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## How Does the ‘Belt and Road Initiative’ Change Urbanisation Patterns in Southeast Asia?

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**Abstract.** This paper examines how Chinese transnational investments, as (re)framed in the Belt and Road Initiative (BRI), contribute to changes in urbanisation processes in Southeast Asia. On the ground, the BRI becomes contextualised and intersects with local and national development trajectories. The growing presence of Chinese actors in the region intensifies urban dynamics, especially in secondary cities and emerging urban sites, where the BRI is used as a lever for local internationalisation strategies. The heterogeneous nature of the links between the BRI and various large urban projects is demonstrated on the basis of case studies involving changing consortia of private and public Chinese and Southeast Asian actors. A regional approach allows us to identify connections and shared processes across Southeast Asian countries. It provides a historically grounded understanding of how the BRI incorporates long-term interactions with China and more recent partnerships in Southeast Asian countries. The paper paves the way for a research agenda that contests the image of China as a monolithic actor implementing the BRI uniformly and consistently. Further analyses are needed to examine systems and networks of actors as well as the local urban politics that affect the BRI on the ground.

**Keywords:** Belt and Road Initiative, Southeast Asia, China, urbanisation, urban projects

### 1. Deconstructing the Belt and Road Initiative as a global urban phenomenon

Since Xi Jinping, President of the People’s Republic of China, launched the Belt and Road Initiative (BRI) in 2013, much has been written about its objectives, implications and impact. Various scholars have explored the pluralistic character of the BRI in China. For example, He (2019) examined how domestic politics shape the BRI at the national scale, while Mierzejewski (2021) investigated how provincial governments locate cooperation and investment programmes under the umbrella of the BRI, sometimes in mutual competition. In its operations abroad, however, the BRI tends to be interpreted monolithically, as a vast new strategy that redefines the global geopolitical and economic balance (Zhou and Esteban, 2018). Some scholars have argued that it has geopolitical aspirations, bolstering the rise of China in the global arena and its ambitions of territorial control of strategic commercial routes (Aminjonov *et al.*, 2019). Others have interpreted the BRI as a response to excess Chinese economic development, to be relieved through the export of Chinese expertise, labour and capital. Sectoral analyses have been conducted in the areas of infrastructure (Stenberg, Ahearn and McConnell, 2017), trade (Gabusi, 2017), health diplomacy (Moritz, 2021) and cultural policies (Winter, 2019).

This paper examines how the BRI contributes to changes in urbanisation processes in South-east Asia. Although recent literature has highlighted the impact of the BRI on urbanisation, numerous aspects remain to be explored. The existing literature falls into four broad categories of analysis. First, policy-oriented papers on the implementation of the BRI, mainly authored by Chinese scholars, have considered the contribution of infrastructure and special economic zones (SEZs) to the development of individual Chinese provinces or China as a whole. Cities across the Eurasian continent are linked through ancient ‘Silk Road networks’ (Ni, Kamiya and Ding, 2017). Strengthening and redeveloping these networks can improve connectivity and thus a city’s ranking in the global urban hierarchy, so far headed by a small number of ‘world cities’ (SASS, 2019). Urban nodes in key BRI areas attract infrastructure investment, foster economic performance and facilitate trade (Chhetri *et al.*, 2018). Some scholars have focused on Chinese cities that may play a leading role in the development of the BRI, such as Wuhan (Yang, Chen and Zhu, 2015) and Xi’An (Li, 2017). Second, researchers have investigated the determinants of China’s foreign direct investments (FDIs) in urban contexts in Southeast Asia, including in infrastructure, logistics and real estate (Anderson *et al.*, 2020). This provides a top-down understanding of China’s changing macroeconomic policy objectives and ensuring capital outflow, but seldom considers the domestic drivers of China’s investment in built environments abroad. A third strand of literature focuses on urban projects that started before the launch of the BRI and only later came to be associated with it (Lyttleton and Nyíri, 2011; Moser, 2018; Moser and Avery, 2021); these authors thus did not use the BRI as an analytical lens. Finally, several recent papers have offered overall frameworks for urban sites located along BRI routes (Bunnell, 2021). At a time when coordinated global efforts are emerging to stimulate infrastructure development, these papers consider the urban-infrastructure nexus as crucial to understanding how the BRI is changing cities (Oakes, 2021). For example, Smith (2022) explored the urban dimensions of the BRI in relation to the dialectical movement between global infrastructural expansion and urban intensification in China’s west, tracing the origins of the BRI to a Chinese state-led effort to urbanise its western interior. Apostolopoulou (2020: 848) described BRI-driven urban transformations as a ‘new form of infrastructure-led authoritarian neoliberal urbanism’ that increases spatial fragmentation and social inequalities. Wiig and Silver (2019) proposed the concept of ‘Silk Road urbanization’ to describe the combination of established spaces of global finance, revived spaces of ancient trade and new spaces of extraction. Finally, Williams, Robinson and Bouzarovski (2020) suggest that the BRI is driving a particular form of urbanization that is bound up with the socio-spatial restructuring of capitalism.

Case studies of the BRI across continents tend to be framed as variations on the general theme of global urbanisation (Apostolopoulou, 2020). This paper proposes an alternative analytical framework, locating the BRI in the broader context of increasing Chinese transnational investment in Southeast Asia. The Southeast Asian peninsula is, given its proximity and strategic position in the development of BRI maritime corridors, of particular interest to China. The country has been the largest trading partner of the Association of Southeast Asian Nations (ASEAN) since 2011 (Liu and Zhou, 2019). In 2020, mainland China invested US\$7.62 billion in ASEAN countries (6.7% of total FDI), making it the fourth largest source of foreign investment after the US, Hong Kong and Japan. Of these

investments, 21% were in real estate and 6% in the construction sector (Fung, 2022). These figures raise questions about how Chinese investments contribute to urbanisation patterns in the region. Following Oake's (2021) invitation to move away from macro-interpretations of the BRI, we posit that the BRI triggers heterogeneous forms of urbanisation across different geographical contexts. For instance, housing built by Chinese developers in Southeast Asia mainly accommodates Chinese migrants, new inhabitants and more recently tourists, unlike in Africa, where Chinese entrepreneurship primarily targets the rising local middle classes (Dittgen and Chungu, 2019).

At a time when ASEAN countries are adopting competing geopolitical strategies, investments in infrastructure are restructuring urban territories and re-articulating urban and rural areas in densely populated regions. The analysis of the effects of the BRI on urbanisation patterns creates an opportunity for reexamining the concept of « *desakota* » (McGee, 2009). This concept has been broadly used to describe the formation of extended metropolitan regions in Southeast and East Asia. Nevertheless, it has generated inward-looking, nationally or regionally based, descriptions of urbanisation trends. In line with more recent approaches to *desakota* as a traveling concept (Ortega, 2020), our research aims to relocate, both conceptually and empirically, Southeast Asia in the intra and trans regional space defined by the trajectories of BRI-related investments. While urban population rates remain lower in Southeast Asia than in Europe or China, Southeast Asian cities have over the last three decades experienced intensified urban dynamics, bolstered by China's growing role in urban and industrial politics in secondary cities, small national capitals, rural sites in transition, and emerging urban sites in search of development levers. Large projects such as SEZs, industrial and infrastructure projects, and urban mega-projects initiated by local and national elites can be incorporated into the BRI through the involvement of Chinese private and public capital and expertise.

Although diplomacy and cooperation put these projects on the BRI map, they can be more or less closely tied to the BRI depending on the actors involved and the prestige of the official agreements. Connections can wither if Chinese companies withdraw, especially following local critiques and contestations of Chinese 'interference' (Esposito, 2020). The complexity and volatility of the links between urban projects and the BRI echoes the concept of 'useful fuzziness' with which Narins and Agnew (2020: 2) describe the blurred programmatic contours of the Chinese initiative. This fuzziness allows a wide range of actors, including Chinese leaders, businesspeople and citizens, to participate in crafting 'a new, as of yet undefined, geopolitical identity in the future' (Narins and Agnew, 2020: 2).

Our research considers the multiplicity of actors—private/public, national/local—and their evolving consortia involved in the re-assemblage of the BRI on the ground in urban Southeast Asia. We suggest that the urban implications of the BRI fall along a spectrum that encompasses different degrees and types of Chinese involvement, connecting in various ways with the production of infrastructure. Timelines, networks of actors, financial arrangements and the evolution thereof are scrutinised critically. We argue that the existing literature on the relationship between infrastructure and cities obscures localised processes of material and spatial production by assuming that urban spaces arise directly from the development of infrastructure itself. In urban Southeast Asia, the production of

urban spaces through real estate ‘bets’ on, the construction of BRI-related infrastructure. This entails the formation of new, urbanised territories and corridors on the periphery of existing urban centres. The lure of infrastructure contributes to land speculation and real-estate developments that wager on—and tactically exploit the promise of—improved urban connectivity in the future. On this basis, we call into question interpretations of the BRI as an infrastructure-based programme and a top-down projection of ‘Global China’s’ urban agency overseas (Shin, Zhao and Koh, 2022).

This paper has been co-written by a team of seven scholars involved in a research project on the role of the BRI in transforming Southeast Asian cities, funded by the French National Research Agency (ANR) between 2020 and 2024. Our intention here is to outline our theoretical position and main avenues of investigation, based on: our interpretation of the available literature on the BRI (in Chinese, English and French) ; the collection and analysis of media sources (in English and in national languages) about the implementation of BRI-related projects ; and the results of the first phase of fieldwork conducted since 2021 in Cambodia, Laos and Thailand. Despite COVID-19 related restrictions, we have been able to undertake a multi-sited research in Sihanoukville, Cambodia, in Vientiane, Laos, as well as Chiang Mai and the Eastern Economic Corridor (EEC), Thailand. These fieldworks have involved several methods of analysis, including formal and informal interviews with various categories of actors (officers, entrepreneurs, activists, local inhabitants, Chinese migrants, academics, and consultants), collection of primary sources about infrastructure and urban-related policies, programs, and projects, analysis of key legislation and national policies, onsite observation of territorial transformations, and inventory of relevant projects. Long-term engagement with the field is required to gain access to sensitive sources of information about highly contested projects. **Multi-sited and comparative research along these lines of inquiry is important to understand Southeast Asia’s urban trajectories and the networks of actors involved, in relation to China’s BRI.**

## **2. Assemblage thinking and urbanisation under Chinese influence**

We use ‘assemblage thinking’ to examine the diverse relations between urban projects and the BRI in Southeast Asia. To this end, we follow Richardson (2021), who conceptualised the BRI as a complex organisation composed of and constantly reproduced through a wide range of interconnected elements (capital, actors, infrastructure, environment, the military, etc.), and Alff (2020: 817), who posited that assemblage allows us to grasp the ‘emergent, dynamically changing and indeterminate character’ of the maritime Silk Road, as well as its ‘materialization in and between particular places...over time.’ We see urbanisation as one component of the assemblages brought together under the umbrella of the BRI, but also, conversely, as a constantly evolving series of assemblages of which the BRI is one component. This dual perspective locates urban production within constellations of multisectoral projects developed through the partnerships and investment programmes of a variety of (public and private) Chinese and local actors. Urbanisation can also be framed within the contextual assemblages that bring together previously unrelated projects and sites participating in intranational or regional investment strategies (Bunnell, 2021).

The BRI can be understood as a ‘political technology’ (Alff, 2020) that urban actors can use tactically to increase the legitimacy, visibility and scope of urban projects including but not limited to infrastructure initiatives, especially when balancing the short-term rationales of real-estate developments with the long-term and uncertain time horizons of the realisation of ambitious new modes of transport. At the same time, we recognise the limits of flat ontology as an analytical lens that tends to view urban sites as mere nodes along networks. Drawing on McFarlane’s (2009) concept of ‘translocal assemblage,’ we argue that urban sites have layers of depth that come into play in local re-assemblages of the BRI. Such sites can therefore be seen as fields of convergence for the knowledge, ideas, actors, capital, expertise and infrastructure that co-produce the urban. Non-human components, including patterns of urbanisation, real-estate market business models and the politics of urban planning, are imbued with high levels of agency that jointly determine how the BRI intersects with local trajectories of urbanisation. Urban sites also serve as the fields where contextual and evolutionary processes of assemblage reframe or even redefine the BRI and its scope in specific contexts, in relation not only to doctrines of economic rentability but also to spatial imaginaries and narratives of urban futures.

Assemblage thinking reminds us that urbanisation is a continuous process. It also draws attention to the interactions between the constituent components of urban sites at multiple scales. As conceptualised by Anderson and McFarlane (2011), urban assemblages are underpinned by unequal power dynamics that determine access to various types of resources. We argue that new territories in Southeast Asia are opening up to urbanisation processes co-shaped by growing Chinese investments in various forms—development programmes, real-estate projects, infrastructure projects, industrial projects, factories in and outside of SEZs, etc.—which interact with national and local strategies for urban and industrial transition. These territories are located in the peripheries of secondary cities and small national capitals; Chinese public and private actors tend to target the fringes of major urban centres and economic hubs with untapped economic and logistic potential, seeking to transform them into strategic areas for Chinese economic, political or diplomatic ambitions abroad. Often these cities have already been involved in regional integration programmes or internationally sponsored infrastructure projects.

There is a need to assess more finely how the BRI connects with, and benefits from, earlier regionalisation programs that have triggered urbanisation in Southeast Asia. The most dynamic of this kind has been the Greater Mekong Subregion (GMS) funded by the Asian Development Bank since 1992. The GMS aims to expand trade and foster connectivity via five north-south and east-west economic corridors passing through Cambodia, Laos Thailand, Myanmar, Vietnam, as well as the Chinese Southern provinces of Yunnan and Guangxi (Taillard, 2009, 2019). Transnational corridors have given critical impulse to marginalised border towns. The latter have reduced their dependence on national capitals and host new international functions (Fau, Khonthapane & Taillard, 2014). Authors have examined how the BRI intersects the GMS from a political economy perspective (inter al. Soong, 2016; Raymond, 2021). Our research focuses, instead, on how infrastructure projects from several, overlapping sources, are layered on the ground of territories involved in urban transition. In

this way, Chinese investment contributes to diversified patterns of urbanisation and rearticulates the already complex and multifaceted relations between existing cities, emerging urban sites and newly urbanising territories. For instance, the massive influx of Chinese investments in Vientiane, the capital of Laos, rearticulates urban expansion as set out in the 2030 Master Plan around new and ambitious transport infrastructure and a series of industrial-cum-urban SEZs. In Cambodia, political cooperation between the Chinese and Cambodian governments since the 2000s and growing Chinese investment since the 2010s have accelerated changes in urban development, not only in the capital of Phnom Penh (Fauveaud, 2020) but also in secondary urban centres such as Sihanoukville. The BRI has not radically transformed the patterns of territorial development initiated by the GMS in the 1990s and pursued under JICA technical assistance during the 2000s. However, the massive scale of Chinese investments has accelerated the transformation of the city and its region in unprecedented ways. Sihanoukville has become a logistics hub thanks to major investments in port, transport and industrial infrastructure. At the same time, the booming gaming and tourist industries have attracted investment in real estate, including the construction of condominium towers and large-scale urban projects which target Chinese publics. As a result, Sihanoukville, once a small town of about 40,000 people, has become the second largest city in Cambodia, with a population of over 250,000.

The BRI thus fosters new ‘hot spots’ for investment, depending on the availability of efficient transportation and on national socioeconomic development policies that lay the groundwork investment through the mass privatisation of land. These policies see cities as the nodal infrastructure of economic growth; urbanisation processes, especially those revolving around small or subaltern urban centres, ‘bet on’ the future economic growth that BRI-related infrastructure may generate. Our research raises the question of whether, and to what extent, the BRI functions in two ways: as a lever for urbanisation processes driven by capital, but also as a geopolitical framework that urban actors from Southeast Asia and China use to reinforce policies for urban internationalisation. Our multisite approach aims to overcome the methodological nationalism of urban research on Southeast Asia by seeking ‘inter-urban connections’ (Bunnell, 2021) and shared regional tendencies. It explores how urban localities participate in specific sets of processes, negotiations and grassroots practices that are not mere variations on the general theme of the BRI, but can contribute to the (re)theorisation of the role of the BRI in urban transformations.

### **3. The BRI in context: Chinese projection in urban environments of Southeast Asia**

To identify the drivers of Chinese investments in the urban environments of Southeast Asia, we locate the BRI in the context of Chinese foreign policies of recent decades that have shaped the country’s projection overseas. These policies have mainly been interpreted in terms of domestic economic motivations. Less attention has been paid to state policy responses to China’s internal challenges and their consequences for overseas investment patterns. We contend that the built environments of Southeast Asia have been impacted by China’s macroeconomic policy shifts during four main phases.

The first phase unfolded with the ‘go out’ policy, particularly after China joined the WTO in 2001 and its exporting regions were confronted with increased labour and land costs (Yang, 2016). To

alleviate the pressure, the state encouraged cross-border relocation of labour-intensive industries. State-owned manufacturing enterprises became the main drivers of foreign investments (Song et al., 2011), targeting SEZs in Southeast Asia. SEZs with ‘clean’ industries subsequently became hotbeds of urban development in countries such as Cambodia, replicating China’s initial urbanisation model (Wu, 2015).

The second phase of China’s macroeconomic policy abroad saw an acceleration of foreign investments. In the aftermath of the 2008 global financial crisis, the Chinese government introduced an ambitious RMB 4 trillion stimulus plan that included large-scale investments financed through bank loans (Naughton, 2009). Beyond serving as a shock absorber, the stimulus package was intended to upgrade the production capacity of Chinese industry. Local governments began investing heavily in transport and power infrastructure (Wong, 2011), with more large-scale urban projects springing up to exploit the value of the land serviced by such infrastructure (Aveline-Dubach, 2020). If this was a boon for state infrastructure and real-estate companies, it also caused a rapid escalation in land values in major Chinese cities. The widespread availability of credit simultaneously generated massive over-capacity in infrastructure, construction materials and real estate, leading to the proliferation of vacant neighbourhoods or ‘ghost cities’ (Sorace and Hurst, 2016). As a result, Chinese firms turned their focus outwards, seeking joint ventures in which to invest with well-connected firms from the host countries (Jin *et al.*, 2021). These included private developers working on large-scale urban projects, notably in the state of Johor in Malaysia, which were thus able to leverage Shenzhen’s success in industrial and urban development.

The third shift of China’s macroeconomic policy manifested itself in the form of the BRI. In 2013, amid ballooning debt and real-estate prices, China experienced an economic slowdown that threatened to turn into a recession. The upgrading of the economy was proceeding too slowly and was hampered by the excess capacity in heavy industry, infrastructure and real estate. The BRI provided for the export of high-end Chinese technology, equipment, technical know-how and standards in infrastructure to BRI countries, especially in Asia. At the same time, it fostered the transfer of low-tech industries and firms involved in the production of construction materials to Southeast Asia (OECD, 2018). The main players in the dissemination of Chinese technology and technical standards were powerful state-owned contracting companies which had, since the 1980s, gradually built up their capacity for high-end construction and engineering services in the Middle East and Africa (Zhang, 2021). However, the BRI also opened up avenues for private firms to operate overseas. Private developers were encouraged to scale up their real-estate projects abroad to relieve pressure on the overheated domestic property market (Aveline-Dubach, 2020). Chinese household capital was then channelled into a growing number of large-scale housing and urban projects, especially in Southeast Asia and Australia (Ma, 2021), while corporate capital focused on office and commercial facilities. Our analysis of the China Global Investment Tracker database, produced by the American Enterprise Institute, revealed a sharp increase in large Chinese property investments<sup>i</sup> from 2013 to 2017 (see table). In Southeast Asia, these investments primarily targeted SEZs and industrial zones in Cambodia, Indonesia and Laos; flagship architectural projects such as the Chinese Cultural Centre of Singapore; high-



end condominium projects in Singapore and Malaysia; and the acquisition of property portfolios in Singapore. The SEZs aside, major investments were thus clustered in the safe, healthy economies of Singapore and Malaysia, where large developers like Country Garden built enclaves such as Forest City, targeting wealthy Chinese migrants.

The fourth macroeconomic policy shift was initiated when, after several years of considerable capital outflow, the Chinese government was alarmed by the downward trend in the country's foreign-exchange reserves and the resulting risk of exchange-rate instability. In 2017, 'irrational' outbound investment in housing markets was curbed with a view to redirecting capital into more productive sectors (J. Zhang et al., 2019). As Xi Jinping had made clear for the domestic housing market, 'houses are built to be lived in, not for speculation.' In 2018, Chinese outbound investment in residential property fell. At the same time, Chinese banks tightened their lending rules, further hindering the capacity of individuals and companies to invest in real estate abroad.

The government restrictions and ensuing downturn in China's property markets has not, however, dampened Chinese developers' and buyers' eagerness to invest in the stable economies of Singapore and Japan as well as in nearby Southeast Asian countries (Paik, 2019). High-net-worth Chinese tend to view these as attractive locations for migration or second homes thanks to the low risk associated with investment and pleasant living environments. Chinese investment in and trade with Southeast Asian countries is further fostered by geographical proximity, cultural and linguistic ties, a high number of Chinese speakers (Liang, Zhou and Liu, 2019) and diplomatic and business connections (Verver and Dahles, 2013). Such formal and informal overseas networks (Liu and Zhou, 2019) help in overcoming the barriers of the occasionally hostile political and institutional environments in the host societies and contribute to shaping a flexible, networked form of Chinese capitalism.

#### **4. Chinese transnational agency in urbanising Southeast Asia**

The large-scale, Chinese-backed urban programmes unfolding in urbanising Southeast Asia have different forms and degrees of association with the BRI. These can range from official government contracts for SEZs to lofty claims by individual entrepreneurs that are not borne out in the form of government funding or diplomatic ties.

The Saysettha Development Zone is one project that enjoys a strong and durable association with the BRI. Located in Vientiane, the capital of Laos, Saysettha has been a designated 'state-level' SEZ since 2011, the highest in the hierarchy established by Laotian legislation. In 2012, the Laotian and Chinese governments signed an agreement identifying Saysettha as a 'priority project' within the BRI. The same year, the Chinese Ministry of Commerce listed Saysettha as a 'national-level overseas economic and trade cooperation zone' and committed an annual development subsidy of RMB 200 to 300 million (approximately €27 to €41 million), as well as a total loan of RMB 2 billion (€274 million). In 2017, Xi Jinping wrote an article in the Laotian press emphasising Saysettha's importance in the development of the Laos-China Economic Corridor (Xi Jinping, 2017). Saysettha is considered one of the new sub-centres of the Laotian capital, but also a 'new city' in line with the concept of 'city-industry integration' (Mao, Liu, Zhuang, Li, 2018). Combining industrial, residential and com-

mercial districts on a surface area of 1000 ha, it is owned by a joint venture of the Vientiane Municipality and the Yunnan Overseas Investment Co. Ltd. (YOIC). This partnership dates from 2009, when YOIC's parent company, the Yunnan Construction and Investment Holding Group, was charged with building the stadium for the Southeast Asian Games in Vientiane with funding granted by the China Development Bank in 2006 (Musil, Peyronnie, and Sisoulath, 2015).

Another SEZ in Vientiane, the That Luang Development Zone, does not benefit from the same level of official recognition. That Luang combines an urban enclave with residential and commercial functions but no industry. It is located on a 99 year land concession of 365 ha, which also formed part of the reimbursement scheme for the 2006 loan from the China Development Bank. With the concession granted to the Shanghai-based private real-estate developer Wanfeng, the local desirability of the zone has twice been called into question: in 2012, when rumours arose (contested by Wanfeng) that That Luang was set to become a 'Chinatown,' housing families of Chinese migrants (Kanhlikham, 2021); and in 2020, when Wanfeng proposed the construction of a colossal Buddha statue (Strangio, 2021). Not only would this statue rise above Vientiane's most sacred symbol and existing tallest structure, the nearby That Luang temple, but it was designed in the style of China's Mahayana Buddhism rather than Theravada Buddhism, which is widespread in Laos.

Despite their differing degrees of association with the BRI, Saysettha and That Luang are both party to the politics of cooperation between Laos and China as shaped before the launch of the BRI, when Laos accepted Chinese assistance and capital for the 2009 Southeast Asian Games. Since then, the Laotian policy 'Turning Land into Capital' has encouraged the granting of land concessions to private (especially Chinese) corporations as a means of generating capital and facilitating development (Keobountham, 2020). The BRI is recomposed on the ground through this national policy and earlier internationalisation strategies centred on the hosting of the Games. It also introduces a new order, however, locating the politics of cooperation between Laos and China in a discourse of trans-continental connectivity. At the same time, it rescales the scope of urban and territorial development realised with foreign assistance to large areas of privatised land surrounding Vientiane: six SEZs in total, developed in partnership with foreign companies (three Chinese, one Taiwanese, one Vietnamese and one Malaysian).

SEZs have become a major policy tool to meet the planning objectives set out in the Vientiane Master Plan until 2030, designed with the technical assistance of the Japanese International Development Agency (JICA). The master plan proposes the development of several new urban centres to avoid the congestion of the city centre (JICA, 2011). The establishment of urban-cum-industrial SEZs circumvents the overlapping administrative competencies between various levels of national and local urban-planning authorities, while simultaneously paving the way for the reception of foreign investment. In this way, SEZs can be viewed as 'spaces of exception' (Ong, 2016) that rely on the manipulation of laws or on the adoption of new laws creating a 'spatial capital accumulation machine' (Bach, 2011: 100) that deregulates territorial management and eases the flow and territorialisation of investment. This model was successfully implemented in experiments in China in the 1980s, when large zones comprising manufacturing, commerce, tourism and real estate were established in less develo-

ped regions such as Shenzhen and Zhuhai (Wong, 1987). As a new industrial city with an export-processing hub, Shenzhen rapidly came to serve as a model both in China and abroad. SEZ are major drivers of the urban expansion of Vientiane, where several large scale architectural and urban complexes including housing, hotels, and commercial functions have been established. These complexes go hand in hand with, and trigger, other developments of the same kind, located outside of the SEZ, many of which are implemented by Lao-Chinese joint venture. The commercial success of these projects depends on the expected improvement in connectivity allowed by the Lao-Chinese railway, which has been inaugurated in April 2023 against the delays caused by the COVID-19 pandemics.

In Sihanoukville, the urban aspirations of the elites rely on a provincial master plan commissioned in 2019 by the Ministry of Economy and Finance and Prime Minister Hun Sen to the Urban Planning Design Institute of Shenzhen (UPDIS). The aim was to transform the city into ‘a modern sprawling metropolis’ by means of a multi-purpose SEZ modelled after Shenzhen. Since 2010, when the Cambodian government announced its intention to turn Sihanoukville into a Cambodian laboratory for free trade and investment, several SEZs had already been developed there in partnership between Cambodian and foreign, especially Chinese, actors. In 2015, the Council of Ministers approved the Cambodia Industrial Development Policy 2015–2025, entitled *Market Orientation and Enabling Environment for Industrial Development*, which proposed transforming Sihanoukville province into a ‘Multi-purpose Special Economic Zone’ (Royal Government of Cambodia, 2015). This lay the foundation for enhanced technical cooperation between China and Cambodia in the development of Sihanoukville. UPDIS was hired with the help of the United Nations Industrial Development Organization—a strong supporter of SEZs in developing countries since the 1990s—and the Shenzhen Foundation for International Exchange and Cooperation (SFIEC). Public companies based in Shenzhen are privileged partners in this technical cooperation. Although the Cambodian government recognises the differences between the economic development trajectories of China and Cambodia, it undoubtedly aspires to draw inspiration from the Chinese experience of economic opening and territorial development. While it is too early to assess their impact on the urban development of Sihanoukville, it is clear that the Chinese-backed SEZs are intended to trigger the formation of an extended urban-cum-industrial region and accelerate urbanisation processes in the province and across southern Cambodia as a whole.

The current Chinese presence in Cambodia is the culmination of a steady increase over the past thirty years. Chinese actors at home, in Cambodia and elsewhere benefit from the political proximity between the Chinese and Cambodian regimes. Chinese and Khmer leaders have long maintained privileged relationships. Hun Sen and China have collaborated closely since the 1997 coup (Mengin, 2007), with China’s economic and political support to Cambodia gradually increasing. It has been the largest provider of foreign investments in Cambodia since 2010. Moreover, it perceives Cambodia as an ally that can help to expand Chinese influence across Southeast Asia (Bi, 2021). These processes, which predate the BRI, have played a major role in increasing the influence of Chinese enterprises and diasporas. Sino-Cambodians have become important economic actors in their

role as mediators with Chinese investors (Tan and Grillot, 2018). Since the 1990s, the opening of the Cambodian economy has allowed for the migration of Chinese business people previously based in China, Hong Kong, Taiwan and other Southeast Asian countries. These businesspeople rely on local Chinese associations and chambers of commerce to develop their networks and activities, benefiting at the same time from the political and economic influence of Chinese descendants and the Sino-Khmer elite (Siphath, 2019). Some have integrated into the circles of the local elite and wield economic influence themselves, especially in real estate (Fauveaud, 2016, 2020). Over the past decade, major Chinese developers of condominium and large-scale real-estate projects have been active in Phnom Penh. Our investigations show that these projects rely on partnerships with Cambodian companies and/or local tycoons to gain access to local resources, especially land, while requiring negotiation with central and local authorities on legal and administrative aspects. As such, they are the result of long-term interpersonal, institutional and business relationships at various scales—from the local to the transnational—between Cambodian, Sino-Khmer, Chinese and foreign actors.

Wider urban aspirations expressed by provincial urban planning contrast with the haphazard casino industry and real estate economy, with their short-term, speculative goals. Since the BRI has been launched, political and economic relations between Chinese and Cambodian actors have intensified while Chinese public and private investments in Cambodia have increased. Cambodian tycoons and officials perceive this wave of financial flows as an opportunity to update their capital accumulation strategies. They establish land deals and new-joint-ventures (Fauveaud, 2023). Since 2017, the surge of investments and projects has transformed Sihanoukville into a regional hub for illegal activities perpetrated by Chinese nationals, including money laundering, human trafficking, and online scams<sup>ii</sup> (Farrelly, Dawkins, & Deegan, 2022; Keeton-Olsen & Dara, 2022; Kennedy, Southern, & Yan, 2022). During interviews, Cambodian representatives explained that the Chinese Government has been increasingly worried, because crimes by Chinese nationals, the casino economy targeting Chinese tourists, and money smuggling from China tarnish the virtuous image of Chinese soft power abroad. The Cambodian Government banned online gambling activities since 2019. As a consequence, hundreds of thousands Chinese workers left Sihanoukville. Additionally, the sudden halt of investments caused by the COVID-19 pandemics froze urban development of Sihanoukville. Economic activities have slowly recovered since the end of 2022. However, approximately 400 buildings developed by Chinese companies have been left unfinished. This has become a primary concern for public authorities: not only they are afraid about the danger of collapsing, but they have to deal with the Cambodian landowners, who complain about the uncertainties of land occupation. Besides, the sudden departure of Chinese workers and businesses in 2020 increased the insecurity of small owners and shopkeepers who had indebted themselves to develop their businesses. The “boom and burst” character of urban development in Sihanoukville raises questions about the long-term effects on urban development of the present speed and scale of BRI related projects. During our fieldworks in 2022 and 2023, we witnessed that criminality remains a driving force of Sihanoukville’s economy, in spite of official statements claiming an alleged recent drop of illegal activities.

Unlike Sihanoukville, the impact of COVID-19 on the implementation of the Eastern Economic Corridor (EEC) in Thailand is not strikingly visible in the urban cum industrial landscapes. It is also minimised by the local and national officers whom we have interviewed. The number of Chinese projects demanding BOI incentives along the corridor has steadily increased between 2012 and 2019 (from 22 to 273). In 2019 alone, the total of the demands to the BOI counted 429 projects, 63% of which were Chinese (Ngampramuan and Piboonsate, 2021). According to the EEC Office, investments demands continued to flock to the Board of Investments (BOI) all during the pandemics, even if constructions works had to be temporarily interrupted.

The EEC takes ground on the « Eastern Seaboard » that exploited the gas field discovered in the 1980s in the Gulf of Thailand (IEAT, 1989), developed a strong industrial base in the area, especially in the petrochemical sector, and built the two ports of Laem Chabang and Map Ta Phut. The Eastern Seaboard also triggered the formation of new urban areas close to these ports, called « new cities », as well as housing clusters for industrial workers. Backed by Prayuth Chan-O-Cha's military government, the EEC relies and further expands this strong infrastructural base. It includes a project for a high-speed rail (HSR) connecting Bangkok to Rayong, land reclamation for the expansion of the two ports, and the commercial development of the former military airport of U-Tapao. It renews and magnifies similar patterns of urban development, with the creation of housing complexes for low income workers, housing enclaves (*mu baan*) for the middle class, as well as a series of « new cities », one of which directly managed by the EEC Office, will target the expected new migrant population.

Because of the longterm development timeline of the EEC (30-40 years) and the strong infrastructural and industrial base already established in the region, the COVID-19 is seen as an annoying interruption, a retardant of well-driven dynamics, rather than as a game changer. This perception is reinforced by the discourse of national ownership and control over the EEC, and multi-laterality of the foreign investment sources, which tend to minimise (at least in official discourses) the weight of Chinese capitals.

Nevertheless, the BOI positioned the EEC within the BRI,<sup>iii</sup> because the HSR will connect to the BRI routes between Bangkok, Nong Khai and, eventually, Laos (currently under development with Chinese assistance). Policies by the EEC Office assert that, thanks to its connection with the BRI, the EEC has the potential to become a connectivity hub in the heart of Southeast Asia. Chinese companies and financial flows are numerous and involved in key projects. Among these, the U-Tapao airport expansion has received assistance from the Asian Infrastructure Investment Bank (AIIB) in 2022. In the Thai-Chinese Rayong Industrial Zone, developed in partnership between the companies Amata (Thai) and Holley (Chinese), are established 150 Chinese firms (Song et al., 2021). This zone functions as a platform for the interaction of Thai and Chinese actors and connects transnational Thai-Chinese productive economy to global value chains (Zhi, Weidong, & Tao, 2021). The joint venture also built a « chinatown » for housing and providing services to almost 2000 factory workers, 90% of which are Chinese, according to the town's management.

However, discourses by Thai officials tend to underrate the role and weight of Chinese expertise and capitals. When questioned about the cooperation with Zhengzhou Airport Economic Zone and China Energy Corporation for an aviation city (« aerropolis ») that will surround the airport of U-Tapao<sup>iv</sup>, EEC Officers answered that « Chinese are only one among the nationalities of the many foreign investors that the EEC plans like to attract ». In a similar vein, a consultant for Chinese firms looking to settle in Thailand told us, Thai actors look for successful solutions irrespective of their origins. When involved in large-scale projects along the corridor, Chinese companies join multi-stakeholders consortia where Thai partners outnumber them. In Laem Chabang's third expansion phase, China Harbour Engineering Company is responsible for land reclamation, under the Port Authority of Thailand. It uses a Chinese constructor, but hired a Thai consultant for the assessments required by the law. After completion, it will manage the port together with Gulf Energy Thailand, PTT, and GPC, itself a joint-venture of Thai companies. Our fieldwork revealed that these arrangements reduce the visibility of the Chinese implication in urban and territorial politics, even if their decisional role in the implementation of the construction works remains important. These arrangements contribute to dissimulate illicit activities concerning the lucrative but unregulated sector of the management of waste, a part of which comes from China. Henceforth, the BRI can be seen as a co-production (Oliveira and Myers, 2021) : local elites opportunistically seek Chinese cooperation as an effective mean — for the availability and flexibility of the funding sources and the internationalisation strategies of many small scale Chinese companies — of implementing a locally and nationally grounded development strategy.

## **5. Conclusion**

This paper has outlined our research position and the guiding concepts in our examination of the role of the BRI, and more broadly Chinese transnational investments, in urbanisation processes in Southeast Asia. We have argued that the implementation of the BRI is path dependent: Chinese foreign policies, deep cultural ties and multi-layered political and economic interactions co-determine how transnational investments become contextualised and intersect with local and national urban politics and development strategies.

Our fieldworks have revealed that urban actors use SEZ as devices to transform the patterns and rationalities that regulate urbanisation. Future research will examine if and where Chinese actors and capitals induce specific and new forms of regulation or, alternatively, if the evolution of regulation systems depend (more broadly) on the influx of foreign investments and the multi-directional circulation of the SEZ as a planning tool. Furthermore, large scale, long term infrastructure projects transform the linkages between urbanisation and industrialisation, especially by expanding the scale of the developments, and intensifying transnational relations between Chinese and local actors. Finally, insights from our case studies show high degrees of specificity in how Chinese forms of involvement are assembled on the ground(s), e.g. the variable impact of the COVID-19 pandemics on BRI-related urbanisation processes, the (in)visibility of Chinese investment and their discursive framing in official discourses, and the types of activities taking place in urbanising territories under Chinese in-

fluence. On these bases, this paper opens up an empirically informed, locally grounded, and comparative research agenda across Southeast Asia. This agenda pays attention to the sociopolitical dynamics between various groups (including experts, investors, local elites, tourists, activists and local communities...) that have agency in the evolving patterns of urbanisation of cities and sites placed under Chinese influence.

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<sup>i</sup> Starting in 2005, the database tracks Chinese investments of more than US\$100 million. See [www.aei.org/china-global-investment-tracker/](http://www.aei.org/china-global-investment-tracker/).

<sup>ii</sup> See <https://cyberscammonitor.net/>.

<sup>iii</sup> See [www.prnewswire.com/news-releases/thailand-targets-to-connect-belt-and-road-initiative-and-eeec-to-boost-investment-opportunities-in-asean-300702545.html](http://www.prnewswire.com/news-releases/thailand-targets-to-connect-belt-and-road-initiative-and-eeec-to-boost-investment-opportunities-in-asean-300702545.html)

<sup>iv</sup> See <https://www.bangkokpost.com/thailand/general/1534938/u-tapao-takes-cues-from-chinese-aero-tropolis>