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Thailand's Land Bridge: A New Pivot Point in the US-China Rivalry

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Abstract

Thailand's proposal for a \$28 billion "Land Bridge" megaproject, connecting the Indian Ocean to the Pacific Ocean, represents a major challenge to Southeast Asia's established sea routes. While the Thai government presents it as an economic project to bypass the crowded Strait of Malacca, this paper argues that the Land Bridge is mainly a geopolitical move. It places Thailand at the center of the growing US-China rivalry and is a major test of its traditional "hedging" (or balancing) foreign policy. This analysis explores the project's strategic impact, arguing that its success depends less on whether it makes money and more on Thailand's ability to manage the competing demands of the great powers. This project is a key case study in how smaller nations use large-scale infrastructure to navigate a competitive world.

Keywords: Geopolitics, Thailand Land Bridge, Malacca Dilemma, US-China Relations, Hedging, Maritime Security.

1. Introduction

The Thai government's ambitious \$28 billion Land Bridge project aims to connect the Andaman Sea (at Ranong) with the Gulf of Thailand (at Chumphon). It is a 90-kilometer system of deep-sea ports, railways, and roads (Government of Thailand, 2023). Bangkok is marketing the project as a faster, cheaper alternative to the Strait of Malacca, the world's most critical shipping bottleneck.

However, in today's world of great power competition, big infrastructure projects are never neutral. They are tools of national power and influence. (Ketsupa, W., 2002) This paper argues that the Land Bridge's geopolitical impact is far more important than its economic one. It is a high-stakes gamble that has become a physical symbol of the US-China rivalry in mainland Southeast Asia.

This research asks the key question: How does this project work as a crossroads for great power competition, and what does it show about the risks of Thailand's balancing strategy in the 21st century? We argue that the project's biggest challenge isn't engineering or money, but the strategic problem it creates. By helping China solve its "Malacca Dilemma" (Baker School, 2025), Thailand directly challenges the interests of the United States and its allies (like India and Japan) while also creating new economic tensions with its ASEAN neighbors (Singapore and Malaysia).

1.1 Research Objective

The central objective of this research is to analyze the Land Bridge as a critical case study in modern geopolitical strategy. The study aims to:

1. Deconstruct the project's dual nature, separating its economic justification from its underlying strategic drivers.
2. Examine the project as a primary test of Thailand's traditional "hedging" foreign policy in an era of intense Sino-US competition.
3. Assess the key strategic risks associated with the project, particularly the potential for "failed hedging" leading to strategic dependency, and the creation of new friction with regional ASEAN partners.

2. Literature review

The first group focuses on the project's business and logistics case. This work is highly doubtful. Many experts have called the project a potential "white elephant" (Storey, 2024). They argue that the time and cost of transshipment (unloading cargo, moving it 90km over land, and reloading it) likely can't compete with a single, direct sea voyage, even with the Malacca Strait's traffic jams (JML, 2024). This view questions the basic business model and whether private international investors (other than China) will be willing to fund it.

The second group looks at the project through a geopolitical and strategic lens. This view says the business case doesn't matter. The project is seen as a key part of China's giant Belt and Road Initiative (BRI) and a direct answer to its "Malacca Dilemma" (Baker School, 2025). For Beijing, the strategic value of a new, controllable route that bypasses a US-watched chokepoint is worth more than any financial loss. This work also highlights the "strategic rivalry" the project creates, putting Thailand in the middle of competing demands from China, the US, Japan, and India (Mark, 2025).

This paper connects these two ideas. We argue that the weakness of the business case is exactly what increases the geopolitical risk. If only Chinese state-backed companies are willing to pay for the "white elephant," the project stops being a neutral platform and becomes a Chinese-controlled asset. This is the very outcome Thailand's diplomacy is trying to prevent.

Theoretical Framework

This analysis uses the concept of Hedging. In simple terms, this is a "don't put all your eggs in one basket" strategy used by smaller countries caught between large, competing powers.

Hedging is Thailand's traditional foreign policy ("bending with the wind" (Lulius, 2022)). It avoids taking sides. Instead of "balancing" (ganging up against a power) or "bandwagoning" (joining its side), a country "hedges" by building strong economic ties with one power (like China) while keeping strong security ties with another (like the US).

The Land Bridge is the biggest test of this strategy. Thailand is trying to "dilute" any single country's control by inviting everyone (US, China, Japan, India, Middle East) to invest (Mark, 2025). But this could fail. If the project's poor economics scare off other investors, Thailand could be left with only China. This would lead to "strategic entrapment," where Thailand loses its freedom of action—the exact opposite of what hedging is supposed to achieve.

3. Methodology

This research is a qualitative study. It is a geopolitical case study that looks at the language and arguments used by the key players. This means we are not running numbers on the project's profits. Instead, we are interpreting the "stories," strategic goals, and arguments of the different countries involved.

The "data" for this analysis comes from:

1. Primary Sources: Official Thai government documents, policy statements, and investment presentations (e.g., Government of Thailand, 2023). This also includes reports from official policy schools that explain national positions (e.g., the Baker School, 2025).

2. Secondary Sources: Academic articles on Thai foreign policy, think tank reports from respected institutions (e.g., Mark, 2025 from ISEAS), and expert commentary (e.g., Storey, 2024).

The method is a stakeholder analysis. We look at the goals, fears, and policies of four key groups: (1) Thailand (the project owner), (2) China (the main supporter), (3) the United States and its allies (the main doubters), and (4) regional neighbors (the main competitors). By comparing these competing views, we can assess the real-world strategic risks of the Land Bridge project.

Analysis I: The Great Power Contest

1. China's Strategic Goal: The "Malacca Dilemma"

For Beijing, the Land Bridge is the best answer yet to its "Malacca Dilemma" (Baker School, 2025). China's economy heavily depends on the Malacca Strait, a chokepoint watched closely by the US and its allies. In a conflict, a US naval blockade could cut off China's energy and trade lifelines. The Land Bridge offers a route that, while less efficient, is "geopolitically secure." It would be on land and run through a friendly nation. It also provides a "dual-use" (commercial and military) foothold in the Indian Ocean, which fits perfectly with China's broader strategic goals (Chaturvedy, 2021).

2. US and Allied Concerns: The "China Dilemma"

For Washington, Tokyo, and New Delhi, the Land Bridge is a major strategic concern. It directly threatens to "reduce" US strategic influence over China (Baker School, 2025). A Chinese-funded or operated port at Ranong would give China's navy a permanent presence in the Bay of Bengal. This directly challenges India's traditional area of influence and gets around the US/Japan "Free and Open Indo-Pacific" (FOIP) strategy. They worry it is a "debt-trap" used to get a strategic asset, similar to what happened in Sri Lanka (Hambantota).

Analysis II: Thailand's Risky Pivot and Regional Tensions

1. Thailand's Balancing Act

Caught in the middle, Thailand is trying to perform its classic balancing act. The government's international roadshow to attract investors from the US, Japan, Saudi Arabia, and Europe is a clear attempt to "dilute" any one country's control (Mark, 2025). The Thai logic is that if many nations invest, the project becomes "global," not "Chinese." This would, in theory, allow Thailand to get the economic benefits while keeping its independence.

2. The Risk of Failure and Regional Friction

This strategy is very risky because the project's business case is so weak. The "white elephant" problem (Storey, 2024) is the core issue. If private, profit-focused investors from the West and Japan decide the project won't make money, they won't invest. This leaves China, which thinks in terms of politics and strategy, as the "only bidder left standing" (Storey, 2024).

This would be a total failure of the hedging strategy. It would lead directly to "strategic entrapment." Thailand, having pushed so hard for the project, would be forced to accept Chinese money on China's terms. This would create the very dependency it was trying to avoid.

Furthermore, this pursuit creates new, sharp tensions within ASEAN. The project is a "win-lose" deal for Singapore and Malaysia. Its entire purpose is to take away traffic and money from their ports (JML, 2024). This weakens ASEAN unity and makes neighbors see Thailand as a direct competitor, leaving Bangkok more isolated as it tries to manage the great power rivalry.

4. Results

The analysis yields two primary sets of results regarding the project's geopolitical nature and its impact on Thai strategy.

Result 1: A Nexus of Competing Great Power Interests

The project does not exist in a vacuum; it is a direct focal point for the US-China rivalry.

- China's Strategic Imperative: For Beijing, the Land Bridge is a clear solution to its "Malacca Dilemma" (Baker School, 2025). China's economy heavily depends on the Malacca Strait, a chokepoint watched by the US Navy. The Land Bridge offers a "geopolitically secure" route that bypasses this chokepoint. It also provides a "dual-use" (commercial and military) foothold in the Indian Ocean, which fits perfectly with its "String of Pearls" strategy (Chaturvedy, 2021).

- US and Allied Strategic Concerns: For Washington, Tokyo, and New Delhi, the Land Bridge is a major strategic concern. It directly "reduces" US strategic leverage over China (Baker School, 2025). A Chinese-operated port at Ranong would give China's navy a permanent presence in the Bay of Bengal, challenging India's sphere of influence and outflanking the US/Japan "Free and Open Indo-Pacific" (FOIP) strategy.

Result 2: Thailand's High-Risk Hedging and Regional Friction

The project's greatest risk is not to its finances, but to Thailand's strategic independence.

- Thailand's Hedging Gamble: Caught in the middle, Thailand is trying to perform its classic balancing act. The government's international roadshow to attract investors from the US, Japan, and the Middle East is a deliberate attempt to "dilute" any one country's control (Mark, 2025). The logic is that if many nations invest, the project becomes "global," not "Chinese," allowing Thailand to keep its independence.

- The Risk of Failed Hedging: This strategy is very risky because the project's business case is weak. The "white elephant" problem (Storey, 2024) is the core issue. If private, profit-focused investors from the West and Japan decide the project won't make money, they will not invest. This leaves China, which thinks in terms of politics and strategy, as the "only bidder

left standing" (Storey, 2024). This would be a total failure of the hedging strategy, leading directly to "strategic entrapment" and dependency on Beijing.

- Regional Friction: This pursuit creates new, sharp tensions within ASEAN. The project is a "win-lose" (zero-sum) deal for Singapore and Malaysia. Its entire purpose is to take away traffic and money from their ports (JML, 2024). This weakens ASEAN unity and makes neighbors see Thailand as a direct competitor.

5. Conclusion

Thailand's Land Bridge project is a perfect snapshot of the Indo-Pacific's strategic landscape. It's a high-stakes gamble where big projects, economics, and great power politics crash together.

This paper has argued that the project's success is not about economics, but about geopolitics. It is driven by China's need to solve its "Malacca Dilemma" and challenged by the US desire to maintain its control of the seas. Caught in the middle, Thailand is attempting one of its most ambitious balancing acts in modern history.

But the project's weak business case is exactly what weakens its political strategy. The critical question remains: Is Thailand the "architect" of a new global hub, or is it just the "game board" upon which the US-China rivalry will be played? The answer will shape the future not only of Thailand but of all smaller nations trying to find their way in a divided world.

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