

Chapter 11

## The Global South

### South Asia, Southeast Asia, and the Indian Ocean Region

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*The chapter considers the mid-decade status and future trajectory of Great Power competition (GPC) in South and Southeast Asia and the Indian Ocean Region (IOR). It is the first of three chapters to evaluate these interwoven regions as a key arena intensifying GPC across the Global South. The chapter describes how increasing Chinese presence and influence in almost every South and Southeast Asian country and across the IOR makes the U.S.-China and the China-India rivalries most salient there both in terms of GPC risks and in terms of opportunities. Russian interests in these regions matter, but in a subtle and even subdued manner. Moscow's long-standing relationship with New Delhi anchors on India's expectation that the Russia-India bilateral strategic partnership should moderate some of the worst animus of the Sino-Indian security dilemma atop the Himalayas and across the IOR. In turn, this complicates GPC rivalries there. The chapter describes how—like in the Western Indo-Pacific—Japan and Australia matter to the contest of power and interests between the United States and China in these regions. It also establishes the important but complicated role played by India in contesting Chinese influence across the regions as New Delhi seeks security against Beijing through both its Russian relations and with its growing interactions with the United States and Quadrilateral Security Dialogue (Quad) partners, including Japan and Australia.<sup>1</sup>*

The Indian Ocean Region (IOR), South Asia, and Southeast Asia are the objects of accelerating rivalry among the Great Powers at mid-decade. This competition is destined to intensify before 2030. With the likely exception of India, all the countries of South Asia, Southeast Asia, and those that border the IOR to its east are part of the Global South.<sup>2</sup> There are a total of 19 countries in these contiguous regions (see figure 11.1). Eight countries are in South Asia,<sup>3</sup> and eleven countries are in Southeast Asia.<sup>4</sup>

As identified in chapter 3a, the term *Global South* refers to countries around the world that are alternatively described as “developing,” “less developed,” or “underdeveloped.”



Figure 11.1. States of South and Southeast Asia. *Source:* Alamy.

Many of these countries—although not all—are in the Southern Hemisphere. Most are in Africa and Latin America. Another grouping is found in South and Southeast Asia.<sup>5</sup> Even though they are in the Northern Hemisphere and no longer truly “developing” countries, India and China consider themselves members of the Global South.<sup>6</sup> Most contemporary Global South countries belong to the G77 and the Non-Aligned Movement, which arose as groupings of lesser developed countries during the Cold War.<sup>7</sup> However, Global South country leaders do not have a bloc mentality. As developing nations, they often work together to achieve a more equitable global order. Yet they are a collection of countries trying to achieve their own economic and security interests individually. Indeed, they are willing to act in solidarity when it’s beneficial to another while simultaneously working with countries beyond the Global South to their collective benefit. Thus, many states of the Global South pursue strategies of multi-alignment or active neutrality in the face of Great Power competition (GPC).<sup>8</sup>

Many international relations scholars consider this Global South construct for geo-economic grouping to be troublesome, but its use has become widespread in policy formulation and strategic debates over the past decade, including at international conferences like the Voice of the Global South summits hosted by India in 2023.<sup>9</sup> The Great Powers use this construct in their evolving strategic writings and policy formulations. China explicitly speaks of its important role in the Global South and how it has a unique role to play in “South-South relations” to end the unfair treatment of Global South countries endemic in the U.S./Western-led international order.<sup>10</sup> Russian foreign policy at mid-decade courts the Global South in its efforts to avoid increasingly prevalent Western sanctions and to de-Westernize the global order.<sup>11</sup> U.S. foreign relations during the Joseph Biden administration turned increasing attention to intensifying strategic competition in the Global South, especially

with China. The administration referred to this cluster of states as one at risk from China's assertion of an alternative vision for global governance that is attempting to make the U.S.-led global order a better "value proposition" for the developing countries there.<sup>12</sup>

In direct proximity to China and India, the developing states of South and Southeast Asia occupy unique positions. At mid-decade, Beijing and New Delhi intensely vie to be the Global South's champion—each advancing a different vision for the future of the international order and their case for primacy.<sup>13</sup> While China touts the need for these regions to benefit from "true multilateralism" and more "globally beneficial globalization," India urges the states of these regions and the multilateral organization of Association of South-east Asian Nations (ASEAN) to strive for an elevated international status for the common interest of all.<sup>14</sup>

This chapter proceeds in six segments. First, it establishes the major geostrategic dynamics and stakes for GPC in the three interconnected regional segments: South Asia, Southeast Asia, and the IOR. Next, it sketches the main strategic interests pursued by the United States, China, and Russia there—amplifying formal strategic aims and flagging their main objectives revealed by ongoing policy activities. The third section of this chapter compares the Great Power tools for influence and policymaking, highlighting the interactions and frictions observed in them and evaluating the arenas where each has obvious advantages at mid-decade and beyond. A fourth segment briefly addresses the roles of Japan and Australia with special attention to their posture in the Quad, partnering with the United States and India across the wider Indo-Pacific region. The chapter first concludes with the trajectory of GPC across South Asia, Southeast Asia, and the IOR at mid-decade and likely for the remainder of the 2020s. It then finally concludes with an analysis of trends in these regions in context of the wider competition for Great Power ascendance in the Global South.

## **Regional Contours, Context, and Competitive Stakes**

### **South Asia**

The population of South Asia is 2.08 billion, which is roughly 25 percent of the world's total. South Asia is densely populated and includes the countries of Afghanistan, Bangladesh, Bhutan, India, the Maldives, Nepal, Pakistan, and Sri Lanka (see figure 11.1).<sup>15</sup>

South Asia has emerged in the modern era of Great Power competition as a crucible of geostrategic dynamics, where the interplay of historical legacies, territorial disputes, and national interests converges to shape the foreign policies of its major players.<sup>16</sup> The rise of China as a regional and global power introduced an intensifying dynamic for the region—with Pakistan and India seeking to navigate their relationship's bilateral approach to Beijing while maintaining their strategic autonomy. Tense Indo-Chinese relations have roots in unresolved border disputes across the Himalayas. The two fought a war over their border in 1962 and had tense standoffs between border military and paramilitary forces in 2017, 2020, and December 2022, with the 2020 altercation in the Galwan Valley turning deadly for at least 20 Indians and 4 Chinese.<sup>17</sup>

China recently has been increasing its presence in the Indian Ocean, which India views as its traditional area of influence. China has created a chain of projects sometimes known as the String of Pearls, including ports in several countries that neighbor India, and has

sent survey vessels, spy ships, modern warships, and submarines through the Indian Ocean to project Chinese power and interests.<sup>18</sup> Beijing insists its activity in the Indian Ocean is purely commercial and that these projects are part of the economically oriented Belt and Road Initiative (BRI), but Indian and U.S. strategists are skeptical. China's close economic and military relationship with Pakistan has particularly worried New Delhi, which sees the increased Chinese presence from all sides as a threat to India's power in the region.<sup>19</sup>

### **Southeast Asia**

The United States and China are engaged in intensifying geopolitical competition for influence in Southeast Asia, which lies at the heart of the Indo-Pacific region (see figure 11.1).<sup>20</sup> Southeast Asia comprises over 675 million inhabitants and—behind China and India—is the third most important economic force in the Indo-Pacific region.<sup>21</sup> Southeast Asia's sea lanes are vital trade arteries. Forty percent of global annual goods trade and 25 percent of all oil and natural gas shipments pass through the Strait of Malacca, a potential chokepoint of strategic concern. Twenty percent of all global maritime trade passes through the disputed regions of the South China Sea (SCS).<sup>22</sup>

China's regional strengths are its geographic proximity and huge economic footprint, including infrastructure investments from BRI, its assertive bilateral and multilateral diplomacy, cultural linkages, values-neutral and transactional political approach, and propaganda narratives. But China also has regional weaknesses due to ASEAN member state frustration with coercive diplomatic pressure, its conflict in the SCS, its broader military buildup, its politically subversive activities in many countries, and its comparatively weak security assistance.<sup>23</sup> U.S. comparative strengths in Southeast Asia are its extensive security assistance and foreign direct investment, the thousands of American companies operating in the region, its soft power appeal, cultural and educational exchange programs, and its strategic counterbalancing against Chinese expansion. Its weaknesses are the episodic nature of its high-level diplomacy, insufficient public diplomacy efforts, impatience with the slow consensual ASEAN style of diplomacy, absence from regional groupings and free trade agreements, inability to compete with China on infrastructure development, and failure to develop a comprehensive and integrated strategy toward the region.<sup>24</sup>

Russia's interests across Southeast Asia pale in comparison to those of China or the United States. Moscow made deliberate efforts in the 2010s to cultivate long-dormant relationships in Southeast Asia that could buoy its arms sales programs and extend its influence in global fossil fuel markets with joint exploration and drilling projects in the SCS.<sup>25</sup> These modest military and economic initiatives in Southeast Asia were set back by Russia's 2022 invasion of Ukraine. Southeast Asian states increasingly disengaged from Moscow over fears of the secondary effects from Western sanctions against Russia; and, due to the rapid drop in Russian military equipment and spare parts availability from the Kremlin intense focus on Ukraine.<sup>26</sup>

### **The Indian Ocean Region**

The Indian Ocean covers 20 percent of the world's water surface and 40 percent of its global coastline. States surrounding the IOR hold one-third of the earth's population, including the countries of India, Indonesia, Pakistan, and Australia. Almost a third of global cargo

transits the Indian Ocean annually. The IOR has more than half the world's proven reserves of oil and gas. Unsurprisingly, 80 percent of global maritime oil shipping transits the IOR, along with one-third of the world's container shipping and bulk cargo traffic. Thus, the stability of the Indian Ocean is critical to the global economy.<sup>27</sup>

The Indian Ocean is less explored or contested than the Pacific or the Atlantic in part because the states ringing it have not had large or assertive maritime programs. That is changing rapidly. In part, the growing importance of the IOR is related to an expanding Chinese commercial and military naval presence there. An estimated 80 percent of Chinese energy imports transit the ocean and 95 percent of trade between China and Africa, Europe, and the Middle East passes through.<sup>28</sup> Chinese security experts have admitted that China gets cost-free security for its shipping interests due to the U.S. military's large role in assuring maritime stability in the region.<sup>29</sup> In 2010, China had almost no naval presence in the IOR. By 2023, Indian security experts estimated at least six to eight Chinese surface warships operating continuously on Indian Ocean waters and two submarines below the surface.<sup>30</sup> Chinese "research ships"—often cover for surveillance efforts—have been increasingly active.<sup>31</sup>

Partly in response to its security concerns about China's presence, India is engaged in a decade-long expansion of its military air and sea capabilities. Indonesia and Pakistan have been increasing the size and span of their naval forces as well. So is Australia. In a program known as AUKUS, Canberra is partnered with Washington and London to procure nuclear submarines and plans to more than double its military surface fleet by the early 2030s.<sup>32</sup> In addition, Singapore has been modernizing its modest naval fleet and has been increasing its maritime patrolling in the Eastern Indian Ocean.<sup>33</sup>

## **GPC Interests and Strategies**

### **China**

Over the past two decades, China has become the key player in the future of Southeast Asia and views it as the most important region of the wider area running from the Philippines through the Maldives. China analyst and former Australian Prime Minister Kevin Rudd describes Chinese strategic aims in Southeast Asia as the most vital region for its agenda of pacifying the "continental periphery."<sup>34</sup> Beijing's strategy is to secure its economic, political, and security interests in the region in a manner that consolidates its status as the dominant Great Power there—displacing decades of American preeminence. Relations between China and the Southeast Asian countries have improved considerably in the last decade or so. However, its gains have not offset the lingering region-wide distrust of China. In part, regional wariness is due to Beijing's outsize diplomatic influence in several regional countries—especially Laos and in part because of its growing military presence and assertiveness most visible in the SCS.<sup>35</sup>

Chinese interactions in this region are dominated by economic and infrastructure relationships. As of mid-decade, Southeast Asia accounts for around 15 percent of China's total trade with the world and 14 percent of its investments. Beijing also views Southeast Asia's market as one with huge growth potential, and with a prominent role in regional value chains featuring rich agricultural, energy, and mineral resources.<sup>36</sup> China is now the main

economic partner of every country in Southeast Asia. Its ascent to this status was enabled by the signing of the free trade agreement between ASEAN and China in 2010 and the entry into force of the Regional Comprehensive Economic Partnership trade agreement in 2022. China was the region's biggest trading partner in 2022, accounting for 21 percent of ASEAN exports and 24 percent of its imports. The United States absorbed 22 percent of ASEAN exports but only accounted for 5 percent of imports. Vietnam (3.8 percent), Malaysia (2.4 percent), and Singapore (2.2 percent) were the main destinations of Chinese exports to the region in the sectors of machinery and electronic goods. This translated into more than 40 percent of the manufacturing capacity for these sectors in those three countries, illustrating the vital role they play in regional machinery and electronic goods value chains.<sup>37</sup>

Chinese economic and infrastructure activities across South and Southeast Asia have an additional strategic aim. Beijing's investments in regional road, rail, and energy pipeline infrastructure—largely through BRI—feature a west-to-east and east-to-west focus that seeks to establish Chinese overland access to the Western Indian Ocean at ports in Indonesia, Burma, and Bangladesh.

In South Asia, the main Chinese strategic aims are to expand its economic activity and influence, enhance its strategic presence, and secure overland energy and economic routes through Pakistan and Bangladesh that avoid the Malacca Strait maritime chokepoint.<sup>38</sup> Beijing also prioritizes security and diplomatic activity to check the strategic rise of India, its main regional security rival. China's strategic goal is to stabilize relations with India to avoid a two-front war with the United States and India—all while minimizing distractions from its more pressing strategic matters to its east.<sup>39</sup> Beijing's distrust of New Delhi has grown in recent years due to expanding India-U.S. ties tethered to Washington's Indo-Pacific Strategy.

For China, the prospect of facing the American military at sea and the Indian military along its southern border and in the Indian Ocean has become much more real and dangerous. Growing defense cooperation between the United States and India threatens the security and stability of China's western border. It also complicates China's longstanding play for strategic influence in South Asia through its strategic partnership with Pakistan. The United States-India partnership puts at risk China's emerging power projection capability in the Indian Ocean, and at the same time could place China's vital energy supply from the Middle East at greater risk. America's growing strategic partnership with India elevates New Delhi's leadership status and encourages countries like Japan and Australia to seek closer strategic ties with New Delhi.<sup>40</sup>

Chinese initiatives involving India increasingly present as an evolving framework of strategic encirclement. Its long-standing military and security relationship with Pakistan—India's implacable security adversary—is a key element of Beijing's geostrategic competition with New Delhi. Beijing and Islamabad have maintained close military and security ties for more than 60 years. Also, since 2015, the China-Pakistan Economic Corridor (CPEC) has become a flagship program in China's global BRI activities. Xi Jinping announced BRI in 2013, and, since then, China has obligated over US\$100 billion in investments on contracts across South Asia. More than half of these BRI contracts have been made in Pakistan through CPEC program, including an estimated US\$54 billion in CPEC funding.<sup>41</sup> China's multifaceted economic lifeline to Pakistan included a gift of \$2.5 billion in 2019 and several loan rollovers and debt distress accommodations between 2021 and 2024.<sup>42</sup>

China's BRI features an array of ambitious projects across South Asia in every country except India. South Asia's strategic location at the intersection between maritime and land access from the Western Pacific to the rich resources and consumer markets in the Middle East and Eastern Africa makes it a consistent target for BRI port, airport, and commercial market infrastructure investments and wide array of China's diplomatic and defense relations with strategically important regional countries like Bangladesh, the Maldives, and Sri Lanka.<sup>43</sup>

China also has strategic interests and motivations for expanding maritime activities in the IOR. Unlike the Western Pacific, the IOR is not a primary Chinese security interest, but it is a secondary one of growing importance. China focuses on the sea lines of communication challenges present in the IOR—and especially the challenge associated with maintaining vital economic access to Middle Eastern fossil fuels in the event of hostilities with America and its Western partners. Beginning in the mid-2010s, China has become more forward leaning in its IOR activities. It pursues economic, diplomatic, and security goals hubbed around polishing its image as a welcomed contributor to regional interactions, ingraining the notion that the Indian Ocean should have no dominant state, and normalizing the Chinese People's Liberation Army Navy and related military presence.<sup>44</sup>

### **The United States**

Since 2017, the United States has viewed South Asia, Southeast Asia, and the IOR as part of a wider Indo-Pacific region. American strategy there aims to sustain a free and open, connected, prosperous, secure, and resilient geopolitical space. From 2021 to 2024, the Biden administration pursued these policy aims by updating and enhancing standing alliances and growing new strategic partnerships.<sup>45</sup> U.S. strategy established India as an essential strategic partner to advance its wider Indo-Pacific aims, especially in South Asia and the IOR.<sup>46</sup> It also sought to extend and enhance Australian and Japanese participation in partnership with India as part of a Quad capable of providing vital services and security relationships for the wider Indo-Pacific region including the IOR.<sup>47</sup>

U.S. strategy advanced a strong and independent ASEAN that remained a central multilateral organization across Southeast Asia and that led efforts to deliver sustainable solutions to the region's most pressing challenges on health, climate and environment, energy, transportation, and gender equity and equality. It advocated closer ties between South Asian countries and ASEAN. It also prioritized deepening ties with South Asian states that prioritize mechanisms to address humanitarian assistance and disaster relief needs, maritime security, water scarcity, and pandemic response.<sup>48</sup>

America's 2022 Indo-Pacific Strategy explicitly highlighted growing its strategic partnership with India to work together and through regional groupings to promote stability in South Asia; collaborating in new domains such as health, space, and cyberspace; and deepening economic and technology cooperation in a manner necessary to sustain a free and open IOR. The 2022 strategy viewed India as a like-minded partner and leader in South Asia and the Indian Ocean, active in and connected to Southeast Asia, a driving force of the Quad and other regional fora, and an engine for regional growth and development.<sup>49</sup>

Over time, the United States has demonstrated three priorities for the IOR: assuring the free flow of commerce; maintaining U.S. military access (especially at Diego Garcia);

and preventing the Indian Ocean from becoming a resource drag on more essential strategic priority areas in the Middle East, the Pacific, or the Arctic.<sup>50</sup> Accordingly, U.S. attention toward the IOR has been subsumed into its focus on the Western Pacific. Only late in the Biden administration did U.S. policy documents start to trumpet its steadily expanding work with IOR partners and organizations, such as the Indian Ocean Rim Association, for key priorities like climate adaptation, sustainable and inclusive blue economies, and maritime security.<sup>51</sup>

Since 2021, U.S. strategy has featured a strengthened Quad to become a premier regional grouping while playing a leading regional role on global health, regional growth in critical and emerging technologies, critical supply-chain cooperation, joint technology deployments, and advancing common technology principles. It also envisioned the Quad for a leading role in improving maritime domain awareness and high standards cyber infrastructure for South and Southeast Asia.<sup>52</sup>

### Russia

While Russian rhetoric frequently highlights the need to deepen relations with countries other than China, Russian foreign policy toward Asia has remained deeply Sino-centric. Russian efforts—to the extent they have taken place—to expand relations beyond China have focused on East Asian countries and on India, with Southeast Asia very much in the bottom tier of Russian priorities in the Asia-Pacific region.<sup>53</sup>

Russia's interest in the region did grow in the mid to late 2010s in part for the potential economic benefits of expanded trade, but primarily for geopolitical reasons.<sup>54</sup> Moscow hoped that greater Russian influence in Southeast Asia might help both to balance its increasingly junior partner role vis-à-vis China and to negatively affect U.S. efforts to expand its reach beyond its traditional allies in the region.<sup>55</sup>

Russia declared itself a partner of ASEAN, but its political role in Southeast Asia is still limited. Moscow's regional posture is largely guided by its strong relationships with Vietnam and China.<sup>56</sup> It also has largely been hubbed around relationships found in the arms sales business and fossil fuels exploration and co-production.<sup>57</sup>

A strong partnership with Vietnam has been central to Russia's political and strategic presence there. Vietnamese-Russian relations are characterized as a "comprehensive strategic partnership." For years, this made Russia Vietnam's only other regional strategic partner besides China. Russian-Vietnamese summits and high-level meetings are a relationship feature, are held annually, and generate plenty of positive rhetoric.<sup>58</sup> President Vladimir Putin's state visit to Vietnam in June 2024 confirmed that Moscow-Hanoi ties remain very important for Russia.<sup>59</sup> However, the relative importance of Russian-Vietnamese relations to Hanoi are a concern in Moscow for Vietnam's relations with the United States, India, Japan, and the European Union steadily improved during the early 2020s.<sup>60</sup> Most worrisome to Russia, Hanoi established a new comprehensive strategic partnership in September 2023 during President Biden's visit there.<sup>61</sup>

Despite its longevity, the Russo-Vietnamese nexus is unlikely to deter China from acting in Southeast Asia when and where Beijing sees fit. If Beijing elects to press ahead with its aggressive conduct in the South China Sea, Moscow lacks the hard power necessary to stop it. As a result, Southeast Asian states are not willing to bank on Russia as a strategic alternative

	<b>Southeast Asia</b>	<b>South Asia and Wider IOR</b>	<b>Common Interests</b>
<b>China</b>	Dominate economic activity Enhance Diplomatic leverage Diminish/displace U.S. Influence	Enhance economic access points into IOR Suppress Indian influence and strategic ascent Constrain U.S. access and influence	Dominate economic activity and generate alternative economic access into IOR Limit risks from evolving Indo-American strategic partnership
<b>United States</b>	Sustain free and open economic access Retain security access and partners Sustain diplomatic access and influence	Sustain free and open economic access Enhance security relationships with India Counter Indian growing influence and access	Sustain free and open economic access Enhance bilateral and multilateral strategic partnerships especially with India
<b>Russia</b>	Sustain/exploit China strategic partnership Retain diplomatic access and influence with historic partners, especially Vietnam	Sustain historic strategic relationship with India despite Sino-Indian tensions Enhance regional economic exchange to offset Western sanctions Grow diplomatic access to buttress global great power status	Prioritize/manage bilateral Chinese and Indian strategic partnerships to best effect Sustain diplomatic activism to challenge West and buttress global Great Power status
Key: IOR = Indian Ocean region			

to China. Traditionally, most Southeast Asian states have looked to the United States as the only country powerful enough to provide that alternative, and this remained true during the Biden administration. However, uncertainty about future American foreign policy under President Donald Trump should be viewed as limiting the extent to which key Southeast Asian states such as Vietnam and Indonesia will be willing to shift further toward Washington. Southeast Asian states are likely to remain curious about greater future relations with Moscow in the pursuit of a bandwagoning strategy versus China once Moscow's immersion in its Ukrainian war subsides—in the hope of avoiding a confrontation with China.<sup>62</sup>

Forced by the unprecedented isolation from the West, Russia has embarked on a course of outreach to the Global South. South Asia is a key region for this outreach. It is one where Moscow had been a dormant player for a long time, showing little interest in developing ties with regional partners beyond India. Putin elevated the importance of South Asia, and especially India, in his 2021 national security strategy with consistent mentions of India as part of an elevated Russian attention to the Asia-Pacific. The 2021 Russian strategy indicated that Putin rejects the U.S. vision for an Indo-Pacific region as an effort to contain both China and Russia.<sup>63</sup> It also hinted at India and other states in South Asia as a potential bulwark in supporting Russia's aim of a Greater Eurasian Partnership, insisting that no single national economic system should dominate Eurasia. Although not overtly stated, the partnership seemed an attempt to avoid a Chinese monopoly in Eurasia, and that balancing relations with India and China were becoming important for the Russian elite.<sup>64</sup>

Russia's national security strategy has not changed since 2021, but its relations to South Asia have in the aftermath of Russia's February 2022 invasion of Ukraine. On one level, South Asia was affected by Russia's incursion into Ukraine because Russia is a major defense supplier for both India and Bangladesh and is an emerging economic partner for Pakistan. As a result, the crisis in Ukraine altered South Asia's security ecosystem.<sup>65</sup> Moscow's mid-decade interactions indicate that it has reconsidered relations across South Asia as an important junction of Russian geostrategic and economic interests. Despite varying South Asian reactions to its war in Ukraine, Russia has stepped up its presence in the region since early 2022 with official diplomatic visits, persistent promulgation of Russian anti-Western narratives, and efforts to revive economic ties.<sup>66</sup>

Russia's expanding engagements across South Asia demonstrate its intention to maintain regular political dialogue there. Desperate to get around international isolation and seeking to co-opt new "friendly states," Moscow has made allowances for the mixed South Asian state positions on its actions in Ukraine.<sup>67</sup> Russia also maintains a posture that could revert to a stronger emphasis on India than on China once the Chinese lifeline to help Russia survive its war in Ukraine becomes less important than its quest to prevent a monopoly by any country over Eurasia, including China. The major Chinese, American, and Russian strategic interests in Southeast Asia, South Asia, and the wider AOR are summarized in table 11.1.

### **Great Power Relative Influence: Tools and Capabilities**

This section explores the mid-decade status of Great Power capabilities and tools for influence across these three co-joined regions. Each of the five analytical subsections below trace Chinese, American, and then Russian influence mechanisms, achievements, and liabilities, beginning with Southeast Asia and then considering South Asia and the IOR.

#### **Economic Competition**

Southeast Asia accounts for around 15 percent of China's total trade with the world and 14 percent of its investments. Southeast Asia's market has huge growth potential, plays a prominent role in regional value chains, and has rich agricultural, energy, and mineral resources. For example, China has shown an interest in importing natural gas and oil from Burma and Malaysia; nickel from Indonesia and the Philippines; and foodstuffs, like rice and fruit, reflecting a particular attention to food security, the importance of which has increased in recent years.<sup>68</sup>

China's expansive economic cooperation with Southeast Asia predates BRI and extends far beyond it. Beijing has been the region's top trade partner since 2009 and its second-largest investor since 2021. Southeast Asia has remained important to the BRI since its inception, as evidenced by the fact that the "Road" component of BRI was rolled out by President Xi during a visit to Indonesia in 2013.

BRI's record in Southeast Asia has been mixed. Some governments have found directly engaging with BRI useful to power their own economic ambitions, as with the Jakarta-Bandung high-speed rail project—Southeast Asia's first high-speed railway—or the China-Laos railway. Others, such as Malaysia, have seen progress in fits and starts, with suspensions and renegotiations taking place amid changes of government.<sup>69</sup>

Others, especially Vietnam, have been largely wary of engaging with the BRI itself too closely, even as they pursue other forms of economic cooperation with Beijing. This has played out as part of an evolving story, where China has adjusted BRI—including commitments to “greening” it and emphasizing sectors like digital and health—while Chinese rivals have attempted to offer alternatives, such as Japan’s Partnership for Quality Infrastructure.<sup>70</sup>

This mixed record in Southeast Asia continued into 2023 and BRI’s 10<sup>th</sup> anniversary. Although Southeast Asia accounted for more than one-sixth of the 369 BRI “outcomes,” China publicly announced at its Third BRI Conference in fall 2023—demonstrating the region’s continued importance for BRI—that over two-thirds of these outcomes involved Cambodia, Indonesia, and Laos. The absence of Malaysia, Thailand, or Vietnam on this list illustrates the lopsided concentration of activity within the region.<sup>71</sup> China’s preeminent role as the main Southeast Asian trading partner and infrastructure development benefactor does not offset the deep suspicions triggered by its aggressive policy in the SCS, its political rise in the region featuring hegemonic tendencies, and its growing subordination of many regional economies to Chinese national interests.<sup>72</sup>

Despite these liabilities, BRI has contributed to a dominant Chinese economic expansion. COVID-19 disruptions did not derail China’s strong economic position in Southeast Asia. Beijing continued to harness itself to the region’s economic integration, joining massive regional trade deals and developing some of its own. Simultaneously, Washington withdrew from trade deals involving Southeast Asian states, like the Trans-Pacific Partnership, and remained relatively distant from the region’s economic integration efforts.<sup>73</sup>

In South Asia, BRI is the most visible example of Beijing’s attempt to expand its economic activity and influence in the region and includes projects such as the China-Pakistan Economic Corridor and the Trans-Himalayan Economic Corridor. CPEC was formally launched in 2015 and committed up to \$62 billion worth of Chinese investment loans in Pakistan, which may ultimately accrue \$40 billion in Chinese-held debt through CPEC projects. Under CPEC, the People’s Republic of China built a major port at Gwadar on Pakistan’s Arabian Sea coast, coupled with a dual-use military airbase and naval facility at nearby Jiwani.<sup>74</sup> Major CPEC investment projects include \$4.8 billion in road work (including the \$2.9 billion Peshawar-Karachi motorway project) and an \$8.2 billion expansion and modernization of the Peshawar-Karachi (ML-1) railway line.

China’s major infrastructure investments in South Asia also include the Trans-Himalayan Economic Corridor between Nepal and China. There, China has pledged connectivity projects that would provide alternative routes and reduce Nepal’s dependency on India. As planned, the corridor would include an ambitious rail link between Tibet and Kathmandu, estimated to cost over \$5 billion, as well as a hydroelectric project costing over \$2.5 billion that has already been canceled once due to a corrupt tender process.<sup>75</sup>

Chinese investments in South Asia also focus extensively on its energy and mining sectors. Beijing’s need for energy fuels Chinese investment across the region and accounts for 47.3 percent of Chinese outbound foreign direct investment there. In Pakistan, 17 CPEC energy-related initiatives are currently underway at a total estimated cost of \$14.5 billion. More than half of this amount (\$7.6 billion) is for the construction of four new coal-fired power plants and another \$2.4 billion to build two major hydropower facilities in Pakistan. There are six more projects in the pipeline, including 2020 deals valued at \$11 billion to

develop two more hydropower projects in Pakistan-administered Kashmir and to upgrade Pakistan's railways, which became the most expensive CPEC projects to date.<sup>76</sup>

India remains a conspicuous outlier in South Asian engagement with the BRI. New Delhi has not joined BRI and is a critic of Beijing's regional investments, especially those in Pakistan. New Delhi views those as underwriting illegal and dangerous Pakistani behaviors in disputed border areas and advantaging corrupt Pakistani politicians and military leaders. India and China have a complex economic relationship that includes extensive trade despite geopolitical tensions. Sino-Indian trade reached a record \$118 billion in 2023–2024, making China India's largest trading partner. Moreover, India's trade deficit with China that same year was over \$85 billion, with China importing mainly Indian raw materials and component parts while exporting high-end electronics, telecommunications, and other advanced technology products. There are over 100 Chinese companies active in India but only a fraction of that number of Indian companies in China.<sup>77</sup>

In Southeast Asia, U.S. fortunes have simultaneously grown both worse and somewhat better since 2020. On one hand, Washington did itself no favors in the regional competition for economic influence with its approach to trade. In a weak attempt to demonstrate that Washington remained economically engaged in regional trade patterns, the Biden administration in 2023 announced the vague Indo-Pacific Economic Framework for the wider region, including seven ASEAN states. Yet the framework came with minimal to no commitments from Washington for access to U.S. markets by Asian states, its scope was limited, and progress on trade-related aspects stalled quickly in 2023–2024 as U.S. congressional opposition over digital trade, labor, and environmental standards grew prominent. This feeble U.S. multinational economic plan was viewed as stingy and unserious when compared to the binding intraregional trade deals among forged between an array of Asian states including China.<sup>78</sup> At the same time, Washington's increasing use of industrial policy to push foreign countries to invest in the United States angered many across Southeast Asia.<sup>79</sup>

On the other hand, the accelerating decline in Sino-American trade relations provided opportunities for Southeast Asian states to build new supply chains with the United States and the West. By late 2023, Southeast Asian states collectively became the fourth-largest trading partner for the United States. Bilateral trade was close to \$500 billion in 2023, with Southeast Asian exports mainly comprised of manufactured goods and high-end electronics. The United States had a \$200 billion dollar trade deficit with Southeast Asia as a result. Southeast Asia's economic importance to the United States then grew even greater as American executive policy and congressional legislation from 2021 and 2022 took hold during late 2022 and early 2023, limiting a large swath of manufacturing on mainland China. By early 2024, the United States had overtaken China as ASEAN's largest export market, with 15 percent of ASEAN's exports destined for the United States, up nearly 4 percent since 2018. The United States also emerged as the largest source of cumulative foreign direct investment in ASEAN, with total stock reaching nearly \$480 billion at the end of 2023—almost double the combined U.S. investments in China, Japan, South Korea, and Taiwan.<sup>80</sup> This continued to grow in 2024.

Leading this investment trend were U.S. tech giants who became keenly aware of Southeast Asia's strategic importance as Sino-American relations soured and business risks in China rose. During 2023 and 2024, U.S. high-tech investments accelerated into Southeast Asia with

huge pledges for Indonesia, Singapore, and Vietnam from Amazon, Apple, and Microsoft.<sup>81</sup> The technology giants ramped up their investments in Southeast Asia hoping to tap into the region's young workforce, rising incomes, and more neutral geopolitical position.<sup>82</sup> This trend seems likely to continue through at least the end of the decade, if not longer.

The bad news/good news framework for U.S. economic relations in Southeast Asia cannot be grounds for undue optimism. Concerns about U.S. commitment to the region persist, particularly due to fluctuating American administrations and their implications for the future of American strategic competition with China. Many ASEAN nations believe that U.S. initiatives often focus more on countering China than on addressing their economic priorities. As they navigate challenges like economic instability, climate vulnerabilities, and widening socioeconomic gaps, ASEAN countries seek even more tangible benefits from their engagement with the United States, including even greater market access and new investments.<sup>83</sup> Southeast Asian states enter 2025 wondering if any of this positive aspiration will be feasible during a second Trump administration.<sup>84</sup>

The United States also has dramatically increased economic presence across South Asia during the early 2020s. Much of this was driven by intensifying economic tensions with China—inspiring a process of “de-risking” and “disinvesting” of critical supply chains away from China and into Southeast Asian and South Asian states. U.S. investments in commercial manufacturing ventures inside Bangladesh, Sri Lanka, and Nepal accelerated. Washington encouraged the growth of electronics manufacturing, pharmaceutical innovations, and high-tech investments across the region, especially in India.

In early 2023, Washington and New Delhi launched the Initiative on Critical and Emerging Technology (iCET), which is committed to deepening and expanding bilateral strategic cooperation across key technology sectors, including space, semiconductors, and advanced telecommunications. Mainly focused on bilateral initiatives, iCET also committed the United States and India to strengthen collaboration with like-minded partners, including through the Quad and a U.S.–India–Republic of Korea Trilateral Technology Dialogue. The iCET and related initiatives committed the United States and India to harmonize export controls, enhance high-tech commerce, and reduce barriers to technology transfer between the two countries, while addressing technology security, including through the India-U.S. Strategic Trade Dialogue. Washington and New Delhi also pledged deeper cyberspace cooperation through the bilateral cybersecurity dialogue and committed to expand the manufacturing and deployment of clean energy, including finding opportunities to expand U.S.–India cooperation in solar, wind, and nuclear energy and the development of small modular reactor technologies.<sup>85</sup>

Moscow's trade with Southeast Asia, although larger than it was a decade ago, remain relatively limited. Russia's security relations are only notable with Vietnam and, to a lesser extent, Burma. The arms trade is the core of Moscow's security engagement with several other Southeast Asia countries. However, the procurement of Russian arms is contingent and vulnerable to shifts toward Western equipment and munitions.<sup>86</sup>

The strength of the Russian economic presence in Southeast Asia lies in mineral, nuclear energy, and advanced air defense technology. Singapore and Malaysia buy Russian oil, and Indonesia is also involved in several energy projects, but again it is Vietnam that is Russia's chief oil and gas partner, with joint projects in both Vietnam and Russia. The same

is true of nuclear energy. Russia has nuclear power construction projects in Burma and Thailand, with a major construction project in southern Vietnam, where it is also providing nuclear-related services and training power plant personnel.<sup>87</sup>

Russia-ASEAN trade appears to have grown at an impressive pace in the last decade—but from a low starting point. The volume of trade increased fivefold from 2010 to 2019. However, even as of 2019 (the last year before Russia's foreign trade sharply declined), Russia's trade with Southeast Asian countries amounted to only \$21.4 billion, making Russia ASEAN's 14<sup>th</sup> trade partner. Russia receives less than 1 percent of total ASEAN exports, while ASEAN's share in Russian trade is 2.7 percent. Russian exports mostly consist of mineral resources (60 percent), machinery and equipment (14.5 percent), and chemicals (13.8 percent).<sup>88</sup>

In South Asia, Russia began exploring fresh avenues for both exports and imports in the face of rigorous Western economic sanctions for its war in Ukraine. Russia offered South Asian states an array of commodities, primarily energy resources, fertilizers, grain, and sunflower oil. The energy sector looms large in economic relations. At mid-decade, India was the largest importer of Russian crude oil, accounting for 40 percent of all supplies. Indo-Russian bilateral trade surged fivefold from 2019 to 2024, with most of that coming after Moscow's invasion of Ukraine.<sup>89</sup> Russia also began exploring the possibility of expanding its crude oil supplies directly to Bangladesh and Sri Lanka, but due to the limitations of their refineries, these states have primarily received Russian oil through India or West Asia.<sup>90</sup>

Agriculture is another significant area of Russia's economic policy for South Asia. Fertilizers and agricultural products account for a large share of trade with the region. Bangladesh was the third largest importer of Russia's grain (outside of the Eurasian Economic Union) during late 2023 and early 2024. Pakistan is another large importer of grain as Russia's exports of this commodity to Islamabad are now taking up to 75 percent of their total bilateral trade.<sup>91</sup>

Although most regional states have been careful in complying with sanctions against Russia, some have supported Russia in circumventing the restrictions. For instance, after May 2022, the Maldives emerged as a crucial transit hub for semiconductor shipments to Russia, ranking second only to China. Russia's economic outreach to South Asia would have been impossible without Beijing's involvement. Currently, a great part of transactions with the Russian entities—be it in energy or agriculture—is conducted in yuan and through the Chinese cross-border interbank payment system. The growing use of Chinese financial infrastructure appears as both the lifeline for Russia's regional economic projects and a looming reliance on Beijing's good will.<sup>92</sup>

### **Political-Diplomatic Competition**

China has prioritized diplomatic dominance over Southeast Asia countries and has been successful in most of its efforts to convert economic presence into political influence. China has won Southeast Asian countries' backing in the United Nations and for new global governance initiatives and secured acquiescence on extremely sensitive domestic issues and "core issues" for Beijing, such as Taiwan, Hong Kong, and silence about the plight of the Uighurs in Xinjiang.<sup>93</sup> Southeast Asian states mainly treat these issues as a Chinese domestic matter.

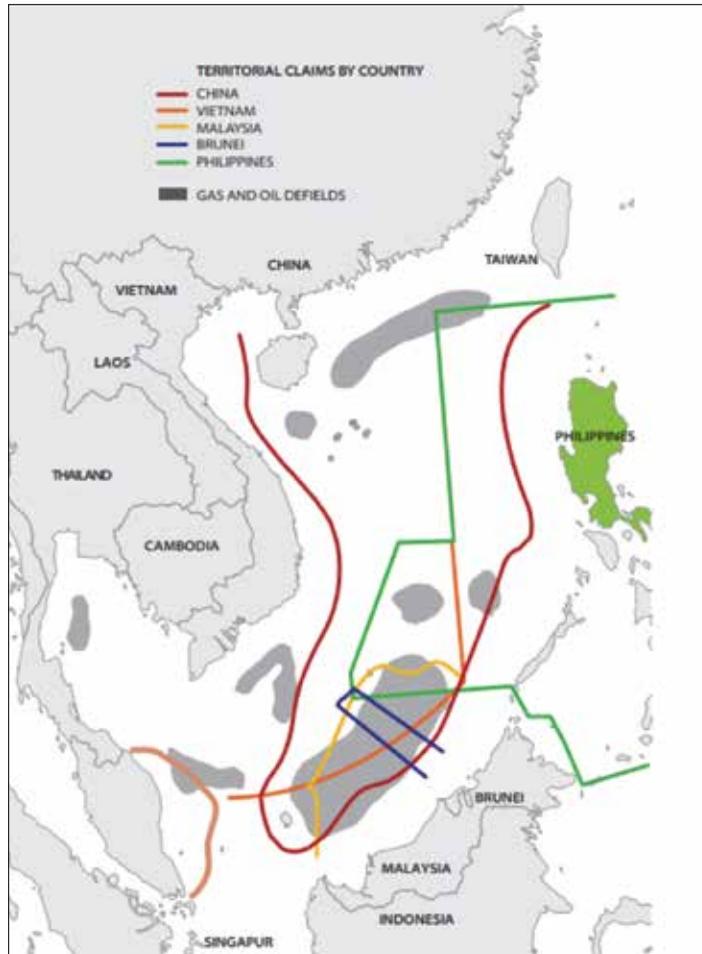


Figure 11.2. South China Sea Disputed Area. *Source:* "Overlapping EEZ Claims and Oil Fields," <https://www.southchinesea.org/maps/territorial-claims-maps/>.

But Southeast Asian frictions with Beijing remain in some important areas. Beijing has stepped up its claims to sovereignty and jurisdiction over territory in the South China Sea. This has caused considerable animus with Vietnam, the Philippines, Malaysia, Indonesia, and Brunei, which also claim jurisdiction over parts of the area. The dispute has been simmering since the 1970s, with military clashes between China and Vietnam in 1974 in the Paracel Islands and 1988 in the Spratlys. But the number of incidents has increased since 2012, coinciding with a rise in China's assertiveness and its inclusion of these territories as "core interests" (see figure 11.2).<sup>94</sup>

Chinese diplomacy has become a divisive factor in ASEAN's unity of action on such vital matters as the SCS wrangle. Cambodia plays a leading role in this, impeding an ASEAN consensus on the dispute. According to the 2023 State of Southeast Asia survey, 61 percent of respondents thought ASEAN was becoming increasingly fragmented, and 73 percent feared the transformation of the institution into an arena of geopolitical competition where its members act as proxies of Great Power interests.<sup>95</sup>

Chinese diplomacy in South Asia complements its robust economic interactions and infrastructure development programs. Beginning in 2015, Beijing turned its economic prominence into greater regional political influence, albeit with uneven impacts. China deepened its long-standing strategic partnership and diplomatic linkages with veritable ally Pakistan. It also has engaged in high-profile diplomatic interactions with Sri Lanka and the Maldives, although both relationships have been mercurial. India continues to be the state with the most influence on the political choices, interests, and conduct of the countries in South Asia (even Pakistan). The India factor continues to limit the depth of Chinese diplomatic entrenchment, but the states of South Asia can—and do—play India off against China when seeking economic and political advantage.<sup>96</sup>

Other than in Pakistan, Chinese political and diplomatic fortunes across South Asia are heavily tethered to Beijing's personal relations with key national leadership.<sup>97</sup> Sri Lanka is the most conspicuous example. China cultivated a close political and diplomatic relationship with the Rajapaksa family political dynasty from 2005 to 2015, when Mahinda Rajapaksa ruled as president, and again from 2019 to 2022, when Gotabaya Rajapaksa was in power. During the later period, China secured Sri Lankan approval of its bid to develop and run the strategically significant CPEC Port City in Colombo over the objections of India and expressed concerns from the United States.<sup>98</sup> The post-Rajapaksa government from 2022 to 2024 then bid out the other side of the Colombo port complex to a consortium led by Indian contractors and heavily funded by the United States.<sup>99</sup> Sri Lanka's presidential elections of September 2024 elevated a leader, Anura Kumara Disanayake, with Marxist-Leninist political roots and raised prospects for a new level of relations with China.<sup>100</sup> India is watching closely.

The Maldives, a long-standing Indian ally, pursued warming Chinese-Maldives relations between 2013 and 2017 featuring enhanced Chinese infrastructure investments. But from 2017 to 2024, when a new Maldives president stalled a free trade agreement with Beijing in favor of expanded bilateral relations with India, Sino-Maldives diplomatic relations cooled.<sup>101</sup> January 2024 saw the election of a new president for Maldives and another policy shift. President Mohamed Muizzu again reoriented his small, strategically located island nation toward Beijing and away from New Delhi.<sup>102</sup> Oscillating relations among the Maldives, China, and India appear likely to continue, with this IOR state leveraging its important strategic position to augment economic, defense, and security capabilities from multiple suitors and in line with the preferences of successive presidents.<sup>103</sup>

While dwarfed by Chinese politico-diplomatic engagement activities, the United States reinvigorated several diplomatic initiatives across Southeast Asia during the early 2020s. From Vietnam to the Philippines to Singapore, Washington moved to exploit fear of Beijing's growing regional assertiveness to woo deeper security alignment and comfort with American diplomacy. President Ferdinand Marcos, Jr., repaired the damage done to relations with Washington by his predecessor, Rodrigo Duterte. Marcos granted the U.S. military an array critical permanent and temporary basing access. Vietnam then upgraded its relationship with Washington to a comprehensive strategic partnership during President Biden's September 2023 visit.<sup>104</sup>

American political and diplomatic relations across South Asia have hubbed around India for more than a decade. Under the Biden administration, the U.S.-India relationship

received further emphasis. The year 2023 was particularly significant in the relationship with Narendra Modi's historic state visit to Washington, which included an address to a joint session of Congress and a series of consequential agreements ranging from high-level defense co-production to new avenues for technological partnership.

During the Modi visit, then Vice President Kamala Harris—with partial Indian heritage—acknowledged the impact that Indian Americans have had in the United States. She reiterated the importance of cooperation between the two countries on climate, space, and public health, among other areas. India and the United States have also found themselves working together more closely within the Quad, as well as other minilaterals such as the India–Israel–United States–United Arab Emirates group announced in July 2022. Tense Sino-India relations, particularly the unresolved border issues along the Line of Actual Control, have provided an additional plank for closer U.S.-India cooperation as well as motivated India to play a more prominent role in South Asia, positioning itself as an alternative to China for other countries in the region and the wider Global South.<sup>105</sup>

Even before its 2022 invasion of Ukraine, the Kremlin launched a diplomatic offensive in Southeast Asia. It boosted bilateral exchanges with countries, including Indonesia, Thailand, and Burma. Russia engaged with Thailand while it was ruled by a harsh military junta from 2014 to 2018. It also was one of just a few states to openly defend Burma's military junta at global institutions, to host a visit by Burma's military leaders after the coup, and to sell Burma weapons despite extensive sanctions by the international community for Burmese military atrocities.<sup>106</sup>

But Russia's brief interlude of greater influence in the region waned as the mid-2020s approached. In large measure, Moscow's dogged support for the military junta in Burma left it isolated in the region as even China distanced itself from the excesses of the government's actions there. As Burma's armed forces began losing territory during 2023 and 2024 to armed opposition, Moscow began to confront the fact a successor government there will not view Russia favorably.<sup>107</sup>

Thailand's period of direct military dictatorship ended in 2019 and May 2023's elections there produced a coalition government that moved closer to the ruling establishment without fully jettisoning the military leadership that Moscow had long embraced. Still, Thailand's post-2023 government has been hesitant about diplomatic overtures toward Russia, buying more Russian arms, or defending Russia's Ukrainian invasion internationally.<sup>108</sup> Russia's embrace of Southeast Asian military governments has complicated its diplomatic inroads there.

Moscow's diplomacy in South Asia grew in importance during the early 2020s. India's preference for strategic autonomy aligned with Moscow's desire for a multipolar world where U.S. hegemony is weakened and where China is not superior to either Russia or India. Russia's growing importance as a provider of discounted fossil fuels and its status on the United Nations Security Council and other international organizations generated an uplift in diplomatic resonance between 2022 and 2024.<sup>109</sup> Although Moscow does not have a dominant diplomatic presence across South Asia, it pursued a widening array of diplomatic visits and initiatives across the region in the early 2020s—including inaugural foreign minister visits to Bangladesh—with an anti-Western message that aligned with Beijing's rhetoric and gained noteworthy traction.<sup>110</sup>

### **Ideological Competition**

In Southeast Asia, China has made a major incursion into cultural affairs through the Confucius Institutes—as of 2024 there were over 30 throughout the region—and a huge scholarship program to study in China. China has sought to supplement its growing economic and political clout with educational, professional, and cultural exchanges, alongside other levers of soft power.<sup>111</sup> Yet for all its activity aimed at improving the country's image across its near-abroad, China is neither as popular nor as loved as Beijing would like. Despite enormous and enduring economic and political clout, it is perceived as a revisionist power that aims to transform the region into its exclusive area of influence.<sup>112</sup>

During the Biden administration, the United States sought to bolster its partnerships and alliances in Southeast Asia. These efforts were generally welcomed, with opinion polling suggesting that the United States retains more soft power and popularity than China across most of the region.<sup>113</sup> Russian ideological resonance in Southeast Asia is limited and far less salient than that of the United States or China.<sup>114</sup>

South Asian opinions about American ideals at mid-decade indicate that although the concept of the American dream still resonates, the elites and political parties across Southeast Asia began promoting more anti-American rhetoric to the public by mid-decade. This rhetoric emerged from intertwined sources, such as preexisting reservations against the United States, nationalism, domestic politics, and the increasing importance and agency of South Asian nations.<sup>115</sup> As Washington's focus on competing with China across the South Asian landscape expanded, preexisting reservations about historical U.S. demands that these countries strengthen democratic institutions, curb corruption, and promote reconciliation and human rights have increased in salience. Notable backlash to U.S. norms and standards spiked in Pakistan, Sri Lanka, and then Bangladesh from 2021 to 2024.<sup>116</sup> Washington's tolerance for antidemocratic and antiliberal tendencies seems likely to be tested as it seeks to woo South Asian support for its Great Power competitive posture there during the remainder of the decade.

Russia's narratives about the need for global multipolarity and the centrality of India and Muslim perspectives in this multipolar framework resonate in South Asia. As the Russian invasion of Ukraine began in February 2022, Russia found Indians sympathetic in referring to Moscow's actions as a "special military action" rather than a "war." Observers reported that clusters of online Indian communities adopted and helped spread pro-Russian narratives endorsing ethnonationalism and claiming Western hypocrisy over the war.<sup>117</sup>

### **Competition for Information Control**

With tension between the United States and China on the rise, telecommunications and media operations are becoming an increasingly fraught area of international competition. Southeast Asia is a conspicuous example. Although many countries in Southeast Asia use Chinese equipment in their telecommunication infrastructure because it is cost competitive and often comes with attractive financing terms and upskilling, the overall level of engagement and risk perception varies considerably across the region. Vietnam is wary of Chinese involvement in its telecom networks, Indonesia and the Philippines are somewhere in the middle, while China Mobile has inserted itself directly into the ownership structure of the sector in Thailand. Malaysia meanwhile is pioneering an entirely new style of national 5G development that initially excluded Huawei but is now leaving the door open.<sup>118</sup>

The European Union and the United States recently warned Malaysia about the national security risks of using Huawei to build its 5G network.<sup>119</sup> Southeast Asian countries have adopted a range of approaches and differing levels of engagement when it comes to Chinese involvement in their national telecom sectors. In 2020, Singapore's leading mobile operators decided against Huawei for its national 5G networks, instead choosing Ericsson and Nokia.<sup>120</sup> Singtel has a long business relationship with the European firms, so this could have been a commercial rather than geopolitical decision. In Vietnam, however, where all three major telecom operators are state-owned, decisions do seem more informed by national security concerns as there is apparently strong reluctance to use Huawei equipment or allow a significant role for China in national telecom infrastructure.<sup>121</sup>

Xinhua, the Chinese wire agency, has been able to expand its content-sharing throughout Southeast Asia, and many newspapers frequently run Xinhua content as part of their regular news. Most domestic Chinese-language media outlets in the region have either been sold to Chinese companies or are now owned by people favorable to Beijing.<sup>122</sup> Digital diplomacy is another element of Beijing's broad-ranging and well-resourced efforts to build influence and shape and control global public narratives about China. But in Southeast Asia, growing influence does not appear to translate into growing trust.<sup>123</sup>

One conspicuous arena for information control competition in Southeast Asia is that of undersea telecom cables. Geopolitical tensions between the United States and China have become manifest in the competition for primacy in subsea communications cables.<sup>124</sup> The region's undersea networks are aging and in growing need of replacement. Vietnam, Singapore, Malaysia, the Philippines, and Thailand each plan to expand or replace their networks by 2030, and the choice of suppliers for these projects is increasingly controversial. Since 2020, the United States has been lobbying across Southeast Asia against choosing Chinese companies.

American pressure has been especially focused on Vietnam where much of Hanoi's network is failing, where the United States argues that China already is purposely sabotaging Hanoi's cables, and where a Chinese provider of future cables would allow Beijing to monitor and mine all data in the network, disrupt the network during a regional crisis, and bind Vietnam to future networks with Chinese standards.<sup>125</sup> Reportedly, U.S. lobbying already has led to three other U.S.-financed transpacific cable projects being routed through the coastal waters of Indonesia and the Philippines to avoid Beijing-claimed waters, driving up the costs of the projects.<sup>126</sup> China has been retaliating by delaying permits for international companies to lay subsea cables in the South China Sea despite the fact that its claims to sovereignty there were rejected by an international tribunal in 2016. Security risks and commercial viability are at stake in these growing undersea cable disputes. Their resolution over the remainder of the decade will shape the future of information management and dominance in this vital subregion of the Indo-Pacific.

Overall, Southeast Asian states have very different economic, national, and strategic interests that shape their perception of China and their willingness to engage with Chinese telecom equipment and media presence. For the United States to alter these varying Southeast Asian approaches, it must expand its own strategic telecom footprint in the region. In turn, this would require deliberate thinking with regional allies and partners about how they might offer truly attractive alternative communications alternatives in the region.<sup>127</sup>

In South Asia, China has steadily increased its dual-use media access to solicit support for its sensitive policy positions and to minimize negative reporting about China. Prior to 2020, China made significant investments in India's top three news aggregators: Dailyhunt, NewsDog, and UCWeb. Concerned about this exposure in general and especially as the COVID-19 pandemic overtook India, New Delhi banned 321 Chinese social media apps during the early 2020s and undertook a more assertive and controversial approach to content-monitoring activities across Indian print, audio, visual, and social media outlets. Most notably, New Delhi banned TikTok from India in 2020. Nepal followed suit in 2023, and Pakistan has implemented temporary bans over the past 4 years.<sup>128</sup> India also has taken increased control over U.S. social media platforms where Facebook and Instagram comprise 89 percent of the most popular sites, censoring reports and monitoring algorithms for antigovernment rhetoric.

But the most notable dynamic in the South Asian commercial information arena involves growing collaboration between the United States and India to generate open, interoperable, reliable, and secure information and communications technology in India and across South Asia. Since 2020, the legacy U.S.-India Information and Communications Technology (ICT) Working Group has accelerated activities and grown in stature. Interacting with the U.S.-India bilateral Initiative on Critical and Emerging Technology (iCET) and the multilateral technological dialogue within the Quad, the ICT has begun oversight of an array of multilateral and bilateral programs featuring advance cooperation on 5G/6G research and development as well as on clean open radio access networks.<sup>129</sup> Combined, these efforts posture the United States and India to expand and extend South Asian telecom and information networks in a manner aligned with U.S./Western standards rather than those from China.

Although Russia does not possess a dominant high-tech or media presence in either South or Southeast Asia, it has been able to use the vast array of regional Internet and social media platforms to good effect in spreading Moscow's propaganda and anti-Western narratives. Right after the beginning of the war in Ukraine, social media analysts identified a prevalence of accounts claiming to be from Indian users indicating that India's social media landscape has become an important destination in the effort to influence public opinion about the war in Ukraine. Users who said they were from India made up nearly 11 percent of the hashtag trend in the 2 weeks after the invasion. There were only 0.3 percent from Russia and 1.6 percent from the United States during that time.<sup>130</sup>

### **Military Competition**

Over the past 5 years, Beijing has adopted a much more assertive military approach in Southeast Asia, and especially in the South China Sea. It has stepped up militarization of the SCS and used fishing vessels and coast guard ships to keep fishing boats from Southeast Asian states from operating in regional waters.<sup>131</sup> Among the most conspicuous worries regarding Chinese military activities in Southeast Asia is its maritime presence at the Ream Naval Base in Cambodia. Initially advertised as a civilian-use port infrastructure project in the BRI program, China confirmed in 2022 that its rebuild of naval facilities at Ream anticipated that Chinese scientists and the Chinese navy would use a "portion" of the base.<sup>132</sup> After the rebuild completed in 2024, two Chinese warships made Ream homeport for 2 months,

providing the Chinese navy with a port of origination in the Pacific free and clear from the traditional U.S. tracking and monitoring locations.<sup>133</sup> The establishment of this Chinese naval base in Cambodia boosts Beijing's military options in the Pacific and its aspirations of becoming a true global power with a network of military facilities around the world.<sup>134</sup>

Chinese security scholars have spoken about a future Chinese Indian Ocean fleet. But at mid-decade, none has emerged and the challenges to creating one remain substantial. Any regional naval fleet would have to deal with the reality that India has home field advantage in the IOR. Indian strategists report that as of late 2023, China maintains some six to eight surface combatant ships and up to two submarines across the IOR—transiting to and from its first-ever overseas military base in Djibouti, which opened in 2017. This is a much greater naval presence than in 2010, but one with significant challenges to overcome. The PLAN would require more air cover and logistical resupply before it could undertake a credible military operation in support of strategic objectives from there.

China's development of carrier battle groups is at least a decade away from being able to conduct effective combat missions in the Western Pacific, much less the Eastern IOR. In addition, beyond Djibouti, China has no formal military bases in the IOR, and its dual-use port arrangements with Pakistan, Sri Lanka, and Cambodia lack the resource capacity and assured protective security necessary to sustain operations. The Chinese navy is hard at work building supply ships such as the Type 901, but these are not a substitute for safe and friendly ports of call and are not anticipated to be available at scale before sometime in the 2030s.<sup>135</sup>

China's military challenges in the IOR are of critical value for India—and by extension, the United States—at least for the next decade. China's naval composition is far better suited for guarding China against the U.S. Navy than for projecting power into the Indian Ocean. In the event of hostilities between India and China, Chinese entry into the northern Indian Ocean would be difficult due to the Indian joint command at the southern tip of the Andaman and Nicobar Islands. Moreover, India would use its small but capable fleet of diesel-electric submarines to guard the choke points between the Indonesian archipelago and the Indian Ocean.<sup>136</sup>

The United States remains the dominant military power for many Southeast Asian states. However, Washington slipped notably in this measure of influence as well. From 2018 to 2023, Indonesia and Vietnam opted for somewhat closer military cooperation with the United States, though they have remained careful not to antagonize Beijing in doing so. The Philippines, which as a U.S. treaty ally has been more willing to openly align with Washington, has allowed the Pentagon to access multiple new bases in the country that would be critical if war erupts over Taiwan, despite the inevitable Chinese blowback. Except for Manila, other Southeast Asia states fear China's proximate military muscle and increasingly accept Chinese dominance.<sup>137</sup>

Although the U.S. military has multiple active military bases in Africa and the Middle East, it has only one formal base in the IOR—the naval and air force facility in Diego Garcia. On any given day at mid-decade, the U.S. Navy will have surface and subsurface vessels operating under two naval fleets across the IOR. In the Western IOR, America's Fifth Fleet, headquartered in Bahrain, is focused on operations astride the Middle East and Africa. In the Eastern IOR, the U.S. Seventh Fleet, headquartered in Hawaii, oversees American warships on exercises and training missions with American military partners



Figure 11.3. Main U.S., Chinese, and Indian Naval Bases in the IOR. Source: Akif Ali Hayat, "China's Maritime Reach: Growing Influence in the Indian Ocean and Its Implication," *Policy East*, November 14, 2023, <https://policyeast.com/the-indian-ocean-is-of-paramount-importance-in-global-trade-serving-as-a-vital-maritime-gateway-connects>.

including India.<sup>138</sup> Although the average daily number of American ships, submarines, and aircraft in the IOR is not publicly available, the totals certainly eclipse the number of Chinese military vessels reported there and routinely exceed the number of Indian surface and subsurface vessels out of port on maneuvers and training at sea. The U.S.-led Operation *Prosperity Guardian* to counter Houthi attacks on shipping in the Red Sea and the Gulf of Aden is a recent high-profile indication of U.S. commitment to defending the security of the Indian Ocean in its northwest approaches, even if the conflict is often framed in terms of the Middle East. Beyond this operation, the Department of Defense assigns ongoing responsibility for the vast Indian Ocean region to three U.S. combatant commands: U.S. Indo-Pacific Command, U.S. Central Command, and U.S. Africa Command. The United States also has an expanding presence in northeast Australia with enhanced land, sea, and air options for the Eastern IOR.<sup>139</sup>

Since 2017, Washington has focused on enhanced security for the IOR with the Quad. For the United States, the Quad should be the foundation of an Indian Ocean strategy. In November 2024, India hosted the 28<sup>th</sup> iteration of the Malabar naval exercises, a huge training operation originally between India and the United States, but now for all Quad members (and occasionally, other friendly nations). The major focus of Malabar 2024 was antisubmarine and anti-air warfare, both elements of future U.S. and Indian strategic interests in the event of conflict with China. The United States also has greatly enhanced strategic interaction with the Indian military across multiple aspects of joint operations, training, and common equipment (see figure 11.3).<sup>140</sup>

Washington's regional strategy prioritizes the growth of Indian military assets and Indian maritime presence so that New Delhi can become the main "net security provider" for the IOR. At mid-decade, India remains far from fully capable of that mission. India's navy and air force are growing, but at a slow pace. India's navy relies on Russian platforms, equipment, and munitions and thus lacks the necessary interoperability for multinational coordination of security and stability activities across the IOR.<sup>141</sup> In addition to military interactions in the Quad, the Biden administration prioritized increased bilateral military technology partnerships and coproduction possibilities with New Delhi, aiming to accelerate Indian maritime capability and interoperability. Among its flagship bilateral initiatives, the India-U.S. Defense Acceleration Ecosystem program of 2023 seeks to encourage and financially stimulate partnerships among U.S. and Indian defense companies, technology incubators, investors, and universities in search of accelerating U.S.-India defense interoperability.<sup>142</sup>

Moscow had not played a major military role in Southeast Asia since the Vietnam War era, but in the 2010s countries there increasingly turned to Russia for cheap and reliable arms. Between 2010 and 2019, the Stockholm International Peace Research Institute determined that Russia had sold about 30 percent of all the weapons purchased by Southeast Asian states. Russia was Southeast Asia's biggest arms supplier in the 20 years from 2002–2021 accounting for \$11 billion in sales. Vietnam, Indonesia, Laos, Burma, and several other states in the region still rely on Russian weapons.<sup>143</sup>

Vietnam is Moscow's primary "repeat customer" for the Russian arms industry, ranking fifth globally and first in Southeast Asia as a destination for Russian arms exports. The People's Army of Vietnam is extremely dependent on Russian equipment. Vietnam has been trying to diversify its procurement sources, but its dependence on Russia cannot be easily undone because of the interoperability with Russian equipment currently deployed, the "user-friendliness" of Russian equipment, a sense of affinity with Russia (many People's Army officers have received education and training in Russia), and the reasonable procurement prices for Vietnam.<sup>144</sup>

Prior to 2022, Russian warships regularly transited contested areas of the South China Sea, and the Russian navy held maritime exercises with ASEAN.<sup>145</sup> Russia has conducted joint naval exercises with China since 2012.<sup>146</sup> These accelerated in the late 2010s, and since Russia's invasion of Ukraine, Russian naval and air operations activities have more regularly been partnered with China—astride both Southeast Asia and in the Indian Ocean.<sup>147</sup>

Unsurprisingly, Beijing and Washington dominate most of the geostrategic competitive landscape from the Philippines to the Maldives, but Moscow remains a player. China's economic dominance remains unrivaled and the source of its competitive strength. It has been converting economic leverage into political and military influence across the collective regions during the early 2020s. But many of its economic partners—including Vietnam, the Philippines, and especially India—remain wary of Chinese strategic intentions, thus hedge with China's Great Power rivals. Most states in Southeast Asia and South Asia value American security partnerships and pursue strategic relations with Washington that complicate Beijing's calculus without choosing the United States over China. They also welcome American economic alternatives to Chinese dominance in trade and commerce, but without overblown expectations about how critical China will remain to their economic fates. Subdued but enduring, Russian influence is most pronounced in its resonant anti-Ameri-

	<b>Southeast Asia</b>	<b>South Asia and Wider IOR</b>	<b>Collective Relative Strengths</b>
<b>China</b>	Economic dominance and influence Diplomatic access Growing military capabilities and reach	Economic prowess Potential for coercive diplomatic influence Military access points beyond historic ones in Pakistan	Economic dominance Diplomatic influence—attractive and coercive—from economic leverage Growing military presence
<b>United States</b>	Security hedge vs. China Financial markets Relative ideological appeal	Ideological appeal of free and open region Military presence, access, and reach Indo-U.S. bilateral strategic partnership and quad collective security potential	Military presence and engagement Security partnerships—especially with India Relative ideological appeal
<b>Russia</b>	Diplomatic access and modest hedge vs. China, especially Vietnam Arms trade and selective military interoperability, especially Vietnam	Strategic partnership with India—diplomatic access, arms sales, and oil supply Anti-Western message resonance—diplomatic and media	Strategic partnership with India Anti-Western messaging via diplomats and media

can/Western messaging—much of which reinforces Chinese themes. India, Vietnam, and Burma also value Russian arms sales, diplomatic relations, and commercial energy transactions. These irritate both Washington and Beijing but are unlikely to diminish in favor of greater reliance on America or China anytime soon (see table 11.2).

### **The Roles of Japan and Australia**

India views all the states of the Indian Ocean Region—from South Africa to Australia—as contiguous, requiring cohesive objectives and programs from partner states if there is to be strategic success in favor of a free and open regional order.<sup>148</sup> India's main strategic evolution over the past decade has been with the United States. Both Washington and New Delhi have grown closer than ever before as both look to work together to counter an increasingly worrisome China. At the same time, both have sought to extend meaningful economic and security partnerships for the IOR. As mentioned previously, the Quad is the premier program in this effort, and it combines common security interests and collective resources of Japan and Australia for enhanced security and stability across the Indo-Pacific region and into the IOR.

#### **Japan**

Japan's strategic outlook on the Indian Ocean may be best reflected in how it participates in port and port infrastructure development. China took an early lead in constructing ports in the IOR ahead of Japan and India. The latter two have been playing catch-up since 2010. Given Japan's greater capital, resources, and a better reputation for building and delivering quality infrastructure, Tokyo is in a more advantageous position to compete than New Delhi. India, however, brings strong historical experience working closely with key states like Sri Lanka and Bangladesh, which add value for Japan.<sup>149</sup>

According to Deepa Ollapally and Satvik Pendyala:

*Tokyo's sweeping new national security strategy, released in December 2022, pointed to China's rising assertiveness in the Indo-Pacific as Japan's "greatest strategic challenge."<sup>150</sup> In turn, Japan's national defense strategy further notes that it must "deepen bilateral and multilateral defense exchanges" and will prioritize "the importance of stable use of sea lane and an energy and economic perspective" with coastal Indian Ocean states. Japan has been increasing its port investment portfolios across the Indian Ocean in recent years. Its major investments include Sri Lanka, Bangladesh, and Burma. Sri Lanka is where Japan began doing the most, with unexpected opportunities since the economic and political crises hit the island during 2022.<sup>151</sup>*

In 2023, Japan made Bangladesh one of the first South Asian states to gain special designation as a preferred recipient of the new Japan Official Security Assistance program in the Indo-Pacific region.<sup>152</sup>

### **Australia**

The 2024 Defence Strategy and 2024 Integrated Investment Program concluded that Australia no longer has a 10-year window of advance warning before the possible start of a conflict with China.<sup>153</sup> Thus, Canberra directed the Australian Defence Force to better focus scarce resources on limited priorities. It directed focus on the defense of Australia proper, deterrence of any attack along its northern approaches, protection of its Australia's main economic connection, and then a positive contribution to Indo-Pacific collective security and to a rules-based order. This strategy discards a largely expeditionary military force and in the face of tight fiscal times, prejudiced Australia's strategic focus on the Pacific, Southeast Asia, and the northeast Indian Ocean.<sup>154</sup> Until otherwise amended, the Australian security approach limits its focus in the IOR to the east and northeast.

Although Australia will prioritize its security relationships in the Quad and other partnerships toward homeland defense and the Western Pacific, its plans for the IOR focus on three key areas:

*maritime security, partnership with India (which has a major stake in the region and sees itself as the net security provider), and emphasis on the rules-based order. It has included—among other initiatives—joint patrols by Indian and Australian maritime surveillance aircraft (P-8s), establishment of a High Commission in the Maldives in 2023, participation with Japan and the United States in India's Malabar exercise in 2023, and close support for the Indian Ocean Rim Association (Australia is one of a handful of countries that seconds foreign ministry officials into the organization to try to strengthen its capabilities).<sup>155</sup>*

### **Summary and Forecast**

Great Power competition from the South China Sea to the Western IOR at mid-decade features intensifying Sino-American dynamics, a limited role for Russia, and the increasing prominence of India.

China's economic and infrastructure activities in Southeast Asia provide it with a substantial capability for political, diplomatic, and some security influence today and through the early 2030s. Beijing has the advantage of proximity and casts a long economic shadow. However, most countries in Southeast Asia mistrust Chinese motives and seek to retain an American security relationship for safety and stability. Southeast Asian states prefer to hedge against China while maintaining economic benefits from Beijing, but without taking sides in the Sino-American rivalry.

China's BRI projects across South Asia—especially those in Pakistan and Sri Lanka—have established a framework for political influence and a growing military presence there. Chinese gains in the IOR worry India and aggravate the Sino-Indian security dilemma long manifest in the Himalayan border dispute and the Indo-Pakistan military confrontation. Sino-Indian border tensions here seem likely to grow as India builds a maritime and air force in partnership with the United States and further aligns its security policies against China and in concert with the Quad.

The American strategic posture in Southeast Asia is simultaneously declining and in flux. Limited American economic trade relationships there enabled the expansion of Chinese influence from its infrastructure and commercial investments. At the same time, Southeast Asian states generally prefer some bilateral security relationship with Washington to none due to their mistrust of Chinese intentions. Economic activities across Southeast Asia evolved at an accelerating pace during 2023–2024, as American and Western business investments there leapt forward in response to manufacturing flight from China due to the deepening Sino-American economic rift. While the trend of increasing American investment into Southeast Asian manufacturing seems likely to continue, it will take until at least 2030 to determine if more tightly coupled U.S.–Southeast Asia supply chains will crowd out Chinese influence or enhance wider strategic relationships.

Washington's expanding array of strategic initiatives with India underscore its strategy for South Asia and the wider IOR. American activities with New Delhi aim to deepen technology and military interactions for an enhanced security partnership and interoperability on the way to elevating India to be the net security provider in the IOR. Simultaneously, the United States at mid-decade has taken an array of complementary market, infrastructure, and sociocultural investments with the smaller states of South Asia to enhance connectivity and dampen the appeal of massive Chinese investment and economic programs dominant there for more than a decade. Pakistan remains an outlier to this process, managed as a strategic partner for Beijing that has some positive utility for American strategy—but utility that must be balanced against the importance of India to the main features of the U.S. Free and Open Indo-Pacific strategy as applied to South Asia and the IOR. These American projects will not produce clear results for many years, thus requiring consistent application and patience.

Russia's influence in these regions is limited but not insignificant. Legacy Russian weapons systems in especially India and Vietnam give Moscow a history from which to generate political-military influence. Russia's global mastery of the information space and message distribution media give it an additional influence platform not enjoyed by China or the United States. Working with India and Vietnam, Moscow can play spoiler in the strategic competition between the United States and China in South or Southeast Asia. Moreover,

even though Russia appears most likely to play on side with Beijing's aspirations in these regions at mid-decade, there is every possibility that changing strategic priorities or regimes in Moscow or in Washington after 2025 could produce a dramatically different geopolitical outcome before the coming decade.

### **Final Conclusions: GPC in this Global South Arena**

South Asia, Southeast Asia, and the wider IOR frame an important arena for Great Power competition in the Global South. This chapter has reviewed and evaluated an array of critical mid-decade dynamics of GPC from the South China Sea to the Western IOR, with special attention to South Asia and Southeast Asian states.

Many of the competitive dynamics found in other areas of the Global South are present in these regions. A struggle for the future of global rules, norms, organizations, and institutions sits beneath the most conspicuous aspects of Great Power rivalry here. As with America's competitive posture across the wider Global South, Washington's preference for world order anchored around a rules-based framework featuring global freedom of transit, the free movement of goods and services, the peaceful resolution of disputes, and the primacy of individual rights over state dominance came under increasing duress from Chinese preferences and Russian narratives.

With Russian support, China has since at least 2021 promulgated an increasingly effective anti-U.S., pro-Beijing narrative in South and Southeast Asia. China proactively advances its Global Civilization Initiative with the premise that global "common aspirations" are "relative," and thus countries must "refrain from imposing their own values or models on others." In this narrative, China brands key elements of the U.S.-underwritten global liberal order as disrespectful of many national and tribal traditions across the Global South and a form of cultural hubris and enslavement over smaller states—and that must be resisted.

In its place, China offers the "community of common destiny"—a new global order with "Chinese characteristics." It promises the ascent of state sovereignty and collective order over individual human rights and political freedoms. Its framework has found traction in multiple states in South Asia and Southeast Asia, but not India. China's alternative strategic construct appears as a direct challenge to New Delhi's predominant influence in South Asia, its increasing economic and cultural reach into Southeast Asia, and its growing presence across the entire IOR. India views Chinese aims in its adjacent regions and around the globe with alarm. Thus, New Delhi is a logical partner for American competition with China in this area of the Global South and beyond. At mid-decade, India has vested in this partnership with the United States and against China's geostrategic aims. However, New Delhi remains a challenging strategic partner for the United States given India's divergent views about Russia and its resolve to retain strategic autonomy.

Thus, the framework for GPC in South and Southeast Asia will resemble the pattern emerging across much of the Global South, with a direct and important role for India at the fulcrum. India's preferences for managing Russia while contesting China's strategic aims across the Global South will test patience in Washington. At the same time, the successful exercise of American patience will go a long way to enlist the most powerful, non-Great

Power of the modern era for defense of the long-standing global rules-based order, helping to blunt much of the Chinese agenda.

The next two chapters of this book continue an assessment of GPC at mid-decade across major areas of the Global South. Chapter 14 considers mid-decade features of GPC in Africa and the Middle East and the prospects for GPC evolution there over the remainder of the decade. Chapter 15 then takes a similar look at another prominent region of the Global South: Latin America and the Caribbean.

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## Notes

<sup>1</sup> The Quad is a minilateral group of four countries: the United States, Australia, India, and Japan. See Sheila A. Smith, “The Quad in the Indo-Pacific: What to Know,” *Council on Foreign Relations*, May 27, 2021, <https://www.cfr.org/in-brief/quad-indo-pacific-what-know>.

<sup>2</sup> The Global South features multiple regions largely comprised of lesser developed countries. As defined in Chapter 1, the Global South commonly refers to the regions of the world dominated by lesser developed countries: South and Southeast Asia, the Middle East, Africa, Latin America, and portions of Oceania. See Miles Kenny, “Global North and Global South,” *Britannica*, February 21, 2025, <https://www.britannica.com/topic/Global-North-and-Global-South>. It is now a term widely used in international relations and global diplomacy, including in prominent strategic documents published by the United States, China, and Russia for most of the past decade. It is used with that understanding in this chapter and the book. Despite its prevalence and growing strategic relevance, some commentators still argue that the Global South is not a proper term or useful construct. See Louise Brooke-Holland, *What Is the Global South?* (London: House of Commons Library, July 11, 2024), <https://commonslibrary.parliament.uk/what-is-the-global-south/>; David Rising, “Everyone’s Talking About the Global South. But What Is It?” Associated Press, September 7, 2023, <https://apnews.com/article/what-is-global-south-19fa68cf8c60061e88d69f6f2270d98b;StewartPatrickandAlexandraHuggins,“TheTerm‘GlobalSouth’IsSurging.ItShouldBeRetired,”CarnegieEndowmentforInternationalPeace,August15,2023,https://carnegieendowment.org/posts/2023/08/the-term-global-south-is-surging-it-should-be-retired?lang=en>.

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<sup>8</sup> Tarik Oğuzlu, “Great Power Competition and the Global South,” *Foreign Policy*, July 13, 2024, <https://foreignpolicy.org/tr/great-power-competition-and-the-global-south/>.

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<sup>15</sup> “Population,” International Monetary Fund, 2025, <https://www.imf.org/external/datamapper/lp@weo/vnm/idn/phl/mmr/mys/khm/lao/tha/sgp/brn>.

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<sup>36</sup> Pérez.

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<sup>43</sup> “China Regional Snapshot: South Asia.”

<sup>44</sup> Sun, “China’s Strategic Thinking Toward the U.S. Role in the Indo-Pacific.”

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- <sup>47</sup> *Indo-Pacific Strategy of the United States*, 7, 9.
- <sup>48</sup> *Indo-Pacific Strategy of the United States*, 9–10.
- <sup>49</sup> *Indo-Pacific Strategy of the United States*, 16.
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