Supplement Ev

Official Country Names

the Kingdom of Cambodia

Lao People's Democratic Republic

Socialist Republic of Vietnam

the Kingdon of Thailand

86---Cambodia

We're diplomatically engaging now!

Hunt '25 [Luke. "US lifts Cambodian arms embargo after resuming military exercises," DefenseNews (11-12-2025). https://www.defensenews.com/global/asia-pacific/2025/11/12/us-lifts-cambodian-arms-embargo-after-resuming-military-exercises/, accessed 8/1] RF-29

PHNOM PENH, Cambodia — The United States has lifted a four-year arms embargo on Cambodia after announcing a resumption of the annual Angkor Sentinel military exercises in a sign that relations between Washington and China's tiny but key regional ally are on the mend.

Details of the resumptions were finalized by the Indonesia-based U.S. Mission to the Association of Southeast Asian Nations on the sidelines of last month's ASEAN Leaders Summit in Kuala Lumpur, Malaysia, between President Donald Trump and Cambodian Prime Minister Hun Manet.

"Based on Cambodia's diligent pursuit of peace and security, the United States will remove the arms embargo on Cambodia, and both sides agreed to restart the bilateral Angkor Sentinel defense exercise, last held in 2017," the mission said in an Oct. 26 statement.

Additionally, the U.S. will increase seats for Cambodian officers at U.S. military colleges such as West Point – which Hun Manet graduated from – the Air Force Academy, and others.

Secretary of State Marco Rubio formally ended the 2021 arms embargo on Friday, according to a Federal Register notice, which added that arms sales would in future be decided on a case-by-case basis.

The notice cited Cambodia's "diligent pursuit of peace and security, including through renewed engagement with the United States on defense cooperation and combating transnational crime."

"Lifting the arms embargo is widely viewed by regional and US analysts as part of the Trump administration's efforts to reduce China's global and regional influence through a broad-based campaign," Gavin Greenwood, a risk analyst with Hong Kong-based Allan & Associates, said.

"That ranges from imposing military and economic rewards to sanctions on those countries it is seeking to peel away from Beijing's orbit."

Angkor Sentinel had been a bilateral exercise between U.S. Army Pacific and the Royal Cambodian Army, focusing on training in peacekeeping and stability operations that included a battalion-level command post exercise, engineering and medical civic action projects.

"This is the protection and preservation of peace, both within the country and with our neighbors, which remains our highest national priority," said Hun Sen, the former prime minister who retains an overarching role in Cambodian politics since transferring power to his son in 2023.

The embargo and suspension of military exercises were initiated due to human rights concerns, Cambodia's dwindling democratic space and China's growing military influence.

In lifting the arms embargo and restoring Angkor Sentinel, the U.S. Mission to ASEAN noted Cambodia had agreed to expand cooperation in combating transnational crime.

This included narcotics trafficking and online scam centers, the mission said, citing "criminal enterprises that steal over $10 billion annually from vulnerable Americans."

U.S. relations with Cambodia struck their lowest point in decades in the late 2010s as China showered Cambodia with Belt and Road projects including reconstruction of the Ream Naval Base on the south coast, in the contested South China Sea.

Ream reopened in April with a deepwater pier and dry dock facilities. It has often been described as China's second foreign naval base, after Djibouti.

However, Chinese investment has since dried up and Cambodia has become increasingly isolated by an overwhelming presence of international criminal syndicates running human trafficking and scam compound rackets and its undeclared border war with Thailand.

Last month the U.S. Treasury Department seized more than $14 billion in cryptocurrency – the largest such seizure in history – from Cambodia's Prince Bank while the U.S. Justice Department indicted Chen Zhi, the bank's Chinese founder, for fraud and running scam compounds.

That, amid a crumbling economy, has forced a rethink in Phnom Penh. Cambodia has repeatedly denied claims of exclusive Chinese use of the Ream Naval base, and says it will offer the base's services to all friendly nations and their navies.

The USS Savannah visited the nearby Sihanoukville port last December, the first visit by the U.S. Navy to Cambodia in eight years and since reopening, warships from Japan, Australia, Vietnam, Russia and China have docked at Ream.

And stengthening bilateral trade.

Seavmey '26 [Meng. "Cambodia Obtains US Assurance on Border Peacebuilding, Strengthens Bilateral Trade," Cambodianess (2-21-2026). https://cambodianess.com/article/cambodia-obtains-us-assurance-on-border-peacebuilding-strengthens-bilateral-trade, accessed 8/1] RF-29

On Feb. 18 and 19, Cambodia's Prime Minister Hun Manet held a series of sideline meetings with U.S. Trade Representative Jamieson Greer and U.S. Deputy Secretary of State Christopher Landau as he was in Washington, D.C. to attend the meeting of U.S. President Donald Trump's Board of Peace.

According to Cambodia's Government Spokesperson Unit, Hun Manet explained to the U.S. officials the root cause of the Cambodian-Thai disputes that had led to the border conflict, the ongoing efforts to implement the ceasefire and the other mechanisms for the settlement.

The prime minister stressed that Cambodia was not making baseless accusations but stating facts witnessed on the ground.

Thanking President Trump for his mediation of the Cambodia-Thai conflict, Hun Manet asked for U.S. support and sharing as to the border situation, and reaffirmed Cambodia's full commitment to the existing bilateral mechanisms and agreements for peaceful resolutions of the disputes.

In response, U.S. Deputy Secretary of State Christopher Landau commended the ceasefire between Cambodia and Thailand, vowing that the United States along with relevant partners will make further efforts to ensure long-lasting peace along the border.

A Joint Vow for Cooperation on Trade, Security

Cambodia's Government Spokesperson Unit reported that the parties said they were satisfied with the ongoing partnership between the two countries in trade, economic, defense and security sectors. They expressed their commitment for deeper cooperation, especially regarding cross-border crimes.

U.S. Trade Representative Jamieson Greer commended Cambodia's efforts to reinforce the relationship between the two countries, especially in the trade sector as the trade volume has increased by nearly 29 percent in 2025 compared to the previous year.

"This shows the remarkable incline of American investment in the country," the Cambodian Spokesperson Unit stated, adding that Hun Manet had updated Greer on the negotiations on the U.S. tariff rate on Cambodian exports, which has now been reduced to 19 percent from 49 percent.

During their meeting, U.S. Deputy Secretary of State Landau thanked the Air Cambodia Company for its recent purchase of Boeing 737 MAX from the U.S. He also stressed that the U.S. is seeking more commerce and economic opportunities, aiming to strengthen its partnership with the country.

Both American officials expressed optimism as to the Cambodia-U.S. relations, expecting them to deepen especially in terms of bilateral trade and U.S. investments in Cambodia.

In response, Prime Minister Hun Manet assured the U.S. officials that Cambodia intends to further facilitate the legal procedures to boost bilateral commerce cooperation, reported the Cambodian Spokesperson Unit.

On Feb. 20, Hun Manet held a series of meetings with other partners. These included the Atlantic Council delegation led by U.S. General Jim Jones and Frederick Kempe, president and CEO of the Atlantic Council; Turkey (or Türkiye) Foreign Minister Hakan Fidan; U.S. Deputy National Security Advisor Andy Baker; and U.S. Under Secretary of War for Policy Elbridge A. Colby, the Cambodian Spokesperson Unit added.

Tariffs at 19%, will go lower with other deals. That resolves part of our harms story.

Ousa '7-28 [Rin. "Cambodia Says U.S. to Match Lower Regional Tariffs if Rivals Win Better Deals," Cambodianess (7-28-2026).

Speaking at a July 27 press conference, First Vice Chairman of the Council for the Development of Cambodia (CDC) Sun Chanthol said a second U.S. investigation under Section 301 of the Trade Act of 1974 is expected to conclude within the next two to three months. He said the additional tariff resulting from the probe into industrial excess capacity is unlikely to exceed 9 percent.

Since July 24, Cambodian exports have been subject to an additional 10 percent U.S. tariff on top of existing Most Favored Nation (MFN) duties. The measure is part of new tariffs ranging from 10 to 12.5 percent imposed on imports from 60 economies that the United States says have failed to adequately prevent goods made with forced labor from entering their supply chains.

The tariffs stem from investigations conducted under Section 301 of the Trade Act of 1974 by the Office of the U.S. Trade Representative (USTR).

Chanthol said Cambodian officials recently held an online meeting with the USTR, during which both sides reaffirmed their commitment to the Agreement on Reciprocal Trade signed last October.

"During our online meeting with the USTR team, we all affirmed our commitment to respect the Agreement on Reciprocal Trade reached last October, which stabilized a volatile trade relationship by lowering the reciprocal tariff to 19 percent," he said.

He added that Washington had also committed to ensuring Cambodia would not be placed at a competitive disadvantage if neighboring countries negotiated lower tariff rates.

"If neighboring countries secure lower final tariff rates below 19 percent after negotiations, the U.S. will also reduce Cambodia's overall tariff rate to the same level to ensure we remain competitive in the region," Chanthol said.

Addressing public concerns, Chanthol stressed that the new 10 percent tariff should not be interpreted as an additional levy on top of last year's 19 percent tariff.

He explained that the previous tariffs imposed under the International Emergency Economic Powers Act (IEEPA) had already been terminated following a U.S. Supreme Court ruling, meaning the current measures replace rather than add to those earlier duties.

Chanthol said tariff rates alone do not determine a country's competitiveness and pledged that Cambodia would continue improving its investment climate to attract new manufacturers.

"Peace, political stability, macroeconomic stability, a skilled and productive workforce, improved infrastructure, an open investment framework and streamlined administrative procedures are among the key reasons investors continue choosing Cambodia," he said.

He added that the government is simplifying investment procedures from business registration through factory operations while working to improve logistics costs relative to neighboring countries.

Cambodia now generates more than 63 percent of its electricity from clean energy sources, a growing advantage for manufacturers seeking greener supply chains, he said.

The CDC approved 276 investment projects worth nearly $4.7 billion during the first six months of 2026, creating about 160,000 jobs, according to official figures.

Remaining Duty-Free Access

Ministry of Commerce Secretary of State Sim Sokheng said the United States has also granted duty-free access to 154 Cambodian tariff lines under its latest tariff revision.

He said the government will continue working with U.S. authorities to expand the list and create additional export opportunities for Cambodian businesses.

Cambodia is also among four countries—alongside Bangladesh, Indonesia and Malaysia—that will be eligible for tariff-rate quotas based on their use of U.S.-made production inputs.

The scheme is intended to encourage manufacturers to source more American cotton and textiles while reducing reliance on supply chains considered at higher risk of involving forced labor.

In a recent interview with Bloomberg, Commerce Minister Cham Nimul said the arrangement would allow Cambodian garment manufacturers using U.S.-sourced raw materials to export finished products back to the United States under quota-free or duty-free treatment.

She added that Cambodia has strengthened measures to prevent the import of goods linked to forced labor as part of its commitments under the bilateral trade agreement.

Under the latest U.S. policy, economies that have either implemented forced-labor import bans or committed to adopting them through reciprocal trade agreements face a 10 percent tariff if they have partially effective enforcement measures.

Within ASEAN, Indonesia and Malaysia are also subject to the 10 percent tariff, while Vietnam, Thailand, Singapore and the Philippines face a higher 12.5 percent rate.

The current trade framework follows months of negotiations.

On April 2, 2025, U.S. President Donald Trump announced plans to impose a 49 percent tariff on Cambodian goods, citing trade imbalances. Cambodia responded within 41 hours, with Prime Minister Hun Manet requesting a postponement and proposing negotiations.

Those talks culminated in the signing of the Agreement on Reciprocal Trade on Oct. 26, 2025.

On Feb. 24, tariffs previously imposed under the IEEPA were struck down following a U.S. Supreme Court ruling. The Trump administration subsequently introduced temporary 10 percent global tariffs under Section 122 of the Trade Act of 1974, but those measures expired after the maximum 150-day period on July 24.

According to the General Department of Customs and Excise, two-way trade between Cambodia and the United States reached $7.4 billion in the first six months of 2026, up 31.4 percent from a year earlier, making the United States Cambodia's second-largest trading partner.

We're putting in money to airport investments.

Thul '6-22 [Prak Chan, US, Cambodia Sign $100M Airport Investment Deal, Signals Renewed Economic Engagement," KiriPost (22 June 2026). https://kiripost.com/stories/us-cambodia-sign-100m-airport-investment-deal-signals-renewed-economic-engagement, accessed 8/1] RF-29

Cambodia and the United States on Monday made a significant step in economic cooperation with the signing of a major airport financing agreement, indicating a possible easing of tensions in their bilateral relationship.

Speaking at Canadia Tower, OCIC Vice Chairwoman Dr. Pung Carolyne described the partnership as a vote of confidence in Cambodia’s future and its governance standards.

“This partnership reflects international confidence in Cambodia's future, and in the transformative potential of this landmark infrastructure project,” she said.

“More than capital, it signals to the world that TIA [Techo International Airport] meets the highest standards of governance, transparency, environmental responsibility, and social standards demanded by leading international institutions.”

The announcement comes amid a historically complex relationship between Phnom Penh and Washington, which has faced strains over governance and human rights issues in recent years.

However, the scale and tone of the investment suggest a renewed willingness on both sides to deepen economic engagement.

“We cannot be more excited,” Caroline Vik, Chief Policy Officer of the US International Development Finance Corporation (DFC), said. “We hope this is the first of many.”

The project centres around the development of Techo International Airport, where the construction phase, according to Carolyne, has already seen ties built between the US, including $41.6 million in goods and services procured from American vendors.

Carolyne said that the agreement extends beyond business. “This relationship runs deeper than commerce.”

“It reflects the growing trust and friendship between Cambodia and the US, built on institutions, standards and shared opportunities that will shape Cambodia's development for years to come,” she added.

Looking ahead, OCIC outlined an expansive vision tied to the airport’s development. Plans include the construction of a new mixed-use “airport city” with more than 10,000 residential and commercial units, aimed at boosting economic activity and employment.

Other planned initiatives include a new waterway linking Boeung Cheung Loung to the Funan Techo Canal, a solar energy project with a planned capacity of 20 to 30 megawatts.

Carolyne said these efforts would transform the surrounding area into a “dynamic urban center” and enhance Cambodia’s attractiveness for investment.

Meanwhile Vik, who represented Washington, praised the airport project and framed it as part of a broader strategic push.

“You are just the type of partner we’re looking for in Cambodia and around the world,” she said. “We hope this is the first of many projects that we do together.”

Vik added that the rapid expansion of the DFC, which now has $205 billion in investment capacity, allows it to support large-scale projects globally through financing tools such as loans, equity, and insurance.

She said that the airport is emblematic of a new phase in US development finance engagement.

“We want to do large, strategic projects like the airport and be the best partner we can possibly be,” she said, adding that the facility itself symbolises Cambodia’s future. “It took my breath away, a truly beautiful project.”

Vik said there are three key priorities guiding US investment strategy, diversifying supply chains, especially for critical materials, strengthening strategic sectors, including energy, AI, and finance and developing critical infrastructure, such as transport and digital networks.

She added that the US is interested in supporting Cambodia’s broader infrastructure ambitions, including ports, canals, railways and telecommunications systems.

And, we mitigated their border dispute.

Wee '25 [Sui-Lee. "Under Trump’s Aegis, Cambodia and Thailand Agree to Resolve Border Dispute," The New York Times (10-26-25). https://www.nytimes.com/2025/10/26/world/asia/trump-cambodia-thailand.html, accessed 8/1] RF-29

Cambodia and Thailand on Sunday agreed to move toward resolving longstanding hostilities over their shared border, as President Trump took credit for mediating the decades-old dispute and sought once again to burnish his peacemaking credentials.

Mr. Trump and the prime minister of Malaysia, Anwar Ibrahim, helped broker a cease-fire between Cambodia and Thailand in July, ending a deadly five-day conflict. On Sunday they witnessed Prime Minister Hun Manet of Cambodia and his Thai counterpart, Anutin Charnvirakul, sign an agreement in Kuala Lumpur, the Malaysian capital.

It was the one of the most high-profile commitments toward peace between the two sides. Mr. Trump termed the deal “the Kuala Lumpur peace accords” and called it “historic.”

But there are significant obstacles for lasting peace: the neighbors have not agreed how to define the border and have to manage nationalistic emotions over the issue. The official text of the agreement described it not as a peace deal but a joint declaration by the prime ministers of both Cambodia and Thailand “on the outcomes of their meeting in Kuala Lumpur, Malaysia.”

Still, a key part of the deal was a commitment by the two sides to withdraw heavy weapons from the border, moves that will be monitored by observers from the Association of Southeast Asian Nations. Another breakthrough was the announcement that Thailand would repatriate 18 prisoners of war to Cambodia.

The agreement on Sunday, signed during an ASEAN summit, was also remarkable because Thailand has consistently said it rejects third-party mediation in the dispute. Thailand’s foreign minister, Sihasak Phuangketkeow, told reporters that the United States helped in facilitating the talks but that the negotiations were bilateral.

At least 40 people were killed after the latest iteration of the border dispute erupted into war on July 24. Hundreds of thousands were displaced. Mr. Trump intervened on the third day of fighting, calling the leaders of both Thailand and Cambodia to say he was not going to continue tariff negotiations if they did not end the conflict.

Cambodia is infatuated, anyway.

Tan '25 [Rebecca. "How Cambodia, a staunch ally of China, became infatuated with Trump," The Washington Post (9-12-25). https://archive.ph/i8a6ym, accessed 8/1] RF-29

PHNOM PENH, Cambodia — Nine thousand miles from Washington, on the muddy banks of the Mekong River, a curious case of Trump fever is spreading.

Government advisers and business leaders here have likened the U.S. president to God. Monks — highly revered in the Buddhist nation — have walked through the streets carrying his photo. Last month, the country's prime minister nominated him for the Nobel Peace Prize.

Despite being one of the world's staunchest China supporters, Cambodia is embracing President Donald Trump with a level of enthusiasm virtually unmatched in Asia.

"The Trump way of operating is something that the Cambodian leadership understands," said Virak Ou, head of Future Forum, a Phnom Penh-based public policy think tank, citing Trump's disregard for democratic processes. "This is the kind of leader they recognize."

Cambodia relies on China as its largest donor, lender, investor and trading partner. It hosts, by one estimate, over a hundred projects that could be considered as falling under China's trillion-dollar Belt and Road investment initiative, and consistently votes with Beijing at the United Nations, even on its most controversial positions.

The country's warmth toward Trump, however, could give Washington an opportunity to reassert its influence, opening a window into the unexpected ways Trump is reconfiguring the global order even as he damages ties with long-standing U.S. allies and alienates budding partners.

Part of Cambodia's charm offensive is calculated — a bid to lower punishing tariff rates, balance an overreliance on Chinese investment, and soften human rights criticism lobbed by previous U.S. administrations, say analysts.

There's also, however, a genuine affinity between Trump and Cambodia's ruling elite, who have become increasingly authoritarian in their efforts to consolidate control over the nation of 17 million. This was turbocharged when Trump helped force a ceasefire in a border conflict between Cambodia and Thailand last month, which channeled nationalist fervor into pro-Trump sentiment

This means that the negative has access to terminal defense against every affirmative.

Furthermore, relations between Cambodia and China are reaching a new high and are set to deepen. It's inclusion likely worsens the 'uniqueness issue'.

Matthews '7-19 [Joseph, senior professor at the BELTEI International University in Phnom Penh. "China-Cambodia ties reach a new high as both countries celebrate 68 years of friendship," TheStar (7-19-2026). https://www.thestar.com.my/aseanplus/aseanplus-news/2026/07/19/china-cambodia-ties-reach-a-new-high-as-both-countries-celebrate-68-years-of-friendship, accessed 8/1] RF-29

As Cambodia and China mark 68 years of diplomatic relations, their bilateral relationship has evolved significantly.

Established on July 19, 1958, through the historic engagement of the previous generations of leaders of the two countries, bilateral relations have withstood changing international dynamics.

By sharing weal and woe, both sides have forged an ironclad friendship that remains a precious asset for both nations and their peoples.

What began as early diplomatic solidarity has transformed into a robust economic partnership and, ultimately, an unbreakable ironclad friendship.

The concept of an ironclad friendship signifies a mutual commitment to preserving strategic stability and providing core support, regardless of global geopolitical evolution.

Both nations have consistently adhered to the Five Principles of Peaceful Coexistence, multilateralism, and close coordination within regional frameworks like the ASEAN-China mechanisms and the Lancang-Mekong Cooperation.

Cambodia became an early partner in the China-proposed Belt and Road Initiative (BRI) following its launch in 2013. Under the BRI and complementary bilateral agreements, economic cooperation between the two countries has facilitated major infrastructure and trade projects in three main areas: the industrial development corridor, transport and connectivity, and trade integration.

Centered around the Sihanoukville Special Economic Zone, the industrial development corridor helps transform Cambodia's coastal Preah Sihanouk province into a premier manufacturing and export hub.

As a result of infrastructure cooperation, major expressways, deep-sea ports, international airports, hydropower plants, key bridges and national roads have been built in Cambodia.

Concurrently, the China-Cambodia Free Trade Agreement and the Regional Comprehensive Economic Partnership have granted Cambodian goods greater access to the Chinese market, making China Cambodia's primary trading partner and a main source of foreign direct investment.

Beyond the BRI, the bilateral partnership was further underpinned by the "Diamond Hexagon" cooperation framework, which has boosted engagement in six priority areas: politics, production capacity, agriculture, energy, security, and people-to-people exchanges.

The framework continues to inject strong momentum into building an all-weather Cambodia-China community with a shared future in the new era to a higher level.

Moving forward, the cooperation between the two countries will continue to deepen. Besides relying on high-level political rapport, relations are increasingly embedded in institutionalized, multi-sectoral integration designed for long-term durability.

Uniqueness

Countries are generally favorable to China, that is great negative uniqueness. However, countries are transitioning to a cautious optimism.

Li '7-16 [Kevin, Fellow, Center for China Analysis at the Asia Society. "Global Public Opinion on China: China's Standing in Southeast Asia's Swing States," Asia Society (7-16-26). https://asiasociety.org/policy-institute/global-public-opinion-china-chinas-standing-southeast-asias-swing-states, accessed 8/1] RF-29

3. Regional Trajectory: From Growth Optimism to Cautious Pragmatism

Across Southeast Asia's swing states, public opinion toward China has remained net positive over the past two decades, but has steadily declined. Using the GPOC dataset's measure of net favorability, the regional average declines from roughly +33 in the 2000s, to +26 in the 2010s, and +20 in the 2020s. The trajectory reflects greater sensitivity to security risks, as China's economic weight and geopolitical presence expanded.

[FIGURE 1 OMITTED]

[FIGURE 2 OMITTED]

The results suggest that in the 2000s, Southeast Asian citizens experienced China primarily as an engine of growth. Trade integration accelerated under the 2002 China-ASEAN framework agreements and the implementation of the free trade area in 2010, which reduced the cost of trade by eliminating tariffs on about 90% of all goods. Chinese demand supported commodity exporters and manufacturing supply chains across the region.

The 2008 Global Financial Crisis reinforced that perception. As Western markets contracted, China sustained growth and import demand, cushioning regional economies. For much of Southeast Asia, China's rise translated directly into jobs, contracts, infrastructure, and export markets. That material embeddedness established a durable baseline, reinforced by proximity, diaspora linkages, and expanding tourism.

From that point forward, two dynamics move in parallel. On one side, economic engagement has deepened. The Belt and Road Initiative (BRI), announced by President Xi in Jakarta and Kazakhstan in fall 2013, expands infrastructure finance and construction activity, further embedding Chinese capital, technology, and capacity across Southeast Asia. Indonesia has emerged as a major recipient of BRI-linked investment, concentrated in coal, metals, mining, and railway development. Others have also seen substantial inflows, including for ports in Singapore, rails in Malaysia, EV manufacturing in Thailand, and beyond.

At the same time, maritime tensions intensified. The sharpest break in public opinion emerges in 2012 when a two-month standoff between the Philippines and China over Scarborough Shoal ended with Beijing consolidating de facto control. Prior to mid-2012, the regional average on public favorability towards China stood near +33; after 2012, it declines to near +21. Subsequent developments coincided with the continuation of this trend, including Vietnam's 2014 oil rig crisis, which triggered a wave of anti-China protests and Indonesia's 2017 renaming part of the SCS to the Natuna Sea. The 2016 arbitration ruling under UNCLOS in favor of the Philippines further elevated regional legal and sovereignty narratives, even as elite responses varied, with some governments responding more cautiously than others.

[FIGURE 3 OMITTED]

This does not make Southeast Asia as a whole hostile toward China per se. Its significance, however, lies in marking the institutionalization of maritime friction as a persistent feature of regional geopolitics. The uptick in incidents demonstrated that China was willing and able to alter facts on the water in ways that carried tangible sovereignty and economic consequences. From here, maritime security risks became a structural factor shaping public sentiment, particularly in claimant states.

In parallel, the late 2010s introduce another adjustment. The U.S.-China trade war accelerated global supply chain fragmentation and relocation into Southeast Asia amid rising cost and geopolitical risk, benefiting Vietnam, Malaysia, and Thailand. Yet these new production ecosystems remain linked to Chinese intermediate goods and upstream inputs. Therefore, China's role becomes more central, not less. Public opinion reflects this dual reality: opportunity expanded, but dependence furthered visibly.

Crucially, however, volatility is not region-wide. In fact, we observe a clear differentiation amongst the maritime frontline states, maritime tension states, and non-frontline states, a distinction explored in the sections that follow.

A broader structural pattern: economic integration is associated with stable baseline sentiment, while sovereignty disputes coincide with instability. Direct territorial friction produces sharp but geographically concentrated downturns. Trade, investment, and supply chain linkages tend to create a durable positive floor. BRI-linked controversies have surfaced, but they have generally been less destabilizing in ASEAN economies than in other economies, such as in Africa.

The COVID-19 pandemic briefly strained China's image before stabilizing. Initial uncertainty gave way to vaccine diplomacy, with Southeast Asia emerging as a major recipient, accounting for roughly 29% of China's total vaccine donations by June 2021. Sentiment in the 2020s remains lower than in earlier decades, but positive on balance.

[FIGURE 4 OMITTED]

Another pattern emerges when separating survey questions that measure favorability toward China from those that assess China's influence. The net favorability figures used throughout this paper combine both types of survey questions. When these observations are disaggregated, questions about China's influence tend to produce more positive net scores than questions about favorability. This suggests that even when attitudes toward China soften following maritime confrontations, respondents often continue to recognize China's influence — in the region and in the world — as substantial. Since survey coverage varies across countries and years, the comparison should be interpreted as indicative, rather than precise.

Of course, Southeast Asia in practice does not move as a bloc. Regional averages conceal substantial divergence across countries. While the general long-term trajectory is best characterized as moderated optimism, distinct differences arise across maritime frontline states, maritime tension states, and non-frontline states.

With respect to Vietnam, public sentiment swings are historically intense, but there is a durable baseline.

Li '7-16 [Kevin, Fellow, Center for China Analysis at the Asia Society. "Global Public Opinion on China: China's Standing in Southeast Asia's Swing States," Asia Society (7-16-26). https://asiasociety.org/policy-institute/global-public-opinion-china-chinas-standing-southeast-asias-swing-states, accessed 8/1] RF-29

4.2 Vietnam

Vietnam exhibits the most dramatic downturn among the swing states, centered on the 2014 Haiyang Shiyou-981 oil rig crisis. When China deployed the rig into disputed waters near the Paracel Islands, the confrontation triggered large-scale anti-China protests and riots inside Vietnam. Public opinion plunged sharply into negative territory in the immediate aftermath. Vietnam's trough also falls to substantially lower levels compared to the Philippines.

[MULTIPLE FIGURES OMITTED]

Yet the crisis proved intense but contained. In July 2014, the rig was withdrawn earlier than planned, allowing both sides to frame the episode as resolved. Additionally, Vietnam did not pursue a legal arbitration route nor rely on a formal U.S. security guarantee. Instead, high-level political and party-to-party exchanges resumed relatively quickly, helping stabilize bilateral ties and gradually restore working political trust. Maritime disputes persisted, but were managed.

The years that followed show gradual recovery. As tensions stabilized, economic linkages regained prominence. U.S.–China trade tensions redirected manufacturing activity toward Vietnam under "China+1" strategies, yet this shift did not weaken Vietnam's economic dependence on Chinese intermediate goods and upstream inputs. On the contrary, supply chain integration deepened.

At the same time, Hanoi's party leadership adopted a more cautious political framing of the relationship emphasizing party-to-party ties and internal security cooperation, even as defense engagement with the United States expanded. As a result, anti-China nationalist narratives were downplayed in official discourse. As economic interdependence expanded and political channels remained open, public sentiment in the 2020s stabilized well above the lows of the mid-2010s.

Thailand favors China, but could be dissuaded.

Li '7-16 [Kevin, Fellow, Center for China Analysis at the Asia Society. "Global Public Opinion on China: China's Standing in Southeast Asia's Swing States," Asia Society (7-16-26). https://asiasociety.org/policy-institute/global-public-opinion-china-chinas-standing-southeast-asias-swing-states, accessed 8/1] RF-29

Thailand follows a gradual trajectory. Net favorability averages roughly +38 across the full period. Sentiment remains consistently positive.

The moderation in Thailand coincides more with domestic political developments. Following the 2014 military coup, which brought General Prayuth Chan-ocha and the junta to power, Bangkok's relations with Western democracies cooled following condemnation, while engagement and warmth toward Beijing strengthened.

[FIGURED OMITTED]

China's muted response to Thailand's political developments and sustained high-level exchanges between the two governments reinforced this alignment. Economic ties also remained highly visible to the public: China continued to be Thailand's largest source of tourists, with over six million visitors in 2024 alone. While controversies involving Chinese tourism or investment occasionally surface in domestic debate, they have not fundamentally altered perceptions. Instead, Thailand's baseline sentiment toward China has remained relatively stable, consistent with strong economic linkages.

We're losing ground writ large.

Grossman '26 [Derek. "The U.S. Is Losing Ground to China in Southeast Asia," World Politics Review (5-14-26). https://www.worldpoliticsreview.com/us-losing-influence-china-southeast-asia/, accessed 8/1] RF-29

Late last month, Chinese Foreign Minister Wang Yi made a five-day, three-nation tour through Southeast Asia, visiting Cambodia, Thailand and Myanmar. Coupled with Chinese leader Xi Jinping's visit last April to Vietnam, Malaysia and Cambodia, it is a sign that Beijing views the region as a strategic and economic priority.

By contrast, since his return to office last year, U.S. President Donald Trump has visited only one country in Southeast Asia—Malaysia—for a regional summit last year. His secretary of state and national security adviser, Marco Rubio, has likewise only been to Malaysia twice—once to arrange Trump's trip, and again alongside him for the summit. Rubio has not visited any other Southeast Asian country. Secretary of Defense Pete Hegseth has fared only marginally better, having visited the Philippines, Malaysia, Singapore and Vietnam—though all last year.

Why does this matter? Because showing up in Southeast Asia is more than half the battle when it comes to waging and winning the competition for influence. Washington, thus far, has shown relative disinterest in sustained high-level engagement, undermining its ability to compete with China. Without routine engagement, Southeast Asian countries become uneasy about U.S. commitments and tend to look elsewhere—such as to China—to fulfill their needs. To be sure, this is a problem that predates Trump, but it has become more pronounced during his tenure.

Sufficient engagement has been predictively unlikely and difficult, there's plenty of disadvantage uniqueness, especially hedging.

Yang '24 [Anthony. "Economic Courting Game in Southeast Asia: Can the United States Keep Pace?" Oxford Political Review (7-29-2024). https://oxfordpoliticalreview.com/2024/07/29/economic-courting-game-in-southeast-asia-can-the-united-states-keep-pace/, accessed 8/1] RF-29

Long gone are the halcyon days of Chimerica, when the US prides its relationship with China being a win-win partnership. Such optimism has faded, as geopolitical tensions intensify over pressing issues such as trade rules and regional leadership, wherein Washington and Beijing compete with one another for support from smaller states. One region that takes centre stage in the US-China geopolitical rivalry is Southeast Asia, which has been subjected to increasing economic engagement from both major powers over the years. However, while China has been able to bolster its economic presence, the US faces domestic and strategic hurdles which compromise its competitiveness vis-à-vis Beijing in Southeast Asia.

The American Lob-sided Engagement in Southeast Asia

Since President Biden took office in 2021, the US has taken accelerating steps to counter China's burgeoning influence in Southeast Asia. Not only were there high-profile exchanges between top-ranking American officials and Southeast Asian host countries, but the first US-ASEAN Special Summit—where the US pledged USD$150 million to deepen relations with ASEAN states—was also held. Furthermore, the US has been strengthening its traditional security cooperation, as well as upgrading its bilateral relationships with key ASEAN partners. On the economic front, the US unveiled the Indo-Pacific Economic Framework (IPEF) in 2022, which focuses on strengthening cooperation primarily on governance, digital ecosystem, and climate change.

Despite the Biden administration's increased efforts to engage Southeast Asia to counter China's rapidly growing influence, pundits have pointed out what they perceive as the blind spot of the American strategy in Southeast Asia. Several have highlighted that the US places a premium on traditional security issues at the expense of economic engagement with Southeast Asia. Based on trade volume, they have argued not only that Washington's current economic engagement in the region is insufficient to rival China's, but also that it has steadily lost ground to its competitor. This is particularly salient given that China's total trade with ASEAN rose to US$730.1 billion in 2022, which is nearly double that of the US—which stood at US$422.5 billion.

Furthermore, pundits have stressed that the IPEF is far from a traditional trade deal that incorporates explicit commitments towards reducing trade tariffs as well as preferential market access. This makes it inadequate to match the efforts of China—which has established deeper economic ties with Southeast Asia through the Regional Comprehensive Partnership (RCEP). Moreover, the Trump administration has also undermined US economic influence in Southeast Asia through its abrupt withdrawal from the TPP in 2017, which was purported to bring balance to China's economic influence in the region. This essentially leaves the US devoid of a credible economic strategy to counter China's increasing economic influence in Southeast Asia.

All-Out Economic Strategy: Easier Said than Done?

Against this backdrop, there are burgeoning calls emanating from policy analysts and retired diplomats—both from and outside of the US—that strongly advocate for the US to elevate its current economic engagement in Southeast Asia to a fully-fledged strategy focusing on trade, investments, and infrastructure. To counter China's economic influence effectively, many have urged the US to adopt an all-out economic strategy that is competitive enough to match the Chinese one. Despite analysts emphasising the infeasibility of the US in crafting an economic strategy that aims to achieve total victory over China in Southeast Asia, they have staunchly argued that a sufficiently comprehensive economic strategy is still useful in strengthening economic relationships with neglected ASEAN states such as Cambodia and Laos. Doing so will possibly allow the US to advance its strategic goals throughout Southeast Asia to counter China.

However attractive such a strategy may seem, it is nonetheless unlikely that the US would chart its economic presence in Southeast Asia through an all-out economic strategy. The hefty political costs of implementing unpopular policies—amidst an increasingly protectionist domestic climate—stands as the main reason for this reserve.

The idea that the Biden administration would revive the TPP or construct a new regional trade deal similar to the TPP does not bode well among supporters of the Democrat Party, as they fear that such free trade deals would harm America's economic interests by outsourcing jobs and businesses because of foreign competition.

Besides, the US is a strong supporter of human rights. According to the 2024 Critical Issues poll conducted by the University of Maryland, a majority of Americans supported the idea of a value-based foreign policy approach that rigorously defends human rights globally. This means that the Biden administration could face tough domestic pressures if it were to grant new market access through free-trade agreements to ASEAN, which is comprised mostly of non-democratic states that the US perceives as lacking sufficient human rights.

At any rate, the challenges for the US to construct an all-out economic strategy to counter China are compounded by Beijing's significant leverage in exerting its economic influence within Southeast Asia. China boasts a mega-regional trade pact, the Regional Comprehensive Economic Partnership (RCEP) with all ten ASEAN states, whereas the US has none under its belt since its TPP withdrawal in 2017. Similarly, China's global infrastructure projects, under the Belt and Road Initiative (BRI), have huge advantages over the US-led Partnership for Global Infrastructure and Investment—namely a fast approval process, minimal preconditions, and full financing aid. For the US to match China in such domains to retain economic competitiveness in Southeast Asia is highly costly, as the US would be hard-pressed to modify its long-standing approach to business radically. With both hands tied in rolling out competitive trade deals, it would be challenging for the US to conceive of a coherent economic strategy to counter China's presence in Southeast Asia.

An all-out economic strategy would remain especially difficult to implement due to the numerous technical complexities involved. Unlike autocracies such as China, whose centralised decision-making apparatus could leverage huge sums of resources in pursuit of its intended policy, the more democratic nature of the American political system requires Washington to gather support from various congressional and interest groups laboriously. The cumbersome processes involved in a comprehensive approach would render it an unattractive instrument for the US to address its challenges in a timely manner.

ASEAN's Persistent Hedging Culture: A Disincentive?

Beyond these economic and policy matters, Southeast Asian states' enduring hedging postures in geopolitical alignment constitutes a largely overlooked source of disincentive for deeper US-led economic involvement in the region.

To elaborate, many analysts have cautioned against the 'hegemonic bargain', whereby Southeast Asian states would support China's bid for regional hegemony in return for economic profits. Concerns have surfaced regarding how China's increasing economic influence would place ASEAN states into Beijing's orbit. Nevertheless, the aforementioned scenario has yet to materialise. Nearly all ASEAN member states have continued hedging by diversifying their foreign policies as well as voicing their collective support for non-alignment, despite having forged and benefitted from the increasingly strong economic ties with China. Even Cambodia, one of the staunchest supporters of China, has repeatedly iterated its unwillingness to choose sides and its keen interest in inclusivity instead of hegemony. With an embedded growth-centric mindset, close to every ASEAN state has resiliently rejected all forms of unilateral alignment with a single major power; such a policy may stymie their freedom to work with various like-minded partners to better develop their nation.

Over the years, China has exploited its strong economic linkages with ASEAN states to exert strong coercive pressures against some ASEAN states with regard to the unresolved South China Sea disputes. For instance, China imposed economic sanctions on the Philippines and Vietnam during the 2012 Scarborough Shoal and the 2014 Haiyang Shiyou incidents respectively to signal its resolve to defend its territorial rights. But, so far, China has experienced little success in leveraging its punitive economic measures to coerce both the Philippines and Vietnam into yielding to Beijing's demands in the South China Sea. The latter would be especially alarming to the US, which seeks to contain China's growing dominance in the disputed waterways.

Despite being ASEAN's largest economic benefactor for more than one decade, China has not been able to pressure ASEAN states to conform to its bidding, let alone to convince them to side with Beijing over Washington. Under such circumstances, why would the US be overly concerned? The urgency of a US-led comprehensive economic strategy to counter China in Southeast Asia is therefore overstated.

Betting on Engagement, Not All-Out Strategy

In the foreseeable future, Washington will probably continue its limited economic engagement in Southeast Asia even as the cries for greater economic involvement loom ever larger. With an increasingly polarised political climate surrounding domestic issues such as immigration borders and employment rate, the US may not feel obliged at the moment to counter China's overseas presence in every sphere and with the same intensity. Such an approach would incur costs and require resources which could be directed at other areas that need more attention. Instead, the US is likely to discount the economic dimension while strategically concentrating on specific areas such as traditional security and bilateral relations that could bolster its relevance in Southeast Asia. After all, ASEAN states have regarded Washington's security engagement as necessary vis-à-vis an increasingly assertive China. With the current balance of power, greater US economic engagement is unlikely to become a reality.

Credibility is important [our paper indentifies lack of presence and transactionalism as barries to credibility], that's why we should deepen engagement.

Kuok '7-29 [Lynn, Lee Kuan Yew Chair at the Brookings Institution. "Beijing's Next Play for the South China Sea," Foreign Affairs (7-29-2026). http://foreignaffairs.com/china/beijings-next-play-south-china-sea, accessed 8/1] RF-29

These efforts depend on Washington's credibility. Countries in the region must trust the United States to act dependably, to counter China without needless escalation, and to observe the international law it invokes. Washington must deepen its economic and diplomatic engagement across Southeast Asia and correct course on policies in the region and beyond that constrain its partners' ability to resist Beijing. Above all, the United States and its allies and partners must see China's advances at sea and on land for what they are and respond before the cumulative effects of individually minor acts harden into a new regional order.

China, despite its positive relations, is marred by suspicion. We can attribute the suspicion towards the U.S. due to transactionalism and unilateralism. This card is really good at making a uniqueness claim, give it a thorough read.

Gersetl '7-30 [Alfred, President of CEIAS. "No easy choice: Southeast Asia's split views on US leadership and China's rise," CEIAS (7-30-2026). https://ceias.eu/no-easy-choice-southeast-asias-split-views-on-us-leadership-and-chinas-rise/, accessed 8/1] RF-29.

Introduction

In principle, thanks to their realist and pragmatic view of global politics and the hedging strategies pursued by the majority of Southeast Asian governments, these governments were better prepared to deal with the Trump 2.0 administration than their European counterparts. Southeast Asia has traditionally sought friendly relations with both the United States and China, while also cooperating with many other partners to reduce the risk of dependence on a single major power. Nevertheless, there were concerns from the outset that Southeast Asia, due to its substantial trade surplus with the United States, could fall victim to US President Donald Trump's transactional economic policies.

Indeed, Trump's "reciprocal tariffs", announced in April 2025, shook the Southeast Asian export-oriented economic model of success to its very foundations. Even longstanding partners such as Vietnam (tariffs of 46%), Thailand (36%), Indonesia (32%), Malaysia (24%), and the Philippines (17%) were hit hard. At 10 percent, Singapore got off relatively lightly. Although the tariffs were later lowered after they were deemed unconstitutional, their announcement raised fundamental concerns about Washington's commitment to maintaining the rules-based international order and the stability of US partnerships in Southeast Asia and the Indo-Pacific at large.

Critical views of the US and more positive perceptions of China in Southeast Asia

According to the Singapore-based ISEAS – Yusof Ishak Institute's 2026 annual expert poll, the main geopolitical concern in Southeast Asia is the US leadership under Trump (51.9%), notably its lack of respect for the rules-based international order. Close behind are global scam operations (51.4%)—many of which originate within the region—and aggressive behavior in the South China Sea (48.2%). Although the latter is mostly attributable to China, there are also critical views of increased military engagement by the United States and non-regional actors.

By contrast, China is viewed more positively in Southeast Asia (and globally). According to the latest Pew Research Center representative survey conducted in March 2026 across 20 countries, respondents now view China more positively than the United States, at 46% compared to 36%. In 2025, 48% of those surveyed held a favorable view of the United States, 38% of China. A NIRA general survey, conducted in spring 2026 in 85 countries, confirms the pattern of China's improved image, while the perceptions of the United States become increasingly negative.

Opinions about China are especially polarized in the Indo-Pacific. Some 90% of Pakistani respondents view China favorably, whereas 88% of Japanese respondents view it unfavorably. Beyond Japan, respondents in key US partners such as Australia, India, and South Korea also view the United States more favorably than China.

The Philippines is the only Southeast Asian country in which a majority of respondents view the United States favorably (57%, compared with 40% for China), according to a Pew Research Center survey. In the other four countries surveyed, China leads by a wide margin. In Malaysia, the disparity is most pronounced: only 25% view the United States favorably, compared with 75% for China. In Indonesia, 28% view the United States favorably, compared with 72% for China. In 2023, those figures were 55%

and 49%, respectively. In Singapore, 27% view the United States favorably, compared with 73% for China. In Thailand, 30% view the United States favorably, compared with 69% for China.

While less pronounced, the critical views of the United States in Malaysia reported by the Pew Research Center align with a large, representative 2022 survey commissioned by Palacký University Olomouc across 15 Indo-Pacific countries. That survey also found very favorable views of the United States in the Philippines and Vietnam (84% each) and net-positive ratings in Thailand (also 84%), Indonesia, and Singapore. This makes the rapid deterioration of these indicators in these three countries all the more stunning.

Striking differences emerge when people are asked whom they trust more to do the right thing in world affairs: Chinese President Xi Jinping or Trump. Across the five Southeast Asian countries surveyed by the Pew Research Center, the Philippines is the only case in which confidence in Trump is higher than in Xi: 68% versus 50%, an 18-point advantage for Trump. In the other four countries, Xi leads by wide margins: Malaysia (66% versus 13%, +53 points for Xi), Singapore (67% versus 19%, +48), Indonesia (62% versus 20%, +42), and Thailand (53% versus 19%, +34).

However, the more positive views of Xi do not translate into a clear strategic preference for China. According to the ISEAS – Yusof Ishak Institute survey, China is, for the second time since 2024, the preferred great power if Southeast Asia were forced to choose between China and the United States. However, the margin is narrow: 52% for China and 48% for the United States. In 2024, the split was even tighter and within the margin of statistical error, at 50.5% to 49.5% in China's favor. Thus, experts in the region remain divided over their strategic preferences for one of the two great powers, underscoring the need to avoid being forced into such a costly choice.

One reason is that while the Trump administration's commitment to the rules-based order is rightly being called into question, confidence in China as a champion of international law is not that high either, not least due to Beijing's assertive behavior in the South China Sea. Across Southeast Asia, views of China as the leader of the Global South are cautiously positive but not decisive. According to the ISEAS – Yusof Ishak Institute survey, 41.9% of respondents have confidence (or strong confidence), 29% express little or no confidence, and 29.1% offer no comment. Even in Indonesia and Malaysia, confidence values are below 45%.

Washington's good cop, bad cop approach toward Southeast Asia

The United States is here to stay in the Indo-Pacific and Southeast Asia. It will remain a crucial security partner and arms provider for countries such as Singapore, Thailand, the Philippines, and Vietnam. And even though China is the main trading partner of the Southeast Asian nations, the United States is a major economic partner, having traditionally been the main investor in Southeast Asia, ahead of the European Union and China.

However, as outlined in the National Security Strategy of 2025, the Trump administration increasingly views Southeast Asia from a geostrategic angle, as a key region for the military and economic containment of China. It is therefore no coincidence that Secretary of War Pete Hegseth reaffirmed Washington's "ironclad commitment" to the US-Philippines Mutual Defense Treaty. The Philippines occupy a pivotal position in the First Island Chain, which includes Taiwan and runs along the South China Sea, hindering China's access to the Pacific Ocean.

At the Shangri-La Dialogue in Singapore in June 2026, Hegseth played "bad cop," warning US allies not to "free ride on the generosity of the American taxpayer" and urging greater investment in their own security and defense, while Rubio presented a friendlier face for the Trump administration in July 2026. During his visit to the ASEAN Regional Forum meeting in July 2026, Rubio emphasized Washington's commitment to remain a reliable and durable partner for Southeast Asia. Together with President Trump's appearance at the ASEAN Summit in Malaysia in October 2025, these engagements helped clarify the US approach to the region.

Conversely, Southeast Asia "is not turning away from Washington, [but] it is becoming less assured by the direction of US leadership". Singapore Prime Minister Lawrence Wang, a long-standing US partner, was among the first Southeast Asian politicians to respond to the geopolitical and geoeconomic challenges, further intensified by Trump's return to the White House and China's foreign policy and military buildup. He stressed that Southeast Asia does not want a world divided into competing spheres of influence and wants to avoid being forced to choose between the United States and China; he stated that these two great powers are increasingly doing so.

Wang seemed to articulate the consensus view in Southeast Asia that the United States under Trump is no longer upholding the rules-based order, which has been the foundation for peace, stability, and economic development in the region. However, rather than aligning with Beijing, Southeast Asia has deepened its hedging strategy since 2025, aiming to balance its relations with China and the United States.

Conclusion

President Trump's unpredictability and inconsistency, especially on trade, have jolted export-dependent Southeast Asia. This is compounded by widespread criticism of his foreign policy, from intervention in Venezuela and the war against Iran to steadfast support for Israel. The latter is notably contested in Brunei, Malaysia, and Indonesia.

Skepticism toward the Trump administration coincides with a somewhat more positive view of China among local citizens and experts, yet recent surveys show Beijing's policies still elicit significant mistrust across the region. Despite increasingly favorable perceptions, China has not been able to win over the hearts and minds of the people of Southeast Asia, let alone in the broader Indo-Pacific. Cooperation with China is therefore driven by shared interests rather than shared values. And while the United States under Trump is no longer seen as a reliable guarantor of the rules-based order, neither China—nor any other country—appears willing or able to fill the vacuum and provide the kind of leadership the US did in the past. For instance, China failed to support Southeast Asian countries in overcoming fuel and fertilizer shortages caused by the war in Iran. Fears that the Trump policies would push the region firmly toward China are therefore overstated.

Over the past two decades, Southeast Asia has adapted to the reality that the defining US–China rivalry is here to stay. Hedging therefore remains Southeast Asia's strategy of choice: a pragmatic, flexible approach to navigating the policies of both Washington and Beijing. Stronger diversification of economic and security ties, based on closer cooperation with like-minded partners, including the European Union, would further bolster this approach.

The two billion rings hollow as new duties just landed.

Majeed '7-26 [Zaini. "Trump Tariffs: Washington's 'We're With You 100%' Promise Rings Hollow In ASEAN As New Duties Land A Day After Marco Rubio's Pledge; Why It Threatens US' Credibility?" The Sunday Guardian (7-26-2026). https://sundayguardianlive.com/world/trump-tariffs-washingtons-were-with-you-100-promise-rings-hollow-in-asean-as-new-duties-land-a-day-after-marco-rubios-pledge-why-it-threatens-us-credibility-246703/ accessed 8/1] RF-29.

The United States imposed new tariffs on seven Southeast Asian economies this week, just one day after US Secretary of State Marco Rubio told the same countries' foreign ministers that the US was "with ASEAN 100 per cent," a sequence of events that analysts point out has deepened perceptions across the region of Washington as an unreliable partner and has handed Beijing a diplomatic opening it is moving quickly to exploit.

Citing what it said were forced labour practices uncovered in its latest investigations, the US imposed levies ranging from 10 to 12.5 per cent on 60 economies, with the Philippines, Singapore, Thailand and Vietnam the hardest hit among Association of Southeast Asian Nations members.

Malaysia, Indonesia and Cambodia were on the lower end of the scale as they were seen to have made more effort to strengthen enforcement. US Trade Representative Jamieson Greer said in a statement that the latest move would "correct what is both a human rights abuse and a distortive trade practice," according to the Post's reporting.

The tariffs came just a day after US Secretary of State Marco Rubio told Southeast Asian foreign ministers that the US was "with ASEAN 100 per cent" at a meeting of top diplomats in Manila also attended by Chinese Foreign Minister Wang Yi.

The juxtaposition was stark enough to draw immediate comment from regional analysts, who described it as damaging to US credibility at a moment when Washington has been actively seeking to position itself as a strategic counterweight to China's growing influence across the bloc.

A Message That Did Not Age Well

Kevin Kim, US ambassador to ASEAN, told reporters that Washington "is pursuing fair and reciprocal trade" but that he would defer to Greer on technical responses, according to reports. That carefully qualified answer did not satisfy regional governments seeking clarity on whether Thursday's tariff action was consistent with Rubio's assurances or contradicted them.

Kim described Southeast Asia as "the engine of economic growth in the 21st century," saying the region's strategic importance would continue to rise. Beyond economic cooperation, he said Washington also intended to strengthen collaboration with Asean on transnational crime, cyber threats, online scams and money laundering, while expanding defence and security cooperation with regional partners, according to the New Straits Times.

The timing of the tariff action has reinforced a pattern of concern that has built steadily within Asean since the start of 2025. At a summit in late May last year, Southeast Asian leaders described US tariffs as "counterproductive and risk exacerbating global economic fragmentation," according to a draft joint communique seen by Reuters at the time. That language reflected a collective regional frustration that has not dissipated despite subsequent rounds of diplomatic reassurance from Washington.

Mustafa Izzuddin, an international affairs analyst with consultancy Solaris Strategies Singapore, said that deepening US engagement in Southeast Asia "may be stymied by Trump's transactional approach to internationalism," according to Malay Mail.

What The Tariff Structure Means For The Region

The new Section 301 forced-labour tariffs operate on a two-tier system: economies that already impose a domestic prohibition on imports produced with forced labour face the lower 10 per cent rate, while those without such a prohibition face 12.5 per cent.

For Asean's export-dependent economies, the practical consequence is a fresh layer of duties stacked on top of whatever reciprocal tariffs were already in place from earlier rounds of the trade dispute, a cumulative burden that has left manufacturing planners and supply chain executives in Vietnam, Thailand and the Philippines recalculating the cost competitiveness of production routed through the region.

OCBC senior Asean economist Lavanya Venkateswaran said countries including Vietnam face additional uncertainty over tariffs targeting transshipments, with questions remaining over enforcement and implementation.

"The bottom line is that it's going to be quite complicated moving forward," Venkateswaran said, according to reporting by Malay Mail.

China's Presence In Manila And Its Strategic Advantage

The setting of Rubio's "100 per cent" pledge made the subsequent tariff announcement all the more diplomatically consequential. Wang Yi's presence at the same Manila meeting meant Beijing had a front-row seat for the moment Washington's words and actions came apart within 24 hours, and Chinese officials are understood to have used their bilateral margins in Manila to press Southeast Asian counterparts on the reliability of US partnership compared with what Beijing characterises as its own consistent and non-conditional economic engagement with the region.

For ASEAN governments, the choice between US and Chinese partnership has never been as binary as either power sometimes implies, and most member states have pursued economic ties with both simultaneously. But each episode in which US diplomatic assurances are followed swiftly by economic pressure makes that balancing act harder to sustain domestically, particularly in countries where manufacturing sectors dependent on US market access are politically significant constituencies.

A Pattern Difficult To Ignore

Thursday’s tariff announcement was not an isolated event but the latest in a sequence that has repeatedly placed Asean governments in the position of receiving diplomatic assurances from Washington followed by trade actions that complicate or contradict them.

The same pattern played out at the Kuala Lumpur Asean summit in July 2025, when Rubio told the region that Washington had “no intention of abandoning” Southeast Asia before Trump announced heavy new levies on six Asean members within days. Whether the region’s governments treat the Manila episode as a fresh data point in an established pattern, or whether Washington finds a way to decouple its security messaging from its trade policy before the next major Asean gathering, will determine in large part how durable the “100 per cent” assurance proves to be.

The authors believe that the 'uniqueness issue' is overblown and relies on a reactionary understanding of the region. While we do concede that China has a slight edge, expert analysis concludes that that is neither durable nor insurmountable. To this extent, we believe that a substantial increase in economic/diplomatic engagement towards the region would be sufficient to break up the Chinese stranglehold. To suggest anything else, we believe, misunderstands the complex regional dynamic and is, unfortunately, inaccurate.

Novice Packet Considerations

Vietnamese Workforce Development

Regional Trade Agreement

Other Countries

Phillipines

Economic engagement, in addition to military engagement, is necessary to counter growing Chinese assertiveness in the South China Sea. The IPEF is necessary but not sufficient.

Gatdula '25 [Rocio. The Manila Connection: Rethinking U.S. Engagement in the Indo-Pacific through the Philippines," Georgetown Security Studies Review (July 18, 25). https://gssr.georgetown.edu/the-forum/topics/geoeconomics/the-manila-connection-rethinking-u-s-engagement-in-the-indo-pacific-through-the-philippines/, accessed 8/1] RF-29

Tensions in the South China Sea have reached new heights. Recent incidents, such as the People's Republic of China's (PRC) Coast Guard's ramming tactics and aggressive use of water cannons against Philippine vessels, vividly show the escalation in the region. These bouts do not occur in the middle of nowhere: they center around strategic landmasses in the South China Sea, such as Sandy Cay—a strategic reef close to Thitu Island, the Philippines' largest outpost in the Spratly Islands. This proximity to the Philippines, and the country's centrality in the confrontation with the PRC highlight Manila's role as a key stakeholder in the intensifying great power competition in Asia. The core challenge for U.S. strategy is: beyond military deterrence, how can Washington maintain effective engagement and counter Beijing's assertiveness? The PRC's approach, which combines military expansion with economic coercion, demands a comprehensive U.S. response that integrates economic tools alongside military measures.

The Indo-Pacific Economic Framework (IPEF), alongside the Philippines' strategic partnership, illustrates a constructive model for U.S. engagement in Asia amidst developing geopolitical dynamics. Given the Philippines' strategic location, economic potential, and alignment with U.S. interests, the Philippines is well-positioned to serve as a key partner in advancing shared objectives. Even with a more pragmatic or transactional U.S. foreign policy approach, initiatives like IPEF offer avenues to promote strategic and economic cooperation, support a rules-based maritime order, and provide a credible alternative to the growing regional influence of the PRC.

Setting the Scene: Great Power Competition in Asia

The PRC's strategic ambitions in Southeast Asia encompass more than conventional military expansion; however, the growth of its armed forces forms the tip of the spear. The People's Liberation Army's Navy, now the world's largest naval force, has constructed and militarized numerous artificial features in the South China Sea, extending its power projection capabilities deep into the Philippines' Exclusive Economic Zone (EEZ). This activity persists despite the 2016 ruling by the Permanent Court of Arbitration in The Hague, which invalidated the PRC's expansive maritime claims under international law. Beijing's continued fortification of outposts and recurrent harassment of Philippine vessels—both civilian and military—not only undermines Philippine sovereignty but also poses risks to regional peace and stability.

The stakes are high: the South China Sea is a vital artery for global trade, with approximately one-third of global shipping passing through its waters, and home to vast untapped reserves of oil, natural gas, and other raw materials, including rare earth minerals essential for modern industries. The PRC's actions not only endanger the Philippines' economic interests but also challenge the broader rules-based order that underpins peace and prosperity in the Indo-Pacific.

The Philippines' Response

The Philippines responded to the PRC's escalation with a multifaceted strategy. President Ferdinand Marcos Jr.'s administration has prioritized domestic stability, advancing military modernization, and pursuing a more assertive and principled foreign policy. Legislative development, including the enactment of the Philippine Maritime Zones Act and the Archipelagic Sea Lanes Act, seeks to codify the country's maritime entitlements in alignment with the Philippine Constitution, the United Nations Convention on the Law of the Sea (UNCLOS), and the 2016 arbitral ruling. These legal measures are reinforced by enhanced defense cooperation, including joint island defense exercises and infrastructure development on Thitu Island, emphasizing Manila's commitment to safeguarding its sovereign rights and upholding the rules-based international maritime order.

Simultaneously, the Philippines has deepened its security partnerships: the 1951 Mutual Defense Treaty with the United States remains the bedrock of Manila's external security, while new agreements, such as the Status of Visiting Forces Agreement with New Zealand, expand the network of like-minded partners committed to regional stability. The Philippines is also aligning more closely with Japan, South Korea, and Australia under the "one-theatre" concept, treating the East and South China Seas as a unified operational domain for intelligence-sharing and mutual reinforcement.

U.S. Economic Engagement and IPEF in Action

While military cooperation remains a critical component of regional security, it is insufficient on its own to counter the PRC's gray-zone tactics and economic statecraft effectively. The United States recognizes that sustained engagement must include robust economic initiatives. Thus, the IPEF reflects a renewed approach to U.S. regional involvement, prioritizing equitable trade practices, supply chain resilience, clean energy development, and digital infrastructure, while deliberately avoiding contentious elements often associated with traditional free trade agreements—such as tariff liberalization, investor-state dispute settlement (ISDS) provisions, and rigid intellectual property protections.

The Philippines' participation in IPEF is particularly significant. As the only U.S. treaty ally with a claim in the South China Sea, Manila is both a frontline state and a test case for the effectiveness of U.S. economic engagement in the region. IPEF projects in the Philippines focus on strategically important sectors such as critical minerals, semiconductors, and maritime infrastructure—areas that directly relate to the broader great power competition by reducing dependency on the PRC's supply chains and enhancing the Philippines' economic resilience.

Recent U.S. trade and investment missions to Manila have yielded over $1 billion in new investments supporting innovation, clean energy, and supply chain security. The Luzon Economic Corridor, launched in 2024, is the flagship IPEF project in the Philippines. It connects key economic hubs like Subic Bay, Clark, Manila, and Batangas, facilitating coordinated investments in infrastructure, renewable energy, and advanced manufacturing. U.S. private sector involvement, such as Cerberus Capital Management's acquisition and revitalization of the Subic Bay shipyard (strategically located at the former U.S. naval base), not only boosts the Philippines' maritime capabilities, but also supports U.S. and allied naval operations in the region.

These initiatives have strategic value: they help the Philippines build a credible first line of defense against PRC coercion, professionalize its armed forces, and reduce long-term reliance on U.S. support. Economic engagement also strengthens Manila's ability to withstand PRC economic pressure and assert its sovereignty in contested waters.

Expanding the Model

The Philippines has emerged as a pivotal actor within an expanding network of minilateral cooperation in the Indo-Pacific. The "Squad"—comprising the Philippines, Japan, the United States, South Korea, and Australia—represents a new model of strategic alignment characterized by enhanced operational coordination, intelligence-sharing, and mutual capacity-building. By framing maritime security challenges as collective concerns, this framework promotes a more integrated regional response. What the "Squad" represents for military and security cooperation, the IPEF offers for economic engagement: a flexible, interest-based platform aimed at strengthening supply chains, driving clean energy development, and shaping the region's digital future. Together, these initiatives reflect a dual-track strategy that integrates security and economic objectives, positioning countries like the Philippines to play a central role in a more resilient, rules-based regional order. When combined with U.S.-supported economic initiatives, such cooperation contributes to the development of a more adaptive and sustainable structure for preserving regional stability.

Public-private partnerships (PPPs) are critical to this strategy. By leveraging U.S. private sector investments in ports, energy, and technology, IPEF provides a mechanism for sustainable development that aligns economic incentives with strategic objectives. The U.S. International Development Finance Corporation's recent $20 million loan for affordable housing and plans for a regional office in the Philippines exemplify the kind of targeted, high-impact engagement needed to make a difference.

To maintain a meaningful stake in the Indo-Pacific, the U.S. must scale and sustain economic engagement alongside military presence. The IPEF should be expanded and fully leveraged as a platform for PPPs, encouraging further U.S. investment in critical infrastructure and technology sectors in the Philippines. Washington needs a comprehensive strategy that integrates economic cooperation, capacity-building, and multilateral coordination to uphold a rules-based order. The Philippines, as a case study, demonstrates the importance of combining strategic location, economic opportunity, and political will to counterbalance PRC ambitions.

Conclusion

As great power competition intensifies in the Indo-Pacific, the United States may increasingly rely on the Philippines as a strategic anchor for regional engagement. In addition to strengthening military alliances, the U.S. employs initiatives such as the Indo-Pacific Economic Framework (IPEF) to counter the multifaceted strategy of the PRC. By deepening its partnership with the Philippines and embedding economic cooperation into its broader Indo-Pacific strategy, the U.S. can further strengthen its regional influence, promote stability, and uphold a rules-based maritime order.

While there are likely more advocates compared to Cambodia, existing engagement towards Manila likely exacerbates the uniqueness issue that is claimed. We believe that adding countries can resolve the uniqueness issue, but it is contigent upon the country being added. It is our opinion that neither Cambodia nor the Philippines sufficient resolve the uniqueness concerns. In fact, we believe either would exacerbate the issue.