

## Featured *MSP Perspective*:

# Energy Competition in the South China Sea

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By Euan Graham

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# MSP PERSPECTIVES



## Energy Competition in the South China Sea

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The recent confrontation between Vietnam and China, over the deployment of a deep-water drilling rig in disputed waters, has refocused the spotlight on energy in the South China Sea. How important is it as a driver in China's overall policy? To what extent is energy resource competition compounding tensions between China and Southeast Asian territorial claimants?

In fact, geopolitical motivations almost certainly took precedence in the decision to deploy China National Offshore Oil Corporation's (CNOOC's) first deep-water platform west of the Paracels in early May 2014. Nevertheless, the imperative to secure seabed energy resources in the South China Sea has emerged as a major policy driver for Beijing. In this context, the recent stand-off with Vietnam is more likely to be a rehearsal than an isolated incident.

China is now the world's largest oil importer, increasing its exposure to political risk in the Middle East and Africa, to potential disruption in transit, and growing competition to secure new upstream resources. Exploiting offshore energy within China's "near seas" is therefore seen as an attractive option from a supply-security perspective against projections for future demand growth.

In the past five years, a heightened focus on energy exploration in the South China Sea - unilaterally if necessary - has emerged in internal Chinese policy debates. This has fed into a major capability upgrade for China's state-owned energy conglomerates, including acquisitions of deep-water rigs, seismic survey vessels and support craft that are now becoming operational, delivering a step-change for exploration and production (E&P) activity in the South China Sea at large. The development of the offshore energy sector can be considered as a key pillar in the China's pursuit of comprehensive "maritime power".

As the number of China's deep-water rigs increases, their deployment further afield is likely to become more common, although the logistical and security

challenges for long-distance E&P operations in the southern portions of the South China Sea remain significant.

The growth of offshore E&P capabilities has proceeded hand-in-glove with the expansion of China's maritime law enforcement capacity, which is tasked with protecting these high-value assets as they venture further out into disputed waters. A pattern of close cooperation was evident throughout the CNOOC rig's turbulent six-week deployment, in which law enforcement vessels provided a security cordon around the platform.

That the South China Sea is energy-rich is not in doubt, including oil and gas fields off China's coast. But the underlying geology points to a concentration of hydrocarbons around the periphery and the southern half in particular, economically advantaging Malaysia, Brunei, Indonesia, Vietnam and the Philippines. This may have the effect of drawing China's E&P activity south over time, raising the stakes of further confrontations in the Exclusive Economic Zones (EEZ) of Southeast Asian littoral states, where these overlap with China's ambiguous dashed-line claims.

Malaysia, Brunei and Indonesia have been producing energy in the southern part of the South China Sea for decades, while Vietnam and the Philippines are newer entrants. Vietnam has moved rapidly to exploit offshore energy within its EEZ and is a petroleum exporter. The Philippines is pumping gas from the Malampaya field and has made new discoveries at Reed Bank.

Most Southeast Asian producers rely on joint ventures (JV) with foreign partners. Vietnam has sought a deliberately diverse portfolio of JV partners, granting concessions to Russian, Indian, Malaysian, US, and European-listed energy firms, with the implied aim of internationalizing its maritime claims.

China's energy companies operate globally on a for-profit basis, and their profile as investors in Southeast Asia is naturally expected to grow. However, political and strategic imperatives can take precedence especially within the "near seas", as was the case with the deployment of CNOOC's deep-water platform in May.

A reactive dynamic can therefore be seen at play in the South China Sea, whereby energy exploration by Vietnam and the Philippines has fanned China's fears of "losing out", prompting a significant policy shift away from the joint development paradigm to unilateral E&P, including within disputed waters. To this can be added the physical disruption of energy surveys undertaken by foreign firms exploring under license within the EEZs of Vietnam and the Philippines.

Vietnam and the Philippines are concerned that the geographical pattern of maritime incidents and the growing presence of Chinese vessels further south in the South China Sea owes in part to the proximity of oil and gas. Reed Bank has emerged as a particular area of concern for the Philippines, which recently protested against the presence of Chinese survey vessels within the vicinity.

*This item is based on an RSIS Commentary published on 11 September 2014.*

# NAVAL DEVELOPMENT AND POLICY



Wikimedia Commons, U.S. Department of Defense ([link](#))

CHINA—UNITED STATES | 25 AUGUST | REUTERS

## U.S., Chinese officials to meet at Pentagon after jet intercept

(Reuters) - U.S. and Chinese military officials will hold talks on rules of behavior at the Pentagon on Tuesday and Wednesday, a U.S. official said, days after the United States denounced a "dangerous" Chinese jet intercept of a U.S. Navy patrol plane. Last Tuesday, a Chinese fighter pilot flew acrobatic maneuvers around the U.S. Navy's P-8 Poseidon anti-submarine and reconnaissance plane, crossing over and under it in international airspace over the South China Sea, the Pentagon said.

[Full Report](#)

JAPAN—VIETNAM | 1 AUGUST | CHANNEL NEWSASIA

## Japan to give Vietnam six ships to boost maritime patrols

HANOI: Japan said on Friday (August 1) it would give Vietnam six vessels to boost the communist country's capacity to patrol its territorial waters, amid a bitter maritime dispute with Beijing in the South China Sea.

[Full Report](#)

JAPAN—CHINA | 5 AUGUST | CHANNEL NEWSASIA

## Japan defence paper warns of China's 'dangerous acts' in sea, air

TOKYO: Japan on Tuesday (Aug 5) warned that China's "dangerous acts" over territorial claims in the East China Sea could lead to "unintended consequences" in the region, as fears grow of a potential military clash.

[Full Report](#)

CHINA—VIETNAM | 1 AUGUST | VOICE OF AMERICA

## Vietnam to arm fishery surveillance ships after standoff with China

Vietnam says all ships under the management of its Fisheries Surveillance Force will be equipped with weapons following a tense standoff with China over a disputed oil rig. According to a government decree published by state media Friday, ships will be outfitted with machine guns starting September 15.

[Full Report](#)

CHINA—UNITED STATES | 7 AUGUST | VOICE OF AMERICA

## China to build lighthouses on 5 isles in defiance of US call

BEIJING—China plans to build lighthouses on five islands in the South China Sea, state media reported on Thursday, in defiance of calls from the United States and the Philippines for a freeze on such activity to ease tension over rival claims.

[Full Report](#)

CHINA | 7 AUGUST | KYODO NEWS (GLOBAL POST)

### **China's military sets up joint operations command center: sources**

The Chinese military has set up a joint command center that would integrate the operations of its army, navy and air forces, military sources have told Kyodo News, in a move aimed at making military strategy and tactics more efficient.

[Full Report](#)

NEW ZEALAND | 12 AUGUST | DEFENSE NEWS

### **NZ Navy's newest ships may have short life**

WELLINGTON — New Zealand's government is considering cutting half of the Royal New Zealand Navy's inshore patrol vessel (IPV) fleet. Two of the four 180-foot IPVs, commissioned in 2009, could be swapped for a larger ship, said Defence Minister Jonathan Coleman.

[Full Report](#)

JAPAN—RUSSIA | 13 AUGUST | RIA NOVOSTI

### **Japan protests Russia's drills on disputed territory**

TOKYO, August 13 (RIA Novosti) – Japan's Foreign Ministry lodged a protest over military drills on Russia's Kuril Islands, four of which Japan has also laid claim to, the ministry's press release said Wednesday. "Based on our country's legal status, holding drills in the Northern Territories [Japan's name for the islands] is unacceptable. We voiced a strong protest," the statement reads.

[Full Report](#)

AUSTRALIA—INDONESIA | 19 AUGUST | REUTERS

### **Australia says to restore intelligence and military cooperation with Indonesia**

(Reuters) - Australia and Indonesia have agreed to resume intelligence and military cooperation, officials from both countries said on Tuesday, ending a rift that erupted late last year over Australian spying. Australian Foreign Minister Julie Bishop and Prime Minister Tony Abbott will travel to Indonesia to sign the new "Joint Understanding of a Code of Conduct" with Indonesian Foreign Minister Marty Natalegawa and Indonesia's outgoing President Susilo Bambang Yudhoyono, Australian media said.

[Full Report](#)

UNITED STATES | 20 AUGUST | STARS AND STRIPES

### **US Navy plan details increased forward presence, number of Pacific ships**

The U.S. Navy's top leader Wednesday released details of a five-year navigation plan that calls for increasing the forward presence of ships to about 120 by 2020, up from this year's average of 97. It also calls for a single "cybersafe" authority to protect the service's networks.

[Full Report](#)



Wikimedia Commons, Kremlin.ru ([link](#) and [license](#))

RUSSIA | 19 AUGUST | DEFENSE NEWS

### **Russian defence minister vows to strengthen Navy**

MOSCOW — Russia announced plans Tuesday to bolster its navy with more advanced weapons in response to NATO's vow to halt the Kremlin's push into Ukraine and feared expansion into eastern Europe. Defence Minister Sergei Shoigu told a general security meeting that he expected to hear a detailed report from Russia's navy commander about how this could be achieved efficiently over the coming six years.

[Full Report](#)

AUSTRALIA | 22 AUGUST | NAVAL-TECHNOLOGY.COM

### **World navies prepare for Kakadu 2014 maritime warfare exercise in Darwin**

Maritime forces from 15 coalition nations are set to take part in the 23rd Kakadu 2014 exercise. It is claimed to be the Royal Australian Navy's (RAN) largest maritime warfare exercise and will be held from 25 August to 12 September in Darwin, Australia.

[Full Report](#)

RUSSIA | 27 AUGUST | USNI NEWS

### **Russia playing politics with alleged submarine confrontations**

Confrontations—and alleged confrontations—between the Russian armed forces and those of the United States, Europe and Japan have been on the uptick in recent weeks. The encounters have paced a general decline in relations between Russia and the West over events in the Ukraine.

[Full Report](#)

INDIA | 26 AUGUST | BUSINESS STANDARD

### **New Indian naval base coming up near Visakhapatnam**

The navy has lifted the shroud of secrecy over a major new sea base being built on India's eastern coast, which will be home to the first indigenous aircraft carrier, INS Vikrant, and an armada of warships under the Eastern Naval Command.

[Full Report](#)

CHINA—VIETNAM | 27 AUGUST | XINHUA

### **China, Vietnam call truce on maritime tensions**

BEIJING, Aug. 27 (Xinhua) -- China and Vietnam will avoid any actions that might worsen their disputes on maritime issues, Chinese and Vietnamese officials agreed in Beijing on Wednesday. Senior Communist Party of China (CPC) official Liu Yunshan said during his meeting with Le Hong Anh, special envoy of the General Secretary of the Communist Party of Vietnam (CPV) Central Committee, that "China-Vietnam relations for a while have been tense and difficult, which we are unwilling to see."

[Full Report](#)

# MARITIME SECURITY AND SAFETY



VIETNAM | 28 AUGUST | VIETNAM NET

## **Maritime security labelled a priority by ASEAN states**

Representatives of ASEAN countries met yesterday to review maritime co-operation and security among regional members at the opening of the 5th ASEAN Maritime Forum (AMF-5). Discussions on maritime co-operation in humanitarian assistance and disaster relief as well as the management and protection of maritime ecosystem and biodiversity and aquatic resources were major focuses in the forum as alarming tensions on the sea happened recently.

[Full Report](#)

BANGLADESH | 5 AUGUST | MARITIME EXECUTIVE

## **Rescuers struggle in hunt for capsized ferry; 120 missing**

Bangladeshi rescuers struggled against a strong current and choppy river waters on Tuesday in the search for a ferry that capsized with more than 200 passengers on board with about 120 of them missing, many feared dead.

[Full Report](#)

JAPAN—CHINA | 5 AUGUST | ZEE NEWS

## **Japan starts coastguard training with Chinese rivals**

Tokyo: Japan and China's coastguard took part in joint drills Tuesday alongside counterparts from the United States and Russia, despite frosty relations between Tokyo and Beijing over a territorial dispute.

[Full Report](#)

TAIWAN—CHINA | 7 AUGUST | FOCUS TAIWAN

## **Taiwan, China conduct joint maritime rescue drill in Taiwan Strait**

Taipei, Aug. 7 (CNA) Taiwanese and Chinese rescue teams conducted a joint drill in the waters off the Taiwan-controlled Matsu islands Thursday to practice search and rescue operations for maritime disasters like the South Korean ferry that sank in April this year.

[Full Report](#)

SINGAPORE | 12 AUGUST | ASIA ONE

## **13th maritime exercise involving 7 navies to focus on piracy and terrorism**

SINGAPORE - Sailors from the Republic of Singapore Navy (RSN)'s Maritime Security Task Force are participating in an annual maritime exercise called Southeast Asia Cooperation And Training (SEACAT) with navies from Brunei, Indonesia, Malaysia, the Philippines, Thailand and the U.S.

[Full Report](#)

SINGAPORE—UNITED STATES | 14 AUGUST | STARS AND STRIPES

### **Navy wraps up CARAT exercise in Singapore**

Navy crews have been picking up valuable lessons from their Singapore counterparts on how to maneuver in the sea version of heavy traffic — a mix of civilian and military vessels, sometimes spiced up with pirates.

[Full Report](#)

PHILIPPINES—JAPAN | 14 AUGUST | ANG MALAYA

### **Philippine Coast Guard's ten 40-meter vessels to improve maritime law enforcement**

The Department of Transportation and Communications (DOTC) shortlisted four Japanese firms qualified to join the bidding for 10 40-meter multi-role response vessels (MRRV). These are Japan Marine United Co., Mitsubishi Heavy Industries Ltd, Nigata Shipbuilding and Repair Inc., and Sumidagawa Shipyard Co. Inc.

[Full Report](#)



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AUSTRALIA | 17 AUGUST | MARINE LINK

### **Drug busting Darwin returns from Middle East**

The crew responsible for intercepting and destroying billions of dollars worth of narcotics, including the largest seizure of heroin in the history of the Combined Maritime Forces, has returned home. HMAS Darwin and her 232 person crew docked at Garden Island, Sydney today after seven months of successful maritime security operations in the Middle East Region.

[Full Report](#)

SOUTH KOREA | 19 AUGUST | JOONGANG DAILY

### **Maritime reforms lag in wake of ferry accident**

Four months after the Sewol ferry disaster, maritime safety reforms remain at a standstill as the Korea Coast Guard and the Ministry of Oceans and Fisheries struggle to handle the aftermath of the accident.

[Full Report](#)

GLOBAL | 20 AUGUST | ICC-CCS

### **IMB: Guard against threat of cyber attacks**

The International Maritime Bureau (IMB) is calling for vigilance in the maritime sector as it emerges that shipping and the supply chain is the 'next playground for hackers'. IMB said, "Recent events have shown that systems managing the movement of goods need to be strengthened against the threat of cyber-attacks."

[Full Report](#)

INDIAN OCEAN | 22 AUGUST | UNITED NATIONS NEWS CENTRE

### **Over 20,000 people risked their lives in Indian Ocean sea crossings this year**

Over 20,000 people risked their lives in sea crossings in the Indian Ocean in the first half of this year, many of them Rohingya who fled Myanmar, according to a new report released today by the United Nations refugee agency.

[Full Report](#)

INDONESIA—SINGAPORE | 27 AUGUST | XINHUA (GLOBAL POST)

### **Indonesia, Singapore extend cooperation in maritime sector**

JAKARTA, Aug. 27 (Xinhua) -- Indonesian and Singaporean authorities have agreed to extend cooperation between the two neighboring countries to improve capabilities of resources working in their maritime sector, an Indonesian official said on Wednesday.

[Full Report](#)

SEYCHELLES | 29 AUGUST | SEYCHELLES NEWS AGENCY

### **Seychelles maritime security forces' skills strengthened**

Over 30 officers from three different units of the Seychelles forces engaged in maritime security duties are now better equipped to discharge their roles and responsibilities having completed three different

training programmes intended to improve the capacity of Seychelles' maritime security.

[Full Report](#)

SOUTH CHINA SEA | 29 AUGUST | MARITIME  
EXECUTIVE

### **Thai tanker hijacked, robbed**

Armed pirates hijacked a Thai tanker off Malaysia's east coast and stole its oil cargo, adding to a series of robberies that has heightened concerns of the growing Southeast Asian piracy plague.

[Full Report](#)

INDIAN OCEAN | 29 AUGUST | SYDNEY MORNING  
HERALD

### **Satellite call adds fresh clues to MH370 search area**

Shortly after Malaysia Airlines flight MH370 disappeared from radar, airline officials on the ground tried repeatedly to call the crew of the Boeing 777 using a satellite phone that might have left clues to the jet's flight path. Now an analysis of those failed attempts to reach flight MH370 could alter the search for the plane.

[Full Report](#)

# SHIPPING, PORTS AND THE MARITIME ECONOMY



GLOBAL | 28 AUGUST | MARITIME EXECUTIVE

## Stronger demand for container shipping

U.S. economic growth and its accompanied consumer spending is on the rise – as shown by key indicators followed by BIMCO’s shipping market analyst – and will result in stronger demand for container shipping.

[Full Report](#)

SINGAPORE | 1 AUGUST | WORLD MARITIME NEWS

## Shipyards feather in Cosco’s Cap

Turnover from shipyard operations increased 29.3% according to Cosco Corporation Limited’s, a Singapore-based ship repair and marine engineering and shipping group, 2nd quarter financial results for the 3 months ended June 30, 2014.

[Full Report](#)

AUSTRALIA | 4 AUGUST | WORLD MARITIME NEWS

## Unscrupulous foreign shipowners threat to Great Barrier Reef

The Maritime Union of Australia says a \$125,000 fine given last week to a Chinese shipping company trying to take a short-cut across the Great Barrier Reef highlights the need for ongoing vigilance of the shipping industry.

[Full Report](#)

CHINA—SINGAPORE | 4 AUGUST | MARITIME TODAY

## Sinopacific Shipbuilding win order to construct 4 SPA60 vessels

Sinopacific Shipbuilding Group (SINOPACIFIC) has recently signed a contract with Singaporean company Vallianz Holdings Limited (Vallianz) for the construction of 4 SPA60 vessels. The vessels will be built in SINOPACIFIC’s Zhejiang Shipyard and all of them are expected to be delivered from the end of 2014 to the beginning of 2015.

[Full Report](#)

CHINA | 5 AUGUST | WORLD MARITIME NEWS

## Chinese shipyards vying to enter LNG market

Shipyards in China are pushing to secure around USD 10 billion worth of new LNG orders until 2020, in an effort to revive the country’s faltering shipbuilding sector.

[Full Report](#)

**China's trade surplus positive indication for shipping**

China recorded a trade surplus of USD 47.3 billion in July 2014. The record high surplus came on the back of very strong export growth while imports contracted. The world's second largest economy saw its overseas shipments increase by 14.5% in July as compared to same month last year, as reported by BIMCO.

[Full Report](#)

**Thai oil keen to upgrade SE Asia Refineries**

Thai Oil, the country's largest refiner, said on Friday it was keen to take part in bids to upgrade refineries in Indonesia and Myanmar as part of its regional expansion in Southeast Asia.

[Full Report](#)

**MOL provides free medical shipment transport to Myanmar**

Mitsui O.S.K. Lines, Ltd. announced that MOL supported PH-Japan's (Peoples' HOPE Japan's - PHJ) Myanmar healthcare program to provide free transportation of PH-Japan's container filled with 2000 units of digital thermometers and electronic blood pressure manometers to hospitals and medical facilities in Myanmar.

[Full Report](#)

**China's new maritime Silk Road to enhance Asean trade ties**

JAKARTA, Aug 15 — Asean member states welcome China's initiative of building the new Maritime Silk Road and wish to enhance cooperation in various fields with China within the vision, Asean Community Affairs Development Director Danny Lee said.

[Full Report](#)

**China Shipping and PIL ink co-operation agreement with container focus**

Shipping Group and Pacific International Lines have agreed to enhance co-operation in container shipping, leasing and manufacturing, among other areas, in yet another symbolic deal of China's second-largest shipping conglomerate.

[Full Report](#)

**UPS enters Myanmar forwarding market**

Myanmar continues to reap the benefits of the political and economic reform process undertaken by President Thein Sein since 2010 that has opened up the former international pariah country to foreign investments. UPS is the latest forwarder to follow its customer base into the South East Asian country, which is fast becoming a major manufacturing centre.

[Full Report](#)



Maersk Line, Wikimedia Commons ([link](#) and [license](#))

**Maersk says 2M will not require approval in China or Europe**

MAERSK Line and Mediterranean Shipping Co will not have to obtain antitrust approval in either Europe or China for their planned 2M alliance, AP Moller-Maersk chief executive Nils Andersen said when announcing the group's second quarter results. Only in the US will the pair need clearance from the Federal Maritime Commission before starting their vessel-sharing agreement covering the east-west trades.

[Full Report](#)

**Kadin prepares maritime road map**

The Indonesian Chamber of Commerce and Industry (Kadin) is preparing a road map of maritime and fisheries programs for the next five years to increase the country's revenue. Kadin's deputy chairman for maritime affairs and fisheries, Yugi Prayanto, said Friday that the maritime sector could make a substantial contribution to Indonesia's gross domestic product (GDP), if managed correctly.

[Full Report](#)

SINGAPORE | 27 AUGUST | SEATRADE GLOBAL

**SAMSUNG C&T Corp wins EPC contract to expand Singapore LNG Terminal**

Samsung C&T Corporation has won the engineering, procurement and construction (EPC) contract from Singapore LNG Corporation (SLNG) for the phase 3 expansion of the Singapore LNG Terminal.

[Full Report](#)

SINGAPORE | 27 AUGUST | SEATRADE GLOBAL

**SBI offshore, Middle East-Chinese consortium in talks to build up to five rigs**

Singapore's SBI Offshore has entered into talks with a Middle East-Chinese consortium for the construction of up to five jack-up drilling rigs. The consortium boasts members involved in oil and gas activities, and it has indicated that the rigs will be deployed in the Middle East and various parts of Asia for operation in water depths of up to 110 metres.

[Full Report](#)