



BRI From the Ground Up

Leaders from 129 countries evaluate a decade of Beijing's signature initiative

Full Report

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Samantha Custer, Ana Horigoshi, and Kelsey Marshall

Acknowledgments

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Acronyms

BRI	Belt and Road Initiative	OECD	Organization for Cooperation and Development
CRS System	Creditor Reporting	PRC	People's Republic of China
EAP	East Asia and Pacific	SSA	Sub-Saharan Africa
ECA Asia	Europe and Central	UK	United Kingdom
LAC Caribbean	Latin America and	U.S.	United States
MENA America	Middle East and North		

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1. Introduction

Announcing its signature Belt and Road Initiative (BRI) in 2013, the People's Republic of China (PRC) positioned itself as a go-to global infrastructure bank (Horigoshi et al., 2022). The advertised value proposition for leaders in low- and middle-income countries was clear: access to capital to deliver physical and digital connectivity projects at scale, with minimal policy conditions, and impressive speed (ibid). The timing was right for countries seeking financing to close a chronic infrastructure gap to grow their economies (Dobbs et al., 2013; Woetzel et al., 2017).

The launch of BRI did not occur in a vacuum. The PRC has been bankrolling an increasing number of overseas development projects since the early 2000s (Malik et al., 2021). It was already outspending the United States and other traditional Organization of Economic Cooperation and Development (OECD) donors after the 2008-09 Asian financial crisis (ibid). Most of this financing supported infrastructure projects in relatively risky financial markets (Horn et al., 2021). Low- and middle-income countries saw Beijing as having the political will and the financial means to follow through on promises to improve physical, digital, and people-to-people connections.

Fast-forward to today: Beijing and its partner countries are actively navigating and managing these earlier choices. In 2024, the PRC is contending with a new reality. It is not merely the banker behind the Global South's infrastructure bonanza; it has also become the largest and most controversial debt collector. Over two decades, the PRC channeled US\$1.3 trillion to support over 20,000 development projects in 165 countries, primarily using debt financing such as loans approaching market rates (Parks et al., 2023).

Opinion runs hot on whether the PRC's debt-financed development represents a net benefit or a net negative for partner countries—from stories of debt distress and environmental decay to endorsements of the BRI as critical to achieving the United Nations sustainable development goals. Nevertheless, a blindspot remains: what does the BRI look like from the ground up? This report analyzes what public, private, and civil society leaders from 129 countries have to say about the PRC as a development partner, its projects, and the BRI overall.

AidData’s 2022-2023 Perceptions of Chinese Overseas Development Survey (hereafter *BRI Perceptions Survey*) took the pulse of 1,650 government, civil society, and private sector leaders from low- and middle-income countries to understand how they view the costs, benefits, and outcomes of PRC-financed development projects.¹ Respondents came from 23 policy areas of expertise. Table 1 includes a breakdown of survey responses by geographic region and stakeholder group.² To our knowledge, this is the first survey to systematically capture perceptions of the BRI comparably among those who make and shape development policy across the Global South.

Table 1. Global BRI Perceptions Survey, Composition of Sample Responses

Geographic Region	Percent of responses received
Government officials (executive branch)	40.4%
NGO/CSO leaders	20.6%
University, think tank, and media	14.2%
Local representatives of development partners	11.9%
Private sector leaders	6%
Parliamentarians	3.4%
Other	3.3%

Stakeholder Group	Percent of responses received
East Asia and the Pacific	13.5%
Europe and Central Asia	5%

¹ The survey was fielded via Qualtrics between July 2022 and April 2023 across 129 low- and middle-income countries and semi-autonomous territories. Of the 51,122 individuals who received our email invitation, 1,650 participated, for an overall response rate of 3.2 percent.

² AidData mitigates potential bias in our surveys in three ways: (1) developing a robust sampling frame of individuals who represent our target population of interest to ensure there is a large enough set of final respondents to facilitate this analysis; (2) collecting data to monitor the demographics of those who receive an invitation versus those who respond to the survey to assess representativeness; and (3) using non-response weights when computing aggregate statistics (e.g., arithmetic means) from the survey results. More information is available in the accompanying Technical Appendix.

Latin America and the Caribbean	17.9%
Middle East and North Africa	7.8%
South Asia	5.5%
Sub-Saharan Africa	50.4%
Other	0%

The remainder of this report is organized as follows. Section 2 examines what leaders have to say about the PRC as a development partner vis-à-vis other major bilateral actors. Section 3 explores how Global South leaders assess the trade-offs and outcomes of PRC-financed projects in their countries. Section 4 considers how the PRC's engagement with partner countries has evolved in the era of BRI and COVID-19. In Section 5, we conclude with lessons learned.

2. Positioning: How Does the Global South Perceive China as a Development Partner?

Leaders in low- and middle-income countries today have more choices when sourcing capital and expertise to fuel their development (Custer et al., 2023). This status quo was not always the case. In the 20th century, most development finance came from a relatively small club of advanced economies and multilateral suppliers, playing by the same rules (ibid). Aid was most often in the form of grants, concessional no- or low-interest loans, and technical expertise.

Today, the development finance landscape looks decidedly different, partly due to the PRC's rising prominence as an infrastructure financier. However, the supply side is only part of the development finance story. For each new project Beijing bankrolls, there is a willing government or private sector counterpart on the other side of that transaction. The *BRI Perceptions Survey* closes an information gap in understanding the Global South's demand to work with the PRC.

This chapter provides a baseline by analyzing leaders' responses to general barometer questions about the PRC relative to other major powers, including perceived involvement in supporting development in their countries, preferred partners in each sector, and best development models for their countries. In the remainder of this section, we break down three key takeaways:

- China is highly visible in the eyes of Global South leaders as a supplier of development financing and training.
- China is the infrastructure partner of choice, but leading democracies enjoy a competitive edge in other sectors.
- When looking abroad for inspiration, democracies and autocracies alike see the allure of Beijing's development model.

Finding #1

China is highly visible in the eyes of Global South leaders as a supplier of development financing and training.

Beijing's efforts to become a dominant player in development finance have not gone unnoticed. Seventy-nine percent of leaders surveyed reported that the PRC was not only present but active in supporting development in their countries, trailing the United States (U.S.) by a mere three percentage points (Figure 1). Beijing's assistance was strongly associated with financing, such as grants and loans (72 percent), as well as scholarships, training, and exchanges (68 percent). It was seen as less active in supplying technical assistance and policy advice, in-kind support, and non-military security assistance (Figure 2). Democracies viewed the PRC as more active (82 percent) than their autocratic peers (77 percent), contrary to speculation that Beijing prefers working with authoritarian regimes.

Regionally, the PRC is most visible in Sub-Saharan Africa, where 87 percent of respondents said it was an active development partner, ahead of France (68 percent), Russia (28 percent), South Africa (27 percent), the United Kingdom (UK) (71 percent), and the U.S. (83 percent). This is unsurprising, given Beijing's revealed interest in the region: Sub-Saharan Africa attracted 42 percent of PRC-bankrolled projects over two decades and one-fifth of its development finance dollars (Table 2). In a similar vein, Beijing was seen as more active (81 percent) than all but Japan (95 percent) in East Asia and the Pacific region, an early recipient of PRC financing and among the first wave of signatories to the BRI.

At first blush, the PRC's strong showing in the Western hemisphere is surprising, as countries have only recently started joining the BRI. Eighty-two percent of respondents in Latin America and the Caribbean viewed the PRC as active, trailing the U.S. by six percentage points. Following the money provides an important clue. While the PRC's dealings in Africa and Asia have invited greater scrutiny, Latin America and the Caribbean quietly became the third largest recipient of Beijing's non-emergency financing (US\$306.2 billion, 21 percent), outspending the U.S. in the region by 5-to-1 (Custer et al., 2023; Dreher et al., 2022) between 2000 and 2021. Considering Beijing's emergency lending, the

region catapults to the single largest recipient of development finance dollars overall (US\$415.3 billion, 26 percent). Conversely, by substantial margins, Beijing was seen as much less active than the UK and the U.S. in South Asia, the Middle East, and North Africa.

Figure 1. Which countries do Global South leaders see as most active in supporting development?

Question 4. How active were the following foreign governments in supporting development in [country] between 2012 and 2022?

Percent of Respondents*

Very active Somewhat active Minimally active Not active at all

Global

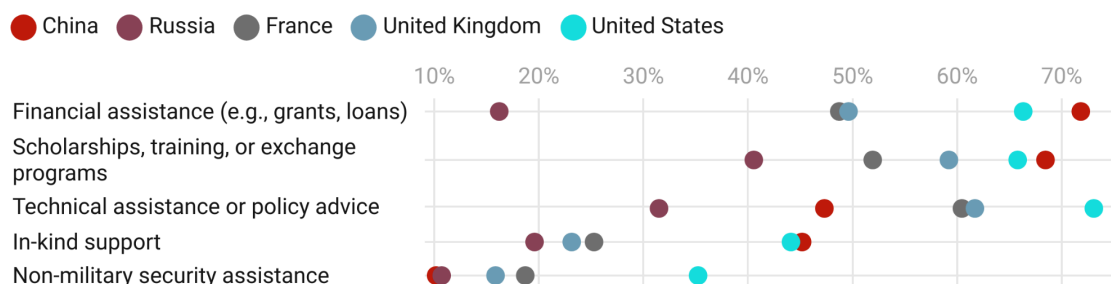


Notes: This visual shows the percentage of respondents who identified a given foreign government's activity level in supporting development in their country. It excludes respondents answering "Don't know / not sure" or "Prefer not to say." Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Figure 2. Which foreign governments do Global South leaders say provide specific kinds of development support?

Question 5. You identified the following foreign governments as active in supporting development in [country]. How do these actors typically provide support to your country? Please select all that apply.

Percent of Respondents*



Notes: This visual shows the percentage of leaders who identified a particular development activity as being provided by a given foreign government. It excludes respondents answering “Don’t know / not sure” or “Prefer not to say.” Response options have been shortened for presentation. Only respondents who selected that government as being active in their country were presented with the option to select relevant development activities. Source: AidData 2022-2023 BRI Perceptions Survey.

Table 2. Development Partner Official Financing (2000-2021), by Region

Region	PRC*	France	Russia*	U.S.	UK
East Asia and the Pacific	\$215.98B 3,841 projects	\$22.27 B 36,951 projects	\$0.45 B 54 projects	\$29.44 B 61,351 projects	\$9.67 B 14,306 projects
Europe and Central Asia	\$326.2 B 1,631 projects	\$6.0 B 9,390 projects	\$1.37 B 66 projects	\$27.41 B 76,838 projects	\$3.61 B 7,954 projects
Latin America and the Caribbean	\$306.24 B 2,428 projects	\$23.373 B 24,190 projects	\$2.41 B 28 projects	\$57.31 B 13,2994 projects	\$6.83 B 13,660 projects
Middle East and North Africa	\$122.116 B 1,086 projects	\$44.20 B 35,570 projects	\$0.18 B 34 projects	\$112.65 B 51,054 projects	\$17.90 B 10,062 projects
South Asia	\$135.85 B 1,343 projects	\$8.29 B 9,418 projects	\$0.02 B 17 projects	\$74.20 B 53,575 projects	\$33.96 B 20,720 projects
Sub-Saharan Africa	\$326.16 B 7,583 projects	\$87.03 B 83,403 projects	\$0.22 B 87 projects	\$203.7 B 24,4817 projects	\$80.34 B 52,427 projects
Multi-Region	\$4.02 B 45 projects	\$32.07 B 9,978 projects	\$0.22 B 70 projects	\$169.38 B 75,184 projects	\$67.36 B 28,732 projects
Global Total	\$1,436.56 B 17,957 projects	\$223.23 B 208,900 projects	\$4.87B 356 projects	\$674.08 B 695,813 projects	\$219.66 B 14,7861 projects

Notes: This table shows the volume of official finance (official development assistance and other official flows) in dollars and project counts by region of interest provided by a given development partner to low- and middle-income countries from 2000-2021. For the U.S., the UK, and France, this includes coverage for all years and is based upon donor reporting to the OECD's Creditor Reporting System. For Russia, this includes a more limited number of years, 2015-2020, reported to the CRS. Since the PRC does not transparently report its assistance to the CRS, we instead use AidData's project-level Global Chinese Development Finance Dataset, Version 3.0 for 2000-2021. We excluded the PRC's emergency lending (e.g., balance of payment loans and currency swaps) from this analysis. Source: Custer et al. (2022) and Dreher et al. (2022). AidData's Global Chinese Development Finance Dataset, Version 3.0. OECD. (2022). Creditor Reporting System.

Finding #2

China is the infrastructure partner of choice, but leading democracies enjoy a competitive edge in other sectors.

Despite growing criticism over its investments' financial and environmental sustainability in recent years, the PRC's appeal as a go-to infrastructure funder remains formidable. Thirty-eight percent of respondents globally selected Beijing as their preferred partner for projects related to energy, transportation, and infrastructure (Figure 3). The PRC's infrastructure advantage is strongest in Sub-Saharan Africa, where nearly half of these leaders chose Beijing among the alternatives. The Middle East and North Africa was the only region where the PRC was the preferred partner of less than one-quarter of respondents.

This dynamic presents a quandary for the PRC in light of a growing gap between what it is willing to fund and what its partners want. Beijing has already begun to shift away from bankrolling *new* infrastructure projects, instead supplying emergency lending to bail out countries struggling to service debts from *old* infrastructure projects (Parks et al., 2023).

Nevertheless, it will take some time before Beijing's partners in the Global South dislodge the perception that the PRC is a one-stop shop for all things infrastructure. When asked about projects the PRC supported in their countries (Figure 4), infrastructure was top-of-mind for respondents, who most frequently cited projects related to transportation (77 percent); government equipment and buildings (51 percent); energy, industry, and mining (47 percent); and digital telecommunications (40 percent). Relatedly, 70 percent of Beijing's non-emergency development finance between 2000 and 2021 focused on the infrastructure and energy sector (Table 3).

Conversely, President Xi's Global Development Initiative faces a public relations challenge to position the PRC as a leader in promoting stronger, greener, and healthier global development (CIKD, 2023). A tiny fraction of respondents said that the PRC was their preferred partner in the environment and governance sectors, 5 and 2 percent, respectively, lagging far behind Western democracies like the U.S., UK, and France (see Figure 3).

Whether this is a firmly held preference on philosophical grounds or a function of path dependence remains to be seen. Over the last two decades, less than 1 percent of Beijing's non-emergency financing supported environmental and governance projects (Custer et al., 2023; Dreher et al., 2022). Moreover, only 5 percent of respondents identified governance or public sector management as areas of focus for Chinese-financed development projects in their countries (see Figure 4).

Leaders in low- and middle-income countries recognize Beijing's long-standing involvement in the social sectors: 44 percent of respondents said the PRC supported education, health, sports, or culture projects (see Figure 4). Relatedly, half of respondents pointed to the PRC's use of people-to-people exchanges to support development in their country. Nevertheless, this activity has not translated into high demand, as yet, across the Global South to work with Beijing on social sector-focused development projects. Only 7 percent of respondents selected the PRC as their preferred partner in the social sector over other major powers. Global South leaders were more likely to view the PRC as a preferred partner in the social sector (7 percent, see Figure 3).

One plausible reason why so few leaders identify the PRC as a preferred social sector partner is that it substantially underspends in absolute and relative terms. Although roughly half of its projects are related to the social sector, these activities attract only 6 percent of Beijing's non-emergency development finance dollars (Custer et al., 2023; Dreher et al., 2022). The lion's share of the PRC's development finance is instead bankrolling activities in the sector that the PRC is most well known for—infrastructure (ibid). By comparison, Western democracies devoted 30 percent or more of their financing to support social sector projects (OECD, 2023). If the PRC is to move the needle, it may need to demonstrate

that it is willing to put its money where its mouth is and double down on investments in the social sector.

Western democracies face the opposite challenge. Their efforts to position the G7 Partnership for Global Infrastructure and Investment (PGII) as a sustainable alternative to the BRI may be hindered by the persistent narrative that their comparative advantage is in other arenas. Just over 10 percent of respondents each identified the U.S. and France as their preferred partners for infrastructure, compared to the alternatives (see Figure 3). In only two regions did other actors catch up to the PRC as the frontrunner in this sector. In Europe and Central Asia, the U.S. and the PRC were in a dead heat at 27 percent each. In the Middle East and North Africa, France narrowly surpassed the PRC by just one percentage point.

Perceptions are not deterministic, but they signal that Western democracies have a long road ahead to articulate and demonstrate a compelling value proposition for their infrastructure-focused initiatives. One place to start might be examining what their financing says about their priorities. Over the last two decades, Western democracies like France, the UK, and the U.S. spent between 6 and 13 percent of their development assistance budgets on projects in the infrastructure sector (OECD, 2023). This amount is minuscule compared to nearly three-quarters of the PRC's development finance in this sector (Custer et al., 2023; Dreher et al., 2022).

Of course, attempting to outspend the PRC head-to-head may not be feasible or desirable. The West is uniquely well-positioned to help Global South counterparts build more robust systems to manage debt financing responsibly and build institutional capacity and accountability to mitigate environmental, social, or governance risks from PRC-financed projects. Another strategy could be teaming up with regional powers such as Japan in East Asia and the Pacific and India in South Asia, which leaders see as more credible alternatives to the PRC in the infrastructure arena.

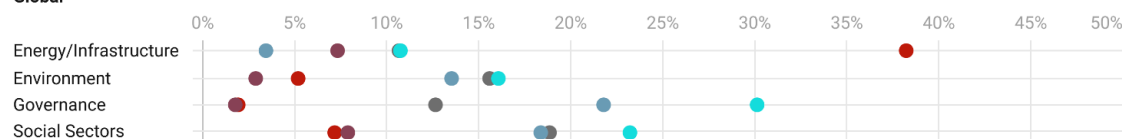
Figure 3. Which countries are seen by Global South leaders as preferred partners, by sector and region?

Question 6. You identified the following foreign governments as active in supporting development in [country]. Which government is your preferred partner in each area? You may select up to one answer in each area.

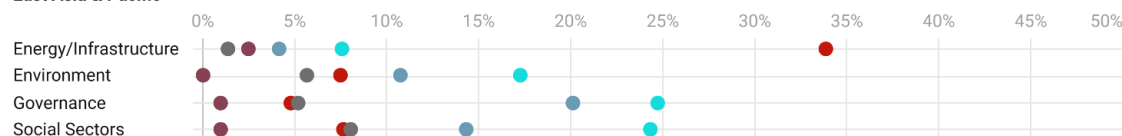
Percent of Respondents*

● China ● Russia ● France ● United Kingdom ● United States

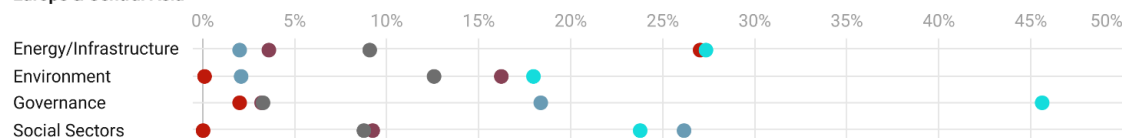
Global



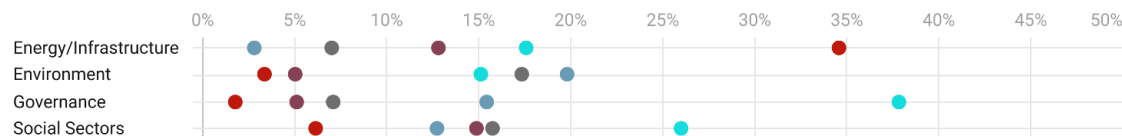
East Asia & Pacific



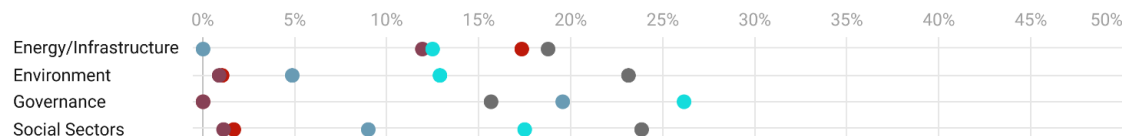
Europe & Central Asia



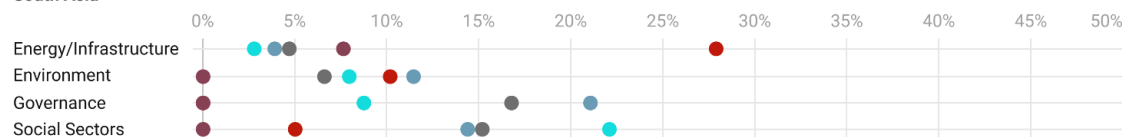
Latin America & Caribbean



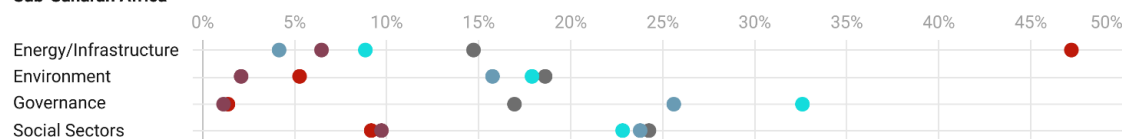
Middle East & North Africa



South Asia



Sub-Saharan Africa



Notes: This visual shows the percentage of respondents that identified a given foreign government as their preferred development partner in a given sector. Respondents could only select one of six partners in each sector: five major powers were options for all regions (France, PRC, Russia, United Kingdom, United States) and one regional power. The region-specific power option varied by location (e.g., Japan in East Asia and Pacific, South Africa in Sub-Saharan Africa, Brazil in Latin America and the Caribbean, India in South Asia,

Germany in Europe, Saudi Arabia in the Middle East and North Africa, and none in Central Asia). Respondents answering “Don’t know / not sure” or “Prefer not to say” were excluded. Source: AidData 2022-2023 BRI Perceptions Survey.

Figure 4. Which development projects do Global South leaders say China typically supports in their country?

Question 9. What types of development projects does the Chinese government typically support in [country]? Select all that apply.

Percent of respondents



q09	Global	Autocracy	Democracy	EAP	ECA	LAC	MENA	SA	SSA
Exchanges, technical assistance, or training	50.1%	48.8%	51.3%	48.2%	42.3%	44.2%	19.4%	60.1%	57.1%
Agriculture, fishing, forestry	21.7%	23.7%	17.2%	25%	11.6%	20.8%	5%	20.8%	24.2%
Debt relief or forgiveness	10.7%	11.1%	10.6%	10.8%	4.6%	5.7%	4.2%	17.8%	13%
Digital telecommunications	40.2%	46.1%	35.6%	34.2%	53.6%	37.7%	39.5%	38.4%	42.6%
Education, health, sports, or culture	44%	41%	46.4%	49%	5.8%	35.3%	23.7%	47%	51.5%
Energy, industry, or mining	46.7%	57.6%	37.1%	51.7%	52.2%	34.9%	38.3%	53.6%	48.4%
Equipment/buildings for government agencies	51.2%	50.7%	50.9%	48.1%	14.9%	25.5%	30.6%	57.3%	67.4%
General budget support	11.8%	11.3%	11.8%	15.5%	0.3%	9.5%	2.5%	21.9%	12.2%
Governance or public sector management	5%	5.3%	4.2%	6.4%	1.7%	4%	2.3%	9.1%	5%
Humanitarian assistance	21.3%	19.3%	22.1%	30%	6%	17.8%	14%	43.3%	18.3%
Transportation infrastructure	77.2%	80.3%	74.6%	78.5%	66.6%	72.2%	60.3%	83.2%	81.1%
Don't know / not sure	2.5%	3.7%	1.3%	2.3%	2.1%	4.2%	8.5%	1.4%	1.2%
Other (please specify)	1.9%	2.6%	1.3%	4.6%	0%	0%	0.4%	0%	2.1%
Prefer not to say	0.1%	0%	0.3%	0%	0%	0.3%	0%	0%	0.2%

Notes: This visual shows the percentage of respondents that identified the Chinese government as supporting activities as a particular type in their country. Respondents could select as many activities as applicable. Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Table 3. Development Partner Official Financing (2000-2021), by Sector

Sector	PRC*	France	Russia*	U.S.	UK
Environment	\$0.27 B 82 projects	\$11.19 B 12,321 projects	\$0; 0 projects	\$10.8 B 31,683 projects	\$7.50 B 9,600 projects
Government	\$10.94 B 1,682 projects	\$6.5 B 18,399 projects	\$0.04 B 4 projects	\$91.87 B 128,550 projects	\$28.05 B 39,916 projects
Infrastructure	\$1,008.3 B	\$28.22 B 2,924 projects	\$0.01 B 3 projects	\$38.08 B 27,139 projects	\$15.63 B 10,749 projects
Social	\$86.22 B 8,764 projects	\$66.83 B 92,784 projects	\$0.17 B 15 projects	\$228.37 B 235,811 projects	\$66.61 B 47,654 projects
Other	\$330.83 B 3,325 projects	\$110.48 B 60,263 projects	\$4.64 B 334 projects	\$304.95 B 272,629 projects	\$101.87 B 39,937 projects
NA	\$0 0 projects	\$0 0 projects	\$0 0 projects	\$0 1 project	\$0 B 5 projects
Total	\$1,436.56 B 17,957 projects	\$223.23 B 208,900 projects	\$4.87 B 356 projects	\$674.08 B 695,813 projects	\$219.66 B 147,861 projects

Notes: This table shows the volume of official finance (official development assistance and other official flows) in dollars and project counts by sector of interest provided by a given development partner to low- and middle-income countries between 2000-2021. The sector estimates were based upon a manual crosswalk between the OECD CRS sector/themes and the sector groupings used for the BRI Perceptions Survey. We owe a debt of thanks to Bryan Burgess for producing this crosswalk and estimate for us. For the U.S., UK, and France, this includes coverage for all years and is based upon donor reporting to the OECD's Creditor Reporting System. For Russia, this includes a more limited number of years, 2015-2020, reported to the CRS. Since the PRC does not transparently report its assistance to the CRS, we instead use AidData's project-level Global Chinese Development Finance Dataset, Version 3.0 for 2000-2021. We excluded the PRC's emergency lending (e.g., balance of payment loans and currency swaps) from this analysis. Source: Custer et al. (2022) and Dreher et al. (2022). AidData's Global Chinese Development Finance Dataset, Version 3.0. OECD. (2022). Creditor Reporting System.

Finding #3

When looking abroad for inspiration, democracies and autocracies alike see the allure of Beijing's development model.

Over one-third of leaders surveyed said their country should pursue their own development model rather than follow in the footsteps of others (Figure 5). Among those looking farther afield, respondents most frequently turned to the PRC (16 percent) as having an attractive model for their countries to learn from, followed by the U.S. (12 percent). However, this is not to say that leaders always view the PRC's actions with rose-colored glasses. When asked whether they approved or disapproved of the job performance of a foreign power's senior

government leaders, 28 percent of respondents said they disapproved of PRC leadership, compared to considerably lower disapproval of the U.S., the UK, and France (Figure 6). The only power inviting greater censure was Russia (50 percent), which, given the survey timing, likely reflects perceptions around the Russo-Ukraine war.

Sub-Saharan Africa was most enthusiastic about both the appeal of the PRC's development model and general favorability. Roughly one-fifth of respondents from that region selected the PRC as the best model for their countries to follow. This revealed preference could indicate a desire among African leaders to assert greater autonomy from the prescriptions of former colonial powers and to chart their own course instead. Relatedly, respondents from Sub-Saharan Africa also gave a markedly higher approval rating (51 percent) to the PRC's senior government leadership, +12.5 percentage points ahead of the global average (see Figure 6).³

Leaders from other regions such as Latin America and the Caribbean (9 percent) and Europe and Central Asia (0 percent) were more skeptical that the PRC's development model was an attractive path for their country, viewing the U.S. as a preferred alternative (13 and 29 percent, respectively). Respondents from Latin America and the Caribbean hold higher ambivalence or uncertainty regarding the PRC, with 44 percent indicating that they neither approved nor disapproved of that government's senior leadership. This likely reflects the perception of the PRC as a more recent player in the region. The PRC faces a different challenge in Europe and Central Asia, where extremely high levels of disapproval (56 percent) of Chinese senior government leadership may signal more systemic Sinophobia among elites in the region (Custer, 2019).

In East Asia and the Pacific, leaders look to neither the U.S. nor the PRC, but rather Japan. Twenty-one percent of respondents selected the regional power as the most attractive exemplar for their countries. Japan also enjoys unusually high approval ratings, with nearly 70 percent of respondents expressing their approval of Japan's senior government leadership. In South Asia, respondents were generally favorable towards India's senior government leadership (46

³ Interestingly, African citizens also consistently present very high approval rates of Chinese leadership in comparison with other global regions, despite a declining trend that started around 2011, according to Gallup World Poll data.

percent approve, 21 percent disapprove) as a regional power but more pessimistic about the prospects of emulating its development model.

Strikingly, the survey underscores the danger of simplistic assumptions about the links between political ideology, favorability of foreign powers, and the appeal of disparate development models. For example, a common supposition is that leaders from autocratic countries are predisposed to be more favorable towards authoritarian foreign powers like the PRC, while democracies express greater affinity for Western democracies. In fact, leaders from both autocracies and democracies expressed higher levels of approval of the job performance of U.S. and UK senior government leadership than the PRC.⁴

Another like-attracts-like assumption would be that respondents gravitate to the development models of countries like theirs. This, too, is not necessarily the case. Notably, respondents from both autocracies (+5 percentage points) and democracies (+3) were more likely to choose the PRC over the U.S. (the second choice) as the development model that was best for their countries (see Figure 5). Leaders' attraction to the PRC's model may have less to do with political ideology than economics, given Beijing's success in dramatically reducing the percentage of its population living in extreme poverty (China Power, 2021) and respondents' stated preference to work with Western democracies on issues related to governance and the rule of law.

⁴ Among respondents from democracies, over 50 percent approved of U.S. and UK senior government leadership, compared to only 37 percent for the PRC. Among respondents from autocracies, a similar pattern emerged, where approximately 50 percent approved of U.S. and UK senior government leadership, compared to only 41 percent for the PRC.

Figure 5. Which countries do Global South leaders choose as representing the best model for development?

Question 7. In your opinion, which of the following countries, if any, would be the best model for the future development of [country]? Please select only one option.

Percent of respondents



q07	Global	Autocracy	Democracy	EAP	ECA	LAC	MENA	SA	SSA
Our own	36.8%	34.3%	38.8%	34.2%	20.5%	45%	32.2%	54.4%	33.8%
China	15.8%	18.9%	13.5%	11.1%	0%	9.1%	13.5%	17.5%	22.4%
United States	12.3%	13.6%	10.9%	3.9%	29%	12.8%	15.7%	2.2%	15.2%
United Kingdom	5.1%	4.7%	6%	6.1%	1.1%	2.5%	7%	1.2%	6.5%
France	3%	0.9%	5.6%	0.4%	9.6%	8.3%	3%	1.8%	1.5%
Russia	0.5%	0.5%	0.5%	0%	0%	0.7%	0%	0%	0.8%
Regional power	6.1%	6.1%	4.7%	20.6%	18.7%	1.5%	2.9%	3.7%	1.4%
None	11.2%	12.6%	10.8%	12.8%	10.6%	8.8%	17%	13.5%	9.9%
Prefer not to say	3.9%	4.7%	2.9%	5.8%	1.7%	1%	5.2%	2.6%	4.5%
Don't know / not sure	5.4%	3.7%	6.3%	5.1%	8.9%	10.5%	3.7%	3.2%	3.9%

Notes: This visual shows the percentage of respondents who identified a given foreign government as having the best development model for their country to emulate. Respondents could only select one of six foreign powers or their own model; this visual drops “don’t know/prefer not to say” responses. Response options have been shortened for presentation. The region-specific power option varied by location (e.g., Japan in East Asia and Pacific, South Africa in Sub-Saharan Africa, Brazil in Latin America and the Caribbean, India in South Asia, Germany in Europe, Saudi Arabia in the Middle East and North Africa, and none in Central Asia). Source: AidData 2022-2023 BRI Perceptions Survey.

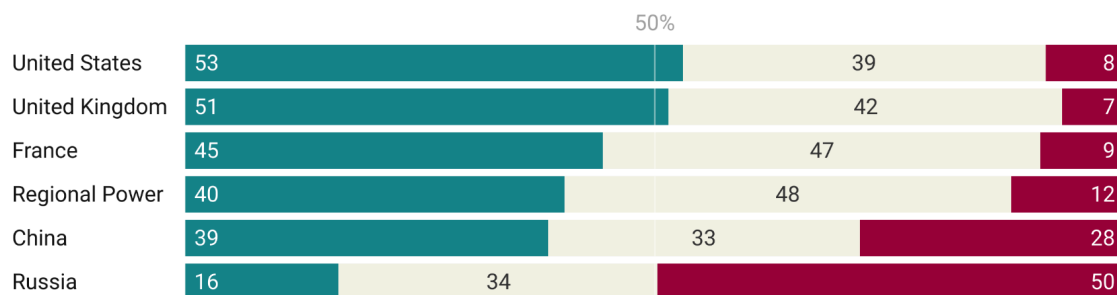
Figure 6. How do Global South leaders rate the leadership of foreign powers?

Question 8. Do you generally approve or disapprove of the job performance of the leadership of the following countries?

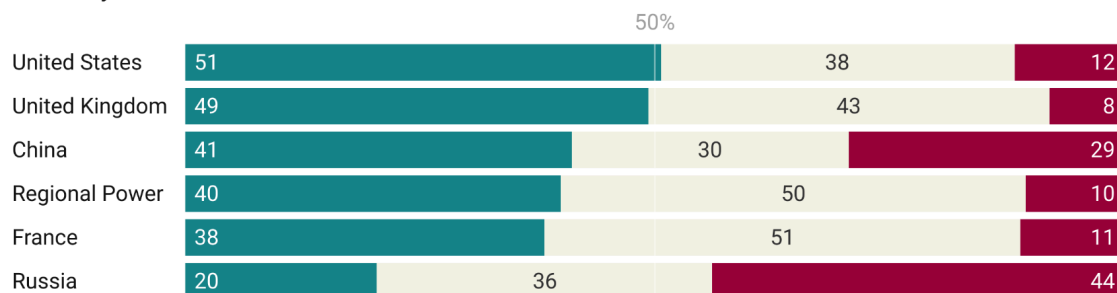
Percent of Respondents*

■ Approve ■ Neither ■ Disapprove

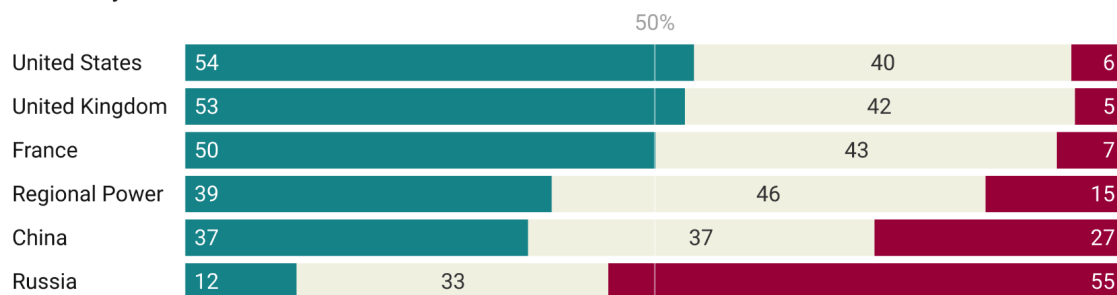
Global



Autocracy



Democracy



Notes: This visual shows respondents' approval ratings for a given power's leadership. This visual drops the "don't know/not sure" and "prefer not to say" options. Response options have been shortened for presentation. The region-specific power option varied by location (e.g., Japan in East Asia and Pacific, South Africa in Sub-Saharan Africa, Brazil in Latin America and the Caribbean, India in South Asia, Germany in Europe, Saudi Arabia in the Middle East and North Africa, and none in Central Asia). Source: AidData 2022-2023 BRI Perceptions Survey.

3. Trade-offs: How Do Leaders Weigh the Benefits, Costs, and Outcomes of PRC Projects?

The PRC is one of the largest and most controversial sources of development finance in the Global South today. Although Beijing was bankrolling projects overseas as early as the 1950s (Information Office of the State Council People's Republic of China, 2011), these early efforts were relatively modest in size, generous in terms, and attracted little scrutiny. This state of play dramatically changed with the fanfare of the BRI's arrival in 2013 as a signature initiative of Chinese President Xi Jinping. The PRC's engagement in the Global South became viewed through the lens of big-ticket infrastructure projects, implemented with minimal transparency and reliant on debt financing.

Skeptics argue that the costs outweigh the benefits, citing adverse spillover effects for local communities. Advocates counter by saying that the PRC unlocked unprecedented amounts of capital for countries to fuel their economies and that criticism of the BRI is a side effect of intensified great power competition and Sinophobia rather than the merits of the projects themselves.

AidData and other research groups have helped separate myth from fact by documenting the scope, terms, and implementation of the PRC's development project portfolio. Substantially less attention has been paid to how Beijing's prospective partners in low- and middle-income countries view the trade-offs and outcomes of these projects. The *BRI Perceptions Survey* is a significant step forward in closing this knowledge gap by systematically collecting, aggregating, and analyzing insights from public, private, and civil society leaders on their experiences of PRC-financed development projects in 129 countries.

This chapter reveals how leaders think about the trade-offs of development projects bankrolled by Beijing. We analyze leader responses to more specific survey questions about the perceived benefits and drawbacks of working with the PRC; the visible economic, environmental, and governance outcomes of these projects; and Beijing's support to their countries in the era of COVID-19.

In the remainder of this section, we break down three key takeaways:

- Leaders view the PRC as offering better financial terms and fewer policy conditions, but with less transparency, capacity, and quality.
- COVID-19 did not diminish Beijing in the eyes of the Global South, as most leaders' attitudes towards the PRC improved or remained the same.
- Leaders see clear trade-offs from PRC development projects: economic gains, environmental harms, and mixed effects on local governance.

Finding #4

Leaders view the PRC as offering better financial terms and fewer policy conditions, but with less transparency, capacity, and quality.

What is the PRC's value proposition as a development partner in the eyes of Global South counterparts? Respondents highlighted several benefits of the PRC's projects (Figure 7): fewer economic, political, or environmental conditions attached (41 percent); more favorable financial terms (37 percent); greater alignment with a partner country's national interests (35 percent); and fewer delays (27 percent). The top four benefits globally held true across democracies, autocracies, and all regions but one. Latin America and the Caribbean did not rate fewer delays as highly; instead, they emphasized higher-quality expertise.

Leaders also cited drawbacks (Figure 8), saying that PRC-financed projects discouraged greater transparency in reporting on project finances, terms, or progress (32 percent); built less capacity in local partners (32 percent); and were completed with lower quality (22 percent). The three drawbacks held true across democracies, autocracies, and most regions. The exception was that MENA, Europe and Central Asia, and South Asia were less concerned about quality than other considerations. Some of these perceptions align with what we know from analyzing Beijing's portfolio of overseas development projects over two decades, while others diverge from this conventional wisdom.

Conditionality—linking aid access to a country's willingness and ability to meet economic, political, social, or environmental policy conditions—has often been a feature of assistance provided by many advanced economies of the OECD's Development Assistance Committee, along with international finance institutions

like the World Bank (Guillaumont et al., 2023). Although support for this tool has wavered in Western capitals in recent years, respondents still view conditionalities as a distinguishing feature of what traditional donors offer.

PRC assistance does not include the same policy conditionalities; however, that is not to say that this financing is absent of conditions altogether. Financing may come with quid pro quo obligations to support the PRC's preferred foreign policy positions (Custer et al., 2018a and 2019) or grant Beijing "preferred creditor" status in the repayment queue (Guillaumont et al., 2023). The *BRI Perceptions Survey* responses imply that leaders may discount these fuzzy future obligations to the PRC instead of the up-front costs of adhering to the explicit policy conditions favored by traditional donors today.

One of the PRC's clear comparative advantages as a development partner has been Beijing's ability to source and fast-track approval of project ideas directly from counterpart leaders. It is no surprise that respondents view Beijing's assistance as more closely aligned with their national priorities—an important predictor of perceived donor performance in past AidData surveys (Custer et al., 2018 and 2021). Comparatively, other bilateral and multilateral actors have decidedly less flexibility, constrained by practices of earmarking and directives (e.g., financing that can only be used for a specifically defined purpose) by parliaments and shareholders or as dictated by the requirements of their organizational mission (Runde et al., 2021; OECD, 2022). This places them at a relative disadvantage.

The need for speed may be more pronounced in democratic countries, argues Liberia's former Minister of Public Works, W. Gyude Moore (2024), as leaders turn to Beijing to help them deliver quickly and visibly for constituents. Beijing does indeed have a formidable track record: delivering infrastructure projects at a much faster rate (2.7 years on average) than an international finance institution (IFI) like the World Bank (5-10 years on average) (Parks et al., 2023). Historically, this discrepancy might have been explained by the IFI's inclusion of environmental, social, and governance (ESG) safeguards that the PRC's projects lacked. However, this has changed recently as Beijing incorporates more ESG-style risk mitigation measures to curb criticism (ibid).

Contrary to expectations, leaders from low- and middle-income countries felt that PRC projects offered more favorable financial terms. On the surface, this finding conflicts with what we know about the terms of PRC-financed development projects. Past research by AidData and others has extensively documented that Beijing operates more like a “banker than a benefactor,” financing projects primarily with debt instruments such as loans approaching market rates or export credits (Dreher et al., 2022).

One interpretation of this result is that a lack of transparency and the PRC’s effective propaganda efforts could contribute to a large information deficit for leaders who may not fully understand the costs of Beijing’s financing. An alternative explanation is that generosity might depend on what leaders compare PRC financing against. If leaders compare PRC financing to the cost of accessing private sector capital for infrastructure projects, it could be true that the PRC offers more favorable terms, even if those are less favorable than usually seen from OECD Development Assistance Committee donors.

Respondents identified the lack of transparency as a drawback of PRC-financed projects. This insight tracks closely with past research, which found that the financial contracts for PRC projects often contain confidentiality clauses that restrict borrowers from revealing the existence or terms of the debt (Gelpern et al., 2021). This may contribute to the misperception regarding the favorability of Chinese lending terms mentioned above.

An early rationale for the BRI was to help Chinese leaders export excess industrial capacity in its steel and construction industries to put to productive use abroad (Hillman & Sacks, 2021; Mathew & Custer, 2023). Beijing’s approach is akin to “circular lending”: the PRC provides financing for Chinese suppliers, implementers, and laborers to deliver its projects with limited inclusion of local businesses (Horn et al., 2021). Respondents likely feel that Beijing’s in-sourcing approach to project implementation to Chinese firms and labor comes at the expense of building capacity in its local partners.

Concerns regarding lower quality as a drawback of working with the PRC vary considerably across regions. There was more heightened pushback from leaders in Asia and Africa, regions with relatively higher project volumes.

Figure 7. What do Global South leaders say is the most important benefit of partnering with China on development projects?

Question 11. What do you think is the single most important benefit for [country] in partnering with the Chinese government, compared to other foreign governments, on development projects? Please select up to three, [if more than one selected follow up question to rank.]

Percent of respondents



q11	Global	Autocracy	Democracy	EAP	ECA	LAC	MENA	SA	SSA
Supplies higher-quality technical expertise on projects	16%	16.2%	16.4%	13.1%	1.8%	23.6%	19.3%	11.2%	16.2%
Builds more local capacity to sustain projects	9%	11.3%	6.4%	9.5%	0.1%	5.4%	15%	4.8%	10.6%
Completes higher-quality projects	9.4%	9%	9.6%	8.4%	8.9%	6.8%	4.5%	10.9%	11.2%
Completes projects with fewer delays	27%	22.4%	33.2%	31.4%	12.1%	16.7%	22.5%	23.4%	31.5%
Promotes greater transparency	3.5%	5%	1.9%	3.9%	2.1%	3.2%	2.3%	1.5%	4.1%
Provides financing on more favorable terms	37%	36.6%	36.8%	36.1%	20.7%	33.8%	32.1%	47.1%	39.5%
Provides financing with fewer conditions	41.4%	44.4%	38%	36.6%	16.5%	36%	41.5%	41.3%	47.8%
Supports projects aligned with national development priorities	34.7%	38.6%	29.5%	25.7%	19.3%	23.1%	38.6%	42.1%	42.3%
Don't know / not sure	5.7%	4.7%	7.3%	2.2%	9.7%	11.4%	6.6%	0%	5.5%
None of the above	8.3%	6.2%	10.1%	10.6%	28.7%	8.1%	3.5%	18.1%	4.7%
Other (please specify)	4%	4.4%	3.9%	3.4%	0.1%	4.8%	5.2%	4%	4.2%
Prefer not to say	0.8%	0.8%	0.8%	1.8%	0%	0%	1%	1.2%	0.7%

Notes: This visual shows the percentage of respondents that selected a given attribute as a benefit of partnering with the PRC on a development project versus other foreign governments. Respondents could select up to three of the response options. Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Figure 8. What do Global South leaders say is the biggest drawback of partnering with China on development projects?

Question 12. What do you think is the single biggest drawback for [country] in partnering with the Chinese government, compared to other foreign governments, on development projects? Please select up to three. [If more than one selected follow up question to rank.]

Percent of respondents



q12	Global	Autocracy	Democracy	EAP	ECA	LAC	MENA	SA	SSA
Provides financing with greater conditions	12.7%	11.7%	13.5%	16.5%	30.2%	11.3%	8.9%	12.1%	10.5%
Builds less local capacity to sustain the project	31.9%	32.2%	32.1%	36.8%	30.1%	17.3%	18.4%	31.7%	37.4%
Completes lower-quality projects	21.7%	19.6%	23.4%	29.9%	6.1%	18.2%	8.6%	7.5%	25.2%
Completes projects less quickly with more delays	5.5%	6.7%	4.7%	8.5%	1.7%	5.6%	1%	17.6%	3.6%
Discourages greater transparency in project reporting	32.4%	33.1%	32.2%	40.6%	50.6%	25.3%	16.3%	25.7%	33%
Invests in projects less well-aligned with our priorities	12.4%	13.1%	11.9%	20.1%	18%	9.9%	27.4%	13.1%	7.1%
Provides financing on less favorable terms	13.2%	14.2%	13%	16.1%	0.4%	11.5%	14.5%	17.2%	13.1%
Supplies lower quality technical expertise on projects	15.4%	13.2%	17.9%	19%	3.8%	15.8%	12.7%	11.1%	16%
Don't know / not sure	13.9%	14.4%	13.8%	9.2%	9.1%	20.5%	21.2%	8.8%	13.7%
None of the above	7.6%	8.3%	5.8%	6.1%	0%	6.2%	12.6%	20.4%	6.9%
Other (please specify)	5.5%	5.9%	5.5%	3.2%	3.9%	7.8%	7.7%	8.4%	5%
Prefer not to say	2.1%	2.5%	1.7%	2%	3.3%	0.6%	0%	2.5%	2.7%

Notes: This visual shows the percentage of respondents that selected a given attribute as a drawback of partnering with the PRC on a development project versus other foreign governments. Respondents could select up to three of the response options. Response options have been shortened for presentation.

Source: AidData 2022-2023 BRI Perceptions Survey.

Finding #5

COVID-19 did not appear to diminish China in the eyes of the Global South; in fact, the majority of leaders' attitudes towards the PRC improved or remained the same.

Given the global supply chain repercussions of the COVID-19 crisis, we asked leaders how that crisis affected PRC-financed projects. Forty-five percent of respondents were uncertain whether COVID-19 impacted BRI projects (Figure 9). Among those leaders who did cite disruptions, they most frequently pointed to delays in implementation (24 percent), redesign to accommodate restrictions (14 percent), and postponement or cancellation of projects (15 percent).

Beyond its usual slate of development projects, Global South leaders pointed to a variety of ways that the PRC showed up to deliver essential supplies to help them navigate a devastating global pandemic (Figure 10). Respondents most often referred to the donation of vaccines (62 percent), personal protective equipment (60 percent), and other medical supplies (44 percent).

The context above might explain why most leaders surveyed reported a more positive view (56 percent) of the PRC as a development partner or no change (34 percent) in light of its response to COVID-19 (Figure 11). This finding starkly contrasts with more negative attitudes widespread in Global North media and policy discourse about China and COVID-19. Europe and Central Asia was the only deviation from this general trend, with more leaders reporting negative views of Beijing (35 percent unfavorable, 26 percent favorable).

Figure 9. In what ways do Global South leaders say COVID-19 affected BRI projects in their country?

Question 26. *In what ways has the COVID-19 pandemic affected BRI projects in [country] from January 2020 to the present day? Please select all that apply.*

Percent of respondents

Don't know / not sure

44.8%

Projects not officially postponed, but experienced delays

23.7%

Projects redesigned to accommodate restrictions

14.4%

Projects have been postponed/suspended indefinitely

10.7%

None of the above

10.2%

The amount of Chinese government financing committed decreased

5%

The loan borrowing terms were renegotiated

4.2%

Projects have been canceled

3.7%

Other (please specify)

2.3%

The amount of Chinese government financing disbursed increased

2%

Prefer not to say

0.6%

Notes: This visual shows the percentage of respondents that selected each way in which COVID-19 affected the delivery of BRI projects in their countries. Response options have been shortened for presentation.

Source: AidData 2022-2023 BRI Perceptions Survey.

Figure 10. What kinds of COVID-19 support do Global South leaders say China provided to their country?

Question 16. *In what ways, if any, has the Chinese government supported in [country] in COVID-19 response, recovery or preparedness for future pandemics?*

Percent of respondents

Donation of vaccines

61.7%

Donation of PPE (e.g., masks, face shields)

59.6%

Donation of other supplies for hospitals/clinics

44.1%

Selling vaccines, PPE or other medical supplies

27.7%

Provision of Chinese medical teams

19.1%

Provision of assistance/training for local health professionals

17.3%

Don't know / not sure

13.4%

Financing for local vaccine production/distribution

7.8%

Canceling debts or easing loan repayments

6.2%

The Chinese government did not provide Covid-19 assistance

2.9%

Other (please specify)

1.4%

Prefer not to say

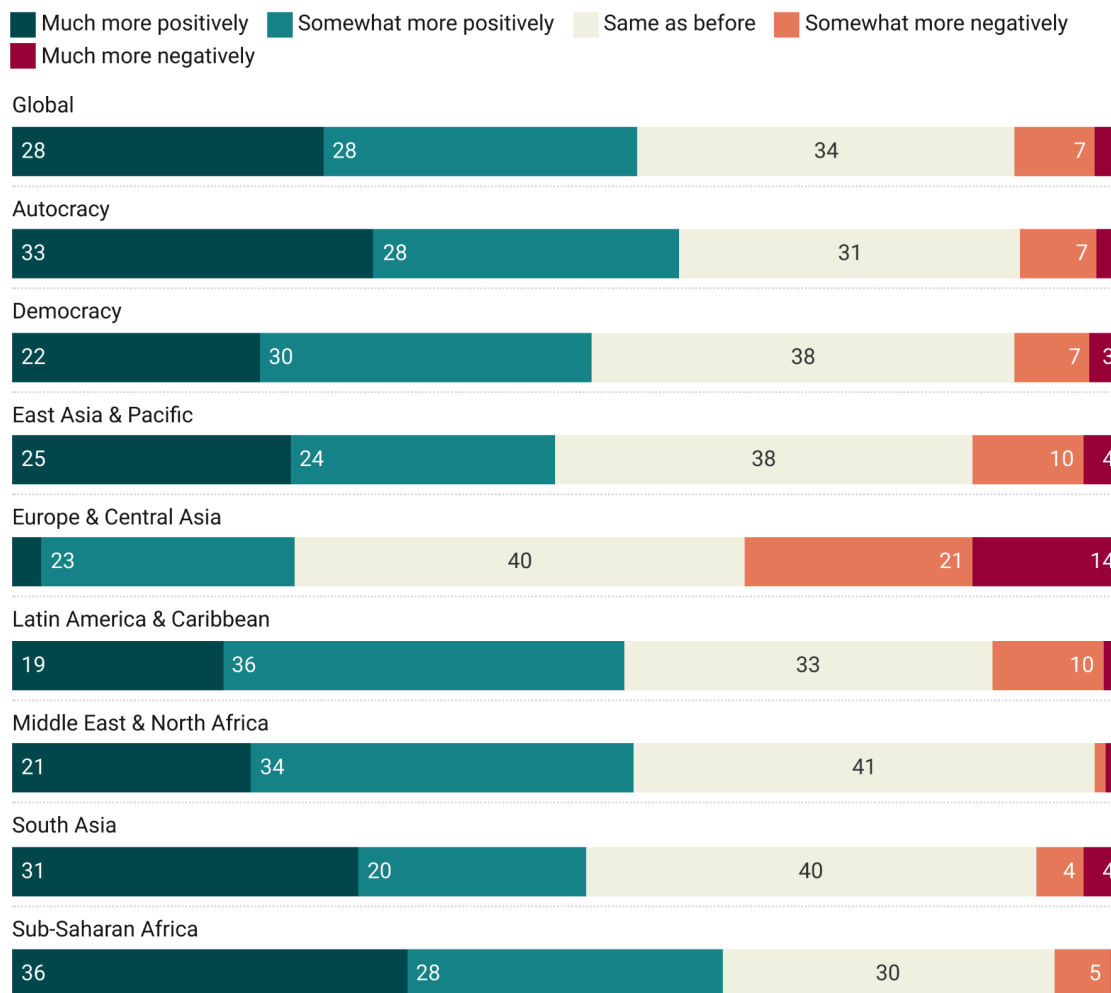
0.8%

Notes: This visual shows the percentage of respondents that selected each way in which the Chinese government supported COVID-19 response, recovery, and preparedness for future pandemics. Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Figure 11. Do Global South leaders view China differently than before, in light of China's COVID-19 support in their country?

Question 17. *In light of the Chinese government's response to the COVID-19 pandemic in [country], do you view China as a development partner more positively, more negatively or the same as before?*

Percent of Respondents*



Notes: This visual shows leaders' responses to a question about how their attitudes towards the PRC had changed since COVID-19 to view the PRC more positively, more negatively, or the same as before. It excludes respondents answering "Don't know / not sure" or "Prefer not to say." Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Finding #6

Leaders see clear trade-offs from PRC development projects: economic gains, environmental harms, and mixed local governance.

How do leaders in low- and middle-income countries assess the outcomes of PRC-financed development projects? Respondents gave Beijing their highest

marks for generating positive economic impacts through its projects (Figure 12). Leaders said that PRC-financed development projects had increased connectivity, such as easing the movement of people and goods (58 percent), in line with an important BRI objective. Roughly half of leaders surveyed credited Beijing's projects with improving trade or tourism revenues (47 percent), access to technology or expertise to enter new sectors (50 percent), and vocational training or education opportunities (49 percent).

Interestingly, given concerns about Beijing not investing in local capacity, half of respondents said that the PRC's projects had increased jobs for local workers. This result likely has less to do with the use of local labor to implement PRC-financed projects than the impression that Beijing's investments open up future employment opportunities. Leaders from autocracies and democracies were generally positive about the PRC's economic contributions to their countries; however, the latter was more tempered across these indicators.⁵

Respondents from Sub-Saharan Africa (52 percent) were the most enthusiastic of their regional peers about the economic benefits of PRC projects, followed by South Asia (-3 percentage points), East Asia and Pacific (-8), and the Middle East and North Africa (-10). Europe and Central Asia was more skeptical about these economic gains: it was one of the few regions where a higher proportion of leaders said that PRC projects worsened rather than improved local jobs (43 percent unfavorable, 19 percent favorable) and training/education prospects (43 percent unfavorable, 14 percent favorable).

Global South leaders do not wear rose-colored glasses when assessing the outcomes of PRC projects. Instead, they see clear trade-offs: economic gains at the expense of environmental bads (Figure 13). Respondents expressed concern that Beijing's projects were worsening levels of air and water pollution (45 percent), sustainable natural resource use (49 percent), protection of wildlife and forests (46 percent), and climate vulnerability (42 percent). Leaders were less critical in one area: PRC financing and countries' preparedness for natural disasters (27 percent unfavorable, 19 percent favorable).⁶

⁵ For example, the percentage of respondents from democracies that identified the PRC as improving various economic indicators was between 3 and 16 percentage points less.

⁶ Attitudes were most favorable on this score in South Asia, where one-third of leaders saw the PRC's projects as improving disaster preparedness.

Half of respondents from autocracies, on average across all indicators, were concerned about potential adverse environmental impacts from PRC-financed projects, compared to roughly one-third of their peers in democratic countries. Ostensibly, this divergence could reflect the fact that democracies may have stronger institutional safeguards in place to protect the public interest such that this could mitigate the risk of negative environmental spillovers.

Censure for the environmental harms from PRC projects was most pronounced where Beijing has the longest track record: Europe and Central Asia (56 percent unfavorable), East Asia and the Pacific (-3 percentage points), and Sub-Saharan Africa (-11). The sentiment was more positive in regions where the PRC is a relatively newer player. One-fifth of leaders from Latin America and the Caribbean argued that the PRC's projects had improved rather than worsened pollution levels in their countries. More leaders in the Middle East and North Africa saw the PRC's projects as contributing to the sustainable use of natural resources and lower pollution than causing harm in these areas.

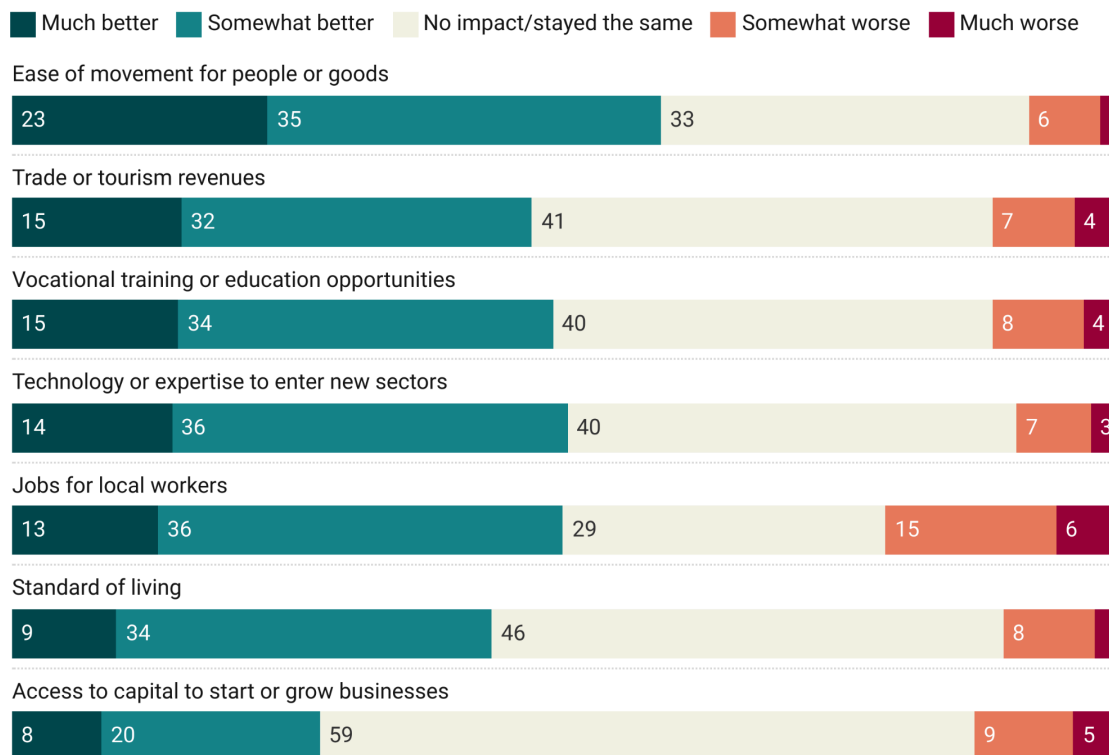
Leaders in low- and middle-income countries held the greatest ambivalence about the governance impacts of PRC-financed projects, with two noteworthy exceptions: public services and corruption levels. Across seven indicators, 62 percent of respondents on average reported that Beijing's projects had no impact on their country's governance (Figure 14). Yet, leaders reported that PRC-financed projects trigger two countervailing outcomes: improved public service delivery (42 percent favorable), at the expense of worsening levels of corruption (52 percent unfavorable).

Corruption was top-of-mind as a negative spillover from PRC projects for respondents across regions, attracting the largest share of negative responses (25 to 66 percent unfavorable). Leaders from autocratic and democratic countries alike agreed that corruption was getting worse in the wake of Beijing's development projects (53 versus 51 percent). In some regions, this pessimism extended to other governance indicators like access to justice and crime levels in East Asia and Pacific (33 and 42 percent unfavorable, respectively). In Europe and Central Asia, one-third or more of respondents were concerned about worsening media freedom, social unrest, and access to justice.

Figure 12. What do Global South leaders say about how Chinese projects have impacted their economies?

Question 13. *Has Chinese government support to development projects in [country] made things better, worse, or had no impact on your economy in the following areas?*

Percent of Respondents*

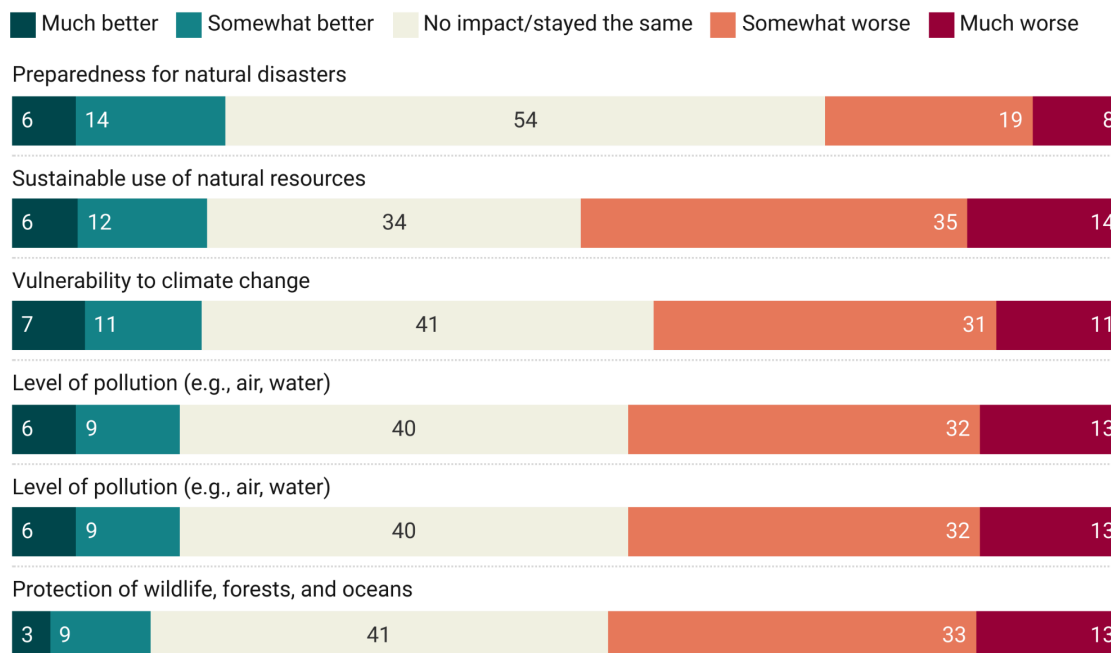


Notes: This visual shows the percentage of respondents who said that PRC official finance projects had made a given economic condition in their countries better, worse, or about the same. It excludes respondents answering "Don't know / not sure" or "Prefer not to say." Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Figure 13. What do Global South leaders say about how Chinese projects have impacted environmental conditions in their country?

Question 14. *Has Chinese government support to development projects in [country] made things better, worse, or had no impact on the environment in the following areas*

Percent of Respondents*

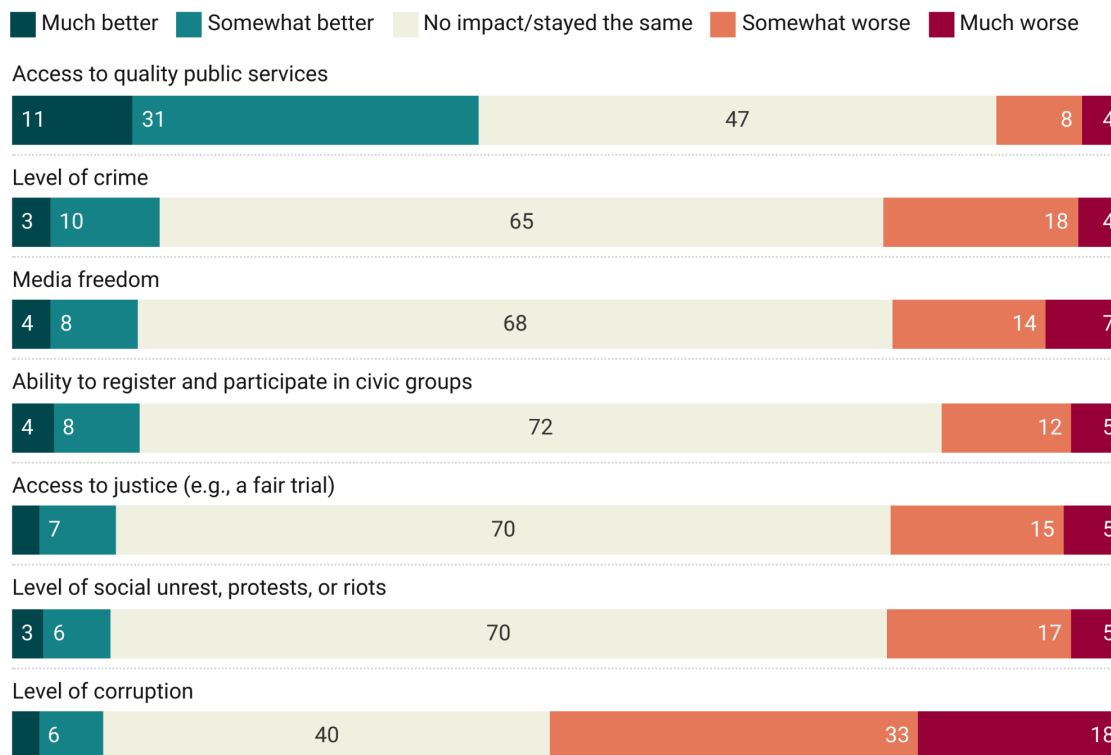


Notes: This visual shows the percentage of respondents who said that PRC official finance projects had made a given environmental condition in their countries better, worse, or about the same. It excludes respondents answering "Don't know / not sure" or "Prefer not to say." Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Figure 14. What do Global South leaders say about how Chinese projects have impacted governance in their country?

Question 15. *Has Chinese government support to development projects in [country] made things better, worse, or had no impact on your country's governance in the following areas?*

Percent of Respondents*



Notes: This visual shows the percentage of respondents who said that PRC official finance projects had made a given governance condition in their countries better, worse, or about the same. It excludes respondents answering "Don't know / not sure" or "Prefer not to say." Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

4. How Has the BRI Changed the Way Beijing Partners with the Global South?

In late 2023, the PRC celebrated the tenth anniversary of the BRI with great fanfare, releasing a white paper outlining the initiative's accomplishments to date and hosting its third summit for participating members. Long on rhetorical flourish, the white paper argued that the BRI was "proposed by China but belonging to the whole world" and helped its partner countries by "offering a Chinese solution to global development issues" (SCIO, 2023).

Beijing has a formidable track record in expanding BRI participation. To date, 150 member states have joined BRI, representing 60 percent of the world's population and one-third of the global economy (Brinza, 2023), along with 30 international organizations. The PRC signed "more than 200 cooperative agreements" related to the BRI (Sacks, 2023) and attracted high-profile endorsements from institutions such as the United Nations (UN, 2019).

Nevertheless, there are some early warning signs of BRI fatigue. An uptick in global media coverage of the BRI, particularly between 2017 and the outbreak of the COVID-19 pandemic, has begun to taper off in recent years (Garcia-Herrero & Schindowski, 2023). While more positive than negative, media sentiment has cooled off in some regions, with the largest changes in tone evident among the first wave of countries joining the BRI (ibid). BRI hold-out countries have yet to be persuaded, underscored by persistently negative sentiments in media coverage (Mokashi et al., 2022) and citizen perceptions (Horigoshi et al., 2022). Some participating countries suspended or canceled BRI projects (Parks et al., 2023), while Italy dropped out of the initiative (Mazzocco and Palazzi, 2023).

Less certain, ten years into implementation, is how much has actually changed in how Beijing engages with its partner countries in the Global South since the announcement of the BRI? With the *BRI Perceptions Survey*, we asked Global South leaders to share their impressions of the BRI: what was its purpose, was their country a member, how many projects were there, what was the focus of these activities, and how Beijing's engagement evolved from 2012 to 2022.

In the remainder of this section, we break down three key takeaways:

- Uncertainty swirls around the BRI: 40 percent of leaders were unsure if their country was a member, and 25 percent were uncertain of its purpose.
- Leaders do not know the number of BRI projects but assume they have larger dollar values and are more reliant on Chinese labor and expertise.
- The BRI brand may have to navigate path dependence: leaders strongly associate Beijing's investments with infrastructure.

Finding #7

Uncertainty swirls around the BRI: 40 percent of leaders were unsure if their country was a member, and 25 percent were uncertain of its purpose.

Despite international media scrutiny and Beijing's propaganda machine, more coverage of the BRI does not appear to have improved understanding of the initiative in the Global South. Asked whether their country was a member of the BRI, 42 percent of leaders surveyed replied, "don't know/not sure" (Figure 15). Uncertainty was particularly acute in Sub-Saharan Africa, where nearly 65 percent of respondents were unaware of their country's membership status.

High uncertainty about membership could indicate that leaders are less interested in the BRI as a club working towards "win-win solutions" than in the specific details of PRC-financed development projects in their country. Alternatively, this result could reflect countries joining the BRI at different times. Most African countries did not sign on to the BRI until after 2017, compared to an earlier start for their Asian peers. Notably, leaders from regions with a longer track record of participation, such as Europe, Central Asia, and South Asia, were more likely to know if their country was a BRI member.

Beyond membership, respondents were also asked about how they would define the BRI. The most common response was that the BRI is "how the Chinese government describes its vision for partnering with other countries on economic and development issues" (34 percent). Once again, however, nearly a quarter of respondents chose "don't know/not sure" when faced with that question, with the highest uncertainty reported in regions like Sub-Saharan Africa and Latin America and the Caribbean, where the BRI is a relatively newer phenomenon.

Respondents from Europe and Central Asia were more likely to have an answer on the purpose of BRI—only 5 percent were unsure. Leaders from this region also tended to be more skeptical than their peers, with roughly one-third of respondents viewing BRI as "an advertising or marketing campaign to promote development projects financed by the Chinese government."

Figure 15. Do Global South leaders know whether their country has joined the BRI?

Question 18. To your knowledge, has [country] joined China's Belt and Road Initiative (BRI)?

Percent of respondents



q18	Global	EAP	ECA	LAC	MENA	SA	SSA
No	21.2%	16.1%	25.9%	28.6%	37.8%	42.3%	12%
Yes	36%	61.6%	63.2%	26.3%	36.1%	47.6%	22.7%
Don't know / not sure	41.8%	20.9%	9.9%	44.3%	24.6%	9.5%	64.4%

Notes: This visual shows the percentage of respondents that selected yes, no, or don't know/not sure in response to a question about whether their country had joined the Belt and Road Initiative. Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Finding #8

Leaders do not know the number of BRI projects but assume they have larger dollar values and are more reliant on Chinese labor and expertise.

Leaders may be uncertain about the BRI as a membership club, but they have more defined views on how Beijing's engagement in their country has changed over the last decade. Three-quarters of leaders reported that the PRC had increased the number and size of projects in their country since 2012 (Figure 16). Leaders' perceptions are highly consistent with the early stages of the BRI when there was a ramp-up of new activities, including a tripling of the number of projects worth US\$500 million or more (Malik et al., 2021). However, it is also clear that Global South countries have not yet fully internalized Beijing's decreasing appetite to bankroll new big-ticket infrastructure projects in favor of deploying emergency lending to bail out legacy projects experiencing distress.

Most leaders surveyed (68 percent) reported that the use of Chinese laborers, suppliers, or firms to implement PRC-financed projects had increased in the past decade (see Figure 16). This finding is consistent with research that estimated that 89 percent of BRI projects were implemented by Chinese state-owned enterprises (Hurley et al., 2018). Public pushback on the use of imported

Chinese labor in some countries has prompted the PRC to begin shifting its practices, such as through the roll-out of Luban workshops which train local workforces to work on BRI projects (Wang, 2020; Yau & van der Kley, 2021).

Leaders also answered additional questions about what they would consider a “BRI” project. Most respondents (62 percent) were uncertain about the number of BRI projects in their country even when provided a range of possible options, or they assumed a negligible number of 10 or fewer projects (24 percent). This result could reflect the overall lack of visibility of PRC investments, making it difficult for the general public and leaders to monitor the impacts. This finding could also indicate that leaders assume that BRI projects are substantively different from non-BRI projects, and only a few of the former are in their country.

Respondents do appear to contrast between what they consider to be a BRI project versus other PRC-financed activities (Figure 17). They assume that BRI projects are larger in monetary terms (59 percent) and more likely to use Chinese laborers, suppliers, or firms in implementation (63 percent). This impression is consistent with the supply of BRI-like projects: “larger-dollar [activities] financed with less generous terms, indicating that the PRC expects these projects to generate a clear economic return” (Horigoshi et al., 2022).

There is considerable regional variation in these results, with respondents from Europe and Central Asia and East Asia and Pacific most likely to see BRI projects as using more Chinese laborers, suppliers, or firms, compared to regions that are newer entrants to the BRI, like Latin America and the Caribbean.

Figure 16. What changes do Global South leaders report in China's development support from 2012-2022?

Question 10. How has the Chinese government's support to development projects in [country] changed, if at all, between 2012 and 2022?

Percent of Respondents*

■ Much more ■ Somewhat more ■ No impact/stayed the same ■ Somewhat less ■ Much less

Use of Chinese laborers, suppliers, or firms to implement



Number of projects



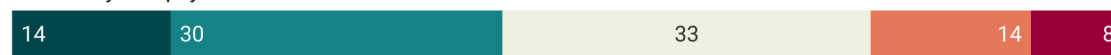
Average amount of financing per project



Access to technical assistance or advice from Chinese experts



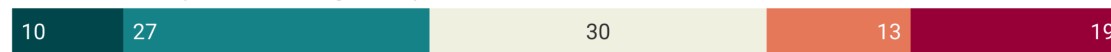
Generosity of repayment terms



Inclusion of specific policy conditions



Inclusion of local partners in design or implementation

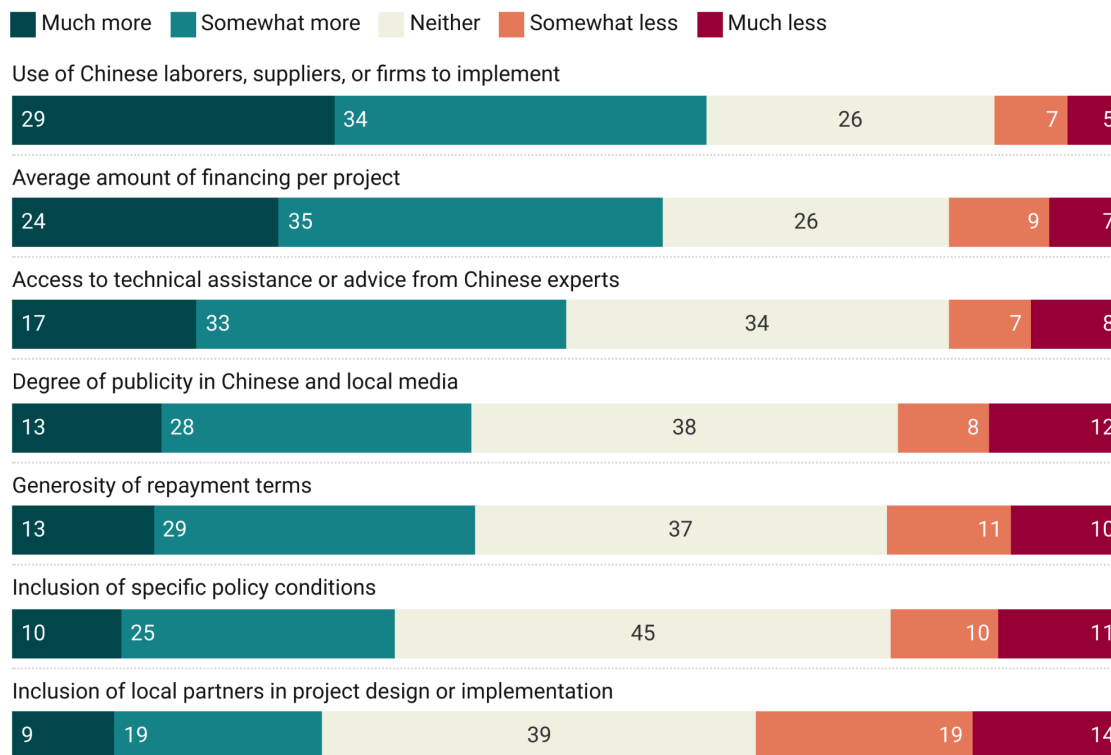


Notes: This visual shows the percentage of respondents that indicated that a given attribute of the PRC's engagement with their country had increased, decreased or had stayed the same between 2012 and 2022. It excludes respondents answering "Don't know / not sure" or "Prefer not to say." Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Figure 17. How do Global South leaders see BRI projects as differing from other Chinese-financed projects?

Question 24. How would you compare BRI projects to other development projects financed by the Chinese government in [country] in the following areas?

Percent of Respondents*



Notes: This visual shows the percentage of respondents that indicated that a given attribute was more or less present in BRI projects versus other PRC development projects. It excludes respondents answering "Don't know / not sure" or "Prefer not to say." Response options have been shortened for presentation. Source: AidData 2022-2023 BRI Perceptions Survey.

Finding #9

The BRI brand may have to navigate path dependence: leaders strongly associate Beijing's investments with infrastructure.

Global South leaders strongly associate the BRI with infrastructure, particularly projects in transportation, energy, and telecommunications (68 percent).

Although Beijing framed BRI aspirations as strengthening connections between people and countries in five thematic areas (Horigoshi et al., 2022),⁷ media

⁷ Specifically, retrospective analysis of President Xi's speeches and other BRI documentation points to five key themes: (i) strengthening policy communication; (ii) improving infrastructure connectivity; (iii) promoting trade facilitation; (iv) enhancing monetary circulation; and (v) promoting people-to-people ties (Horigoshi et al., 2022).

coverage and popular discourse revolve around the PRC's big-ticket investments in ports, roads, railways, power plants, and 5G. These "hard" infrastructure projects also attracted the lion's share of the PRC's financing. Comparatively, respondents were less likely to view social infrastructure projects (e.g., hospitals, schools, government administrative buildings) as associated with the BRI.

Respondents strongly associate commercial investments such as economic zones (44 percent) and building industrial parks (36 percent) with the BRI in the economic development realm. By contrast, fewer leaders viewed activities that ease budget constraints, such as debt forgiveness (10 percent) and general budget support (9 percent), as indicative of the BRI. Leaders saw activities such as providing scholarships (32 percent) and conducting joint research projects (24 percent) as the most BRI-like activities to foster people-to-people ties.

5. Conclusion

On issues as hotly contested as the PRC's growing engagement with the Global South and how the Belt and Road Initiative may shape the future of global development, it is difficult to separate signal from noise. In this report, we brought new evidence to bear on how public, private, and civil society leaders from 129 countries think about the PRC as a development partner, the outcomes of its projects, and the BRI overall. Leaders do not view the PRC's contributions through rose-colored glasses but neither do they embrace an unhelpful debt trap diplomacy narrative which diminishes their agency to chart their own path.

In a crowded marketplace, how do those who make and shape development policies view Beijing's value proposition relative to other major powers? The results of the 2022-2023 *BRI Perceptions Survey* underscore Beijing's durability as a preferred infrastructure partner and the path dependence of its investments, which remain strongly associated with transportation, energy, and telecommunications. However, although leaders appreciate the economic potential of its development model, Beijing's brand does not extend as readily into social, environment, and governance sectors.

Do low- and middle-income countries view Beijing's projects as helping or hindering their development progress? Leaders' perceptions often align with

Beijing's actual project portfolio—bigger dollars and fewer policy conditions, but with lower levels of transparency, capacity, and quality. Context matters too, as underscored by the sizable number of respondents who view the PRC as offering more favorable financial terms, perhaps relative to borrowing from private capital markets.

Ten years into implementation, how do Global South leaders perceive and experience the BRI? Leaders see trade-offs. They give high marks to the PRC for helping to improve access to quality public services and to facilitate economic gains from increased connectivity, access to technology, and vocational training. Nevertheless, they understand that these advances are at the expense of worsening pollution, climate vulnerability, and corruption. There was less certainty about the BRI as a membership club—leaders struggled to articulate the purpose or whether their country was a member. What made more of a lasting impression was Beijing's contribution to COVID-19 response and recovery, which leaders viewed as having a positive or neutral effect on perceptions of the PRC.

Looking forward, the survey results illuminate three implications for the future of the PRC's partnership with the Global South and the BRI. First, Beijing must be prepared to navigate vulnerabilities in light of a growing gap between what it is willing to fund and what its partner countries want. Second, Beijing's competitors will need to be more proactive in articulating their own value proposition in ways that are responsive to partner country priorities. Third, heavy-handed attempts by the PRC's strategic competitors to vilify Beijing's contributions as entirely bad for local economies are likely to ring hollow. Instead, a more constructive approach would be to help countries maximize the economic benefits of PRC-financed development projects while mitigating debt distress, environmental harms, and higher corruption levels.

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Appendix A. Supplemental Data Sources

Summary

Variable	Coverage period	Source and details
Chinese development financing	2000-2021	AidData's Global Chinese Development Finance Dataset, 3.0 (Custer et al., 2023; Dreher et al., 2022)
CRS financing	2000-2021*	OECD's Creditor Reporting System (CRS). All financing reported to the OECD-CRS system. *The data for Russia includes only 2015-2020

Appendix B. Details on the Implementation of the BRI Survey

Introduction

Policymakers and practitioners in low- and middle-income countries have a substantial influence over a multitude of sectors, and their decisions and beliefs have a strong impact on the direction of their country's development and relations with other powers. However, we find that there is often very little available information on the beliefs, priorities, and preferences that shape these important decisions. While public opinion surveys are often circulated through the general population, very few examine the beliefs of the elite, and those that do often rely on convenience sampling frames, lacking a clear population of interest and a systematic way to sample them. This makes it incredibly difficult to identify the extent to which the respondent views are generally representative of the individuals whose beliefs we wish to identify.

AidData is a market leader in fielding large-n surveys of policymakers and practitioners in low- and middle-income countries in a consistent and comparable manner. One of the comparative advantages of our surveys is the leverage of a global sampling frame that was initially developed in 2010 and consistently updated to reflect the changes occurring in the sampling frame. Rather than employing a convenience sample that most market research firms use, we at AidData build out our own sampling frame using position maps of institutions throughout target countries to better identify the government agencies and organizations that execute functions relevant to our research questions, followed by the search for contact information related to the individuals holding these positions.

For the *Perceptions of Chinese Overseas Development Survey*, hereafter referred to as the BRI survey, our research team updated the institutional position maps and respondent sampling frames to include over 51,000 individuals throughout 129 countries globally. These potential respondents are government and development partner officials, civil society leaders, private sector representatives, parliamentarians, and independent experts from think

tanks, universities, and media. In this appendix, we provide an overview of our methodology and describe key attributes of our sampling frame construction, questionnaire design, survey implementation, and data aggregation processes.

Defining the Population of Interest

Although it is impossible to capture the entire population of development policymakers and practitioners, our team takes incredible pains to identify a well-defined and observable population of interest for this survey. We define this population as those individuals who are knowledgeable about the formulation and implementation of government policies and programs in low- and middle-income countries between 2012 and 2022. We then break down this population into six key stakeholder groups, which are intended to identify the subgroups and how their priorities shift according to their work. These stakeholder groups are (i) officials from host government agencies; (ii) representatives of development partners operating in-country; (iii) leaders of civil society organizations and non-governmental organizations; (iv) representatives of private sector organizations, such as commercial associations; (v) independent experts from universities, think tanks, and media; and (vi) national-level parliamentarians.

Creating the Sampling Frame

The cornerstone of AidData's Listening to Leaders sampling frame is the construction and application of Institutional Position Maps (IPMs) that identify as many of the relevant organizations in-country as possible according to a list of different organization types we have constructed for each of the six stakeholder groups. We then identify the key mid- and senior-level positions within each organization to inform subsequent contact searching.

Our research team first identified a list of ideal-type organizations for the six stakeholder groups that can be found across all countries that discharge functions relevant to our questions of interest. For the six stakeholder groups, we identified 67 ideal-type organizations, each of which was assigned a numeric code. For example, in the first stakeholder group, which identifies the individuals working within the host government, there are potentially 33 different types of

organizations, such as the Ministry of Finance, the Supreme Audit Institution, and the National Statistical Office.

We then create an ideal Institutional Position Map for each country, which functionally identifies the equivalent country-specific institutions and positions that can be mapped back to a list of the ideal-type organizations. The use of IPMs allows us to accommodate each country's unique set of institutions while still facilitating cross-country comparisons due to our systematic inclusion criteria.

Once country-specific IPMs are up-to-date, our research team begins to search for the names, titles, and contact information of those individuals working at the mid- to senior-level of the organization. To do this, we utilize publicly available resources to identify the information of potential survey respondents, such as organizational websites and directories, international conference records, Who's Who International, and public profiles on Facebook, LinkedIn, X (formerly Twitter).

The variability in the degree to which individuals' contact information is publicly available can result in an unbalanced sampling frame. In order to mitigate this risk, our research team has a quota system we use to attempt to identify an ideal number of contacts for each institution type in the IPM. These quotas help the team to ensure the sampling frame includes contacts for each institution type whenever possible.

By clearly defining a population of interest and constructing a master sampling frame that was stratified by country, stakeholder group, and institution type, we managed to overcome one of the most vexing challenges associated with expert panels and opinion leader surveys: the absence of detailed demographic data and the inability to assess the representativeness of findings at various levels. The stratification of our master sampling frame by country, stakeholder group, and institution type makes it possible to generate extremely granular elite survey data that can be published at varying levels of disaggregation without compromising participant confidentiality. It also enables analysis of the factors that influence participation rates, as well as the underlying sources of response bias.

Developing and Testing the Questionnaire

When deciding which questions to ask our sampling frame, we consider first what we are interested in learning about, and second, what perspective our respondents can supply that we cannot get otherwise. AidData staff then finalized research questions of interest for the survey, and designed modules to examine those themes - including perceptions of international actors, and then perceptions of the Belt and Road Initiative. With these themes, we created a series of questions to explore the themes in mind in collaboration with our partners.

Once we had developed a draft version of the questionnaire, we identified a set of external experts with experience working with large-scale surveys to review and give feedback on our instrument. Following these consultations, the research team updated the survey instrument and programmed it in Qualtrics (a respected software program for conducting online surveys). We then identified a set of pre-testers to take the survey using the Qualtrics platform and give feedback on the design to ensure a high-quality survey experience. After pre-testing the survey, the research team finalized the English questionnaire and had it translated into five additional languages: Arabic, French, Portuguese, Russian, and Spanish.

Fielding the Survey

The *Perceptions of Chinese Overseas Development Survey* was administered under the direction of Principal Investigator Samantha Custer and Co-Principal Investigator Ana Horigoshi in compliance with the standards set out by the William & Mary Institutional Review Board's Protection of Human Subjects Committee (PHSC). The online survey was fielded on a rolling basis between July 2022 and April 2023, beginning with Sub-Saharan and North Africa, then extending to additional regions. The survey implementation was guided by best practices in survey methodology such as the Weisberg (2005) total survey error approach and the Dillman et al. (2009) tailored design methods.

Prospective survey respondents were first sent pre-notification messages approximately one week ahead of sending the invitation link. Survey recipients were then sent a tailored email invitation to participate that included a unique

link to the online questionnaire. Over the course of the survey administration period, survey recipients received two different automated electronic reminders. The day and time of the reminders were varied to maximize the response rate. Survey participants were able to take the survey in one of six different languages: English, French, Spanish, Portuguese, Russian, and Arabic. Of 51,122 individuals who received our email invitation, 1,650 participated for a response rate of 3.2 percent. Table A-1 shows the breakdown of the sample of survey respondents by stakeholder group and region.

Table A-1: Global BRI Perceptions Survey, Composition of Sample Responses

Stakeholder Group	Percent of Responses Received
Government officials (executive branch)	40.4%
Parliamentarians	3.4%
NGO/CSO leaders	20.6%
Private sector leaders	6%
University, think tank, and media	14.2%
Local representatives of development partners	11.9%
Other	3.3%
Total	100%

Geographic Region	Percent of Responses Received
East Asia and the Pacific	13.5%
Europe and Central Asia	5%
Latin America and the Caribbean	17.9%
Middle East and North Africa	7.8%
South Asia	5.5%
Sub-Saharan Africa	50.4%
Other	0%
Total	100%

Appendix C. BRI Survey Questionnaire

Notes about the survey, usually explaining display logic, will be italicized and in red (like this section). Anywhere where the survey pipes in information, it will be indicated in red font, unitalicized.

Introduction

We would like to begin by asking you a few questions about your professional background.

Q1. Which of the following countries did you work in for the longest time between 2012 and 2022?

Please select only one option.

- [List of 142 countries and independent territories]
- I did not work in any of these countries during this period

Respondents who selected 'I did not work in any of these countries during this period' routed out of the survey; respondent country selection piped into subsequent questions

Q2. In which type of organization did you serve for the longest time between 2012 and 2022?

Please select only one option.

- Government agency, Ministry or Office
- Parliament
- Development Partner
- Non-Governmental Organization or Civil Society Organization
- University, Think Tank or Media
- Private Sector
- Other (Please specify: _____)
- I did not work for any of these types of organizations during this period

Respondents who selected 'I did not work in any of these countries during this period' routed out of the survey

Q3. Please select all the years in which you held this position:

- 2012
- 2013
- 2014
- 2015
- 2016
- 2017
- 2018
- 2019
- 2020
- 2021
- 2022

Module 1: General Perceptions of Development Partners

The next few questions are about views of foreign governments who may have supported development projects in **country** during the 2012 and 2022 period. We are interested in your perceptions, which may be based upon your knowledge or experience.

Q4. How active were the following foreign governments in supporting development in **country** between 2012 and 2022?

	Not active at all	Minimally active	Somewhat active	Very active	Don't know/Not sure	Prefer not to say
China						
The US						
Russia						
The UK						
France						
Region-specific route-in						

Region specific route-ins: Japan=East Asia & Pacific, India=South Asia, South Africa=Sub-Saharan Africa, Saudi Arabia=Middle East and Northern Africa, Brazil=Latin America & Caribbean, Germany=Europe, Türkiye (Turkey) = Central Asia.

Respondents who select minimally active, somewhat active, or very active on Q4 for one or more partners will be routed to Q5, respondents who select not active, don't know, or prefer not to say for all partners on Q4 will be routed to Q7.

Q5. You identified the following foreign governments as active in supporting development in **country**. How do these actors typically provide support to your country? *Please select all that apply.*

	Financial assistance (e.g., grants, loans)	Technical assistance or policy advice	Scholarships, training or exchange programs	In-kind support (e.g., food, raw materials, equipment, supplies)	Non-military security assistance (e.g. policing, peacekeeping)	Don't know/ Not sure	Prefer not to say
Partners selected in Q4							

Respondents will only evaluate those partners for which they selected minimally active, somewhat active, or very active in Q4

Q6. You identified the following foreign governments as active in supporting development in **country**. Which government is your preferred partner in each area? *You may select up to one answer in each area.*

	Energy, transport, or telecommunications infrastructure?	Health, education, or social protection?	Governance or rule of law?	Natural resource management or environmental protection?
Partners selected in Q4				
None of these partners				
Other (please specify_____)				
Don't know/not sure				
Prefer not to say				

Respondents will only evaluate those partners for which they selected minimally active, somewhat active, or very active in Q4

Q7. In your opinion, which of the following countries, if any, would be the best model for the future development of **country**?

Please select only one option.

- China
- The US
- Russia
- France
- The UK
- **Region-specific route-in**
- We should follow our own country's model
- None of these / There is no role model
- Don't know / not sure
- Prefer not to say

For Q7, each geographic region will have a region-specific route-in that is most applicable: Japan=East Asia & Pacific, India=South Asia, South Africa=Sub-Saharan Africa, Saudi Arabia=Middle East and Northern Africa, Brazil=Latin America & Caribbean, Germany=Europe, Türkiye (Turkey) = Central Asia.

Q8. Do you generally approve or disapprove of the job performance of the leadership of the following countries?

	Approve	Neither approve or disapprove	Disapprove	Don't know /not sure	Prefer not to say
China					
The US					
Russia					
The UK					
France					
Region-specific route-in					

For Q8, each geographic region will have a region-specific route-in that is most applicable: Japan=East Asia & Pacific, India=South Asia, South Africa=Sub-Saharan Africa, Saudi Arabia=Middle East and Northern Africa, Brazil=Latin America & Caribbean, Germany=Europe, Türkiye (Turkey) = Central Asia.

Respondents who selected not active, don't know, or prefer not to say for China on Q4 will skip Module 2 and be routed directly to Q18 in Module 3. All others will be asked to complete Module 2, beginning with Q9

Module 2: Awareness of Chinese development projects

The next few questions are about your views of development projects supported by the Chinese government in **country** during the 2012 and 2022 period. We are interested in your perceptions, which may be based upon your knowledge or experience.

Q9. What types of development projects does the Chinese government typically support in **country**? *Select all that apply.*

- Transportation infrastructure (e.g., support to roads, railways, ports)
- Digital telecommunications (e.g., support to mobile, fiber-optic networks, Internet, satellite)
- Equipment or buildings for government agencies
- Education, health, sports, or culture (e.g., hospitals, schools, stadiums, cultural centers)
- Energy, industry, or mining (e.g., power plants, gas pipelines, natural resources)
- Humanitarian assistance (e.g., disaster or other emergency relief)
- People-to-people exchange, technical assistance, or training (e.g., study abroad, language learning/teaching)
- General support to the national government's budget
- Agriculture, fishing, forestry
- Governance or public sector management

- Debt relief or forgiveness
- Other (please specify _____)
- None of the above
- Don't know / not sure
- Prefer not to say

Q10. How has the Chinese government's support to development projects in **country** changed, if at all, between 2012 and 2022?

	Much more	Somewhat more	No impact / Stayed the same	Somewhat less	Much less	Don't know / not sure	Prefer not to say
Number of projects							
Average amount of financing per project							
Generosity of repayment terms							
Inclusion of specific policy conditions							
Use of Chinese laborers, suppliers, or firms to implement							
Access to technical assistance or advice from Chinese experts							
Inclusion of local partners in design or implementation							

Q11. What do you think is the single most important benefit for **country** in partnering with the Chinese government, compared to other foreign governments, on development projects?

Please select up to three.

- Provides financing on more favorable financial terms (e.g., lower interest rates, longer repayment schedules)
- Provides financing with fewer economic, political, or environmental conditions
- Promotes greater transparency to encourage coordination or collective action
- Supports projects more closely aligned with national development priorities
- Supplies higher-quality technical expertise to design or implement projects
- Completes projects with fewer delays
- Completes higher-quality projects with longer-lasting benefits
- Builds more local capacity to sustain projects and project benefits
- Other (please specify _____)

- None of the above
- Don't know / not sure
- Prefer not to say

If more than one answer is selected in Q11, respondents receive Q11A as a follow up.

Q11. A. Please rank the benefits you selected in order of importance.

- Route-in previous selections from Q11

If more than one answer is selected in Q12, respondents receive Q12A as a follow up.

Q12. What do you think are the biggest drawbacks for **country** in partnering with the Chinese government, compared to other foreign governments, on development projects? *Please select up to three.*

- Provides financing on less favorable financial terms (e.g., higher interest rates, shorter repayment schedules)
- Provides financing with greater economic, political, or environmental conditions
- Discourages greater transparency in reporting on project finances, terms, or progress
- Invests in projects that are less well aligned with our priorities
- Supplies lower quality technical expertise to design or implement projects
- Completes projects less quickly with more delays
- Completes projects with lower quality end results that are not durable
- Builds less capacity in local partners to sustain the project in future
- Other (please specify _____)
- None of the above
- Don't know / not sure
- Prefer not to say

Q12. A. Please rank the options you selected in order of biggest drawbacks.

- Route-in previous selections from Q12

Q13. Has Chinese government support to development projects in **country** made things better, worse, or had no impact on your economy in the following areas?

	Much worse	Somewhat worse	No impact / Stayed the same	Somewhat better	Much better	Don't know / not sure	Prefer not to say
Jobs for local workers							
Vocational training or education opportunities							

	Much worse	Somewhat worse	No impact / Stayed the same	Somewhat better	Much better	Don't know / not sure	Prefer not to say
Access to capital to start or grow businesses							
Technology or expertise to enter new sectors							
Trade or tourism revenues							
Standard of living							
Ease of movement for people or goods							

Q14. Has Chinese government support to development projects in **country** made things better, worse, or had no impact on the environment in the following areas?

	Much worse	Somewhat worse	No impact / Stayed the same	Somewhat better	Much better	Don't know / not sure	Prefer not to say
Level of pollution (e.g., air, water)							
Protection of wildlife, forests, and oceans							
Sustainable use of natural resources							
Vulnerability to climate change							
Preparedness for natural disasters							

Q15. Has Chinese government support to development projects in **country** made things better, worse, or had no impact on your country's governance in the following areas?

	Much worse	Somewhat worse	No impact / Stayed the same	Somewhat better	Much better	Don't know / not sure	Prefer not to say
Level of crime							
Level of corruption							
Access to quality public services							
Media freedom							
Access to justice (e.g., a fair trial)							
Ability to register and participate in civic groups							
Level of social unrest, protests, or riots							

Q16. In what ways, if any, has the Chinese government supported in **country** in COVID-19 response, recovery or preparedness for future pandemics?

- Donation of vaccines
- Donation of personal protective equipment (e.g., masks, face shields)
- Donation of other medical supplies or equipment for hospitals/clinics
- Selling vaccines, personal protective equipment or other medical supplies
- Provision of Chinese medical teams
- Provision of technical assistance or training for local health professionals
- Financing to support vaccine production and distribution in country
- Canceling debts or easing loan repayment terms
- Other (please specify _____)
- The Chinese government did not provide any assistance related to COVID-19
- Don't know / not sure
- Prefer not to say

Q17. In light of the Chinese government's response to the COVID-19 pandemic in **country**, do you view China as a development partner more positively, more negatively or the same as before?

- Much more positively
- Somewhat more positively
- Same as before
- Somewhat more negatively
- Much more negatively
- Don't know / not sure
- Prefer not to say

Module 3: Belt and Road Initiative

The next few questions are about your views of China's Belt and Road Initiative (sometimes called the One Belt, One Road Initiative or Silk Road Economic Belt) in **country**. We are interested in your perceptions, which may be based upon your knowledge or experience.

Q18. To your knowledge, has **country** joined China's Belt and Road Initiative (BRI)?

- Yes
- No
- Don't know / not sure
- Prefer not to say

Q19. Are there any additional ways that you would describe BRI in your own words?

- **Respondents write-in answers here.**

Q20. Which of the following statements best describes the Belt and Road Initiative? *Please select only one answer.*

- It is how the Chinese government describes its vision for partnering with other countries on economic and development issues
- It is the name of the Chinese government's overseas development program
- It is an advertising or marketing campaign to promote development projects financed by the Chinese government
- It is an development model that countries can adopt to improve their prosperity
- It is a political coalition that countries can join to amplify their voices
- It is a global cooperation mechanism for participating countries to work together on economic or development issues
- It is an initiative to solve China's domestic economic problems (e.g., excess supply of industrial capacity relative to domestic demand, excess foreign currency reserves)
- None of these statements describe BRI
- Don't know / not sure
- Prefer not to say

Q21. Which of the following do you consider to be a BRI project? *Select all that apply.*

- Supplying customs inspection equipment or training to facilitate cross-border trade
- Establishing joint disaster monitoring networks
- Building road, rail, or other transportation infrastructure
- Improving telecommunication network connectivity
- Expanding oil or gas pipeline networks
- Building a hospital, school, or government ministry
- Donating equipment (e.g., computers, vehicles) to a government ministry
- None of the above
- Don't know / not sure
- Prefer not to say

Q22. Which of the following do you consider to be a BRI project? *Select all that apply.*

- Establishing special economic zones
- Conducting bilateral currency swaps (i.e., allows two countries to exchange currencies at a fixed rate)
- Training financial regulators or investigators
- Building industrial parks
- Providing general budget support or balance of payments support
- Forgiving debt or easing loan repayment terms
- Supplying training or equipment to boost agricultural production for export
- None of the above
- Don't know / not sure
- Prefer not to say

Q23. Which of the following do you consider to be a BRI project? *Select all that apply.*

- Providing scholarships for students or professionals to study abroad in China
- Facilitating cultural or sports exchange programs
- Supplying teachers or salaries to support Chinese language teaching in host country
- Donating health equipment or medicine to a local clinic or hospital
- Donating food or other humanitarian assistance in an emergency situation
- Building wells to facilitate community access to potable water
- Conducting joint research projects between a Chinese and host country university
- None of the above
- Other (please specify _____)
- Don't know / not sure
- Prefer not to say

Q24. How would you compare BRI projects to other development projects financed by the Chinese government in **country** in the following areas?

	Much more	Somewhat more	Neither more or less	Somewhat less	Much less	Don't know / not sure	Prefer not to say
Average amount of financing per project							
Generosity of repayment terms							
Inclusion of specific policy conditions							
Access to technical assistance or advice from Chinese experts							

	Much more	Somewhat more	Neither more or less	Somewhat less	Much less	Don't know / not sure	Prefer not to say
Use of Chinese laborers, suppliers, or firms to implement							
Inclusion of local partners in project design or implementation							
Degree of publicity in Chinese and local media							

Q25. To the best of your knowledge, how many BRI projects has the Chinese government supported in **country** to date? *Please select only one answer.*

- More than 100
- 50-100
- 25-50
- 11-25
- 6-10
- 1-5
- None
- Don't know / not sure
- Prefer not to answer

Q26. In what ways has the COVID-19 pandemic affected BRI projects in **country** from January 2020 to the present day? *Please select all that apply.*

- Projects have been postponed or suspended indefinitely
- Projects were redesigned to accommodate travel or meeting restrictions
- Projects have been canceled
- Projects were not officially postponed, but still experienced delays in implementation
- The borrowing terms of loans previously issued by the Chinese government were renegotiated
- The amount of Chinese government financing disbursed to support existing projects increased
- The amount of Chinese government financing committed to support new projects decreased
- None of the above
- Other (please specify _____)
- Don't know / not sure
- Prefer not to say

Q27. Please select the sector in which you have worked for the longest time period between 2012 and 2022. *If you worked across multiple areas, please select one area you are most familiar with.*

- Agriculture, Fishing and Forestry
- Economic Policy
- Education
- Energy and Mining
- Environment and Natural Resource Management
- Finance
- Health
- Human Development and Gender
- Industry, Trade and Services
- Information and Communications Technology
- Labor Market Policy and Programs
- Nutrition and Food Security
- Development
- Good Governance and Rule of Law
- Public Sector Management
- Rural Development
- Social Development and Protection
- Trade
- Transportation
- Urban Development
- Water, Sewage and Waste Management
- Foreign Policy
- Other (Please indicate): _____

28. Are you willing to participate in a future survey or interview? We would like to learn from your updated perspectives on developments in **country** and elsewhere.

- Yes, you can contact me at the same email address.
- Yes, you can contact me at the following email address:

- No

Appendix D. Weighting Scheme for Survey Aggregate Statistics – Inverse Probability Weight

The response rate to the *Perceptions of Chinese Overseas Development Survey* was 3.2 percent. In light of imperfect information about the representativeness of our sample vis-à-vis the sampling frame (i.e., the population of interest), we use a weighting scheme to mitigate the potential for bias in our results. Consistent with the 2018 and 2021 Listening to Leaders publications, we employ non-response weights to account for unit non-response (or survey non-response) and to redress potential bias deriving from it. To generate non-response weights, we took the following steps. First, we estimated the probability of survey response using a logistic regression. For all members of our sampling frame, we have information on their gender, country, and stakeholder group (e.g., host government officials, development partners). We used all these predictors to estimate the probability of survey response for each member of the sampling frame (as each factor was significant in predicting survey response). Then, we took the inverse of the estimated probability to arrive at the final nonresponse weights used for our analysis. Additionally, we cap the weights at two standard deviations from the mean in order to avoid excessively large weights. This weighting scheme is the standard method used in AidData surveys.