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CHINA'S INVESTMENT IN THE EAST COAST RAILWAY LINE (ECRL) PROJECT IN MALAYSIA AS A STRATEGISATION OF SPACE

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Abstract

China has partnered with Malaysia to construct the East Coast Railway Line (ECRL) as an alternative route for securing the energy supply that sustains its industrial development. The ECRL project addresses the structural constraints imposed by the Straits of Malacca, the chokepoint through which the bulk of China's Middle Eastern oil imports must travel, by linking Port Klang to Port of Kuantan by rail, with onward shipment to mainland China by vessel. This article examines how China deploys its investment in the ECRL project as a strategisation of space, drawing on smart power and hard power theory as its analytical framework to trace the strategies China has used to draw Malaysia into constructing the project. The discussion is organised into five parts: an account of the ECRL project and China's role in it; the theoretical framework of smart power and its relation to connectivity; the smart power strategy China uses to project regional dominance; the relationship between the ECRL project and Chinese strategic interests, emphasising its mutual benefit for both countries; and, finally, an analytical synthesis showing that Chinese investment in the ECRL project constitutes a strategisation of space, exercised through smart power and through the connectivity it builds among China, Malaysia, and other oil-exporting states.

Keywords: *ECRL; China; Malaysia; Strategisation of Space; Investment*

INTRODUCTION

China is widely regarded as an emerging global power. Kristof (1993) anticipated that China would come to rival the supremacy of the United States, pointing to its economic growth and military spending as the fastest-expanding in the world at the time. Shenkar (2006), by

contrast, argues that this rapid economic expansion has itself become a source of new difficulty for China, generating rising inequality between rich and poor, pervasive corruption across business and government, severe pollution, and mounting demographic pressure.

A further consequence of China's rapid growth is the challenge of energy security. According to Zheng Bijian, senior adviser to former Chinese President Hu Jintao, China's per capita water resources amount to only a quarter of the world average, while its per capita natural gas, copper, and aluminium resources stand at roughly 8.3%, 4.1%, 25.5%, and 9.7% of global averages respectively (Zhao, 2008). Data from the United States Energy Information Administration (2015) show that China had become the world's largest energy consumer by 2011 and its second-largest oil consumer after the United States; by 2004 it was already the world's second-largest oil importer, at 117 million tonnes, a marked reversal from the 1980s, when China had in fact been East Asia's leading oil exporter (Mubah, 2011). Although China's oil-consumption growth has slowed in recent years, the Energy Information Administration projected that the country would still account for more than a quarter of global growth in oil consumption in 2015 (United States Energy Information Administration, 2015).

Longer-term projections point in the same direction: China is expected to require 600 million tonnes of crude oil annually by 2020, more than triple its domestic output, with oil demand reaching 11 million barrels per day, natural gas consumption more than tripling to 3.6 trillion cubic feet a year, and coal use rising by 76% to 2.4 billion tonnes annually. Oil imports were projected to cover 61% of China's estimated demand by 2010 and 77% by 2020, prompting former Chinese Premier Wen Jiabao to describe energy dependency as a matter of national security (Zhao, 2008). In response, China has pursued a range of diplomatic and administrative measures to secure its energy supply, cultivating commercial and political ties with energy-producing states, investing aggressively in overseas oil fields and pipelines, and using its position within international organisations to advance energy cooperation (Zhao, 2008). This effort rests substantially on state-owned energy companies: the China National Petroleum Company (CNPC), which controls more than two-thirds of China's crude oil production capacity and operates mainly in the north and west; China Petroleum and Chemical Corporation (Sinopec), which controls more than half of the country's refining capacity and serves as its principal crude oil importer in the south; and the China National Offshore Oin

Oil Corporation (CNOOC), responsible for offshore exploration and production (Zhao, 2008). In June 2005, China further consolidated this effort by establishing the State Energy Leading Group under Premier Wen, an institution designed to strengthen the planning and coordination of national energy policy (Ishida, 2007); under its oversight, state-owned firms have expanded domestic exploration while also improving energy efficiency and developing alternative fuels, reinforcing the extent to which the search for overseas energy has come to shape China's foreign relations (Zhao, 2008).

Much of China's oil imports from Africa and the Middle East must nonetheless pass through the Straits of Malacca, the most strategically significant shipping route into the country. The strait constitutes one of the world's most critical waterways in both economic and strategic terms, forming the shortest maritime link between the northern Indian Ocean and the north-western Pacific and connecting major economies such as China, Japan, South Korea, and the Middle East (Chia & Leng, 1987). More than 200 vessels pass through the strait daily an annual throughput of approximately 70,000 ships carrying roughly 80% of the energy transported to Northeast Asia along with about a third of the world's traded goods (Qu & Meng, 2011). At its narrowest point, the Philips Channel, the strait is only 2.8 kilometres wide, with a navigable channel of just 2.1 kilometres, making it one of the world's principal maritime chokepoints; its shallowness and narrowness constrain the passage of large vessels and increase the potential need for traffic-regulation measures, bridges, or tunnels that could further affect the flow of seaborne traffic (Chia & Leng, 1987). Qu and Meng (2011) note that incidents in the strait, such as tanker accidents near Port Dickson in August 2009 and at the Changi Terminal in May 2010, have on occasion forced its partial or complete closure, exposing China's acute vulnerability to any disruption of its oil imports and, by extension, to risks for its economic development, social stability, and military operations (Zhang, 2011; Zhao, 2008). The strait has, in addition, long been associated with piracy: the International Maritime Bureau recorded 138 pirate attacks in 2006 alone, some involving heavily armed assailants targeting small tankers, attacks widely attributed to separatist elements linked to the Free Aceh Movement (Lobo-Guerrero, 2008).

Chinese leaders have accordingly come to view the Straits of Malacca as a significant strategic vulnerability (Zhang, 2011; Zhao, 2008). In November 2003, President Hu Jintao warned that unspecified major powers sought to control the strait and called for new strategies to mitigate this exposure, noting that roughly 80% of China's trade, including its oil imports, passed through the six-hundred-mile waterway (Sarma & Reinert, 2013). The Chinese press

subsequently devoted considerable attention to this so-called ‘Malacca dilemma’, famously declaring that whoever controls the Straits of Malacca holds a stranglehold on China's energy route (Storey, 2006), a formulation that has since remained a central concern both for Chinese planners and for outside observers of China's rise (Sarma & Reinert, 2013).

Beyond strengthening its own energy enterprises, China has pursued cooperative pipeline agreements with exporting states. Its first major transnational pipeline, completed in 2006 by CNPC and the Kazakh firm KazMunayGaz, linked Xinjiang Province to Kazakh oil imports and connected onward to a line from Western Siberia (Tessman & Wolfe, 2011). In the Russian Far East, the Eastern Siberia–Pacific Ocean (ESPO) pipeline, developed in two stages, includes a spur line delivering roughly 300,000 barrels per day from Eastern Siberia and offshore Pacific fields to Northeast China (Tessman & Wolfe, 2011). At a broader scale, China has formed the Belt and Road Initiative (BRI), comprising the overland Silk Road Economic Belt and the maritime twenty-first-century Silk Road, terms that evoke both the historic Eurasian trading network predating the sixteenth century and China's aspiration to reclaim the prosperity and standing it associates with its historical past, an aspiration articulated domestically as the Chinese Dream (Liu & Dunford, 2016). Announced as a formal policy concept at China's Central Economic Work Conference in December 2013, the BRI has since been joined through memoranda of understanding by more than thirty countries, with over forty more expressing interest, evidence of its considerable influence on global development (Liu & Dunford, 2016). In 2014, President Xi Jinping further launched the Asian Infrastructure Investment Bank (AIIB) with 47 billion US dollars in seed funding to support the initiative (Zhong, 2016); BRI-financed projects, largely built and supplied by Chinese state-owned or state-linked firms, are intended to revive the ancient Silk Road as a modern trade corridor stretching more than 8,000 miles from Shanghai to Berlin, encompassing an economic zone spanning over a third of the Earth's circumference and enabling the overland transport of energy through corridors such as the Eurasian Land Bridge, China–Mongolia–Russia, China–Central Asia–West Asia, China–Pakistan, Bangladesh–China–India–Myanmar, and China–Indochina (Liu & Dunford, 2016; Zhong, 2016).

One expression of the China–Indochina economic corridor is China's growing investment in Malaysian infrastructure. China has in recent years become Malaysia's largest foreign investor: in November 2016, fourteen memoranda of understanding worth a combined 143.6 billion Malaysian ringgit were signed with Chinese firms, encompassing the East Coast Railway Line (ECRL, valued at 55 billion ringgit), the Melaka Gateway Project (32.6 billion

ringgit), the Trans-Sabah Gas Pipeline (2.5 billion ringgit), a Wuxi Suntech Power Co. Ltd. manufacturing facility in the Malaysia–China Kuantan Industrial Park (4 billion ringgit), Xiamen Malaysia University (1.3 billion ringgit), and several other major projects (Loh, 2017).

This article focuses on the ECRL project because it represents the single largest Chinese investment among these initiatives and carries the most direct significance for transporting oil supply toward China. The planned line will connect the more developed West Coast of the Malaysian Peninsula, running from Port Klang, to its comparatively underdeveloped East Coast at Port of Kuantan and onward to the peninsula's north-eastern corner, thereby strengthening the East Coast's connection to the strategically vital Straits of Malacca, a gateway linking Southeast and South Asia, the Middle East, and Africa (Grey, 2017). By connecting Port Klang to Port of Kuantan, the ECRL offers China a cheaper and less risky alternative route than exclusive reliance on the strait itself. This article accordingly investigates how Chinese investment in the ECRL project functions as a strategisation of space, structured across four analytical parts an account of the ECRL project and China's role in it, the theoretical framework of smart power and connectivity, the smart power strategy China deploys to project regional dominance, and the relationship between the ECRL project and China's strategic interests followed by a concluding synthesis.

ANALYSIS FRAMEWORK

Strategy, Power, and Connectivity

Freedman (2013) describes strategy as the art of creating power, situated within a realm of bargaining and persuasion as much as threat and pressure, and of psychological as much as physical effect; strategy is, in this sense, the central political art, concerned with extracting more from a situation than a simple balance of power would suggest, and functions as an instrument through which actors pursue their power interests.

Power itself denotes an actor's capacity to shape the behaviour of others in order to obtain a desired outcome, achieved through three principal mechanisms: coercion, payment, and attraction. Coercion and payment together constitute hard power, while the capacity to secure preferred outcomes through attraction constitutes soft power (Nye, 2009). Because relying on either form in isolation rarely suffices to implement state policy effectively, Nye (2009) introduced the concept of smart power. Wilson III (2008) defines smart power as an actor's capacity to combine elements of hard and soft power in mutually reinforcing ways that

advance its purposes effectively and efficiently. The concept responds directly to the limits of soft power alone: Nye (2009) illustrates this with the case of North Korean leader Kim Jong Il, whose reported fondness for Hollywood films did nothing to alter his pursuit of a nuclear weapons programme. Nye (2009) further describes the skill of combining hard- and soft-power resources into a coherent smart-power strategy as contextual intelligence the intuitive diagnostic capacity that allows policymakers to align tactics with objectives. Crocker et al. (2007) similarly characterise smart power as the strategic use of diplomacy, persuasion, and capacity building, together with the cost-effective projection of power and influence in ways that retain political and social legitimacy.

As an emerging economy, China has likewise developed and deployed its own smart-power strategy. The individual policy choices made under Hu Jintao and his advisers reflect a deliberate effort to arrange a balanced, integrated set of instruments capable of advancing both narrow political objectives and broader national purposes. Hu's doctrine of 'China's Peaceful Rise' stands, in this respect, as a clear counterpoint to the emphasis on military superiority that characterised the approach of former U.S. President George W. Bush (Wilson III, 2008). The term 'peaceful rise' originated with Zheng Bijian, who introduced it in 2004 at a roundtable meeting between the Bo'ao Forum for Asia and the China Reform Forum, arguing that peace and rise, though seemingly contradictory, could coexist: China, in his account, would safeguard world peace through its own development, pursuing socialism with Chinese characteristics while engaging with economic globalisation on the basis of peaceful coexistence (Bijian, 2004). At the 17th Party Congress in 2007, Hu observed that an increase in hard power alone risked alarming China's neighbours, whereas a simultaneous increase in soft power would make it less likely that other states would form coalitions against China a logic that captures the essence of a smart-power policy combining both forms. The stability and pragmatism associated with China's governance, reinforced by an appeal to Confucian values, has helped reassure international partners and reflects the exercise of soft power, even as competing claims over oil fields and the Diaoyu Islands have periodically incentivised the use of hard power in the East China Sea (Koreh, 2015).

Power is closely bound up with connectivity, which through infrastructure and large-scale projects has long been recognised as central to global political and economic change and as a reflection of shifting political and economic realities; Halford Mackinder's classical contribution to geopolitics, for instance, rested on the transformative effects of railway construction (Blanchard & Flint, 2017). Port-rail connectivity in particular constitutes a

strategic element of port development, both economically and competitively, and helps to reduce negative externalities for surrounding populations and environments: effective rail linkages expand a port's hinterland and support growth in capacity without straining the port-city relationship, connecting spatially fragmented processes without congesting the urban environment around the port (Matamala & Salas, 2012). A seaport, in this sense, functions as a state's extended hand into foreign markets, bringing together shipping lines, inland waterways, and railways so as to enable the exchange of goods with the least possible friction (Lobo-Guerrero, 2012).

RESEARCH METHOD

This article focuses on the ECRL project because it represents the largest single Chinese investment concerned with transporting oil supply from oil-exporting countries toward China. The planned rail line will connect the more developed West Coast of the Malaysian Peninsula, beginning at Port Klang, to the comparatively underdeveloped East Coast at Port of Kuantan and onward to the peninsula's north-eastern corner, thereby strengthening the East Coast's link to the Straits of Malacca as the strategic gateway between Southeast and South Asia, the Middle East, and Africa (Grey, 2017). By connecting Port Klang to Port of Kuantan, the ECRL provides China with a comparatively cheaper and less risky transport option. This article accordingly investigates how Chinese investment in the ECRL project functions as a strategisation of space.

The analysis is organised into five parts. The first introduces the ECRL project in Malaysia and the role of China, explaining why the ECRL was selected among other Belt and Road projects. The second situates the case within its theoretical framework, namely smart power theory in relation to connectivity. The third examines the smart power strategy China employs to project dominance in the region, drawing on data concerning China's regional sphere of influence from academic journals, books, and other relevant sources. The fourth relates the ECRL project to China's strategic interests, discussing how the project proves mutually beneficial for both countries. The fifth part presents the concluding synthesis.

RESULTS AND DISCUSSIONS

The ECRL Project in Malaysia and the Role of China

Although many countries participate in the Belt and Road Initiative, the partnership with member states of the Association of Southeast Asian Nations (ASEAN) is particularly

significant given China's active engagement with the region. Chinese contractors have increasingly competed with more established Korean and Japanese firms in these markets, establishing a strong presence in Malaysia through a solid bilateral relationship between the two governments (Miu et al., 2017).

China ranks as Malaysia's second-largest export destination, accounting for 10% of Malaysia's total exports in 2016, while simultaneously topping the list of import sources at 20% of Malaysia's total imports; because Malaysia imports considerably more from China than it exports, the bilateral trade relationship produced an estimated deficit of 24 billion ringgit for Malaysia in 2016, meaning that China derives the greater economic benefit from the relationship (Lee, 2016). Malaysia additionally possesses one of the highest-quality infrastructure bases among ASEAN countries: a study guided by Goldman Sachs Global Economics ranked Malaysia's infrastructure quality at 5.1, compared with 5.9 for South Korea, 4.6 for Thailand, 3.8 for Indonesia, and 3.2 for the Philippines (Grey, 2017), underscoring Malaysia's strategic appeal as an investment destination for China.

In November 2016, Malaysia and China signed fourteen agreements worth a combined 33 billion US dollars, the most significant of which concerned the ECRL, Bandar Malaysia, and the Melaka Gateway (Lee, 2016). Among these Belt and Road projects in Malaysia, the ECRL remains the most expensive, at approximately 55 billion ringgit (Grey, 2017).

The 600-kilometre ECRL mega-project is intended to sustain the momentum of Malaysia's National Transformation Programme, cutting through four states Klang Valley, Pahang, Terengganu, and Kelantan and connecting Port of Kuantan and the Malaysia–China Kuantan Industrial Park to the West Coast, both regarded as components of the broader Maritime Silk Road Initiative. The line links numerous townships, including Port Klang, the Integrated Transport Terminal at Gombak, Bentong, Mentakab, Kuantan, Kemaman, Kerteh, Kuala Terengganu, Kota Bharu, and Tumpat, as part of a wider plan to connect rural areas; the Malaysian government has stated that the railway is expected to lower transportation costs, reduce goods prices, and shorten travel time between the West and East Coasts (Grey, 2017). The project aims to reduce travel time from Shenzhen to Port Klang from 165 hours via Singapore and the Straits of Malacca to 135 hours via Port of Kuantan and the ECRL, thereby altering the existing regional trade route that presently runs through the Straits of Malacca, Singapore, and the disputed South China Sea (Patrick, 2017).

The project is financed through a twenty-year loan from the Export-Import Bank of China. Malaysia's Prime Minister at the time stated that the ECRL was expected to add 1.5% to the gross domestic product of the three states it traverses (Lee, 2016), while then Transport Minister Datuk Seri Liow Tiong Lai noted that the project would bring substantial economic development to the East Coast and further strengthen the longer-term potential of the East Coast Economic Region (Rosely, 2016).

The ECRL Project as a Chinese Smart Power Strategy to Project Regional Dominance

China's principal objective is to remain economically and militarily strong, yet exercising influence as a genuine world power requires projecting power beyond its borders, particularly within the ring of neighbouring states it has historically sought to dominate. Southeast Asia is especially significant in this respect: as the region most accessible and receptive to Chinese influence, and as an economically dynamic area closely tied to China's own coastal development, it is an almost inevitable target for incorporation into a recognisably Chinese sphere of influence (Stuart-Fox, 2004). China's economic rise has, in turn, restructured industrial networks across East Asia, positioning China as the final point of assembly and export for regional production, while the Chinese government has sought to consolidate its economic leadership by driving broader regional economic integration (Goh, 2011).

The ECRL project itself can be read as one expression of this smart-power strategy: by financing the line, China simultaneously extends its influence over Southeast Asian states and secures access to resources from oil-exporting countries. Grey (2017) argues that the project signals China's growing influence over ASEAN member states and functions as both an economic and political instrument for securing more robust diplomatic alliances and unimpeded access to newly expanding markets; empirical evidence suggests that China's pursuit of high-speed rail dominance extends well beyond transport and convenience into the realm of political influence and economic ties, as illustrated by the fact that the ECRL contract was awarded directly to a Chinese firm without an open international tender, one of numerous Chinese investments in Malaysia in recent years.

For China, the ECRL project also represents a further extension of its influence in Malaysia, a country that maintains claims to some of the disputed South China Sea islands central to China's own geopolitical and strategic interests. At the project's Kuantan ceremony, Chinese State Councillor Wang Yi stated that the Chinese government attaches great importance to China–Malaysia relations and regards Malaysia as a valued neighbour and

reliable partner committed to mutually beneficial cooperation and shared development (Lee, 2017). Such statements underscore the strategic value that China attaches to close ties with Malaysia, even as critics of then Prime Minister Najib Razak argued that the country had grown excessively reliant on Chinese financing (Lee, 2017), a dependency that positions Malaysia squarely within China's regional sphere of influence. China's relations elsewhere in Southeast Asia have, by contrast, proven considerably more strained notably with Singapore, whose support for the 2016 international tribunal ruling against China's South China Sea claims, together with its deepening ties to the United States, has left China comparatively reluctant to invest there (Stuart-Fox, 2004; Goh, 2011). Given the region's expanding trade and economic development, China's determination to secure both political and physical connections through high-profile projects such as the ECRL is unsurprising: once a new rail route begins serving a region previously lacking functional connectivity, the resulting benefits tend to accumulate quickly (Grey, 2017).

The ECRL Project as a Strategisation of Chinese Interest

China's 55-billion-ringgit investment in the ECRL is expected to cut travel time between the East and West Coasts from an average of twelve hours to roughly four. As transport costs fall and East Coast localities gain improved connectivity to Port Klang in Selangor, new business opportunities and jobs are expected to emerge along the line's twenty-three stations, benefiting existing towns such as Mentakab, Chukai, and Maran while potentially opening new settlements along the corridor (Grey, 2017).

Malaysia relies heavily on its rail network to support both passenger and freight transport, with ridership growing by 8.5% between 2011 and 2015 according to Suruhanjaya Pengangkutan Awam Darat (the Land Public Transport Commission), and annual nationwide rail ridership reaching 230 million in 2014. The East Coast Economic Region, covering 51% of Peninsular Malaysia's total area and home to nearly five million people, has been identified by the government as the primary beneficiary of the ECRL, described as a high-impact infrastructure project forming the backbone of the region's multimodal transport network (Grey, 2017); this evidence indicates that Chinese investment is capable of building genuinely new economic capacity for Malaysia.

The ECRL project benefits China as much as Malaysia, since it grants China greater and more diversified access to oil supplies. CNPC alone accounts for roughly 80% of China's total foreign equity oil production, while Sinopec and CNOOC have likewise expanded their

overseas holdings; by 2008, overseas equity investment accounted for close to 30% of China's total oil production. Geographic diversification remains a central objective of China's national oil companies: roughly half of China's oil imports originate in the Middle East, 30% in Africa, and only 3% in the Asia-Pacific region (Tessman & Wolfe, 2011). By investing in the ECRL, China thus secures faster access to oil supplies from exporting countries, helping to manage its underlying energy-security challenge.

CONCLUSION

China's rise has brought with it considerable consequences, chief among them the challenge of energy security: as its economy grows, China requires an ever-larger energy supply to sustain industrial development, yet the constraints of the Straits of Malacca widely referred to as the 'Malacca dilemma' obstruct the easy transport of oil from the Middle East. To help address this problem, China formed the Belt and Road Initiative, in which more than sixty countries participate, Malaysia among them, through the construction of the ECRL project linking Port Klang to Port of Kuantan by rail and onward to mainland China by vessel.

The analysis presented above indicates that Chinese investment in the ECRL project constitutes a strategisation of space, exercised through smart power and through the connectivity China builds among itself, Malaysia, and other oil-exporting countries in pursuit of its interest in oil. As defined above, smart power combines hard and soft power to advance an actor's aims effectively, involving the strategic use of diplomacy, persuasion, capacity building, and the projection of power and influence. In the case of China and Malaysia, China uses Malaysia as a regional sphere of influence by committing an immense sum to the construction of the ECRL; the resulting relationship leaves Malaysia dependent on China, even as China in turn regards Malaysia as a trustworthy partner.

Beyond its regional influence, China also uses Malaysia as a strategic conduit for its energy supply from oil-exporting countries: by routing trade through Malaysia, China reduces both time and cost while easing its exposure to the Malacca dilemma. For Malaysia, the project offers reciprocal benefits by strengthening its position within regional trade and business networks. Chinese investment in the ECRL project in Malaysia should therefore be understood as a strategisation of space.

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