 李莉 [Li Li], 2018.

²⁶⁸ 隋广军 [Sui Guangjun], 2018.

²⁶⁹ 夏立平 [Xia Liping] and 钟琦 [Zhong Qi], “特朗普政府‘印太战略构想’评析 [Analysis on Indo-Pacific Strategy of Trump Administration],” 现代国际关系 [*Contemporary International Relations*], No. 1, 2018.

Appendix D. Top U.S. Allied and Partner Security Providers for Southeast Asia

While the United States should start by increasing coordination with Australia, Japan, and (to a lesser extent) India in Southeast Asia, the United States could also explore working with additional allies and partners. This appendix analyzes which U.S. allies and partners are top security providers for ASEAN countries to help the United States identify additional allies and partners to work with in individual Southeast Asian countries.²⁷⁰ We selected the top security providers based on the ASEAN recipient's perspective: which provider currently gives the recipient country what it needs the most or provides the most in terms of defense cooperation.²⁷¹

ASEAN countries, as discussed above, seek diversity in defense engagements to balance competing security interests. Countries do not readily identify their top security partners beyond the United States, China, or Russia (which we exclude for our analysis below). Based on the available public information and interviews in the region, we identify one top security provider and two additional important security providers for each Southeast Asian country.²⁷² Because the United States provides significant security cooperation to most ASEAN countries and because there is substantial overlap in allied and partner engagements with ASEAN countries, it is not easy to assess which ally or partner is the top security provider beyond the United States and even more difficult to assess two additional important security providers for each country.²⁷³ It is best to view the assessment below as one way to identify security providers, with the understanding that other regional or extra-regional actors could play similar roles as some of the important security partners identified.

Top Security Providers

Figure D.1 maps the top U.S. allied and partner security providers for ASEAN. The ten providers are displayed in the middle of each circle and are (in order of effort) Australia, Japan,

²⁷⁰ The study only includes U.S. allies and partners as security providers and excludes actors that could be competing with the United States (such as China, Russia, and North Korea).

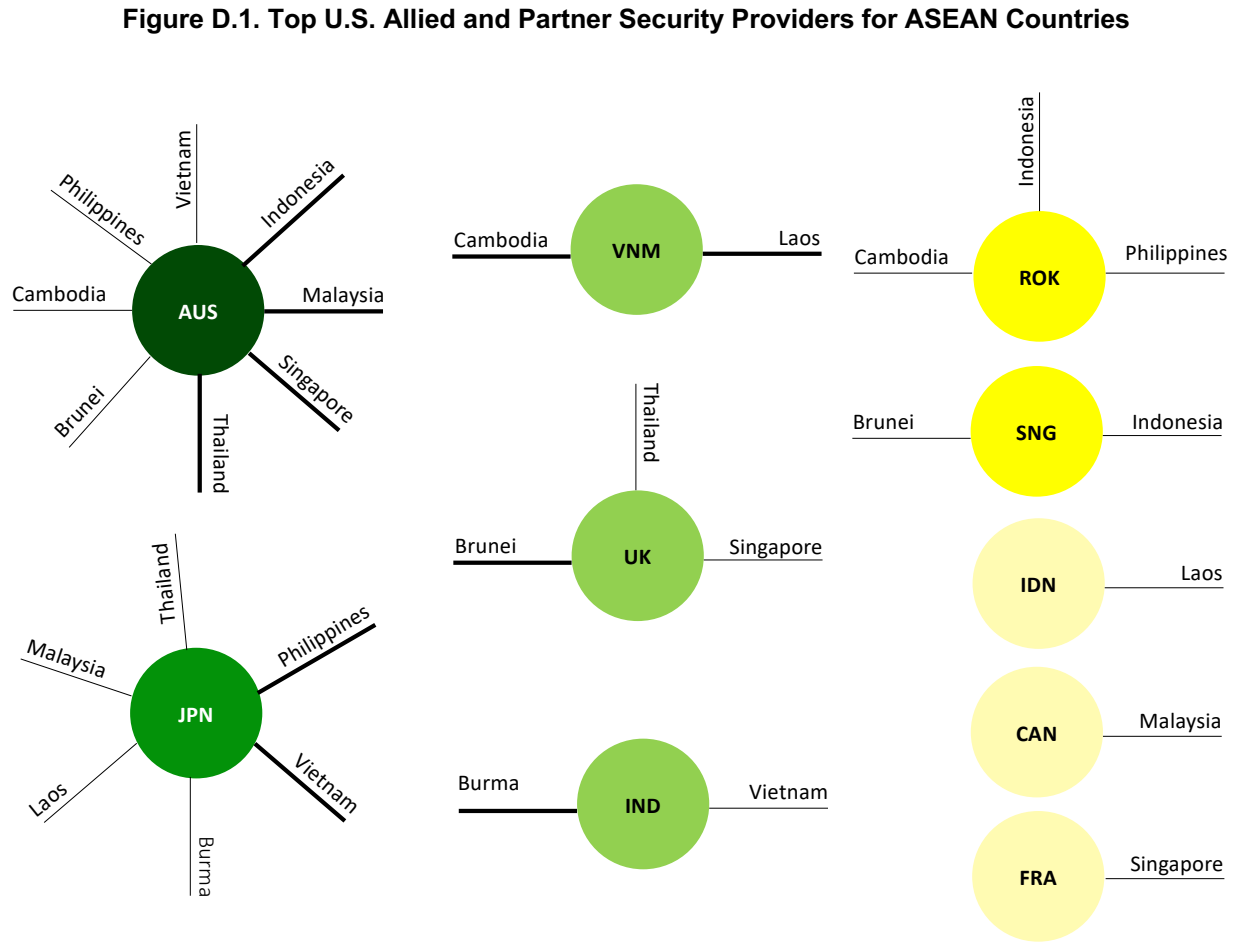
²⁷¹ This differs from the analysis in the main body of the report, where the study assessed military engagement and cooperation from the perspective of three security providers (Australia, Japan, and India) and their main defense partners.

²⁷² The RAND research team did not conduct research in Brunei, Burma, Cambodia, or Laos. The assessments for these countries are based on publicly available reporting.

²⁷³ For example, U.S. defense exercises with Malaysia make up a fifth of Malaysia's total exercises with all foreign militaries. A number of U.S. and foreign officials interviewed have also noted that U.S. engagement with ASEAN countries at times come at the cost of additional allied and partner activities and vice versa. ASEAN countries have finite defense budgets and are only able to embrace a portion of all available security cooperation opportunities.

Vietnam, the United Kingdom, India, South Korea, Singapore, Indonesia, Canada, and France. Each line extending from the circle indicates the corresponding ASEAN security recipient. The thickness of the line represents the importance of the provider to the recipient country, differentiating between the top provider (thick line) and two additional important providers (thin lines). Because we identify three providers for each recipient Southeast Asian country, each recipient country shows up three times in the figure.

Figure D.1 shows that Australia is the most active security provider in Southeast Asia and Japan is the second. Excluding U.S., Chinese, and Russian efforts, Australia is the top provider for four countries: Indonesia, Malaysia, Singapore, and Thailand and an important partner for four others (Brunei, Cambodia, the Philippines, Vietnam). Japan is the top provider for the Philippines and Vietnam and actively engages with, trains, and supports the militaries in Burma, Laos, Malaysia, and Thailand.



Three U.S. allies and partners—Vietnam, the United Kingdom, and India—are also top security providers in the region. Vietnam is critical to Cambodia and Laos. Vietnam should be viewed not just as a recipient of security assistance, but a provider of one as well. The United

Kingdom is the top partner for Brunei and an important partner to Thailand and Singapore, with potential to expand its activities in the region.²⁷⁴ India plays a top role in Burma and is an important partner to Vietnam.

Finally, South Korea, Singapore, Indonesia, Canada, and France are important providers for seven ASEAN countries. South Korea is an underappreciated security provider that is important to at least three countries, Cambodia, Indonesia, and the Philippines.²⁷⁵ Similar to Vietnam, both Singapore and Indonesia should be considered not just as recipients, but as partners the United States can work with to reach out to third countries in Southeast Asia. Canada and France are also security providers for the region and there is potential for both to do more.²⁷⁶

²⁷⁴ UK defense priorities for Southeast Asia are Singapore (most important) and Burma, Brunei, Indonesia, Malaysia, Thailand, and Vietnam. See Government of United Kingdom, Ministry of Defence, *UK's International Defence Engagement Strategy*, London: Foreign and Commonwealth Office, 2017, p. 8.

²⁷⁵ The ROK not only provides significant military equipment to the region, but is also becoming more actively involved in the region. See Prashanth Parameswaran, "ASEAN–South Korea Security Ties in the Spotlight at 2018 Seoul Defense Dialogue," *The Diplomat*, September 21, 2018d; "South Korea Provides 222 Military Vehicles to Cambodia," Xinhua, March 23, 2017; Prashanth Parameswaran, "What's Next for the Indonesian–South Korean Fighter Jet Program?" *The Diplomat*, January 15, 2019b; Prashanth Parameswaran, "New Frigate Upgrade Deal Puts South Korea–Philippines Military Ties into Focus," *The Diplomat*, August 28, 2019g.

²⁷⁶ France's main defense partners in Southeast Asia are Singapore (most important) and Indonesia, Malaysia, and Vietnam. See Government of France, *France and Security in the Indo-Pacific*, May 2019, p. 10.

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In long-term strategic competition with China, how effectively the United States works with allies and partners will be critical to determining U.S. success. To enable closer cooperation, the United States will need to understand how allies and partners view the United States and China and how they are responding to U.S.-China competition.

In this report, which is the main report of a series on U.S.-China competition in the Indo-Pacific, the authors define what U.S.-China competition for influence involves and comparatively assess U.S.-China competition for influence in six countries in Southeast Asia—Indonesia, Malaysia, the Philippines, Singapore, Thailand, and Vietnam—as well as the roles of three U.S. allies and partners that are active in Southeast Asia—Australia, India, and Japan. The authors first explore why the United States is competing with China in the Indo-Pacific and what the two are competing for. They then develop a framework that uses 14 variables to assess relative U.S.-Chinese influence across countries in the Indo-Pacific. Drawing from interviews in all nine countries and data gathered, the authors apply this framework to assess how regional countries view U.S.-China competition in their respective countries and how China views competition in each of the regional countries. Finally, the authors discuss how the United States could work more effectively with allies and partners in Southeast Asia and beyond.



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