

# European Union's Response to the Belt and Road Initiative in Southeast Asia

Michal Fliegel\*

*Bachelor's Program of International Business Administration (BIBA), Feng Chia University, Taiwan*

Yu-Kuan Lin

*Bachelor's Program of International Business Administration (BIBA), Feng Chia University, Taiwan*

---

## Abstract

This article analyzes the behavior of China and the EU towards ASEAN countries in the South China Sea. Beijing has been increasing its regional presence in hard and soft ways. However, Brussels also wants to deepen its regional partnerships, especially with like-minded countries. Both actors have overlapping economic and political interests in the area. These will be interpreted from the rational choice theoretical perspective. China and the EU use mainly infrastructural projects as a means of increasing their influence over Brunei, Malaysia, Vietnam and Philippines. In China's case it is via the Belt and Road Initiative, and the EU has the Global Gateway. Foreign policy analysis is employed as a methodological tool in putting forward the goals, means, and projects implemented. Trading data, reports, and opinion polls show whether China or the EU is more successful. This research likewise shines more light on specific behaviors and the overall functioning of both initiatives.

Keywords: European Union, China, Southeast Asia, Rational Choice Theory, Foreign Policy Analysis

JEL Classifications: F5

---

---

\*Corresponding author

E-mail: mfliegel@o365.fcu.edu.tw

Address: Bachelor's Program of International Business Administration (BIBA), Feng Chia University, Taiwan, No. 100 Wenhua Road, Xitun Dist., Taichung 407102, Taiwan.

## 1. Introduction

In recent years China has been making headlines with its global Belt and Road Initiative (BRI). This is mostly an infrastructural project that first began as an imitation of the Ancient Silk Road connecting Asia with Europe. It has now extended to the wider world. However, Asia is still the pivotal area as it is China's home region. Much of the associated trade is conducted over water, especially the South China Sea (SCS) (Yu & Jon, 2021). At the same time this has become a contentious area where both regional and extra-regional economic and political interests meet (Hu, 2023). The topic has thus transcended into the realm of international political economy.

The BRI caught the attention of the European Union (EU). It has realized that it too needs a more comprehensive global engagement strategy. The EU does not want to fall behind other major actors such as China, America, Japan, etc. This has recently led to formulating its own foreign policy plan which is called the Global Gateway Initiative (Tagliapietra, 2024). The multifaceted strategy, among other areas, includes reaching out more comprehensively to the far away Association of Southeast Asian Nations (ASEAN) markets. The initiative is mostly economic but includes the political aspect of seeking to further develop ties with like-minded partners (Furness & Keijzer, 2022).

Well before the BRI was introduced China has been proclaiming sovereignty over much of the South China Sea area. It has been continually ramping up its presence. This has led to contention with several Southeast Asian countries including Brunei, Malaysia, Vietnam and the Philippines. One strategy that China uses is providing developmental projects via the BRI to these countries to shift the focus away from ongoing territorial disputes. In other words, it is trying to make trading the better alternative outweighing political issues. However, this has led to some analysts labeling China's behavior as economic coercion (Hosoya & Kundnani, 2024, pp. 83–90).

As for the EU, apart from its value-based diplomacy, it is foremost an economic organization with extensive trade interests. That is why Brussels seeks to engage with all world regions including Southeast Asia (Furness & Keijzer, 2022). The strategy is to create strong lasting ties with as many countries as possible. At the same time, to be able to actively compete with other significant actors over influence (Hosoya & Kundnani, 2024, pp. 83–90). This paper therefore utilizes rational choice as a theoretical tool to address the behavior of the Europeans and Chinese towards the selected ASEAN countries.

Foreign policy analysis will serve as the method for analyzing China's and the EU's relationship with Brunei, Malaysia, Vietnam and the Philippines. Both large actors want to have influence in the South China Sea area. They do so mainly by providing the recipient countries with economic incentives (Hosoya & Kundnani, 2024, pp. 23–54). To better understand the situation their objectives, tools employed, and main projects implemented will be put forward. These will then be evaluated using trading data, reports, and opinion polls conducted in the four ASEAN countries. The results are going to show how China and the EU behave and who is more successful in exerting influence. This study will also shine more light on how the two initiatives function in the regional context.

## **2. Literature Review**

Scholars have been observing engagements of China and the EU with Southeast Asian countries from several different perspectives. When it comes to the South China Sea area much literature is devoted to security implications. Possible balancing strategies are often discussed on the side of ASEAN countries such as in “Examining ASEAN’s effectiveness in managing SCS Disputes” (Hu, 2023). China’s wide range of economic activities are likewise extensively covered. Many reports have been made on the different types of projects carried out in Southeast Asian Countries. For example, Carnegie provides a look into China’s economic activities in ASEAN countries and discusses their impact. Nations within the SCS area tend to be listed as impacted more negatively than others (Carnegie China, 2023).

Although receiving less coverage, the European Union is increasingly mentioned in literature as another influential player within the discussed region (Hu, 2023). As Furness and Keijzer mention, the EU needs to better connect with far away regions. Outer Europe and nearby African countries are no longer enough. The EU needs to go beyond these traditional destinations if it wants to remain competitive with respect to large players such as China (Furness & Keijzer, 2022). Setting up the Global Gateway Initiative is not only seen as an important future economic engagement strategy. Tagliapietra points out that the EU also needs it to better promote its core values, help build social infrastructure and globally enact its sustainability drive (Tagliapietra, 2024).

Several works have discussed the topic of comparing the Belt and Road Initiative with the Global Gateway. For example, “China’s BRI and EU Global Gateway Experiences with Public-Private Partnerships for Infrastructure Projects in Africa: Assessing Impact and Significance”. It highlights some of the most influential projects by both sides, while pointing out that the EU lags behind in infrastructure projects in comparison with China (Insisa, 2024). The Central European Institute of Asian Studies has looked into the ASEAN region from a financial and sustainability perspective. As is the case in Africa, the EU lags behind China. Although there are many issues associated with BRI projects, Beijing’s drive still remains rather unchallenged (Lupi, 2025). There are, however, few such works, and they offer limited scope. This paper helps fill the gap with a politico-economic analysis while adding the perspectives of people living in the four selected ASEAN countries.

## **3. Theory and Methodology**

Over time, as the realms of politics and economics develop, so do their conceptualizations. One particular perspective gained much traction in political economy. It is that decisionmakers oftentimes make their judgements based on calculating different outcomes. They then select the most beneficial scenario, which is otherwise referred to as rational behavior. When everyone uses this same logic in drafting policies it creates an overall competitive environment which in return facilitates progress. The concept of rationality has multidisciplinary usage. It transcends not only different fields but also levels of analysis (Kahler, 1998, pp. 919–924, 939–940). China with its BRI and the EU with the Global Gateway follow similar logic. They are making calculated moves in achieving the best

outcomes for themselves. This is why this research paper assumes the rational choice theoretical perspective.

China and the European Union have their own goals and aspirations. The same goes for the South China Sea area. They have been forming strategies and actions to meet their ends. Achieving them requires navigating a complex series of interactions. These include national interests, intergovernmental relations and the international system as a whole. Leaderships of both actors take all of these variables into account while planning their moves. Foreign policy analysis (FPA) will therefore be used as a methodological tool (Morin & Paquin, 2018, pp. 1–10). This approach seeks to explain the motivations of why actors behave in certain ways. For instance, among the studied ASEAN countries, China mostly uses trade in pushing forward its agenda instead of physical force. It has the capabilities to employ both but mostly chooses not to use the latter. This stems from calculated behavior, i.e. rationality, which is considered an essential component of FPA (Pekkanen et al., 2014, pp. 1–21). In this case it is more beneficial to use trade as a way to gain influence.

To find the motivations behind the Belt and Road Initiative and the Global Gateway their official statements of purpose are going to be put forward. These mainly come from primary governmental sources. Then, the main projects included in both initiatives are going to be outlined, along with trading data, and various reports coming from primary and secondary sources. Since both BRI and Global Gateway are relatively new, they are monitored since their formation till present. Hard data will show the levels of ongoing interaction. Furthermore, surveys are used to assess public opinion on China and the EU among the people of Brunei, Malaysia, Vietnam and the Philippines. These come from the ASEAN Studies Center which has conducted them across all ASEAN countries over the past several years.

Based on the literature review it is expected for China to have a relatively large influence on the studied countries. Being its home region, this area is especially important for national development. However, certain controversies are expected, especially when it comes to overlapping territorial claims. As for the European Union, this is a very distant region but not one completely without presence. Brussels clearly wants the situation to change but it is quite early to expect any significant outcomes from the Global Gateway. It is likewise questionable to what extent Brunei, Malaysia, Vietnam and the Philippines qualify as the so-called like-minded partners. Overall, China's influence and presence is expected to be much larger than that of the European Union.

#### **4. South China Sea Area**

It has become the norm that South China Sea often makes the headlines of world news. It has multidimensional regional and extra regional implications. This is due to vast strategic importance. The area is surrounded by large populations who have interests in its energy resources, sources of protein and infrastructural usage. China is engaging the area especially due to three reasons: 1. regional integration, 2. resource control and 3. enhanced security (Dutton, 2011, pp. 1–17). As mentioned earlier, even distant actors are increasingly interested in the SCS area. The European

Union wishes to economically engage its surrounding countries (Hosoya & Kundnani, 2024). In doing so it likewise seeks to form new value-based partnerships which will help promote long-term sustainability (Tagliapietra, 2024).

In recent years China has been making strong claims about its sovereignty over much of the area. These claims overlap those of several other actors, including Brunei, Malaysia, Vietnam and the Philippines. China firmly emphasizes that it has historical rights to support its position (Dutton, 2011, pp. 1–7). In 2013 the Philippines have even taken the issue to arbitration before the International Tribunal for the Law of the Sea. The verdict gives China no right to most of the area. Although seen as a victory from the perspective of the vested ASEAN countries, Beijing has officially stated that it will disregard any result even prior to being announced. The EU has not taken a direct stance on the issue. Overall, unless enforced, the ruling will likely remain only on paper (Graham, 2016). As can be seen on Figure 1 below, the topic of South China Sea is among the biggest concerns to people in Brunei, Malaysia, Philippines and Vietnam.

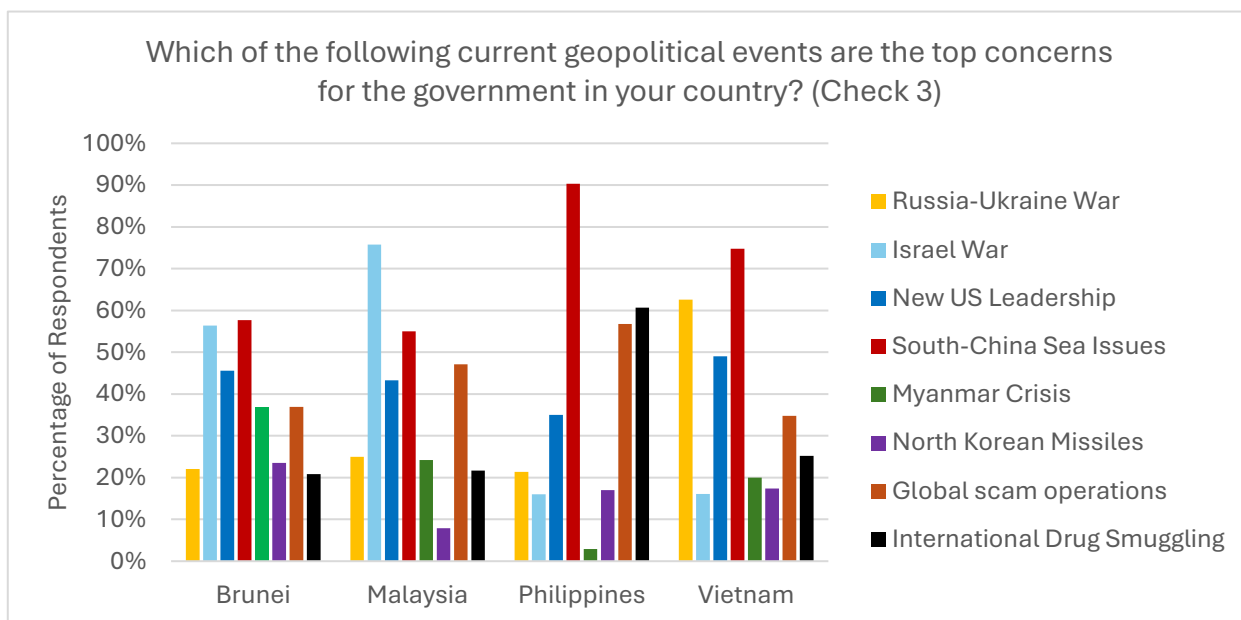


Figure 1. Source: ASEAN Studies Center, 2025.

## 5. Belt and Road Initiative

### 5.1 Purpose and Goals

In 2013 China announced creation of the so-called New Silk Road while General Secretary Xi was on an official visit of Kazakhstan. It comes as a push to strengthen the country's economic and political influence. First proclaimed as the Silk Road Economic Belt and Maritime Silk Road, i.e. One Belt, One Road. It was meant to infrastructurally interconnect with nearby areas, especially in Central Asia. However, over time, it expanded to reach all parts of the World and became known as the Belt and Road Initiative. The Asian Infrastructure Investment Bank (AIIB) was setup alongside the initiative to support the investments (McBride & Berman, 2023). To understand the motivations behind the BRI, some of the most important official goals are now going to be put forward.

Beijing wishes to enhance multilateral communication, especially via intergovernmental exchanges, businesses, and international organizations. The latter are especially important in adhering to international standards which will help reduce barriers. Developing comprehensive infrastructural links, including IT, are the main aims. These should be inclusive and respect national sovereignty. As a result, an all-inclusive business, financing and investment environment will be created, which is based on free trade principles. This is supported by the creation of the AIIB. On the sidelines, BRI helps internationalize the Renminbi. It also aspires to enhance people exchanges, including in the realms of arts and tourism. Other areas such as AI, sustainability and healthcare are likewise included (People's Daily, 2023). Since 2013 financing of all BRI projects has cumulatively exceeded \$1 trillion. Nearly 2/3 of this figure represent construction contracts (C. N. Wang, 2025).

### **5.2 Main Projects in Brunei**

To date the largest China-Brunei construction effort is the \$1.2 billion Temburong bridge. With its 30 km length it is the longest of its kind in Southeast Asia. It opened in 2020 and was built by the China State Construction Engineering Corporation and South Korean Daelim company (Ong, 2024). Another notable project is the Muara Port. This is a Chinese-Brunei joint-venture effort via the Muara Port Company. It is essential to increase handling productivity, which is believed to spur international trade capacities. Operations of this \$307 million investment are set to commence in 2027 (Xinhua, 2024b).

For most of the past decade, China has been a net exporter to Brunei. However, as can be seen in Figure 2 below, there are irregularities between the different years. By the end outgoing goods to Brunei have dropped to a relatively low level. Lately, the main articles of China's export are mineral fuels, oils, distillation products and electronics (Trading Economics, 2025a). When it comes to imports the trend is opposite. After initially recording low numbers there is a quick rise since 2019. It is especially organic chemicals, mineral fuels, oil and distillation products that are imported by China (Trading Economics, 2025e).

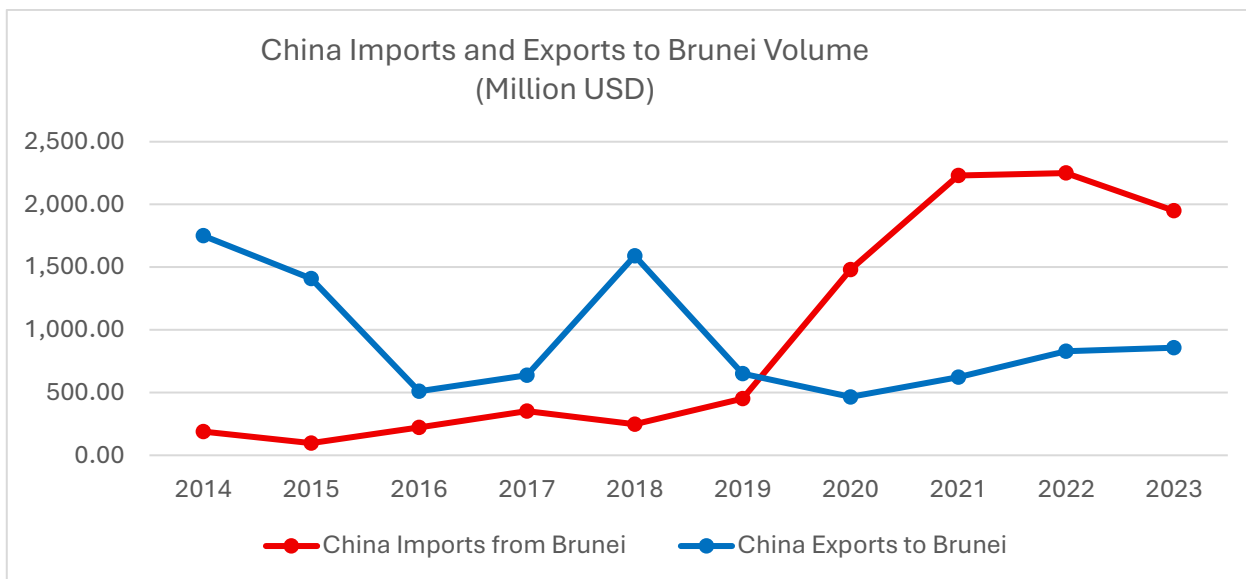


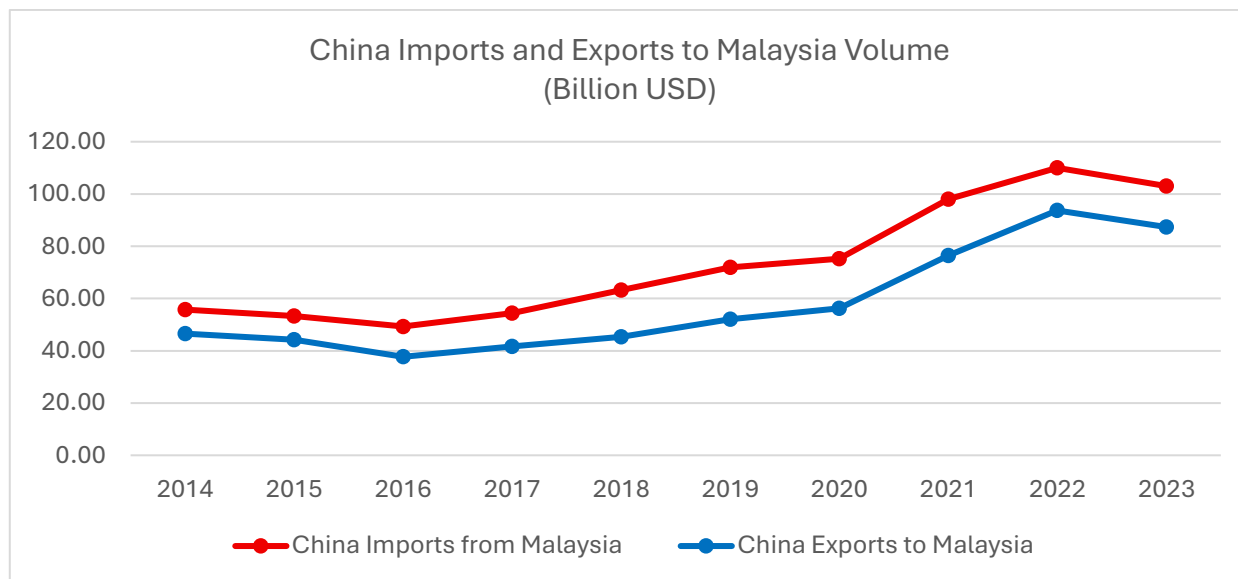
Figure 2.

Source: Trading Economics, 2025.

### 5.3 Main Projects in Malaysia

China has been actively implementing BRI projects in Malaysia ever since the initiative was announced. One of the biggest joint projects is the 655 km long East Coast Rail Link which is nearing completion. Another clearly noticeable trait is the 452 meter Tun Razak Exchange tower in Kuala Lumpur, which was built by the Chinese State Construction Engineering Corp. Malaysia has historically been an important partner for China due to being the first ASEAN member to establish diplomatic ties with it (C. Wang, 2025). The two countries aim to further strengthen cooperation in building pan-Asian rail links. Other areas include implementing a 5G network, semiconductors and stable supply chains (Xinhua, 2025).

Figure 3 shows that Malaysia is among the highest traders with China among the studied countries. Both imports and exports have been rising relatively steadily since 2016. That particular year marks the lowest monitored Chinese exports to Malaysia with \$37.7 billion. 2022 marked the top with \$93.7 billion. Chinese imports have gone from \$49.3 to \$110 billion within the same time range. The main imports flowing to China are mineral fuels, oils, distillation products and electronics. Most common products flowing in the opposite direction are electronics, machinery, nuclear reactors and boilers (Trading Economics, 2025f, 2025b).



**Figure 3.** Source: Trading Economics, 2025.

### 5.4 Main Projects in Philippines

China is working on several projects in the Philippines. Its Hunan Road and Bridge Construction Group Co. Ltd. is helping develop the Cebu Bus Rapid Transit. Several bridges are likewise being built around the country. For example, the four-lane Davao Bridge, which stretches 1,340 meters. Another bridge in the same city is being readied to connect Samal Island by 2027. It is set to accommodate up to 25,000 vehicles every day (Xinhua, 2024a). This bridge will stretch roughly 4 km. Its price tag is over \$400 million which is funded largely through a Chinese governmental loan (Republic of the Philippines Department of Public Works and Highways, 2022).

Trading with Philippines has not reached high levels but remains steady when it comes to China’s imports. Figure 4 shows a slight uptick in 2021 but then returned to previous numbers by 2023. The main articles are electronics, ores and machinery (Trading Economics, 2025g). Chinese exports have been on a rising trajectory, peaking at \$64.7 billion in 2022. The following year saw a drop by more than \$12 billion. This is likely a side effect of the recent South China Sea issues. When it comes to Chinese exports to Philippines the top articles in 2023 were electronics, machinery, nuclear reactors and boilers (Trading Economics, 2025c).

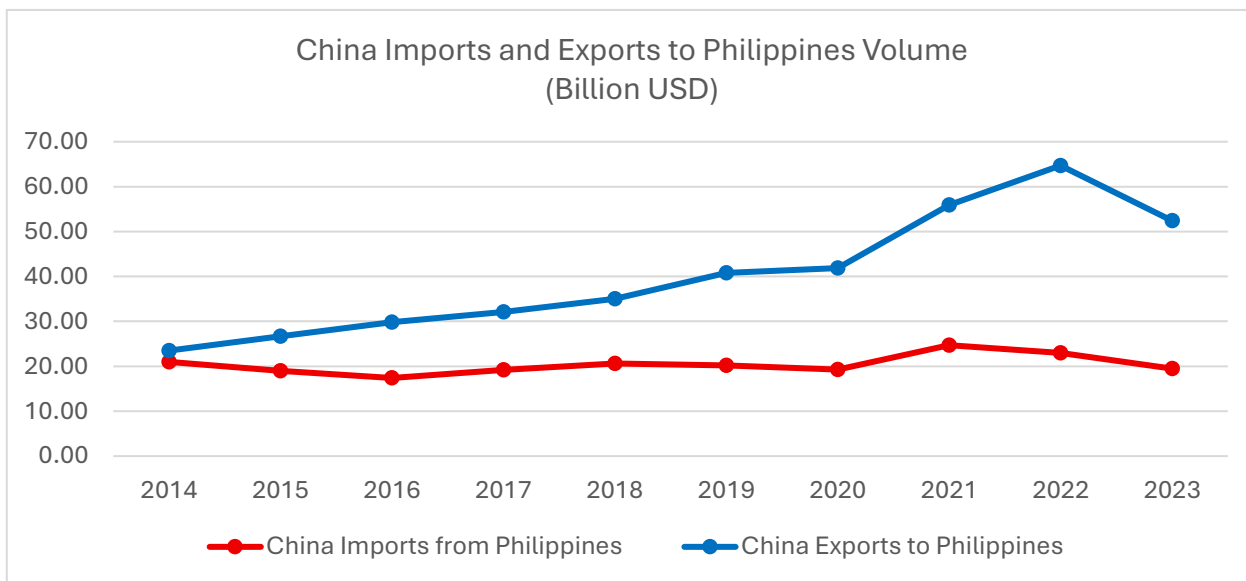


Figure 4.

Source: Trading Economics, 2025.

### 5.5 Main Projects in Vietnam

So far Vietnam has not taken much part in BRI projects, however there are some major plans to be carried out. At the forefront is the China-Vietnam standard-gauge cross border rail link from Yunnan Province passing through Lao Cai-Hanoi-Haiphong. This railway, expected to cost \$8.37 billion, will serve 20% of Vietnam’s population. The expected total completion is by 2030 (Yang et al., 2025). There is also a similar type of planned road connection linking Yunnan Province and Hanoi, which will include several bridges on the Vietnamese side. Both the rail and road projects are set to be accompanied by simplified customs procedures (People’s Daily, 2025).

Vietnam tops the list of four when it comes to trading. Both Chinese imports and exports to the country have been steadily growing since 2014 as shown on Figure 5. Exports peaked in 2021 at \$92.3 billion and have persisted in that range. Imports on the other hand have grown from less than \$20 billion to over \$92 billion. They seem to have stabilized in the past three years. Most products flowing in both directions are electronics, machinery, nuclear reactors and boilers. China also imports for example different kinds of fruits while, on the other hand, exporting fabrics (Trading Economics, 2025h, 2025d).



Figure 5.

Source: Trading Economics, 2025.

## 6. Global Gateway Initiative

### 6.1 Purpose and Goals

The European Union is foremost an economic community which wants to keep its home continent globally competitive. In today’s multipolar world this task is increasingly difficult. After witnessing the fast development of China along with its Belt and Road Initiative Brussels realizes that it needs to step up its worldwide efforts. (Furness & Keijzer, 2022; Tagliapietra, 2024). It likewise wants to preserve its influence. This, among others, goes for the ASEAN region where the union provides countries with economic incentives. At the same time, it pushes forward its core values such as retaining the liberal international order and upholding democratic principles. The EU wishes to strengthen ties with similarly thinking partners (Hosoya & Kundnani, 2024, pp. 23–54, 83–90).

As for the official goals the Global Gateway pushes for multilateral cooperation in different sectors. These include digital, climate, energy, transportation, health, education and research. When it comes to the abovementioned values, they more specifically include democratic principles, high standards, good governance, transparency, equality, green processes, security and spurring the private sector (European Commission, n.d.-a). The first phase 2021-2027 sets to mobilize up to €300 billion worth of investments. They are meant to support sustainable projects which will benefit local communities. This will be accompanied by high environmental and labor standards, including financial management. Combined, the Asia-Pacific, Latin American and Caribbean regions are set to receive investments of €45 billion (European Commission, 2023).

### 6.2 Main Projects in Brunei

So far, the two sides have not materialized concrete infrastructural projects but have jointly been exploring several areas such as climate issues, green energy and sustainable development. Apart from these, Brunei expressed wishes to also collaborate on digital transition and artificial intelligence (The Bruneian, 2024). There was, however, already a mutual project called the EU-Brunei Partnership

Facility meant to strengthen relations. It was carried out in 2022-2024. The main goals were to enable people exchanges for policymakers, opinion leaders, students, media and even the general public (TRIPPCONS, 2022).

The European Union has little trade activity going on with Brunei, which is evident from Figure 6. Imports rarely exceed \$100 million. They were down to just above \$3 million in 2021 and 2023. Articles that mainly travel to the EU are machinery, nuclear reactors, boilers, electronics but also aircraft and spacecraft (Trading Economics, 2025n). Exports to Brunei have reached almost \$1 million in 2015 but have significantly dropped since. The last available figure for 2024 is \$233 million. In that year it was mostly aircraft, spacecraft, machinery, nuclear reactors, boilers, but also articles such as tramway that went to Brunei (Trading Economics, 2025j).

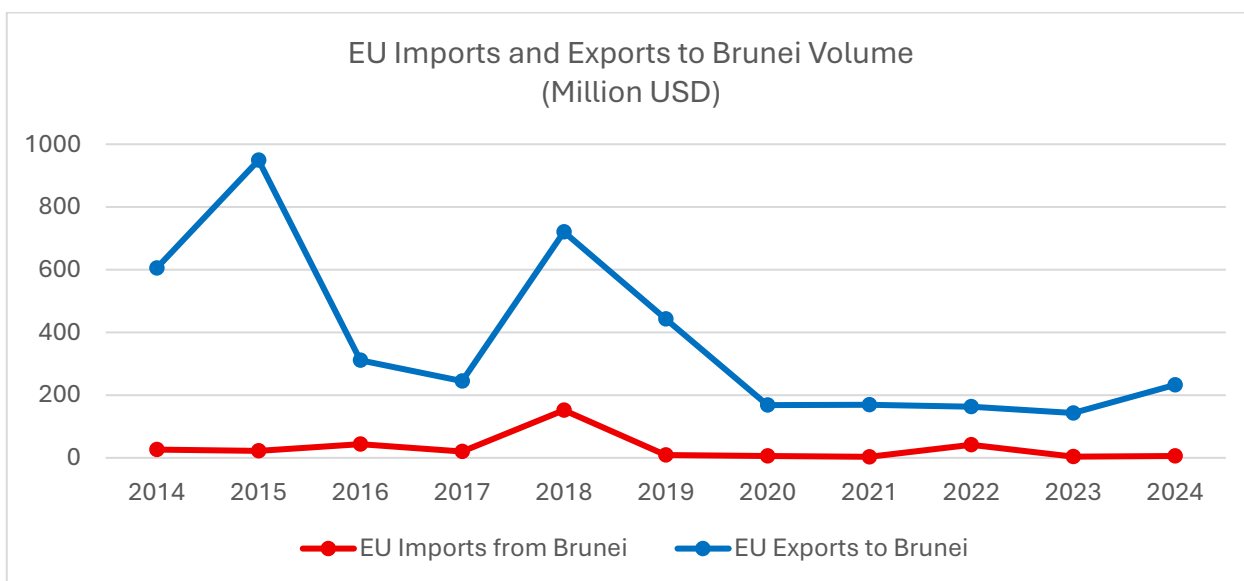


Figure 6.

Source: Trading Economics, 2025.

### 6.3 Main Projects in Malaysia

The EU sees Malaysia as a pivotal strategic partner with shared trading interests but also core values. In 2022 the two signed the Malaysia-EU Comprehensive Partnership and Cooperation Agreement. Key areas include the 2030 Agenda for Sustainable Development, abiding by international norms and frameworks like the Paris Agreement, and enhanced connectivity. Brussels is working together with Kuala Lumpur on preserving Malaysia’s biodiversity, preventing deforestation, preventing illegal poaching and giving guidance on implementing UN SDGs (European Commission, 2024a). As for infrastructure projects, the EU for example helped develop the Lumut Maritime Industrial City which was assisted by the Port of Antwerp-Bruges International company. The port is expected to attract large investments of up to €15 billion while giving jobs to more than 55,000 people (EUROCHAM Malaysia, 2025).

There has been steady ongoing trading between the European Union and Malaysia. The EU, however, imports significantly more than it exports to this country. Figure 7 shows that imports were

in the higher \$20 billion range except for 2021 and 2022 when they rose all the way up to \$37 billion. They then dropped to \$30.9 billion by 2024. Exports stayed between \$12 billion to \$19.2 billion throughout 2014-2024. The main products traded include electronics, machinery, nuclear reactors, boilers but also optics and medical apparatus (Trading Economics, 2025o, 2025k).

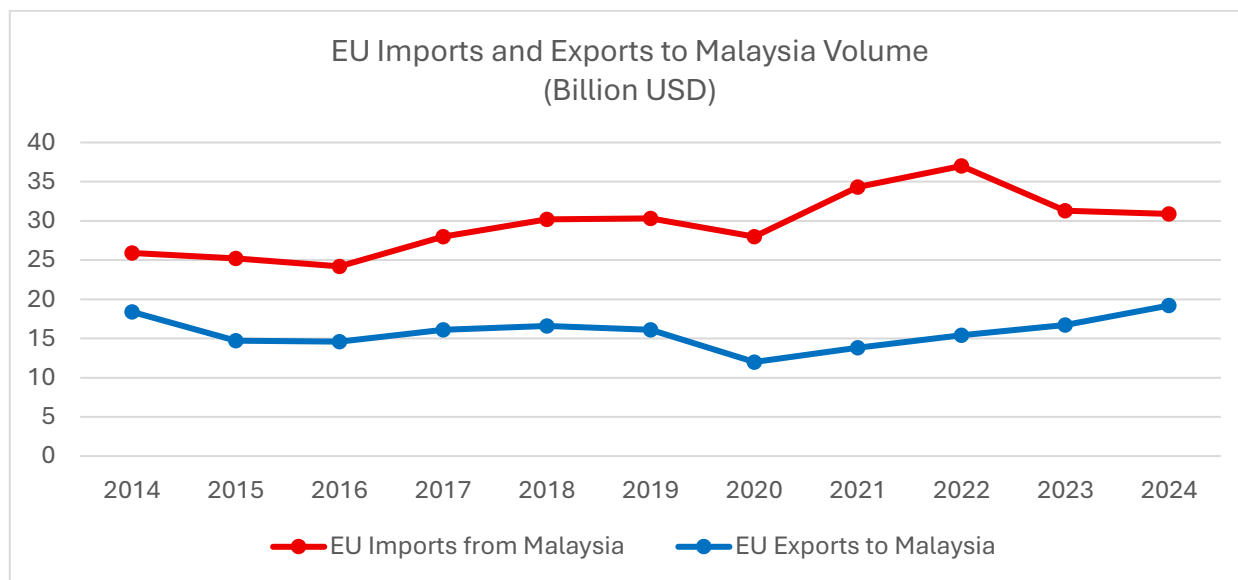


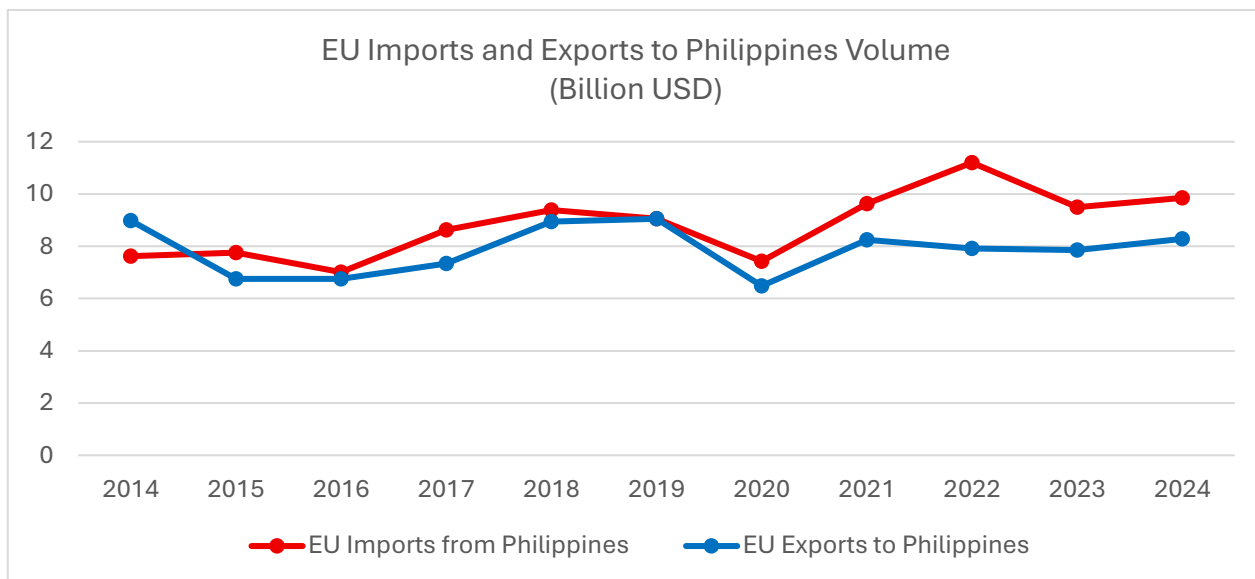
Figure 7.

Source: Trading Economics, 2025.

### 6.4 Main Projects in Philippines

Brussels already has a number of connections with Manila. Between 2021-2024 the EU has allocated €147 million via the Global Gateway. This money is to mainly be used for green transition, digitalization and good governance. Some example projects include the Green Economy Team Europe Initiative, Team Initiative on Digital Connectivity and Copernicus disaster risk management program. The EU is also helping promote a peaceful consolidation process in Mindanao. It furthermore offers help in educating, training and certifying seafarers (European Commission, n.d.-b). There is also cooperation in higher education through the PATHWAY Project since 2021. It is led by the European Erasmus+ Program and promotes university-enterprise connections (European Chamber of Commerce of the Philippines, 2022). As can be seen, the union is mostly providing assistance with alignment towards sustainability and some of its core values.

EU’s trade with Philippines is higher than with Brunei but much lower than the other two studied countries. Both the union’s imports and exports remain quite similar when it comes to amounts and even trends. In Figure 8 they both have wavy shapes starting off at \$7.62 billion worth of imports and \$8.98 billion exports. The former finishes off in 2024 at \$9.85 billion and the latter at \$8.28 billion. No significant changes have thus happened within the monitored timeframe. In 2024 the most popular articles imported by the EU were electronics, nuclear reactors, boilers, animals, vegetable fats and oils. Exports show much similarity but also include, for example, meat and aircraft (Trading Economics, 2025p, 2025l).



**Figure 8.** Source: Trading Economics, 2025.

### 6.5 Main Projects in Vietnam

To date the Brussels inked a cooperation agreement with Hanoi on extending the capital’s Metro Line 3. The aim is to promote the city’s sustainable development, ease of access for local residents, improve air quality and safety standards. This project is supported by €10 million (European Commission, 2024b). Apart from this infrastructure project the EU also supports Vietnam in meeting its Net Zero 2050 goal. The main focus is on transitioning from usage of fossil fuels to clean energy (Federal Ministry for Economic Cooperation and Development of the Federal Republic of Germany, 2025). Although not yet substantial, this shows that the EU is planning on extending future partnerships with Vietnam.

Figure 9 below depicts that the EU imports from Vietnam are the highest out of the four countries studied. They are increasingly rising since 2014, except for a slight drop in 2020. By 2024 they have reached the volume of \$59.27 billion. Biggest trade articles are electronics, but among others, also for example footwear, coffee and tea (Trading Economics, 2025q). Exports from the EU to Vietnam are nowhere near as significant. They mostly hover above or below \$10 billion per year. The starting point in 2014 shows a \$5 billion increase by 2024 but this is still much lower than the imports figures. The most widely exported products to Vietnam are pharmaceuticals and machinery (Trading Economics, 2025m).

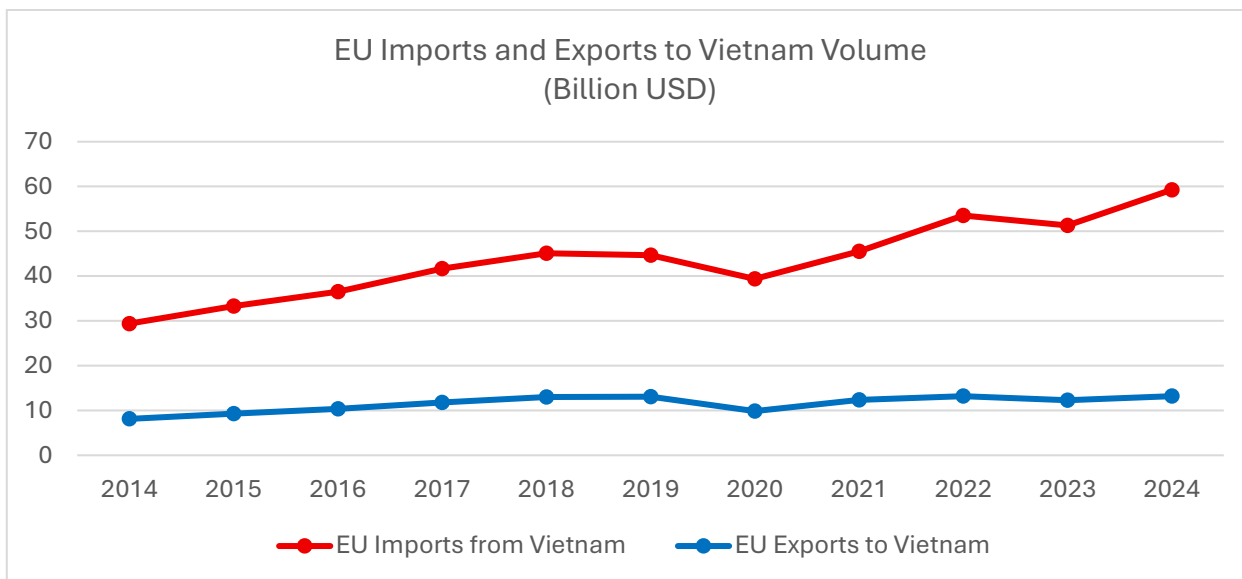


Figure 9.

Source: Trading Economics, 2025.

## 7. Receptions

### 7.1 Academic Views

The Belt and Road Initiative has brought many wide-ranging implications. On the plus side it has added new financial and technical resources into developing the global south. Chinese investments mostly target infrastructural and industrial types of projects. These have a proven positive impact on economic growth in the target countries. The initiative has helped to give more global attention to developing countries and set-up a work model for south-south cooperation (Boston University Global Development Policy Center, 2023). Within just a single decade financing of BRI projects exceeded \$1 trillion. The initiative is also advancing the usage of green technologies and investments are being made into renewable energy. While recent global foreign direct investment flowing from developed to emerging economies has been decreasing China’s has actually been growing (Nedopil, 2024).

On the other hand, the initiative is increasingly treated with suspicion, especially by western countries. There have been accusations of debt trap diplomacy for example in the case of Sri Lanka. The details of most loans remain undisclosed. Some analysts also point to opaque enterprises and predatory business practices. Majority of intergovernmental engagements tend to be bi rather than multilateral. However, the largest challenge are conflicting interests, particularly with the west and its allies. These countries do not particularly like seeing China’s rising global influence (Yu & Jon, 2021). From a strategic perspective the BRI is seen as economic diplomacy meant to ease pressure on politically sensitive issues such as tensions in the South China Sea. The idea is for the ASEAN members to metaphorically look away (Gong, 2020).

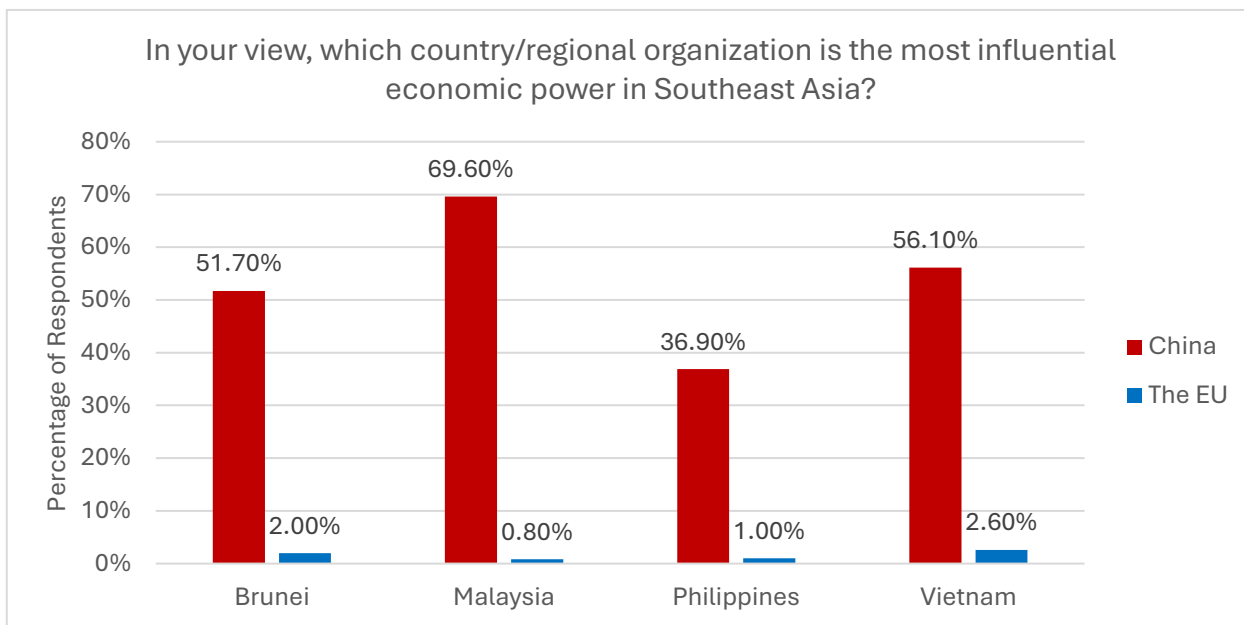
Within the South China Sea area, the European Union is seen as an alternative to China and some other global actors such as the United States. The Global Gateway brings what some call the “European Way”. It goes much further than simply providing assistance in infrastructural projects.

This initiative is accompanied by transparency, good governance and attention to human rights (Lupi, 2025). Attention is paid to sustainability and implementing projects according to the UN SDGs. This includes such areas as climate change, renewable energy and developing social infrastructure (Tagliapietra, 2024). The EU also acts as a positive model for inspiring ASEAN integration. The Southeast Asian organization has selectively applied certain policies for example in market integration, regulatory measures and economic liberalization (Chen, 2023).

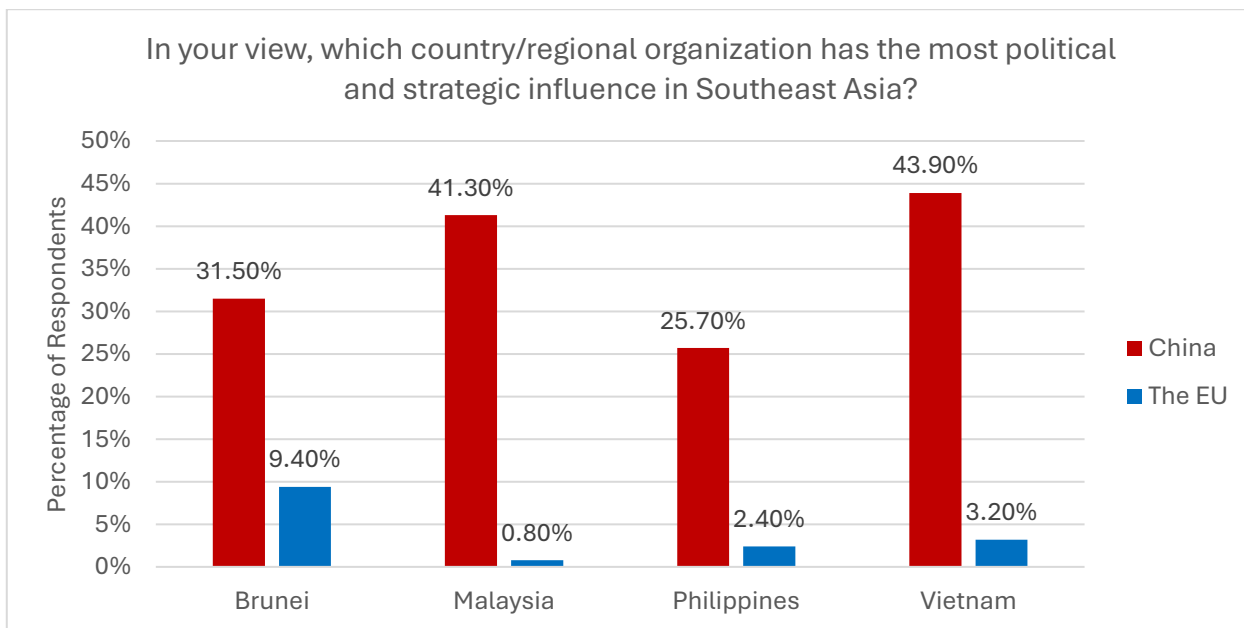
The Global Gateway, however, does not come without caveats. First of all, it was created as a response to the BRI, not proactively. It remains questionable whether the Gateway can realistically compete with China for economic and political influence. The way that the union invests and implements projects in foreign countries is at times seen as complicated and inconsistent. This is due to a myriad of internal actors involved in the processes (Heldt, 2023). Some also question the amount of investment put into the Global Gateway which is significantly smaller than China's BRI. An additional drawback is that Beijing itself is increasingly emphasizing green development which is one of the pillars of the "European Way". Finally, Europe still faces certain colonial legacy in Southeast Asian countries and may therefore be viewed with certain suspicion (Lupi, 2025).

## **7.2 Public Opinion**

Now opinion polls from the four studied ASEAN countries are going to be put forward to see where their publics stand on China and the European Union. First of all, their economic and political influence will be examined. From the two graphs below, it is quite evident that China vastly outperforms the EU. Basically, the union scores very low in both categories. The only slight exception is in Brunei where Brussel's perceived political influence in Southeast Asia reaches nearly 10%. However, this is still far behind Beijing's. As for China, it scores high economically in Malaysia (69%), but also in Vietnam (56.1%) and Brunei (51.7%). It does not attain such high numbers in the political influence realm but all its scores are within the range of 25%-44% (ASEAN Studies Center, 2025).



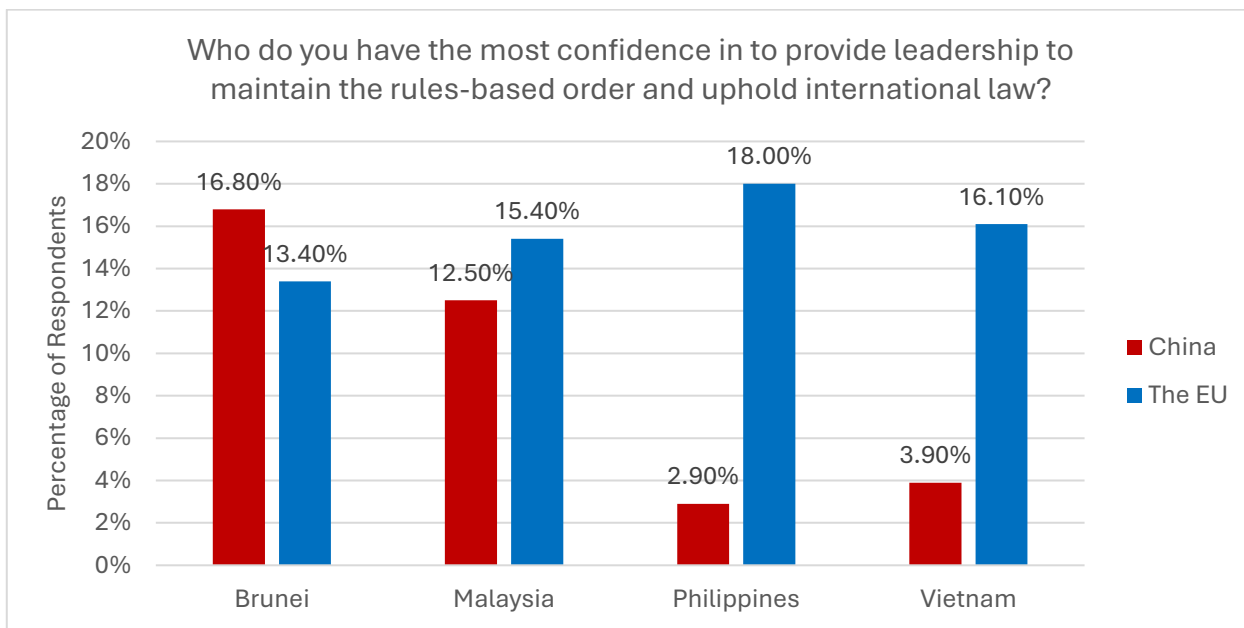
**Figure 10.** Source: ASEAN Studies Center, 2025.



**Figure 11.** Source: ASEAN Studies Center, 2025.

Apart from influence itself it is beneficial to look into other indicators to better understand the overall complexity of the situation. China is generally viewed as being strong economically and politically within Southeast Asia, but this does not necessarily represent what the ASEAN publics think about its role within the region. As can be seen on Figure 12 below there is a stark difference in the EU’s positioning vis-à-vis China when it comes to confidence in international leadership. Brussels outperforms Beijing in most of the four Southeast Asian countries and lags only slightly behind in Brunei. The European Union does particularly well in Philippines and Vietnam. China has very low scores in both these countries (ASEAN Studies Center, 2025). Particularly in the case of Philippines, where Beijing scores lowest, the South China Sea disputes most likely plays a significant

role. As mentioned earlier, the country has even previously taken the issue to an international arbitration (Graham, 2016).



**Figure 12.** Source: ASEAN Studies Center, 2025.

Finally, to link with the previous opinion poll, the ASEAN publics were also asked about who they feel confident about “doing the right thing”. In other words, whether they think China or the European Union contributes to international peace, security, prosperity and global governance. This is depicted in Figure 13. Here, the results are not overwhelmingly for either country, but the EU does outperform China. The four ASEAN countries mostly have no or little confidence in Beijing. The situation is most positive in Brunei where 34.9% respondents feel confident and 15.4% very confident. However, China is not trusted at all in Philippines and Vietnam. This is a similar trend to what was seen in Figure 12 above. The EU on the other hand has roughly 50% confidence in both these countries. It is also doing quite well in Malaysia and Brunei. The latter is where 21.5% of the respondents are actually very confident in Brussels (ASEAN Studies Center, 2025). As a simplification, to put it all into theoretical terms, China has hard while the EU soft power within the SCS area.

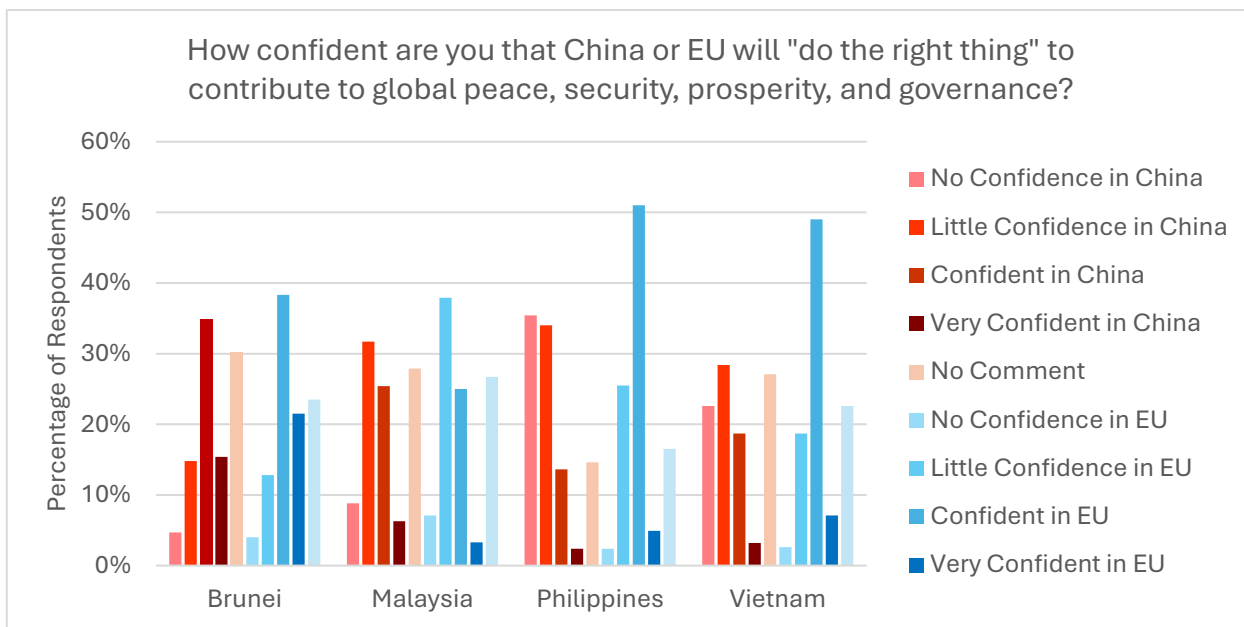


Figure 13.

Source: ASEAN Studies Center, 2025.

## 8. Conclusion

Based on the findings it is without doubt that both China and the European Union are behaving rationally by seeking their own interests in the South China Sea area. Both of them state in their own official sources that they are seeking more all-round partnerships in the region (European Commission, 2023; People’s Daily, 2023). However, some of their motivations follow a different logic. For China it is about retaining its economic and political influence in the region. Becoming closer trading partners drives attention away from certain issues such as assertive behavior in the SCS. By providing huge investments the Belt and Road projects have in fact proved to advance many of the partner countries’ economies. However, this often comes along with untransparent loans and questionable business practices (Boston University Global Development Policy Center, 2023; Dutton, 2011; Yu & Jon, 2021). This leaves the ASEAN members having to make a difficult choice between economic benefits and national sovereignty.

The European Union on the other hand is a relative latecomer into the modern-day scramble for influence in Southeast Asia. It only came up with its Global Gateway retroactively after seeing the successes of the Belt and Road. Brussels’ intentions are to expand market access but also to build long-term relations based on sustainability, high standards and liberal democratic values (Hosoya & Kundnani, 2024, pp. 23–54). However, this initiative is in its early stages and with limited funding for the SCS area countries. It involves complicated procedures and many strings attached such as transparency and good governance (Lupi, 2025). Brunei, Malaysia, Vietnam and Philippines might as well opt for China because making deals with it are rather bilateral, more straightforward and simple (Yu & Jon, 2021). It is also arguable whether the four ASEAN countries are truly like-minded. For example, Brunei is a monarchy and Vietnam communist. Malaysia is a democracy with constitutional monarchy, while Philippines is a democracy but with a dire human rights records (Human Rights Watch, 2023).

On first sight, the way that China and the EU are perceived by publics of the SCS area countries overwhelmingly falls into Beijing's favor. At least when it comes to economic and political influence. This can be referred to as possessing the so-called hard power. China has clearly been implementing many more projects across Brunei, Malaysia, Philippines and Vietnam. Its trade volumes with these countries all exceed those of the European Union (Trading Economics, 2025i). However, when the respondents are asked about who they see as upholding international law and being a more responsible actor then the EU scores higher (ASEAN Studies Center, 2025). It is thus Brussels who wins the soft power competition. There is therefore a discrepancy between the actor who holds actual strength as opposed to the more trusted one. In the end, more time is needed to judge both initiatives, especially the Global Gateway. Because the studied region is China's home it is likely to retain its hard power position via the Belt and Road. However, it will be challenging to do the same when it comes to soft power.

## References

- ASEAN Studies Center, (2025), State of Southeast Asia Survey Archives—ISEAS-Yusof Ishak Institute.
- Boston University Global Development Policy Center, (2023), The BRI at Ten: Maximizing the Benefits and Minimizing the Risks of China's Belt and Road Initiative.
- Busbarat, P., A. Camba, F. I. Pratiwi, H. Po, S. Đỗ, B. Sengkhamkhoutlavong, and M. Thuzar, (2023), "How has China's Belt and Road initiative impacted Southeast Asian countries?" *Carnegie Endowment for International Peace*.
- Chen, X., (2023), "Bridging Normative and Market Power Europe: The EU's Diffusion of Market-related Norms and Policies in ASEAN," *Journal of European Integration*, 45(4), 593-612.
- Dutton, P., (2011), "Three Disputes and Three Objectives—China and the South China Sea," *Naval War College Review*, 64(4).
- EUROCHAM Malaysia, (2025), Official Launch of the Lumut Maritime Industrial City (LuMIC) Masterplan: Shaping Perak's Future Through Inclusive and Sustainable Development. EUROCHAM.
- European Chamber of Commerce of the Philippines, (2022), European Chamber of Commerce of the Philippines—PATHWAY Project. PATHWAY Project.
- European Commission, (n.d.-a), (2025), Global Gateway overview—European Commission.
- European Commission, (n.d.-b), (2025), Philippines—European Commission.
- European Commission, (2023), Global Gateway—European Commission.
- European Commission, (2024a), Malaysia. International Partnerships.
- European Commission, (2024b), Global Gateway: EU and Vietnam strengthen their partnership to boost sustainable mobility - European Commission.
- Federal Ministry for Economic Cooperation and Development of the Federal Republic of Germany, (2025), Just Energy Transition Partnership (JETP) with Viet Nam, 2.
- Furness, M. and N. Keijzer, (2022). "Europe's global gateway: A new geostrategic framework for development policy?" *Briefing Paper*, 1/2022.
- Gong, X., (2020), "China's Economic Statecraft: The Belt and Road in Southeast Asia and the Impact on the Indo-Pacific," *Security Challenges*, 16(3), 39-46.
- Graham, E., (2016), "The Hague Tribunal's South China Sea Ruling: Empty Provocation or Slow-Burning Influence?" *Council of Councils*.
- Heldt, E. C., (2023), "Europe's Global Gateway: A New Instrument of Geopolitics," *Politics and Governance*, 11(4).

- Hosoya, Y. and H. Kundnani (Eds.), (2024), “The Transformation of the Liberal International Order: Evolutions and Limitations,” *Springer Nature*.
- Hu, L., (2023), “Examining ASEAN’s effectiveness in managing South China Sea disputes,” *The Pacific Review*, 36(1), 119-147.
- Human Rights Watch, (2023), World Report 2024, Human Rights Watch.
- Insisa, A., (2024), “China’s BRI and EU Global Gateway Experiences with Public-Private Partnerships for Infrastructure Projects in Africa: Assessing Impact and Significance,” *Reconnect*.
- Kahler, M., (1998), “Rationality in international relations,” *International Organization*, 52(4), 919-941.
- Lupi, P., (2025), Global Gateway and Belt and Road Initiative in Southeast Asia, CEIAS.
- McBride, J. and N. Berman, (2023), “China’s Massive Belt and Road Initiative Council on Foreign Relations,” *Council on Foreign Relations*.
- Morin, J.-F. and J. Paquin, (2018), *Foreign policy analysis: A toolbox*, Palgrave Macmillan.
- Nedopil, C., (2024), “China Belt Road Initiative BRI Investment Report 2023,” Griffith University.
- Ong, C., (2024), “The Belt and Road Initiative 2025, Brunei,” *CDR*.
- Pekkanen, S., J. Ravenhill, R. Foot, and Y. F. Khong, (2014), *Foreign Policy Analysis and the International Relations of Asia*, In S. Pekkanen, J. Ravenhill, & R. Foot (Eds.), *The Oxford Handbook of the International Relations of Asia*, Oxford University Press.
- People’s Daily, (2023), Visions and Actions to Unswervingly Promote the High-Quality Development of the Joint Construction of the “Belt and Road” , CPC News.
- People’s Daily, (2025), Joint Statement of the People’s Republic of China and the Socialist Republic of Vietnam on Continuously Deepening the Comprehensive Strategic Cooperative Partnership and Accelerating the Building of a China-Vietnam Community of Shared Future with Strategic Significance, CPC News.
- Republic of the Philippines Department of Public Works and Highways, (2022), PH Gets Loan from China For Samal Island-Davao City Connector Bridge, Department of Public Works and Highways.
- Tagliapietra, S., (2024), “The European Union’s Global Gateway: An institutional and economic overview,” *The World Economy*, 47(4), 1326-1335.
- The Bruneian, (2024), EU Ambassador to ASEAN underscores EU-Brunei cooperation at keynote lecture, The Bruneian.
- Trading Economics, (2025a), China Exports to Brunei—2025 Data 2026 Forecast 1992-2023 Historical.

- Trading Economics, (2025b), China Exports to Malaysia—2025 Data 2026 Forecast 1992-2023 Historical.
- Trading Economics, (2025c), China Exports to Philippines—2025 Data 2026 Forecast 1992-2023 Historical.
- Trading Economics, (2025d), China Exports to Vietnam—2025 Data 2026 Forecast 1992-2023 Historical.
- Trading Economics, (2025e), China Imports from Brunei—2025 Data 2026 Forecast 1992-2023 Historical.
- Trading Economics, (2025f), China Imports from Malaysia—2025 Data 2026 Forecast 1992-2023 Historical.
- Trading Economics, (2025g), China Imports from Philippines—2025 Data 2026 Forecast 1992-2023 Historical.
- Trading Economics, (2025h), China Imports from Vietnam—2025 Data 2026 Forecast 1992-2023 Historical.
- Trading Economics, (2025i), Economic Indicators, List By Country.
- Trading Economics, (2025j), European Union Exports to Brunei—2025 Data 2026 Forecast 2000-2024 Historical.
- Trading Economics, (2025k), European Union Exports to Malaysia—2025 Data 2026 Forecast 2000-2024 Historical.
- Trading Economics, (2025l), European Union Exports to Philippines—2025 Data 2026 Forecast 2000-2024 Historical.
- Trading Economics, (2025m), European Union Exports to Vietnam—2025 Data 2026 Forecast 2000-2024 Historical.
- Trading Economics, (2025n), European Union Imports from Brunei—2025 Data 2026 Forecast 2000-2024 Historical.
- Trading Economics, (2025o), European Union Imports from Malaysia—2025 Data 2026 Forecast 2000-2024 Historical.
- Trading Economics, (2025p), European Union Imports from Philippines—2025 Data 2026 Forecast 2000-2024 Historical.
- Trading Economics, (2025q), European Union Imports from Vietnam—2025 Data 2026 Forecast 2000-2024 Historical.
- Wang, C., (2025), “Major infrastructure projects in Malaysia showcase vitality of BRI cooperation,” *Global Times*.

Wang, C. N., (2025), “China Belt and Road Initiative (BRI) Investment Report 2024,” *Green Finance & Development Center*.

Xinhua, (2024), Feature: Chinese projects in Philippines yield tangible results, benefit locals—BELT AND ROAD PORTAL, Belt and Road Portal.

Xinhua, (2024), Brunei, China enhance cooperation on port hub—BELT AND ROAD PORTAL, Belt and Road Portal.

Xinhua,(2025), China, Malaysia agree to build high-level strategic community with shared future.

Yu, J. and W. Jon, (2021), “What is China’s Belt and Road Initiative (BRI)?” *Chatham House*.