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Yellow Peril 2.0: A review and critique of current research and reporting on China's rising land investments in Southeast Asia

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Yellow Peril 2.0: A review and critique of current research and reporting on China's rising land investments in Southeast Asia

Juliet Lu

1. Introduction

Chinese land deals, more than those of most other countries considered 'land grabbers', come under unique scrutiny. Media coverage of Chinese land investments outweighs the proportion of global investments they represent and Chinese companies are predominantly portrayed as eschewing regulations and standards, being especially unscrupulous in their pursuit of profit, and acting as not as typical economic actors but as strategic agents of the Chinese state. The land grabs literature has been, from its inception, a highly activist body of work and initial efforts to quantify and describe land grabs were based on media reporting. It also emerged at a political moment, exacerbated by the 2008 global financial crisis, characterized by China's growing economic influence and involvement in sectors traditionally dominated by Western actors (e.g. development aid and infrastructure financing). At this point in the study of global capitalist processes and transnational land investments, the role of China must be considered by scholars across fields and regions, through various lenses of analysis. I argue that common understandings and portrayals of Chinese land investments, largely framed by Western hegemonic ideas of development and hampered by the inherent difficulties of studying such a new yet expansively influential phenomenon as Chinese global capital, too often rely on a simplistic set of dominant narratives and biases which must be unsettled.

Land grabs scholars have complicated and deepened portrayals of China in the literature. Definitions of land grabs have also been tested and expanded to acknowledge a broader diversity of actors and processes at work. Nevertheless, key narrative elements from the original framing – strong investors versus weak host countries, land deals of unprecedented size rising in number at terrifying speeds, and long standing ecological, political, and sociocultural structures being wiped away by emerging crises and new forms of foreign exploitation and extraction – remain especially compelling. Within this framing of land grabs generally, China is disproportionately studied for how it fits simplistic characterizations of the quintessential land grabber, and this view of China persists. This paper aims to refine approaches to studying China's land investments by grounding them in the specific context of Southeast Asian agricultural land deals, and using this context as a lens through which to distinguish between meaningful trends and misleading generalizations of Chinese agricultural land investments globally.

I focus on Chinese agricultural investments in Southeast Asia because I see it as an ideal lens for complicating the "Spectre of Global China" (Lee 2013), around which scholarship and international commentary has been largely grounded in African experiences. I posit that Southeast Asia is a region in which common global narratives and biases about China do not carry, and thus that studying China in Southeast Asia has important contributions. To begin with, there is a tendency to overgeneralize – to study Chinese land deals as a monolithic category while missing or misrepresenting the nuances in the drivers and channels through which Chinese investments occur. For example, early literature focused on state-owned enterprises, and work on this specific type of Chinese investor still frames base assumptions of Chinese investor motives, links to the state, and operating standards. But due to the geographic proximity of Southeast Asia to China, far more small- and medium-sized Chinese enterprises in less strategic, state-supported sectors can afford to invest in Southeast Asia than in Africa or Latin America. This generates a greater diversity of economic activities and investors, especially in sectors like agriculture where profit margins are thin and distance is a defining factor.

Second, Chinese land deals are often analyzed without critically distinguishing them from other investors or asking whether their being from China is a useful analytical category at all. China is one of many emerging market investor countries, and especially in Southeast Asia where intra-region investment (especially by highly competitive Thai, Vietnamese and Malaysian agribusiness corporations) is common, Chinese companies are sometimes indistinguishable from, even less active than, other transnational corporations. Framing Chinese investments as necessarily unique distracts from studying other investors, host country actors, and underlying structural causes shaping and driving the global boom in foreign land acquisitions.

Finally, Chinese investments are readily presented in contrast to traditional donors, often with the implication that this constitutes evidence of fault. Chinese land deals, especially those which China packages as development cooperation, are often criticized as purely profit driven or privileging Chinese national interests over host country development goals and social or environmental safeguards. Meanwhile, there is growing evidence that Chinese investments have been far from uniformly successful, and the relative power of Chinese actors in political contexts foreign to them should be more deeply studied. China’s own narratives about its outward investment and development cooperation activities contain contradictions and simplifications of their own. But critiques too often portray China in ways which ignore the sordid history of Western aid, trade, and development cooperation which predates (indeed often paved the way for) China’s current interventions. They also often obscure the fact that, for a variety of reasons, host country governments and elites seek out Chinese assistance and themselves often shape the structure and impacts of Chinese land deals.

After reviewing scholarship on the dominant narratives framing Chinese land grabs, I conclude that most of the problematic simplifications and tropes documented so far can be attributed to misunderstandings about the relationship between the Chinese state and the myriad forms of Chinese capital now operating globally, far from state control. I argue that the tendency to overgeneralize, to assess China in isolation of context and comparison, and to criticize based on China’s differences and not on a nuanced assessment of its actual practices and impacts on the ground, are rooted in homogenizing misunderstandings of China as a non-democratic, authoritarian power in contrast to Western liberal democracies (Yan & Sautman 2013, 134). In the next section, I lay out how this homogenizing view of Chinese state-capital relations is mobilized to portray China as a threat to Western political and economic ideals comparable to how the racist color-metaphor of Yellow Peril was mobilized in the past. I then review common narratives of Chinese land grabs and existing critiques, and discuss alternative explanations for the aspects of Chinese investments these narratives seek to explain rooted in evidence from Chinese agribusiness deals in Southeast Asia. I conclude by reflecting on how studies of Chinese land deals can be improved, and what dominant narratives about them reveal.

2. Yellow Peril 2.0: What is there to fear in a rising China?

Yellow peril was a racist color-metaphor coined in the late 19th century by Russian sociologist Jacques Novikow, taken up soon after by various Western leaders to galvanize xenophobic support for invading Asian countries or for expelling Asian immigrants, and revived during the Cold War era (Diana 2009, 104). Hofman and Ho (2012) translate Yellow Peril into a modern context in which “expectations of China as an emerging global power or as the ‘booming billion consumers’ market’” dominate portrayals of its growing economic involvements abroad (3). I engage this metaphor not necessarily to debunk or label current representations of China as forms of Yellow Peril. Rather, I hope to remind us that the rise of China more broadly raises specific, historically situated anxieties in the West. These anxieties were capitalized upon strategically by leaders for their own political gains in the past, and used to obscure or distract from other geopolitical processes of relevance. They are rooted in basic fears of the sheer size of China’s population, its economic influence, and its symbolism as an archetypal other – the exotic opposite of the West.

There is a common formula used for introducing topics related to China’s growing economic influence. First, statistics fetishizing the sheer size of China are presented. Second, these are contrasted with a more modestly sized nation or with the same categories for China many decades ago (before its recent rapid rise). Then, a crisis of scarcity is established by looking to China's domestic context to demonstrate a severe mismatch between China's resources and its demands. Identify a potential source of these desperately sought resources – preferable a country whose size and economic status run opposite China's. Finally, this crisis narrative is tied together with the shocking statistics presented to assert that Chinese land investments across the global south constitute an interconnected, grand strategy of the one-party, authoritarian Chinese state.

This formula sets audiences up to focus on four characteristics of Chinese land investments which are fairly innocuous on their own, but which in combination engender perceptions of China as a threat: the fetishization of China's size, the speed of China's rise, the portrayal of China and Western powers as ideological opposites, and the view of Chinese investors and host country actors as strong and weak respectively. There are certainly real concerns to be explored within each of these aspects of Chinese land investments. China wields a certain level of influence merely by nature of its size, and policy or market shifts that might go unnoticed in a smaller nation can reverberate throughout the global economic system. Its ascendance to economic superpower status has been so rapid that actors and institutions both inside and outside China struggle to understand it and to adjust. Finally, Chinese approaches to development, business, trade, and diplomacy depart from those of traditional development partners, aid donors, economic actors, and governments in marked but often non-transparent ways – Chinese actors have yet to subscribe to certain international environmental and social standards of operating, for example.

But the larger task at stake which emerges in reviewing the narratives of 'global China' identified, the critiques of these narratives, and the alternative framings offered, is a struggle to discern the relationship between the Chinese state and the myriad forms of Chinese capital as they "Go out". The tendency to zoom out and focus on the size and scale of Chinese investments, which contributes to monolithic representations, I think reflects the parallel tendency to see Chinese actors as universally connected to Chinese state interests. After all, it was only a few decades ago that China's economy was almost completely centrally planned, its State Owned Enterprises structured economic and social life alike, and the Chinese government was on the opposite side of an ideological divide from the Western powers during the Cold War.

Many decades later, much has changed and yet on some levels, in some cases, and with certain types of economic actors the Chinese state-capital connection is still uniquely strong. For example, Beijing often paves the way on diplomatic levels for investments in strategic minerals and these deals are typically implemented by national level state-owned enterprises. Meanwhile, China's approach to development cooperation does not shy away from blending economic and political interests with its aid interventions – an approach which, given traditional donors' approaches to development aid which are rooted in a history of colonial exploitation, is normally avoided. Finally, many assume that because China is not a liberal democracy, its investors actively seek out authoritarian regimes and its investments in other countries are obtained through particularly undemocratic means. The view of Chinese investment as a proxy for Chinese state interests thus fuel concerns that Chinese companies have unfair market advantages (Moeller 2012), are particularly exploitative or undemocratic (Buckley 2013), and serve to extend Chinese state control into foreign countries (Lee 2014, 33). Still, these concerns are rarely explored on the ground or rigorously challenged by checking rhetoric against reality in Chinese land deals, and cases in which Chinese state involvement *is* significant and influential are often referred to across sectors and contexts inappropriately.

It is time to chart clearer boundaries within the "Spectre of global China" between what is known, what is inferred based on evidence and experience so far, and what is problematically assumed based on bias. The dangers of failing to more constructively analyze and engage China are threefold. First, we cannot afford to vastly misunderstand one of the most influential economic actors in the world, in part because if we do, we will fail to shape effective responses to it. Second, we may distract ourselves from studying important processes and trends that sensational coverage of China obscures. Third, we may alienate Chinese actors and place Chinese leaders on the defensive at a defining moment in the country's development as a global leader, exacerbating damaging misunderstandings, biases, and resentments.

I therefore gesture towards xenophobic tropes of Yellow Peril to remind us that these anxieties around the rise of new powers – emerging markets, BRICS countries, and especially China – hold a special currency in portrayals of a global world order shifting under China's rise. This is especially true in an arena like the land grabs debate which was founded on an activist agenda aimed strategically at highlighting new forms of power inequalities, exploitation and dispossession. Modern tropes of Yellow Peril encourage us to see China as a competitor, to see differences necessarily as threats, and to see its inherent size and expanding economic orbit in zero sum terms as a territorial challenge on multiple fronts. My point is not to defend Chinese land investments against Western criticism or to argue these investments' pros or cons. Instead, I hope that critically interrogating Western representations and logics underlying common critiques will help us move toward more constructive engagements of China in the land grabs literature. Moreover, Chinese actors engage in plenty of their own biases, xenophobic stereotypes, and historical simplifications. The perspectives of these Chinese actors cannot be effectively interrogated or engaged in their own right unless they are untethered from Western biases and hypocrisies and delivered with attention to and inclusion of Chinese perspectives on development.

3. Complicating China through the Southeast Asia context

Each investment region and investor country has unique characteristics, but there are special aspects of the China-Southeast Asia relationship that make it an important lens through which to study the rise of China. At a fundamental level, China's proximity to Southeast Asian nations results in multiple unique layers for study which I think prove some of the points already raised by Africa scholars regarding common narratives of Chinese land investments. True, China's ties to Africa or Latin America have their own depth and political significance, but the geopolitics, historical and sociocultural ties, and the basic logistical realities of trade affecting and affected by Chinese land investments its Southeast Asia are multiplied by their proximity. In Southeast Asia, the relationship between the Chinese state and Chinese capital is particularly fractured, especially when comparing investments in regions bordering China in the Mekong Region to those in island Southeast Asia. Complicating this state-capital relationship are long histories of trade, migration, political tension, and territorial disputes between China and its neighbors, as well as intra-regional economic ties and political interests which China must balance.

China in Southeast Asia

Despite the abundance of studies highlighting China's rise in land investments in Africa,
Based on FAO (2013, 16 and 25) and UNCTAD (2009) reporting, Mills (2015) observes that Asia has experienced higher FDI flows from 2000-2010 than either Africa or Latin America and, within this figure, China was the top contributor to agricultural investments from 2003-11. Conversely, Hofman and Ho (2012) observe that, "contrary to common perception, the bulk of Chinese investments over 2000– 2008 did not go to Africa, but to Southeast Asia" (20). There thus appears a disconnect between the abundance of studies and media reporting on China in Africa and the higher levels of Chinese investment in Southeast Asia, reflecting a methodological bias (Oya 2013).

This significant presence of Chinese capital in Southeast Asia makes sense both because of its close proximity to the region and, as a result, its strong historical ties. Chinese maritime activities have been a defining feature of Southeast Asian economic trade and cultural exchange throughout history. There is a vast, economically active diaspora of ethnic Chinese throughout the region who were a critical source of capital when China itself was developing in the 1980s and now constitute key networks through which Chinese investments of all sorts function (Goetz 2015). Geopolitical tensions – old and new – also shape current patterns and pathways of investment. Southeast Asia was a fault line during the Cold War (Pye 2012), and the region was carved out according to corresponding political lines. While China enjoyed friendly socialist country relations with Laos, Vietnam and Cambodia at that time, relations quickly turned sour after China invaded Vietnam and Laos and Cambodia also cut off diplomatic relations with China in solidarity – only opening relations again in the 1990s (Mertha 2014). Currently, China is engaged in territorial disputes with Vietnam and the Philippines in the South China Sea – disputes which sparked a wave of anti-Chinese investment demonstrations in Vietnam in 2014.

These historical and territorial tensions perhaps explain why China has worked to increase its ‘soft power’ engagements in the region (Lum et al. 2008). And in contrast to Western leaders’ critiques of China as not yet a ‘responsible stakeholder’ (Zoellick 2005) and media labels of it as a ‘rogue creditor’ (Wall Street Journal 2006), China also emerged as a key source of financial support for Southeast Asian nations after both the 1997 Asian Financial Crisis and the 2008 Global Financial Crisis. China is also increasingly stepping away from its tendency to eschew multilateral institutional involvements, having actively supported the Asian Development Bank’s Greater Mekong Subregion (GMS) project, established the Asian Infrastructure Investment Bank (AIIB), and increasingly engaging as an outside partner in the Association of Southeast Asian Nations (ASEAN). China seems to see a special political value in establishing the same reputation it seeks in other regions – as a leader of the developing world, a South-South development partner, and a responsible investor.

Within Southeast Asia, there is also a distinct geography to land grabs and the involvement of Chinese investors. According to a review by Schoenberger and Vandergeest (2017), the degree of land deals deemed to constitute ‘land grabs’ varies significantly across countries: Vietnam and Thailand host relatively few, perhaps because their governments have heavily supported smallholders over agribusiness interests; Indonesia and Malaysia have experienced extensive agribusiness plantation activity, but these plantations originate from colonial era systems and thus are more driven by domestic than foreign capital and arose long before the 2000s, when the land grabs boom is seen as beginning; finally, Laos, Cambodia and Myanmar – the frontier market economies of ASEAN – have been of focus in the land grabs scholarship in Southeast Asia, and have been significant recipients of large-scale Chinese and other foreign agricultural investments. Across the region, land grabs scholars have tended to emphasize the role of complex, country and historical context-based drivers, as well as micro-level negotiations of over global crisis narratives (Schoenberger and Vandergeest 2017). These include a significant emphasis on host country political histories and regional capital flows. For example, projects of post-war state building and post-socialist land and agricultural reforms feature centrally in explanations for the boom in foreign land acquisitions in Laos and Cambodia (Sikor & Lund 2009; Schoenberger and Vandergeest 2017). This tendency to look less at global drivers and more at regional and local factors stems from the deep body of research in Southeast Asia on agrarian transformations, state territorialization, and enclosures which long predated the land grabs literature here.

Finally, in the countries that border China in montane Southeast Asia, there are special local geographies, defined by regional networks, through which Chinese investment has occurred. First, boom crops have swept through the region for decades now, often concentrated in frontier regions – borderlands or areas where the reach of global markets is recent and transformational (Eilenberg 2014; Barney 2009; Lagkervist 2014; Tsing 2003). The actors who engage in crop booms include large-scale agribusiness investors, but also a highly varied set of borderland networks and smaller-scale producers. The activities of small and medium enterprises (SMEs) are also documented (see, for example, Friis 2016) and even large deals like hydroelectric dams have been shown to involve a diverse range of actors, Chinese and other, with motives and interests that depart from the Chinese state (Lamb & Dao 2017).

In this multi-layered context, despite its proximity, diplomatic weight, and historical ties, it is clear that China has far from dominated the rise of agribusiness investments in Southeast Asia. Borras and

Franco (2011) ask whether a narrow focus on the 'new bad guys' (28), meaning China, South Korea, and the Gulf States, has distracted from the role of traditional investors, especially domestic capital and EU investors especially. Instead of dominating weak states with a flood of capital and political pressure, Chinese investments have often become instruments for extending state power. A number of scholars have noted that Chinese investments in the northern Lao borderlands are used to make mountainous, remote regions more legible (Tan 2014; Diana 2009), and to discipline ethnic minorities or communities deemed less loyal to state interests (Dwyer 2012). Woods (2011) documents how Chinese investments in the Burmese borderlands became tools for extending the reach of the Burmese military government in ceasefire zones. This tendency for host country governments to use foreign land investments as mechanisms of political control fits tropes of corrupt or inept domestic regimes allying with global capital at the expense of local land users, but Lu and Schoenweger (2017) find that Chinese investors' interests can instead be deprioritized, even directly hindered by these state building and territorialization projects. Moreover, the assumed weak capacity for local land users to resist the forces of global capital is increasingly questioned (Kenney-Lazar 2016; McAllister 2015). Despite China's closer proximity to Southeast Asia than other regions, its higher levels of investment there, its historical ties, and its diplomatic efforts, Chinese investments do not fit the stereotype of strong, predatory resource investors preying on weakly governed host countries.

Realities defining the Chinese state-capital relationship

Finally, Chinese investment has seemed to explode suddenly across the developing world, which has contributed to China's portrayal as enacting a hostile takeover or an aggressive rush for resources. But this explosion of involvement also means that China is a newcomer, which comes along with significant weaknesses and drawbacks inherent to this position. As a newcomer, Chinese economic actors – regardless of the influence China's general size and wealth afford it – are not always able to control or define the terms of their engagement in land deals.

Examples from Southeast Asia, therefore, suggest revisions needed in how the relationship between the Chinese state and Chinese global capital is understood. To begin with, large-scale economic strategies like the "Go Out Policy" and the "One Belt One Road" initiative are often cited to explain flows of Chinese investment. These are important factors, but I see them as over-used in explaining trends and under-explained in the specificities of their implementation. For example, the Go Out Policy is typically depicted as a push factor incentivizing Chinese investment abroad but most of its concrete policy mechanisms simply removed long standing barriers to firms' access to capital for investing abroad. The One Belt One Road initiative also provides very few forms of tangible support or incentives for firms investing abroad (aside from a select few high-profile infrastructure projects) and instead provides a guiding political rhetoric that does more to encourage investments in certain geographical areas and sectors than to actually directly support firms. In this sense, state "support" for Chinese investors – especially in the agricultural sector which is not of strategic focus at a national level – is not as concrete as often depicted, and rarely constitutes tangible market advantages "Beijing calling the shots" (Laos merely a bystander).

The Chinese state does support investments through diplomatic facilitation and financial incentives at times, but typically only in certain 'strategic' resources (e.g. iron, copper, rubber) and state owned enterprises (SOEs). But below the level of national SOES, other forms of Chinese capital – categorized by Lee (2014) as provincial SOEs, private companies of different sizes, and entrepreneurial family farms (to which Hofman & Ho (2012) add financial institutions) – have different logics of accumulation and approaches to production and management than these national level SOEs and tend to serve the same logics of profit maximization as other representatives of global private capital. And regardless of the different degrees of connection to the Chinese state across this hierarchy of capitals, the Chinese state struggles to control firms when they operate abroad. This year, the State Council has begun reigning in unprofitable foreign investments and diplomatically unflattering projects, signaling the Chinese state's interest in protecting its reputation as a responsible investor and curbing significant investment failures in this first rush of foreign investment (Kuo 2017).

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4. Complicating and Clarifying the picture of China: Chinese narratives and perspectives

Finally, interesting findings have emerged from ground-level anthropological studies of Chinese perspectives on going out in Southeast Asia. Nyiri (2013) notes that, with China's increasing investments abroad, a Chinese mobile class is rising and cultivating their own developmental discourse. In Africa, Chinese managers openly reflect on the sense of Western hegemony, with copper mining employees labeling the Zambian mining sector a "white old boys' club" until two decades ago (Lee 2014) and Buckley (2013) documents how Chinese aid workers reinforce Chinese state claims that its development experience is closer to those of African nations than the experiences of traditional donors who developed long before. In Southeast Asia, while Chinese development discourses have been labeled patronizing and claims to a shared development path widely questioned (Cohen 2009), Chinese actors tend to take these criticisms and doubts as proof of China's victimization by the West and therefore of its claim to being the rightful leader of the developing world (Lu 2017). They assert that Western approaches to fostering development are less practical than Chinese approaches, and that Western concerns like workers' rights or free democratic expression are "fantasies that … only nations with full bellies can afford" (a high-ranking Chinese scholar of Chinese state Africa policy, cited in Nyiri 2013, 1399).

It is thus a fascinating and perhaps importantly noted irony that many of the critiques the West has of China – that its development interventions are linked to business deals, that it invests disproportionately in areas of weak land governance, and that its interventions are not tied to political requirements for host country governments – are exactly what Chinese actors take pride in. Instead of seeing the contrasts between their approaches and those of traditional investors or donors as proof of the validity of critiques, they take them as proof that China departs from hegemonic approaches to development which they depict as "a neo-colonial Euro-American project based on uneven power relations that enables the Global North to impose its political and economic ideologies onto the Global South" (Morris-Jung 2017, p. 5 *forthcoming*). In other words, just as critics proclaim China's exceptionalism in negative ways, China proclaims its own exceptionalism – often citing the same factors as evidence – in positive ways.

5. Conclusions

With almost a decade of experience and analysis of land grabs in our hands, it is time to is time to address a number of misconceptions, exaggerations, and knowledge gaps that seem to still plague portrayals of China. I see these as symptomatic of Western anxieties stemming from a persistent confusion around the relationship between the Chinese state and the myriad forms of Chinese global capital. Monolithic representations of Chinese capital hinge on a preoccupation with China's size, missing the ways Chinese actors compete with each other, the ways they are both subject to and actively evade Chinese state and host country state oversight, or simply operate independently of their country origins like other transnational corporations. Portrayals of China's rise as sudden and aggressive often forget the long history of isolation Chinese capital has undergone, ignore host country pull factors encouraging foreign investment, and do not recognize the steep learning curve Chinese actors are now undergoing through investing in new, foreign political contexts.

I suggest that studies of Chinese agricultural investments abroad need to ask whether and in what cases Chinese capital differs from other forms of global private capital, to what degree differences are rooted in Chinese characteristics or local contexts, Hofman and Ho (2011) pose a distinction between studying “Chinese land grabbing” as a category in itself or “globalization with Chinese characteristics” which I take to be a more embedded approach (21).

Meanwhile, when encountering critiques of global China, we need to ask who offers these critiques, to what intended audiences, and what purposes they may serve. How is anti-Chinese sentiment refracted through or strategically drawn into by multi-layered domestic politics? How do geopolitical struggles take up individual land deals in symbolic ways? How do governments use the spectre of global China as a straw man or leverage Chinese involvement as a counterweight to other regional powers? Who are the winners and losers in this complex network of shifting power and economic interests?

Common framings encourage us to focus on the size and spread of Chinese land deals, the stark suddenness of their rise, the seeming dominance Chinese investors exercise over small, weak host country states, and the ominously opaque relationship between the Chinese state and the hierarchies of Chinese capital. To counter these framings, we need to more carefully differentiate between types of Chinese investors across different sectors and investment contexts. We should view the last two decades of Chinese investments abroad not as a series of static incidents but as a learning process, with investors’ involvements in land deals across new political contexts as evolving encounters “where knowledge framings and their politics are constantly being negotiated” (Scoones et al. 2013, 11). And we should study ‘globalization with Chinese characteristics’ not simply in its contrast to normative understandings of traditional investors but in its own right.

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