

China and the Philippines Square Off

by George Friedman - December 27, 2023

The Philippines has long been an important component of Washington's alliance network in the Asia-Pacific. Its geography is such that Manila can help to make or break China's access to the maritime transport corridors its export-oriented economy depends on. But that same geography has usually meant that the Philippines has maintained some semblance of balance between Beijing and Washington.

The status quo changed in 2022, when Ferdinand Marcos Jr. was elected president. He has pursued a much more pro-U.S. foreign policy, one best exemplified by an agreement this year that allows Washington to establish military bases in the country. Add to this the fact that Australia, also a U.S. ally, signed a similar agreement with Papua New Guinea, and China is left looking at a potential wall stretching from the Aleutian Islands to Japan to Australia built for no other reason than to contain its expansion, armed with entrenched artillery and missiles and several ports of call.

Since then, the question has been whether China would respond – and if so, how. Previous efforts in that regard included attempts to drive a wedge between the Philippines and the United States; they failed because the U.S. had more to offer the Philippines economically than China. Beijing is now trying a different approach. Chinese President Xi Jinping had many reasons to speak with U.S. President Joe Biden in California earlier this year, and one of them surely included ways to limit the threat of a potential U.S. blockade. Whatever was or was not agreed to in California clearly did not satisfy China, which has begun a campaign designed to seduce Manila and discourage it from honoring its military agreement with the U.S. It has also threatened to intrude on the Philippines at will, has reissued a territorial claim in the South China Sea that runs counter to international law, and has even had its aircraft close in on U.S. bombers in the region in an attempt to force the U.S. to reevaluate its position in the region.

To be clear, no combat has yet taken place. These are merely gestures in a region where gestures are common currency. But what is clear from these events is that no stable understanding was achieved on military matters or the South China Sea. China is signaling that it will not tolerate American bases in the Philippines. But the U.S. has just substantially strengthened its position against China and is in no position to back down voluntarily.

This is the kind of situation that threatens to escalate into something much more deadly. The prospect of war, however, depends on the military capabilities of the two belligerents. The U.S. Navy has always been more powerful than China's, and its new land-based defensive and offensive positions in the Philippines and Papua New Guinea undermine China's ability to mount a naval assault even further. (If nothing else, they limit China's aggression by making the risk of defeat too expensive to bear.)

That said, it was believed that China's economic problems and America's preoccupation with Ukraine would force the two into an accommodation. Sometimes a negotiation requires a final gut check to make sure nothing is left on the table. Perhaps this is the case, but it's more likely that Beijing doesn't believe the U.S. can solve its economic problems, and Washington doesn't believe China wants a military accommodation.

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