

ADVANCING PAKISTAN-ASEAN ENGAGEMENT: LESSONS FROM ASEAN-CHINA RELATIONS

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Abstract

In the decades since establishing dialogue relations, China and ASEAN engagements have grown increasingly strategic and developed into one of the most resilient economic and political relationships in Asia. This paper examines major economic and diplomatic strategies behind that success, with key lessons to inform Pakistan's future approach to the 10-member bloc. It begins with a historical background of China-ASEAN relations, and their distinct motivations to deepen engagement. The paper highlights that the China-ASEAN strategic partnership was an important factor in helping low-growth Southeast Asian economies achieve domestic competitiveness post-1990s, open up new trade and investment opportunities in the region, and accelerate the Belt and Road progress. Based on ASEAN's experience with China, the paper offers concrete policy recommendations for Pakistan to advance its case for a full dialogue partner with the \$3.2 trillion bloc. Other recommendations include a long-term opening for diversified economic and trade engagement with ASEAN and accelerated progress for the China-Pakistan Economic Corridor (CPEC) in areas such as transport infrastructure, energy, and industrial cooperation. Pakistan can learn from three ASEAN states — Cambodia, Laos and Vietnam — that faced similar economic, trade, and growth challenges in recent years, and the strategies that they employed to address these impediments.

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Introduction

It has been about two decades since China and the Association of Southeast Asian Nations (ASEAN) elevated their dialogue relations to a strategic partnership. In agreeing to this shift in 2003, both sides acknowledged that political trust between them had ‘notably enhanced’ and that the steady cooperation in five economic engagement areas including agriculture, telecommunications, and two-way investments was evident.¹

The transition towards a strategic partnership with ASEAN can be understood as a part of China’s proactive neighbourhood diplomacy in the Asia-Pacific region. China’s approach to partnerships typically invites emphasis on key features, such as “building stable bilateral relations without targeting any third party” and “routinising official visits” such as regular summit meetings.² In ASEAN’s case, Beijing has been able to generate enduring consensus on key considerations such as stepping up investments, aligning ASEAN’s long-term development strategies and visions with the Belt and Road, and promoting more top-level government engagement through platforms such as their ‘special summit’ and the ASEAN-China (10+1) Foreign Ministers’ meetings.³ Beijing serves as the bloc’s leading trade partner, with a two-way trade volume of \$975.3 billion in 2022.⁴

Greater alignment between the strategic objectives of ASEAN and China has also bolstered Beijing’s economic and political partnerships with individual Southeast Asian states. For instance, in the case of Cambodia, there has been frequent support for the South China Sea Code of Conduct (COC), a Beijing-led maritime stability proposal with ASEAN to help reduce the risk of conflict in the South China Sea. Beijing sees the COC as a key instrument to support long-term consensus on amicable dispute resolution.⁵ At the same time, Cambodia, a relatively less competitive economy within ASEAN, also

emerged as a major recipient of the BRI projects with important lessons for Pakistan.⁶ Both countries are comparable based on two factors. First, Cambodia shares Pakistan's assumption that BRI investment will inevitably catalyse economic growth in the long-run. Second, China enjoys its status as a top bilateral donor, lender, investor, and trading partner for both economies, making it imperative to understand how Cambodia has supported BRI progression while leaning heavily on Chinese financing. The broader China-ASEAN strategic partnership played a key role in compelling countries such as Cambodia to reform domestic barriers to free trade and investment in a bid to facilitate their economic growth. Pakistan's modest economic profile and limited export potential make it critical to understand how specific ASEAN economies overcame similar challenges and how Islamabad can pursue post-reform engagement with the 10-member bloc.

"The gains in China-ASEAN cooperation over the past 30 years are attributable to our unique geographical proximity and cultural affinity and, more importantly, to the fact that we have actively embraced the development trend of our times and made the right historic choice," said Chinese President Xi Jinping at the Special Summit commemorating the 30th anniversary of China-ASEAN dialogue relations on 22 November 2021.⁷

It was at this summit that China announced the establishment of a Comprehensive Strategic Partnership (CSP) with ASEAN, a move that would signal deeper coexistence with ASEAN and expand common ground to new frontiers, such as stronger development synergies between Beijing's Belt and Road and ASEAN's All-inclusive Outlook on the Indo-Pacific (AOIP).⁸

Pakistan is the oldest Sectoral Dialogue Partner (SDP) of ASEAN, a status that represents one of several tiers of close engagements between ASEAN and its external parties. Pakistan was conferred the SDP status in July 1993 and relations were

institutionalised during the first ASEAN-Pakistan Joint Sectoral Cooperation Committee (APJSCC) meeting in Bali in 1999.⁹ The initial consensus was to focus on two-way cooperation in specific areas of trade, investment, industry, environment, science and technology, drugs and narcotics, tourism, and human resources development. Advancement in these areas could pave the way for an elevation in Pakistan's status with ASEAN. However, progress in all cooperation spheres has been very limited.

A joint feasibility study for the ASEAN-Pakistan Free Trade Agreement was completed in 2009, though a 2011 moratorium on the proposal suggests limited headway on its implementation.¹⁰ Pakistan's request for a Full Dialogue Partnership (FDP) with ASEAN is also pending since 1999, though envoys of select ASEAN states have expressed optimism for Islamabad to work towards upgrading its relationship.¹¹ A key challenge was ASEAN's moratorium on establishing new FDPs, which was lifted in 2022 for the United Kingdom to enter into partnership with ASEAN.¹² Fundamental to this change was London's relationship with ASEAN, and its track record of practical engagement, particularly in trade and economics.

The rare change for the United Kingdom suggests that Islamabad's road to an FDP status runs through tangible and measurable cooperation in areas agreed with ASEAN in 1997. These were later expanded to include counter-terrorism, violent extremism, and transnational crimes. In 2022, two-way trade between ASEAN and Pakistan reportedly exceeded a meagre \$11 billion, though the bloc continues to identify as one of Pakistan's major trading partners.¹³

Imports from ASEAN are well above Pakistan's total exports to the bloc, indicating significant room to pursue value addition of key products and identifying specific market sectors to facilitate access for Pakistani wheat and cotton exporters.¹⁴ Despite ASEAN states exporting such products to larger trading partners, there is evidence to suggest that the bloc remains open to importing wheat, cotton, and

other raw materials in substantial quantities from diverse suppliers.¹⁵ Both ASEAN and Pakistan enjoy time-tested relations with China, having aligned part of their signature policies and development aspirations with Beijing, to the benefit of the BRI.¹⁶

Given ASEAN's enormous market growth, substantial collective GDP, vast access to maritime trade routes, and a demonstrated interest in diversifying economic relations, it is imperative for Pakistan to learn from ASEAN's success strategies to pivot towards FDP status in future.

This paper builds on the existing body of research on China's strategic partnership with ASEAN to generate new knowledge and opportunities to inform Pakistan's future relations with the bloc. It also examines BRI's mixed reception in Southeast Asia to inform future progress under the China-Pakistan Economic Corridor (CPEC). The underlying aim of the research is to extract individual lessons from ASEAN countries to improve Pakistan's trade and investment profile in a highly competitive Southeast Asian market.

The paper answers the following research questions:

1. What factors have consolidated the China-ASEAN Strategic Partnership in Southeast Asia?
2. How can Pakistan advance its case for a Full Dialogue Partner (FDP) status with ASEAN?
3. What lessons does the China-ASEAN Comprehensive Strategic Partnership offer to inform closer China-Pakistan development cooperation under CPEC?

Historical Background of China-ASEAN Ties

Since the advancement of the China-ASEAN dialogue process in 1991, the relationship has contributed significantly to political stability and economic diversification in the Southeast Asian region.¹⁷ ASEAN's economy was on track to record its lowest growth in decades, providing a meaningful opening to forge free-trade links with Beijing and ensuring a \$676 billion increase in bilateral trade by 2020 facilitated higher growth rates.¹⁸

On the diplomatic front, China's rise as FDP with ASEAN in 1996 allowed the 10-member bloc to promote dialogue-based conflict resolution in the contentious South China Sea, support greater supply chain integration, and use upticks in high-level visits to manage competing expectations on maritime border security. Beijing's success in advancing the 2002 Declaration on the Conduct (DOC) of Parties in the South China Sea bound ASEAN and China to a peaceful settlement of all disputes, effectively preventing any maritime concern from having a detrimental impact on robust economic relations.¹⁹

The opening-up of China's economy to the world also brought lucrative opportunities for some low-growth economies to increase domestic competitiveness. Cambodia and Laos were among the poorest in 1998, but their growing integration in ASEAN rendered them beneficiaries of a 20 per cent annual increase in China-ASEAN trade and investment.²⁰ To increase their share of investment under the China-ASEAN partnership, some of these low-growth economies were also compelled to address some barriers to domestic growth, including rampant poverty and a small-sized industrial base, underlining the value of China-ASEAN engagements for policy reform.²¹

Larger economies such as Malaysia and Indonesia also remained closely engaged with Beijing through ASEAN's broader economic partnership and acquired strong incentives to advance their preferential trade terms with Beijing. Today, ASEAN's combined GDP tops \$3 trillion, identifying as the third largest in Asia and among the top ten economies of the world.

On defence and security, both ASEAN and China have striven to promote common understandings between Beijing's view of an acceptable maritime *status quo* in the South China Sea, and what ASEAN considers to be in line with its expectations on territorial and maritime jurisdiction.²² To advance this objective, Beijing has increased its presence and influence within key ASEAN-focused institutions and

dialogue frameworks, including the ASEAN Regional Forum and the ASEAN Defence Ministers' Meeting-Plus (ADMM+) format. In effect, this has enabled Beijing to reinforce the value of confidence-building with countries such as Indonesia, which has a complicated history of asserting its maritime rights at sea.

ASEAN's proximity to a wealth of mineral resources, critical maritime trade access routes, and major ports has proven strategically significant to Beijing. It has repeatedly acknowledged that the bloc's approach to non-interference in the South China Sea and mega trade arrangements, such as the Regional Comprehensive Economic Partnership (RCEP), make it opportune to maintain maritime stability for uninterrupted trade gains in the coming years.²³

Remarks by top Chinese officials in regional forums indicate recognition of RCEP as a major driver of multilateralism and free trade.²⁴ At the same time, ASEAN states have shown increased support for key enablers of security cooperation in the region, such as the China-ASEAN Code of Conduct (COC) for the South China Sea.²⁵ This Code continues to serve as a blueprint for enhancing "favourable conditions for a peaceful and durable solution of differences and disputes among countries" on the maritime front.²⁶ The acceleration of ASEAN-China trade to \$975.3 billion in 2022 strengthens incentives to maintain that upward trajectory without the costs of political instability in the region.²⁷

Countries such as Indonesia have also been important recipients of China's Belt and Road investments. They have chosen to align with Beijing on core infrastructure support and Indonesia welcomed prospects of synchronising its national development policies with win-win connectivity offerings under the BRI. However, the extent of the BRI's contribution to Indonesia's sustainable infrastructure financing capacities remains to be seen. In the post-financial crisis era, Beijing has readily expanded its BRI footprint within ASEAN, prioritising support for key sectors such as transportation,

road, and railways to help its strategic relations endure with the 10-member bloc.

ASEAN's Motivations for Closer Engagement

ASEAN's motivation for closer engagement centres on two major considerations, i.e., economic security with China and a *status quo* that is conducive to maritime dispute management.

On economic security, the potential for high complementarity between ASEAN's Economic Outlook Vision and China's Belt and Road has made it easier for Southeast Asia to reap the benefits of a win-win cooperation with Beijing. Pertinent signs of the aforementioned include the 2019 ASEAN-China Joint Statement on "Synergising the Master Plan on ASEAN Connectivity (MPAC) 2025 and the Belt and Road Initiative (BRI)."²⁸ It acknowledged the progress and cooperation opportunities created by synergising the two development master plans. As statistics from the Economist Intelligence Unit (EIU) noted in August 2022, China was ASEAN's largest bilateral partner in goods trade and its total trade value was "54 per cent higher than ASEAN's trade with the US."²⁹

For ASEAN states, the progression of China's Belt and Road allows it to be part of a broader conversation on connectivity with like-minded development partners spanning multiple regions. Vietnam and Indonesia, for instance, have narrowed some capacity gaps in their high-growth sectors in the lead-up to ASEAN stepping up their developmental cooperation with key countries in the Middle East.³⁰ The BRI's consistent returns for people's livelihood have also been demonstrated to ASEAN states over the years. These include a marked rise in employment through Special Economic Zones (SEZs) and a significant rise in Overseas Direct Investment (ODI) into ASEAN, averaging over 50 per cent annually between 2013 and 2017. This momentum has significantly strengthened critical real-estate, ICT, and transport sectors across ASEAN economies.³¹

The absence of a viable alternative to ASEAN-China Belt and Road cooperation has also contributed to the 10-member bloc's economic security engagements with Beijing. Since the BRI's launch in 2013, China-ASEAN trade has more than doubled, and ASEAN was the recipient of 131 BRI projects, the highest figure across the Asia-Pacific.³² ASEAN leaders have also repeatedly recognised stronger Belt and Road cooperation as a major development priority, paving the way for stronger interactions to synergise the bloc's Master Plan on ASEAN Connectivity (MPAC) 2025 with the BRI through high-level forums.³³ One case in point is the telephonic exchange between former Chinese Premier Li Keqiang and Vietnamese Prime Minister Pham Minh Chinh, where the Vietnam-focused BRI component of the 'Two Corridors, One Economic Belt' was seen as a major upside to fostering bilateral trust.³⁴

On the multilateral stage, the China-ASEAN Comprehensive Strategic Partnership (CSP) ensures that conditions remain conducive to such win-win development synergies. The 24th ASEAN-China Joint Cooperation Committee (JCC) meeting in March 2023 was an important indicator of the 10-member bloc attempting to balance its development relations with the West while cooperating with China. The Committee promised to strengthen engagement in areas such as "political dialogue and cooperation, non-traditional security, trade and investment, food and agriculture, ICT, cyber security, digital economy, tourism, education, public health, culture and information, media, environment, and sustainable development."³⁵

ASEAN has also shown very little interest in heeding Washington's calls to distance itself from Beijing and continues to express dissatisfaction at US attempts to contain China technologically and militarily.³⁶ Countries such as Thailand, Malaysia, and the Philippines have been reluctant to endorse US intelligence assessments about Beijing's Huawei-focused telecommunication instalments, and are unlikely to factor broad-based security concerns

from Washington in their technology partnership decisions with Beijing.

Militarily, ASEAN shares common expectations with China on the principle of non-interference, which has significant weight in its foreign policy. A case in point is the ASEAN Outlook on the Indo-Pacific which explicitly notes contributions to the maintenance of peace, freedom, and prosperity. Despite close ties with Washington, ASEAN's strategic vision does not endorse the US Indo-Pacific strategy's China containment focus.³⁷ These diverging views on the Indo-Pacific signal greater strategic alignment with China, which also views peace and security in the Asia-Pacific as a matter central to the interests of territorial powers and its immediate neighbours. "China and ASEAN will continue to promote the role of the Treaty of Amity and Cooperation in Southeast Asia as a code of conduct for inter-state relations in Southeast Asia," affirmed China and ASEAN in their five-year master plan for the development of relations.³⁸

Maritime security in a complex South China Sea environment is also a compelling example of ASEAN's support for regional peace with China and its desire to manage any differences through consultative diplomacy. ASEAN is less willing to support any long-term roadmap for maritime cooperation that does not involve China, and this is reinforced through its staunch support for a UN-aligned, China-backed Code of Conduct (COC) to secure peace in the region.³⁹

This UN-aligned COC captures ASEAN's multi-decade willingness to use dialogue-based resolution as a way to build mutual trust with China and is specifically designed to prevent conflicts in the South China Sea. Doing so enables ASEAN to maintain its "centrality" in all strategic issues related to its neighbourhood, dampening US hopes to enlist the 10-member bloc's support against China in the Indo-Pacific.⁴⁰

Challenges to Pakistan's Policy Towards ASEAN

As a major South Asian power, India has sustained a very strong economic and political relationship with ASEAN, making it difficult for Pakistan to muster a competitive edge on both fronts. India became a strategic partner in 2012 and has attempted to advance regional connectivity initiatives that take exception to Pakistan. These include the India-Myanmar-Thailand (IMT) Trilateral Highway and the Kaladan Multimodal Transit Transport Project.⁴¹

The scale and frequency of ASEAN and India's economic and strategic engagement makes the situation further challenging. Their flagship ASEAN-India Free Trade Agreement (FTA) is itself marked by substantial liberalisation in tariffs, covering well over two-thirds of traded goods. In contrast, Pakistan faces an uphill task of increasing its modest basket of exports to ASEAN in even traditional goods. These span top items such as bed linens, rice, and cotton fabrics, collectively accounting for 22 per cent of Pakistan's major exports in 2022.

On the strategic level, India is keen to advance Washington's containment of China's ambitions in Southeast Asia, forming a core part of the US-led Indo-Pacific strategy. This is a significant concern for Pakistan, given India's hopes for strengthening connectivity with ASEAN's own Indo-Pacific Outlook. ASEAN's strategy does not share India's containment ambitions: it resists interference, military excesses, and a zero-sum approach to engagement. Recent trends indicate the extent of New Delhi's deepening outreach in Southeast Asia and the South Pacific at present.⁴² That includes key conventions such as the 20th India-ASEAN Summit in Jakarta. The outcome document suggested a consistent pattern from New Delhi to build a metanarrative around countering terrorism, a critical component of India's ongoing regional isolation campaign against Pakistan.⁴³

To counter Indian propaganda, Pakistan is consistently treating the ASEAN-Pakistan relationship on its own merits. For instance, in October 2023, Pakistan's Caretaker Foreign Minister Jalil

Abbas Jilani underscored Pakistan's commitment to "facilitating special relations with ASEAN member states," highlighting the need for common solutions to shared challenges, including "terrorism."⁴⁴

Benefits for Pakistan

A Path to Full Dialogue Partner (FDP) Status

The lead-up to the 2003 ASEAN-China strategic partnership carries important lessons to advance Pakistan's case for a Full Dialogue Partner (FDP) in the long term. Consider the 1996 ASEAN Ministerial Meeting in Jakarta: China was successfully accorded the FDP status. This transition underscored a track record of substantive cooperation between China and ASEAN members, including the promotion of "economic growth, sustainable development and social progress" based on the principles of equality and mutual benefit. A 1997 joint statement between ASEAN and Chinese leaders in Kuala Lumpur made that fact fundamentally clear.⁴⁵

As a Sectoral Dialogue Partner (SDP) with ASEAN, Pakistan initially agreed to cover broad-based engagement in areas spanning trade, industry, investment, environment, science and technology, drugs and narcotics, tourism, and human resources development. However, Islamabad has fallen significantly short in increasing its value offerings to ASEAN markets, as well as supporting cooperation across softer targets, such as tourism. As a result, Islamabad faced an uphill task of convincing diverse economies—such as Vietnam, Singapore, and the Philippines—that it is in the interests of the 10-member bloc to welcome Pakistan's FDP prospects.⁴⁶

Islamabad can influence a shift by giving priority focus to human resource development and tourism, two of the eight initial cooperation areas agreed with ASEAN as its SDP.⁴⁷ Pakistan's dwindling economic growth, growing import dependency, and significant debt constraints make it difficult to deliver value offerings across other cooperation areas such as trade, industry, and investment

in the near-term. It should also put together joint legal, technical, financial, and management committees with the Philippines, Indonesia, and Vietnam to increase political, commercial, and economic links at the bilateral level, limiting resistance to its FDP request. This is important because, in 2018, Pakistan's Joint Secretary of Commerce Division Nazim Latif claimed before a parliamentary panel that three member countries—Philippines, Indonesia, and Vietnam—were opposing Pakistan's entry to the 'ASEAN plus six'.⁴⁸

Taking Pakistan's bilateral ties with these three ASEAN states as a test case presents two advantages. First, it compels Islamabad to link its domestic manufacturers and exporters with specific product markets within those economies, given that a lack of prior integration in ASEAN markets deprived exporters of valuable access. In contrast, countries such as India in the early 2000s focused on stepping up their exports from agriculture and textile, two sectors that go a parallel with Pakistan's current export strengths.⁴⁹ The fundamental difference was New Delhi's treatment of its relations with individual ASEAN states as an opportunity to bring down export barriers, learn from competition in existing sectors, and treat priority cooperation with ASEAN as an opportunity to give export visibility to domestic producers.

Many of Pakistan's current trade and cooperation challenges with specific ASEAN states are not exclusive to Islamabad. India has been an FDP with ASEAN since December 1995, and still shared a trade deficit of more than \$6 billion with the 10-member bloc between 2007-08.⁵⁰ As a result, Pakistan's meagre trade volume with Indonesia (about \$ 2.6 billion in early 2022) and a trade balance heavily favouring Indonesia, should inform—not discourage—changes in Pakistan's economic structure.⁵¹ As a World Bank analysis notes, "Through the 1990s, Vietnam's economic structure was not significantly different than that of Pakistan then or now. Vietnam exported textiles, agricultural products, and minerals."⁵²

A major difference was Vietnam's ability to leverage trade and investment integration within the global marketplace to spur productivity growth. Islamabad's debt-stressed economy, limited spending potential, and heavy import-dependence make integration with individual ASEAN economies a better alternative to going global. Prioritisation of joint legal, technical, financial, and management committees with the Philippines, Indonesia, and Vietnam can give exporters and governments greater clarity on which sectors to target, and begin to make headway on some of the eight cooperation areas agreed with ASEAN. In turn, stronger bilateral relations with all three ASEAN states can decrease their future resistance to Pakistan's FDP request.

Having an ASEAN strategy that is informed by bilateral partnerships is of critical value to Islamabad in the long run. Islamabad is among ASEAN's oldest Sectoral Dialogue Partners (SDPs), and the bloc has shown signs that it could relax its moratorium on new dialogue partnerships based on internal reviews.⁵³ This makes it opportune for Pakistan to pursue timely efforts that end up advancing its case for FDP status soon. As Ambassador Mohammad Hassan, Pakistan's former envoy to Indonesia, Timor Leste, and ASEAN, puts it: this would also require "working closely with the ASEAN Secretariat, as well as approaching individual ASEAN member states in their respective capitals."⁵⁴

An Opening for Diversified Economic Engagement

The China-ASEAN Comprehensive Strategic Partnership offers a variety of lessons for Pakistan to inform closer economic cooperation with the 10-member bloc in the coming decades. Islamabad has enjoyed the status of a sectoral partner since 1993 but has struggled to diversify its basket of exports to the market in comparison with other countries. For instance, in 2022, Pakistan's total trade with ASEAN topped \$11 billion, yet ASEAN's trade volume with some of the other sectoral partners reached much higher sums.⁵⁵

The growth in trade between ASEAN and sectoral partners such as Brazil came at a time when the bloc had engaged in joint trade workshops and open-ended troika meetings to coordinate mutual expectations on trade advancement and lift bilateral trade by noticeable margins. By prioritising similar trade workshop channels and treating Pakistan-ASEAN sectoral engagements on a priority basis, Islamabad can emerge better positioned to expand its share of trade with ASEAN and examine growth opportunities in key sectors through ministerial and commercial links.

Pakistan's approach to a Free Trade Agreement (FTA) requires some semblance of predictable growth and political stability at home before gaining long-term traction with the ASEAN. It is a fact that Islamabad signed a landmark 2006 FTA with its iron-ally China, though two-way trade is yet to meet its optimal level.⁵⁶ By examining how ASEAN countries such as Cambodia have managed to advance their trade in key sectors such as agriculture, Islamabad could emerge better positioned to inform its approach to diversified trade engagements with ASEAN. For instance, Cambodia was a beneficiary of ASEAN's stated vision to strengthen and showcase agriculture and food security "as key pillars of cooperation" with China.⁵⁷ It is in Islamabad's interests to enlist ASEAN's support as a starting point for guidelines on sustainable agriculture cooperation and build on responsible agricultural investments from there.

During a major telephonic exchange between Vietnam's top leaders and their Chinese counterparts in April 2023, Vietnamese Prime Minister Pham Minh Chinh reportedly proposed that China "further promote imports, open up its market to Vietnamese farm goods, and increase the quota on Vietnamese goods shipped through China."⁵⁸ Vietnam's focus on agriculture to dial up trade is particularly relevant to Pakistan's prospects with ASEAN. Islamabad remains heavily dependent on its agricultural sector and can pursue value

addition in this space by increasing the presence of joint working groups and feasibility teams with ASEAN.

Evidence from the China-ASEAN strategic partnership suggests that countries with modest growth and limited spending revenue were still able to dial up trade, challenging assumptions that meagre growth will keep Pakistan's heightened trade prospects at bay. A case in point is the \$10.57 billion-strong trade increase between Cambodia and China in the first 11 months of 2022, and Cambodia's rise in trade with the nine other ASEAN countries to reach \$16.053 billion in 2022.⁵⁹

Closer engagement with the 10-member bloc can inform best practices in Pakistan to cater to investor sentiment in Southeast Asia as well. Leading economies such as Indonesia have bolstered their business-to-business interactions with Beijing, both through the ASEAN framework and bilaterally. One major upside has been the strengthening of two-way trade and the identification of key areas where Indonesia's export capacities align with consumer demands in China.

Pakistan can benefit from such an exchange with the 10-member bloc. Sharing of best practices allows Pakistan to get a sense of market expectations in distinct ASEAN economies. This leaves Islamabad better positioned to promote value-added products in its future export engagements. Beijing has also maintained close commercial and industrial linkages with countries such as Vietnam, whose agricultural produce became a major selling point in overall exports.⁶⁰

A key trigger was trade facilitation, including simplified customs procedures and lax documentation, to help link domestic manufacturers in the agricultural space to their buyers outside ASEAN. Pakistan's dependence on the agricultural sector and its desire to support sustainable food production and agricultural systems makes it critical to engage with ASEAN and build on Vietnam's fast-tracked export experience with China.

The level of priority attached to ASEAN-Pakistan commercial and ministerial links has also varied under different governments in Pakistan, making political will a critical consideration for diversifying economic engagements. Under the leadership of former Prime Minister Nawaz Sharif in the late 1990s, Pakistan agreed to “encourage and facilitate direct contacts” between respective government agencies on both sides and sought to match ASEAN’s priorities with the *Pakistan 2010 Perspective* plan.⁶¹ However, by 2010 it became increasingly clear that ASEAN-Pakistan Joint Sectoral Cooperation was largely driven by awareness campaigns and the focus was still on identifying new potential areas for economic cooperation.⁶²

As the China-ASEAN Strategic Partnership demonstrates, acceleration of trade despite limited export potential is possible once integrated into ASEAN’s network of external partners. Despite the bloc’s substantial focus on the digital economy, countries have succeeded in dialling up exports of important agriculture and textile products and could welcome import diversity in the event of supply chain shocks.

The Covid-19 pandemic made clear that some Southeast Asian economies were witnessing a plunge in exports, and states reliant on a single product faced significant growth challenges.⁶³ Such growth shocks present an opportunity for Pakistan to step up its agricultural production and textile manufacturing, position itself as an alternative supplier, and link value-added products to specific markets in ASEAN. Through strong institutional linkages, Islamabad can succeed in advancing commercial links with the 10-member bloc, identify key sector products of value to ASEAN, and link its exporters to active buyers within the region.

Accelerating the Belt and Road Progress

The Belt and Road’s flagship \$62 billion China-Pakistan Economic Corridor (CPEC) is seen as central to Pakistan’s geo-economic connectivity ambitions. To inform progress in areas such as

transport infrastructure, energy, and industrial cooperation, ASEAN's own experience with China offers key lessons to maximise opportunities for the Belt and Road progression while minimising its challenges.⁶⁴

First, a stronger focus on joint working groups is key to consistently coordinating expectations on logistics and project targets. ASEAN member states have been able to step up their collaborations with Chinese construction companies and funding agencies in a bid to strengthen current and future investments in their countries.⁶⁵ Key platforms, such as the ASEAN Forum, have played an important role in reinforcing a high-level government consensus on BRI sustainability, underlining the value of Pakistan's engagement with the 10-member bloc at its flagship forum.

Given CPEC's success in reportedly accumulating some \$25 billion in direct investment between 2013 to 2023, more frequent diplomatic exchanges with ASEAN could generate new synergies between the bloc's *Master Plan on ASEAN Connectivity* and Islamabad's investment diversification plans for CPEC.⁶⁶

Evidence from Vietnam suggests considerable success in attracting BRI financing while forming an important part of the ASEAN connectivity master plan. The country has been able to evaluate the long-term success of BRI based on the performance of early-phase projects and their prospective returns for the citizenry.⁶⁷ That includes projects that are central to addressing Vietnam's long-term infrastructure investment gap of \$605 billion from 2016 to 2040, involving sectors such as electricity and road infrastructure which form common ground with CPEC's early phase.⁶⁸

As a result, one of Southeast Asia's fastest-growing economies has striven to attract different sources of funding to cover its long-term infrastructure financing needs. By increasing Pakistan's diplomatic exchanges with ASEAN, Islamabad stands a better chance to assess ASEAN's approach to sustainable BRI financing. New working

groups can offer a vantage point to evaluate ASEAN's approach to negotiating past BRI projects, particularly low to middle-income economies that have been keen to limit financial risk. Malaysia's success in restarting its BRI-focused railroad project in 2019 is a case in point. Both sides agreed to reduce project costs by over 30 per cent.⁶⁹

To maximise Pakistan's opportunities to benefit from these new working groups, sustained periods of political stability are imperative. It was only in May 2013 that an elected government completed a full democratic term in office, and proceeded with a peaceful transfer of power.⁷⁰ Addressing challenges such as sharp divisions over conducting elections, political protests across major cities, and the recurring threat of domestic terrorism is crucial to ensure that CPEC progresses smoothly towards its second phase projects. Significant mega projects include major upgrades to the Main Line 1 railway between Karachi and Peshawar. This \$10 billion project was part of the corridor's first phase but was delayed by four years, underlining the need to constantly reinforce CPEC in Pakistan's broader national consensus spanning all governments.⁷¹

One of the reasons ASEAN states such as the Philippines and Indonesia stepped up BRI investments is because of greater political will and limited desire to tie the BRI to the specific agenda of any single government of the day. The China-ASEAN comprehensive strategic partnership has enabled BRI participants to leverage frequent investments and long-term plans through key summits and initiatives, such as the 2021 ASEAN-China Special Summit. "ASEAN and China agree to explore cooperation on low-carbon, circular, and green economy by following the trend of the latest science and technology developments and industrial transformation, including through sustainable economic models and initiatives as inspired by regional and national action plans such as the Belt and Road Partnership on Green Development and the Bio, Circular, and Green Economy," read a joint statement from the summit.⁷²

By prioritising domestic political stability and multilateral engagement on the BRI, ASEAN states emerge better positioned to reinforce swift project progress on a bilateral level and maintain a noticeably high level of economic and political engagement with Beijing on common BRI challenges and constraints. CPEC witnessed a similar uptick in economic and political engagement with China during its early years, paving the way for successive Joint Cooperation Committee (JCC) meetings of CPEC.⁷³

However, closer engagement with ASEAN can also offer valuable lessons on advancing specific policy reforms that could be unrelated to the BRI, but remain critical to delivering the benefits of infrastructure and power projects to its masses.⁷⁴ Moreover, stronger and more frequent diplomatic engagement with ASEAN can enable Pakistan to implement the BRI consensus reached through its joint working groups with China and help market CPEC—one of BRI's six main economic corridors—among Vietnam, Laos, Cambodia, Thailand, Malaysia, and Singapore. These six major ASEAN states are at the heart of the sprawling China-Indochina Peninsula Economic Corridor, i.e., another major BRI corridor.⁷⁵

Conclusion

China and ASEAN have succeeded in consolidating their diplomatic and economic ties by elevating a wide-ranging strategic partnership to a comprehensive engagement. This transition has enabled middle-to-low-income ASEAN economies such as Cambodia to unlock multisector BRI financing, diversify sources of investment, and support ministerial linkages between ASEAN and China to support their common interests in maritime security, defence, and conflict resolution.

It is in Islamabad's interests to learn from these experiences, strengthen its relations with ASEAN, and pursue targeted cooperation at the bilateral level in at least one of the eight cooperation areas agreed upon with ASEAN. Demonstrated cooperation at the bilateral

level is key to strengthening its case for an FDP status in the future. As this paper's examination of key ASEAN economies indicates, countries such as Cambodia, Laos, and Vietnam shared many of Pakistan's existing growth and export limitations, only to work towards navigating them.

ASEAN states also succeeded in identifying key areas where their export capacities aligned with consumer demands in China. All this makes it critical for Islamabad to learn from ASEAN's experience with China and implement best practices to get a sense of market expectations in distinct ASEAN economies. It should also increase the presence of joint working groups and feasibility teams within the 10-member bloc to support a track record of sustained engagement.

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