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China's Belt and Road Initiative in Portuguese-Speaking Countries: Development and Limits

Qiu Saiying

Master in International Studies

Supervisor: PhD. Cátia Miriam Costa, Integrated Researcher and Invited Assistant Professor, Center for International Studies
ISCTE-University Institute of Lisbon

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SOCIOLOGIA
E POLÍTICAS PÚBLICAS

Department of History

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Abstract

The Belt and Road Initiative has attracted numerous attentions from all over the world after it was unveiled. Some countries have immediately joined the initiative, while other countries have either rejected the proposal with a big NO or are taking a neutral stance and observing the development of the situation. This dissertation addresses three main questions surrounding the implementation of the B&RI by taking Portugal as a case study under the Portuguese speaking countries scope. The research analyzed official trade data, contracted projects; media articles, discourses, and interviews with state leaders; local people's opinions were collected through semi-structured interviews to understand the practical development status of the B&RI. The aim of the study is to offer more feasible references and enlightenments to future large-scale development projects as well as for other countries, replicable and exemplary models of cooperation with China within the B&RI framework.

Key words: Belt and Road Initiative, Portuguese-speaking countries, China, Portugal

Resumo

A Iniciativa Um Cinturão Uma Rota tem vindo a atrair grande atenção por todo o mundo depois de ter sido revelada. Alguns países aderiram imediatamente à iniciativa, enquanto outros países ou rejeitaram a proposta com um grande NÃO ou estão a tomar uma posição neutra e a observar a evolução da situação. Este artigo aborda três questões principais em torno da implementação da Iniciativa Um Cinturão Uma Rota, tomando Portugal como estudo de caso no âmbito dos países de língua portuguesa. A pesquisa analisou dados oficiais de comércio, projetos contratados; artigos de mídia, discursos e entrevistas com líderes de Estado; as opiniões da população local foram recolhidas por meio de entrevista semiestruturada para entender o status de desenvolvimento prático da Iniciativa Um Cinturão Uma Rota. O objetivo do estudo é oferecer referências e esclarecimentos mais viáveis para futuros projetos de desenvolvimento em larga escala, bem como para outros países, modelos replicáveis e exemplares de cooperação com a China no âmbito da Iniciativa Um Cinturão Uma Rota.

Palavras-chave: Iniciativa Um Cinturão Uma Rota, países lusófonos, China, Portugal

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List of Abbreviations

B&RI-Belt and Road Initiative

CPLP- Comunidade dos Países de Língua Portuguesa- (Community of Portuguese-Speaking Countries)

FOIP- Free and Open Indo-Pacific

PSCs- Portuguese-Speaking Countries

ARI- Autorização de Residência para Investimento- (Residence Permit for Investment)

HS- Harmonized System

SEF- Serviço de Estrangeiros e Fronteiras- (Border and Foreigners Service)

GDP- Gross domestic product

REN- Redes Electricas Nacionais- (National Electricity Grids)

RMB- Ren Min Bi- (Chinese Yuan)

SCO- Shanghai Cooperation Organization

SAR- Special Administrative Regions

AICEP- Agência para o Investimento e Comércio Externo de Portugal- (Portuguese Foreign Investment and Trade Agency)

EDP- Portuguese energy company- (Portuguese energy company)

UNITA- União Nacional para a Independência Total de Angola- (National Union for the Total Independence of Angola)

IMF- International Monetary Fund

ASEAN- Association of Southeast Asian Nations

NATO- North Atlantic Treaty Organization

TTIP- Transatlantic Trade and Investment Partnership

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Chapter I Introduction

The Belt and Road Initiative was first introduced by Xi Jinping in 2013, the initiative has been controversial since the beginning. One could argue that the B&RI has become a new name card of China which means that China used this new name card to trade and expand its influence through soft power. While sceptics may argue that because of the lack of regulation and market coordination and with the vagueness of the B&RI, it may have a bleak future with no fruitful results.

“The project evokes the historical past of China, in the inland the “Silk Road”, complemented by a new Maritime Silk Road based on the routes maintained by the Ming dynasty in the fifteenth and sixteenth century.” (Xing, 2019a apud Costa, 2020) Owing to its original role was to transport silk produced in ancient China, it was named the Silk Road alongside the history. Guided by Confucius’ theory of an ideal of the perfect society, after at least 2000 years since the ancient Silk Road was formed, China now rolled out a contemporary version of its which is the Belt and Road Initiative.

The dissertation specifically analyzed the official trade data, contracted projects; media articles, discourses, and interviews with state leaders; local people’s opinions were collected through semi-structured interviews to understand the practical development status of the B&RI. The dissertation joined the debate by taking Portugal as a case study country. Intending to figure out how the Belt and Road is progressing in Portugal, three research questions were presented. 1. What has the B&RI accomplished in Portuguese-speaking countries since its launch, having Portugal as the case study? 2. How does Portugal view the Belt and Road Initiative? 3. What are the possible limitations of the B&RI development? In order to answer the research questions, qualitative and quantitative methods were used with empirical evidence such as trade data. The study is unfolded through various subsections. The literature review contains background of the surge of B&RI under the Confucianism and commercial liberalism theoretical references; the status quo of Portuguese speaking

countries and relative relationship with China; the imperative platform and linkage between China and PSCs-Forum Macao as well as the role it has been carrying in the interconnection aspect. Responses of the leaders of PSCs to the B&RI were examined afterwards. In the following chapters, to explore what has B&RI accomplished in Portugal by demonstrating related data is the priority. Respectively, semi-structured interviews were conducted aiming to present local views on B&RI in Portugal. As a result, most of the respondents had no deep cognition of B&RI but somehow have a general idea of it. Almost half of the interviewees held a positive view of B&RI while the rest stayed unclear and remained to be seen.

The possible limitations of B&RI were discussed, indicating possible hindrance that may impede the expansion of B&RI from 2 subsections. The dissertation also contains discussion of the results and in the last chapter, a few conclusions were summarized as well as a few suggestions for future study in this area.

1.1 Methodology: Materials and methods

This chapter principally summarizes the research methods and materials adopted in this thesis, including Section 1 describing research background and main objectives to be studied. Section 2 indicates the significance of the study. Section 3 outlined the data collection and methods, followed by possible hypotheses proposed for the research content in Section 4. At the end, the limitations of the study were also outlined.

Research background and research objectives.

The Belt and Road Initiative is a land-based “Silk Road” that traverses East and West and connects Europe and Asia created by envoy Zhang Qian to the Western Regions more than 2100 years ago. After that, the Maritime Silk Road also gradually emerged. Land and Maritime Silk Roads together constituted a major channel for communication, trade, and cultural exchanges between China and Eurasian countries in ancient times and promoted the interconnection of

civilizations between the East and the West. Now, in the atmosphere of the current slow recovery of the global economy, the modern Silk Road emerged. “This New Silk Road recovers not only the economic and trade relations but also suggests the cultural and intellectual connections as part of the project” (Duarte, 2019 apud Costa, 2020). Strengthening regional cooperation is an important driving force for the development of the world economy, and it has become a tendency. As an indispensable economy community in the world, the Community of Portuguese-speaking Countries, the cooperation between China and Portuguese-speaking countries has reciprocity characteristics, strategic characteristics, forward-looking characteristics, and universality characteristics. Therefore, understanding the construction of the Belt and Road Initiative in Portuguese-speaking countries and the problems they are facing are particularly essential for further promoting and improving the initiative.

To understand better this new global trend in Portuguese-speaking countries, here are the research questions of this study:

- What has the B&RI accomplished in Portuguese-speaking countries since its launch, having Portugal as the case study?
- How does Portugal view the Belt and Road Initiative?
- What are the possible limitations of the B&RI development?

Significance of the research.

Along with the speedy economic growth of China after the opening up since 1978, in the meantime of developing domestic life quality, China looks farther to an international perspective. Based on the interpretation of the international order under the Confucius diplomacy philosophy, the Belt and Road Initiative was launched. This research about B&RI in Portuguese speaking countries could contribute to the overall knowledge of this research theme by providing more perspectives, especially local people’s view of it. The implementation of B&RI could also set up a model for future large-scale development projects to learn from the experiences and avoid the mistakes exposed. The use of Portugal as a case

study will also serve as a reference for other Portuguese-speaking countries. In the meantime, the research aims to manifest how Confucianism influences China's foreign policy and how China applied commercial liberalism in its foreign relations. Last and most importantly, through further analysis, the research will offer useful inspirations and enlightenments for the future development of the Belt and Road and other mega development projects all around the world and provide guidance for subsequent cooperation and interconnection of humanity.

Data collection and methods.

This paper adopts the method of combining qualitative analysis and quantitative analysis by using empirical evidence such as primary statistics data for trade and contracted projects under the B&RI framework. The primary data that this study presented are mainly from the Chinese Foreign Ministry, General Administration of Customs of China, Economic and Commercial Office of the Chinese Embassy etc. Through the analysis of data in different years, we can get some relative conclusions. The primary sources used for this research also include semi-structured interviews with seven Portuguese about their opinions about B&RI. The author collected the respondents through snowball sampling method, from the first Portuguese respondent the author knows, and through the introduction of the first respondent, the second and third batches of respondents were settled. During the interview, the author followed the questions in the questionnaire (table 6) to complete the interview while collecting data and opinions at the same time. The author asked questions roughly, the interviewees freely expressed their opinions, then the author analyzed their attitudes and positions based on the answers. Due to the pandemic, some of the interviews were held through digital communication methods: WeChat, Messenger, Zoom platform etc. The questionnaire uses multiple choice. The 7 Portuguese worked in different areas in Portugal and the ages vary from 21 to 72 years old, with Portuguese nationality and already working or being half-studying and half-working.

Possible hypotheses.

The Belt and Road Initiative was based on the traditional thought of Confucius that harmony is the most important, harmony can lead to prosperity. “Centrality is the great foundation under Heaven, and harmony is the great way under Heaven. In achieving centrality and harmony, Heaven and Earth maintain their appropriate positions and the myriad things flourish. (中者也，天下之大本也。和也者，天下之達道也。致中和，天地位焉，萬物育焉) Therefore, harmony is the highest ideal in the Zhongyong. Because Zhongyong lays out the foundation for Confucian metaphysics, we can say that harmony is the highest ideal for Confucianism as a whole.” (Li, 2006) Nowadays, not only Chinese but also many people from all over the world hold a same stance that peaceful trade should be more uppermost than destructive conflict.

Considering the fact presented above, and based on the empirical evidence in this study, the following hypotheses can be introduced and be justified throughout this work.

- The B&RI has had or not had fruitful outcomes in Portugal in various fields.
- Local Portuguese residents generally hold an optimistic, neutral, or negative perspective of B&RI’s implementation in Portugal.
- Ideological clashes and transparency conundrum could be or not possible factors of limitations of B&RI.

Limitations of the study

- The lack of resources on the topic. There is a sea of research resources online or non-electronic files about the B&RI, but relative documents related to the situation in Portuguese-speaking countries are nearly none. This requires the author to find out related information from many resources of different related themes. The chosen case study is concerned with the collaboration of only one country engaged in PSCs. With that in mind, the results must be reasoned for in this regard and these limitations are highlighted at the end of this dissertation as well as some suggestions for further research.

- The pandemic barrier. Due to the COVID-19 pandemic, research advancement becomes very difficult, the author can hardly make the interviews directly with the interviewees.
- The interview samples are limited. Based on the characteristics of the semi-structured interview, the sample size is bounded. In this research, the author interviewed in total seven interviewees, they are from different working areas and with different ages, the opinions and results still have their limitations.
- The complexity and unpredictability of human behavior in the study of international relations is also one of the limitations, which is beyond the scope of rigorous scientism. (Xing, 2011)

Chapter II Literature review

2.1 Belt and Road Initiative: The rebirth of an ancient treasure

“In his opening remarks at the Belt and Road Forum in Beijing in May 2017, President Xi noted that:

Infrastructure connectivity is the foundation of development through cooperation. We should promote land, maritime, air and cyberspace connectivity, concentrate our efforts on key passageways, cities and projects and connect networks of highways, railways, and seaports.... We need to seize opportunities presented by the new round of change in energy mix and the revolution in energy technologies to develop global energy interconnection and achieve green and low-carbon development. We should improve trans-regional logistics network and promote connectivity of policies, rules, and standards so as to provide institutional safeguards for enhancing connectivity.”

(Dollar, 2019)

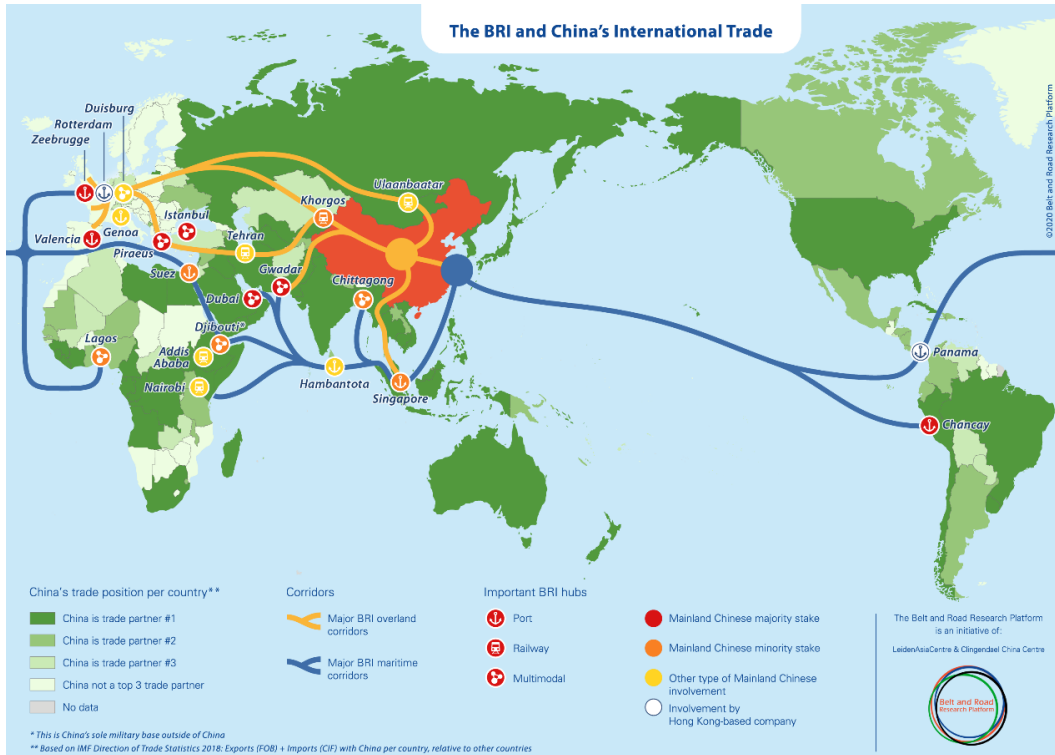
In 2013, a new transnational initiative was announced by the Chinese president Xi Jinping in Kazakhstan. As a brand-new version of the ancient land-based commercial trade route (丝绸之路) that initiated in ancient China and linked Asia, Africa, and Europe, Chinese businessmen used this route to transport mainly silk and other merchandises, progressively, businessmen, scholars, diplomats, missionaries and so on started to appear alongside the route.

“In terms of transportation, the Silk Road is mainly divided into the land Silk Road and the Maritime Silk Road. Correspondingly, nowadays, this new belt and road initiative is also divided into two parts: Silk Road Economic Belt and 21st Century Maritime Silk Road.” (Lee and Kim, 2017 apud Damuri, Y. et al., 2019)

1. North Route A: North America-Japan, South Korea-Ji Lin-Mongolia-Russia-Europe
2. North Route B: Beijing-Russia-Germany-North Europe
3. Middle Route: Beijing-Wulumuqi-Kazakhstan-Hungary-Paris
4. South Route: Quanzhou-Guangzhou-Kuala Lumpur-Jakarta-Calcutta-Athens-Venice
5. Central Route: Lian Yun gang-Xian-Xinjiang-Central Asia-Europe

Source: Xin Hua silk road platform¹

¹ What are the cities along the Belt and Road? <https://www.imsilkroad.com/news/p/397749.html> accessed on 22.10.2022



Source: Belt and Road Research Platform <https://www.beltroadresearch.com>

“According to official estimates, the Chinese government is pursuing B&RI projects in 138 countries, primarily in South, Southeast, and Central Asia, Africa, and the Middle East.” (Anu Anwar, 2019) “B&RI is a project bringing together cultures, civilizations and economies and it covers about 65% of the world’s population and one-third of the world’s GDP.” (Costa, 2020) According to a report by the Ministry of Commerce of the People's Republic of China, citing Beijing Daily, as of 2022, 32 international organizations and 147 countries have joined the project², which means that, corresponding to different countries, B&RI needs to formulate a model that is in line with the development of each country.

Meanwhile, for China itself, one of the main objectives of putting up this initiative is to equalize the inequality between the disadvantaged inland China and the wealthy coastal provinces. Through this project, some of the under-developed parts of China can get aid and integrate with their neighboring countries. “For the Chinese government, the B&RI is an opportunity to change China’s international perception

² 147 countries and 32 international organizations have signed more than 200 cooperation documents for the construction of “One Belt, One Road”
<http://fec.mofcom.gov.cn/article/fwyydyl/zgzx/202202/20220203280955.shtml> accessed on 21.10.2022

and, simultaneously, to promote the domestic convergence between provinces.” (Costa, 2020)

On one hand, the proposal of the Belt and Road is conducive to solving the problem of unbalanced development within China. Based on this view, to some, B&RI can be seen as an international version of the Go West campaign. “Compared with this initiative, the B&RI offers much greater international stakes; this is also why some called it the international version of the Go West Campaign.” (Zhao, 2016 apud Zeng, 2019) On the other hand, China also can use the B&RI as an export canal and find a receptacle for its corporations, stated-owned enterprises to have more business opportunities along with the more and more saturated domestic market.

During the past 40 years, China devoted its main strength to improve the life quality of its ordinary people, enhancing its domestic living standard, after some fruitful results, China desperately needed to find a possibility to enlarge its influence in the international society, to comply with the development trend of economic globalization and China’s export-oriented economy evolution, China has already brought forward the “Going Global” strategy in 1999. After entering the 21st century, expanding its external influence is an indispensable step in the development process.

On the international level, co-construction of the “Belt and Road” is committed to the interconnection of the Asian, European, and African continents and nearby oceans, builds, and reinforces the interconnection partnerships of countries along the route, and develops a multi-cultural, multi-level, and comprehensive interconnection network to realize the diversified, reciprocal, balanced, and harmonious development.

“China drew an international discourse based on tradition, recovering the ancient Silk Road, and revitalizing its historic regional scope.” (Costa, 2020) By introducing the well-known ancient Silk Road, people can better understand and accept the B&RI project, which is also in line with the basic elements of project promotion world widely. Yet, this narrative attracts dissent opinion, “(...) some Chinese scholars argue that the Chinese government should not embed too many historical elements into their narratives of the B&RI, as this would lead to a concern over the revival of the ancient tributary system.” (Zhao, 2015 apud Zeng, 2019)

Besides this, some scholars tend to compare the B&RI to the Marshall Plan. “Many argue that the B&RI is China's Marshall Plan (Chen, 2014; Shen, 2016), but possibly much more ambitious (...)” (Zeng, 2019) In fact, China can learn the experiences of the Marshall Plan which contributed greatly to the economic recovery of Europe, turning the USA into the leader of Europe. Nonetheless, the Marshall plan is part of the competition with the USSR, to prevent the spread of communism, to some extent exacerbated the differentiation between Eastern and Western Europe, this is also what the Belt and Road Initiative should avoid in principle.

In the meantime, the ambiguity of the concept of B&RI has been criticized widely by many scholars: “Ironically, the (Chinese) authors’ description of the ‘old’ Western structures is considerably clearer than the priorities and policies of the novel B&RI-based model. This is a returning phenomenon in B&RI related treatises: it seems easier for Chinese authors to meticulously describe the Western system and pinpoint its many faults, than to propose a clear alternative system with B&RI at the core.” (Roctus, 2020)

Notwithstanding, the vagueness and ambiguity of the concept can be interpreted as a deliberate attempt to encourage collective actions as so called “strategic ambiguity”. “Strategic ambiguity was first presented by Eisenberg (1986) as a form of communication that accommodates a diversity of goals, while facilitating change and preserving positions of leadership.” (Braga & Sangar, 2020) With further clarification, “Strategic ambiguity, then, is an intentional lack of clarity or deliberate uncertainty in the communication of goals in order to reach an objective.” (Jarzabkowski et al., 2010 apud Braga & Sangar, 2020) As addressed by Braga and Sangar, the continent-spanning, multi-country, infrastructure mega-project B&RI cannot help but be political. It is exactly the kind of collective action project that strategic ambiguity is suited for.

Analogously, scholars who understand the Chinese traditional culture compared implementing Chinese Mega-project to playing “go”. As Henry Kissinger stated in his book on China (2011), “China's strategy is guided by the thinking of its native board

game Go (围棋 weiqi) not the Western chess strategic thinking.” This theory substantially believes that when considering implementing a giant project, China tends not to specify every movement they take but at the end, the whole pattern will appear. By contrast, Western strategic thinking is more like the chess game with clear and small but steady steps with the intention of making sure that short-term effects can be seen. “To employ a famous allegory, Chinese long-term strategic thinking somewhat resembles the ancient game of go, with stones being placed seemingly randomly until a pattern eventually appears, a posteriori giving strategic significance to the initial “random” moves. Western strategic thinking might instead resemble chess, with many specific and clear short-term set pieces giving meaning to a predefined long-term result. The reform and opening up in 1978 was also seen as an example of grand goals with emptiness and vagueness at the beginning but had significant results at the end. “Even when putting aside possible cultural roots of strategic thinking, there is ample ground to conclude that the “empty” Chinese approach to B&RI is deliberate. China’s Reform and Opening up campaign (from 1978) is another recent example of an initially “empty” strategy with very grand goals, an ambiguous heading for a hotchpotch of many divergent local experiments (“go-stones”), which seemed to lack overall coherence.” (Roctus, 2020)

In fact, the proposal of the Belt and Road is based on the Chinese cognition and interpretation of the traditional philosophy of “harmony is to be prized”(以和为贵). “The use of a historical background also favors the rehabilitation of the Chinese philosophical tradition, including political thought and arousing a new interest in Chinese intellectual.” (Costa, 2020) The Chinese are deeply influenced by Confucianism, and this influence is not only on the level of individual behavior, but also on China's approach and perception of international relations. “Harmony can take place between individuals at the level of the family, the community, the nation, and the world.” (Li, 2006) Confucius (551–479 B.C.E.) lived during the Spring-Autumn Period (Spring-Autumn Period in Chinese culture/history refers to 770–476 B.C.E.), when the social situation was in huge turmoil. “(...) the last part of the Spring-

Autumn Period saw dramatic change in social politics and economy and was followed by collapse of the social order.” (Zhao, 2008) The vassals and lords were in constant strife, and Confucius traveled among the powers in search of a way to save the world. During this process, his diplomatic theory was formed, he advocated the idea of peaceful diplomacy as well as civilized and harmonious coexistence with neighboring countries and opposed all unjust wars. “For Confucians, the difference between harmony and disharmony is like that between right and wrong, good and bad, and success and failure.” (Li, 2006) In recent years, the core idea of peaceful diplomacy theory has been transformed into peaceful development diplomacy aiming to build a harmonious world order. “The ideal of a society is to harmonize not only with the society but also with other societies. The human ideal is to achieve harmony not only among the members of the human community but with the rest of the cosmos as well. (...) For Confucians, therefore, order in the world has to be achieved through harmonization.” (Li, 2006)

“The most significant aim of Chinese foreign policy is to build a harmonious international community and the B&RI integrates the way China foresees international relations.” (Costa, 2020) “The core of Confucian teachings is ren (仁)—the noblest human virtue: being respectful (generous, honest, diligent, and kind. The relevance of Confucianism is the spirit of humanism, as in many other cultures and civilizations.” (Lahtinen, 2015) China applies the virtues based on people-to-people communication to the level of state communications and believes that communications between countries should also follow the philosophy of Confucius (respectful, generous, honest, diligent, and kind.) and countries should live in harmony as well as between people. In the ancient book the analects of Confucius (2019), You Zi said: “In practicing the rules of propriety, it is harmony that is prized.” Influenced by Confucianism, China has followed the value of peaceful trade instead of conflicts when dealing with international relations. “(...) harmony is by its very nature relational. It presupposes the coexistence of multiple parties; a single item does not harmonize” (Li, 2006) This well explained why China proposed the Belt and Road

Initiative, through China itself, harmonious world order will never be achieved, only through interconnection with other countries will a harmonious world order be gradually formed. “Harmony presupposes differences and has to be achieved through differences.” That is why China wanted the participation of many other countries in B&RI. Because each country is different, harmony does not require sameness, it is precisely because of the differences between countries that harmony can be formed. Confucius was an exponent of harmony in diversity (和而不同), therefore influenced by this thought, China did not propose any specific pattern for B&RI-related countries to follow and its concept is as mentioned before quite vague so that participant countries are able to keep their features while complementing to each other in the process of forming the harmonious world order. “Chinese culture believes in harmony in diversity, which is an ancient philosophical system based on mutual benefit and interest for people from different cultural backgrounds.” (Kang et al., 2018) Likewise, Li (2006) argued that “Harmony is not only about similarity; it welcomes difference and diversity, so long as the different and diverse seek cooperation for mutual benefit.” One of the Belt and Road goals is to seek cooperation for mutual benefit which is highly consistent with Confucius “Harmony” philosophical thought.

Commercial liberalism also provided theoretical support for the formation of the Belt and Road Initiative. The basic view of commercial liberalism is that economic and trade exchanges between countries help to contain conflicts and achieve peace. (Cao, 2020) “Liberals argue that economic interdependence lowers the likelihood of war by increasing the value of trading over the alternative of aggression: interdependent states would rather trade than invade.” (Copeland, 1996)

According to the French thinker Montesquieu, liberalism holds that “(...) the natural effect of commerce is to lead to peace. Two countries in trade relations depend on each other, and if one has an interest in buying, the other has an interest in selling, all based on mutual necessity.” (Keohane, 2002 apud Cao, 2020) Such a line of theory can well throw light on the core concept and spirit of B&RI. This optimistic view advocates trade for peace which is the background of the launch of B&RI and highly

in line with the original intention of the proposer. German philosopher Kant, on the same topic, clearly stated that the spirit of commerce and war cannot coexist and that it will sooner or later dominate a people. (He, 2001 apud Cao, 2020) China then, can be seen as an advocate and practitioner of the idea of trade for peace.

Based on the theoretical foundation of a harmonious society advocated by Confucianism and the essence of commercial liberalism that business trade will eventually lead to peace, Belt and Road Initiative's proposal becomes justifiable.

2.2 Community of Portuguese Language Countries: A Group of Countries on the Rise.

The Community of Portuguese-speaking Countries (CPLP) was officially declared in Lisbon, Portugal, on July 17, 1996, consisting of nine countries whose official language is Portuguese: Portugal, Brazil, Angola, Mozambique, Guinea-Bissau, Cape Verde, Sao Tome and Principe, Timor-Leste, and Equatorial Guinea.

“There are no fundamental strategic differences and political entanglements between China and Portuguese-speaking countries. On the contrary, both sides are active advocates and driving forces for the democratization of international relations and multilateralism. At the regional level, Portuguese-speaking countries are also important targets for China to develop relations with sub-regional organizations such as the European Union, Southern Common Market, The Rio Group, the Economic Community of West African States, and the Southern African Development Community.” (Wei, 2014)

A good historical background is the cornerstone of a successful relationship. Unlike some other organizations, the CPLP contains countries from the Global North and the Global South, which is highly in accordance with the connectivity and interconnection characteristic of the B&RI.

Many Portuguese-speaking countries have even established bilateral relations with China in an early stage. (See Table 1) The Portuguese-speaking countries, with a

population of more than 223 million people spread across the globe, are linked by the same official language, which greatly enhances the mutual understanding and interaction between countries and peoples, leading to a multifaceted collaboration, which contributes to the development of the region and some of the more underdeveloped countries of its members.

This establishment background can ensure stability and a harmonious development within the organization to a certain extent. Nevertheless, they are still different when it refers to the historical paths, current domestic status, regional situation even the function they are carrying out on the international platform.

Table 1

Table 1. List of diplomatic relations between China and Portuguese-speaking countries (until October 2018)			
Bilateral countries	Time of establishment of diplomatic relations	Partnerships	Partnership establishment time
China and Angola	1983.1.12	strategic partnership	2010
China and Brazil	1974.8.15	comprehensive, strategic partnership, strategic partnership	2012/1993
China and Cape Verde	1976.4.25	—	—
China and Guinea-Bissau	1974.3.15 established, 1990.5.31 broke diplomatic ties, 1998.4.23 reestablished	—	—
China and Mozambique	1975.6.25	Comprehensive cooperation strategic partnership	2016
China and Portugal	1979.2.8	comprehensive, strategic partnership	2005
China and Sao Tome and Principe	1975.7.12 established, 1997.7.11 broke diplomatic ties, 2016.12.26 reestablished	comprehensive, cooperative partnership	2017
China and East Timor	2002.5.20	comprehensive, cooperative partnership	2014
Source: Ministry of Foreign Affairs of the PRC / translated by the author			

“It was in this document that the operationalization of the different areas was

determined, and the objectives were defined more clearly, outlining in general terms the role to be played by the community, such as political-diplomatic concertation, cooperation in all domains, and the promotion of the diffusion of the Portuguese language.” (CPLP 2007, Figueira& Silva-Rêgo 2018).

Obviously, the CPLP as an indispensable community in today’s world, it is commonly believed that China has no reason to waive the cooperation with this powerful and potential market. “In fact, all members of the Portuguese-speaking countries have the potential for fruitful cooperation. For example, China is an important energy buyer, Portugal has wind, hydro and solar energy and the corresponding energy access technologies, Brazil has oil and biofuels meanwhile Mozambique has biofuels, etc.” (Wei, 2014)

In particular, the total value of China’s imports and exports to Portuguese-speaking countries has been increasing in recent years. This dissertation takes the data from 2017 to 2018 as an example. (See Table 2) Similarly, the shared prosperity aims, and long-term development of the Belt and Road also fit in with the development interests of Portuguese-speaking countries.

Table 2

Table 2 Total value of imports and exports between China and Portuguese-speaking countries (2020 ~ 2021 year)								
Unit: 10 thousand US dollars, %								
Number	Country	2021 year 1 ~ 8 months in total						2020 year
		Import and export	Export	Import	Year on year growth			Import and export
					Import and export	Export	Import	
1	Angola	1439074.67	146920	129215 4.67	32.89	49.77	31.2	1082942. 51
2	Brazil	10865955.7 5	3302342.9 8	756361 2.77	45.98	65.5	38.83	7443497. 43
3	Cape Verde	4962.26	4962	0.26	-10.14	-7.84	-99.81	5522.37
4	Guinea-Bissau	6515.86	6515.83	0.02	104.9 3	104.9 7	-95.41	3179.5
5	Mozambique	237948.15	172431.1	65517.0 4	55.49	41.41	110.67	153032.5 1
6	Portugal	569700.63	326543.61	243157. 03	30.92	20.56	48	435151.1 5

7	Sao Tome and Principe	960.61	951.59	9.02	30.37	29.74	170.21	736.81
8	East Timor	15675.03	15488.46	186.56	41.8	41.46	76.95	11054.21
Total		13140792.9	3976155.5	916463				9135116.
		7	9	7.38	43.85	58.63	38.26	49
Source: General Administration of Customs of the People's Republic of China/translated by the author								

Due to historical reasons, there are great differences in the economic development level of Portuguese-speaking countries. “From the metropolis, the former colonies borrowed the Portuguese language and the Catholic religion, but other cultural differences between them are significant.” (Savelyev et al, 2021) As German economists Max Weber said: “If there is one thing we can learn from the history of economic development, it is that culture can make all the difference.” Hence, the economies from PSCs vary a lot based on cultural differences. Also as mentioned in the study by Savelyev et al. as the result: “(...) the African colonies of Portugal immediately after gaining independence turned to different development trends. (...) It is safe to say that there is no similarity in economic development among the Portuguese-speaking countries.”

Many Portuguese-speaking countries are facing the challenges and responsibilities of coping with the economic crisis and seeking their own development paths. For this reason, combining the Belt and Road Initiative with the development of Portuguese-speaking countries is in the fundamental interests of the people of all countries. China and Portuguese-speaking countries are immensely complementary in economy and diverse resources, and there is greater room and space for cooperation between China and Portuguese speaking countries.

However, there are also various problems and shortcomings in the trade between China and Portuguese-speaking countries. Due to the various issues mentioned, there is a need for a platform for communication between China and Portuguese-speaking countries. Since we all know that geographically China is located far from other Portuguese-speaking countries, is there any important link between China and the PSCs?

2.3 Forum Macao - the linkage between China and Portuguese-speaking countries.

“No one can deny the pivotal role that Macao has been playing in the Sino-Portuguese relationship. The Macao connection has played a crucial role in the continuation of the Sino-Portuguese relationship, primarily through a group of influential politicians and advisers once posted in the former colony. For example, the last governor of Macao, General Vasco Joaquim Rocha Vieira, has served as a general board member of Energias de Portugal SA (EDP) since 2012. Some of these advisers were instrumental in bringing in the first wave of Chinese investors in the 1990s, mainly in real estate through the empire of Stanley Ho, the Portuguese-speaking casino magnate.” (Le Corre, 2018)

The Forum Macao was established on such a foundation and a good atmosphere. The Forum Macao is a non-profit organization initiated by China in 2003 and hosted by Macao, with the theme of cooperation and development.

“Forum Macao is one of the first international organizations created by China, only preceded by the Shanghai Cooperation Organization (SCO).” (Costa, 2021) Therefore, It can be seen that the proposal of the Forum Macao is extremely challenging and creative, and it also reflects the importance China attaches to Portuguese-speaking countries as well as the forward-looking nature of the Forum Macao itself.

Macao has been a pivotal bridge between China and Portuguese-speaking countries since ancient times. After the sovereignty handover in December 1999, society and its system, relevant policies, local life and even unemployment rate have been transformed substantially. “The demographic portrait of Macao changed, as well as its Chinese special Administration region role in domestics and foreign policy.” (Costa, 2021) Under the one country, two systems formula, Macao has been given a great degree of freedom in the handling of foreign affairs:

(...) the Macao Special Administrative Region may on its own, using the name “Macao, China,” maintain and develop relations and conclude and implement

agreements with states, regions and relevant international or regional organizations in the appropriate fields, such as the economy, trade, finance, shipping, communications, tourism, culture, science and technology and sports. (Macau Joint Declaration, 1987, Annex I, Chap. VIII; and Macau Basic Law, 1993, Chap. VII – Domestic Affairs, Art. 136, apud Mendes, 2014).

Based on this multi-cultural identity of Macau, it has turned into the frontier of “East meets West.” As Costa stated in 2021: “Macao now integrates a broader national plan for economic and social development and, simultaneously, keeps its traditional features as a place for dialogue between the East and the West.”

“Macau has always been a center of international communication, with different languages. Since the nineteenth century, Macau has had a periodical press in Portuguese, English and Chinese, which has made the territory a center for international communication.” (Costa and Lam, 2016) “Even today it is common to see messages in different languages on the same poster.” (Costa, 2021) Macao is a place where China can broadcast her political speeches and discourses particularly to the Portuguese-speaking countries. Except the political discourses, until today, we still can see many advertisements and bus stop boards in Portuguese in Macau, although Macao has returned to the embrace of China, it still retains the Portuguese characteristics to a large extent. “The specific international communication environment of Macau favors the spreading of the political message and ensures that discourse dissemination goes beyond local frontiers.” (Costa, 2021) “To expend their domestic and international projects, the Chinese central government gave Macao the mission to exercise soft-power and to deepen relations with the PSCs.” (Costa, 2021) China has given Macao appreciable authority to cooperate straightly with some Portuguese-speaking countries in specific areas, which has greatly reduced red tape and allowed Macao to grow in stature in the international community. As a former colony of Portugal, Macao plays an indispensable role in the exchanges in all domains between China and Portuguese-speaking countries today.

Since the establishment of the Forum, China and Portuguese-speaking countries have cooperated in a wide variety of areas. These include cooperation in education

and human resources, Portuguese learning programs, Sino-Portuguese cultural events, promotion of mutual investment and enterprise exhibitions, etc. “Several events have been organized in the Macau SAR, often with the support of the Macau Forum, with the official aim of "reinforcing cooperation between Lusophony and China," namely international conferences gathering professionals from all Portuguese-speaking countries working in several sectors: medicine, journalism, law, and even in central banks, airports, and civil engineer laboratories. Profiting from the attractiveness that has been linking Macau with Lusophony, the University of Macau hosted several meetings of the Association of Universities of Portuguese Language-*Associação das Universidades de Língua Portuguesa (...)*” (Mendes, 2014)

At the 4th Ministerial Conference of the Forum Macao in 2013, three centers were proposed, including the Commercial Service Centre for SMEs of China and PSCs, the Distribution Centre for Food Products of PSCs, and the Convention and Exhibition Centre for Economic and Commercial Cooperation between China and PSCs. The development of the Forum Macao mainly revolves around these three centers.

The Forum Macao has also played an extremely prominent role in promoting the development of the Belt and Road. As reported by the official site of Forum Macao in July 2021, The Forum Macao, together with the mainland-Macao Business and Professional Committee on “Belt and Road”, co-organized the International Infrastructure Investment and Construction Summit with the theme “Exert Macao’s platform function, Promote China and Portuguese-speaking Countries to Build a Belt and Road Together”³

“By the end of 2017, the Center has organized 36 training courses and invited a total of more than 900 participants from Portuguese-speaking countries to Macau for training and exchange, covering many training areas of greatest concern and need for Portuguese-speaking countries, such as economic services and trade, social management, tax policy, law, Chinese and Portuguese language teaching,

³ The Permanent Secretariat of the Forum Macao organized a parallel forum on “Playing the role of Macau as a platform to promote the construction of the Belt and Road between China and Portuguese-speaking countries <https://www.forumchinapl.org.mo/sc/>中葡论坛澳门常设秘书处举办发挥澳门平台作用/ accessed on 21.10.2022

transportation and communication infrastructure, healthcare, Chinese medicine, hotels, and tourism.” (Zhuang, 2019) “Through Forum Macao, China has found the perfect instrument to maintain, all together, multilateral, and bilateral relations with the PSCs.” (Costa, 2021)

Due to Macao’s invaluable role in the Forum Macao and its important role as a linkage between China and Portugal, economic and trade cooperation between China and Portuguese-speaking countries has been strengthened, and Macao’s international influence and visibility has increased by leaps and bounds.

Chapter III CPLP countries’ responses to B&RI.

Since the Belt and Road project was proposed, Portuguese-speaking countries have shown great interest and attention. Both Portuguese President Marcelo de Sousa and Prime Minister António Costa have made it clear that they are willing to strengthen cooperation with China within the framework of the “Belt and Road” to realize the productive connection between Portugal’s development strategy and the “Belt and Road” initiative. “China is Portugal’s largest trading partner in Asia, and Portugal is the fifth largest destination country for Chinese investment in Europe.” (Ma and Zhang, 2020)

As written by Xinhua News Agency reporter Bi Yuming: “In May 2016, when Portuguese President De Sousa met with Yang Zhenwu, President of People's Daily, he said that Portugal agreed with China’s “Belt and Road” initiative and was willing to expand close cooperation with China in transportation facilities, port construction and other fields; that month, Mozambique, in the joint statement between China and Mozambique, stated his “determination to strengthen the synergy and connection between the ‘21st Century Maritime Silk Road initiative’ and the country’s development strategies and policies.” In 2016, the Cape Verdean ambassador to China said at the “Belt and Road” Ambassadors Forum that the “Belt and Road” is a future-oriented and promising initiative that will strengthen ties between countries through

economic cooperation and regional integration. In March 2015, the Brazilian government announced its participation in the AIIB; (...) the Angolan ambassador to China said that the “Belt and Road” has brought people closer together and appreciated that the Chinese government put up this initiative.”

We can see, then, that leaders of many Portuguese-speaking countries well fathomed the original intention of the Belt and Road Initiative, gave positive comments to the Belt and Road Initiative, and regarded it as an opportunity and an important path to strengthen their own development.

The president of Angola João Lourenço once said in an interview⁴: “The Belt and Road Initiative is very good because it unites the people and cultures of different countries in the world, covering almost all seven continents. Angola can benefit from it, and we hope to contribute our power to it.”

Jasper Roctus (2020) has pointed out that China, in fact, is developing B&RI on the go. That gives the EU an opportunity to engage with B&RI and remold it into a more desirable form. Because China increasingly sees Europe as B&RI’s “final destination”, the EU has a lot more leverage than it commonly assumes. This shows that most countries have a positive view on the implementation of the Belt and Road Initiative.

Chapter IV Developments of B&RI in Portugal.

4.1 The historical basis is the cornerstone.

“The Portuguese people have indeed inherited the glorious history of a former superpower that comes with the long-term relationship with China established from the Ming dynasty (1557) onward. That year, the Portuguese kingdom paid an annual tribute of 500 taels to remain in its enclave of Macau, which was handed over to Beijing in 1999 after nearly four hundred years of Portuguese colonization.” (Le Corre, 2018)

⁴ Angolan President: The Belt and Road Initiative brings opportunities for Angola’s development. <https://news.sina.cn/gj/2018-09-02/detail-ihixzkm3462006.d.html> accessed on 22.10.2022

Portugal, which has a population of 10.18 million, is bordered by the Atlantic Ocean to the west and Spain to the east and north. Portugal, like Spain and Italy and other southern European countries, has shown early affirmation and interest in the construction of the Belt and Road Initiative. Portugal and China share many similarities along the history especially the Macao SAR.

The story of China and Portugal begins in Macao. “In the mid-16th century, due to the new situation between China and foreign trade, the Ming government set aside a southwest part of the Macau Peninsula to the Portuguese and other foreign merchants to live and trade. Macau had become a Chinese leading trading port before the 19th century and had also become an important international port in Asia.” (Zhang et al., 2022)

During that time, Macao was more of a trade hub for Portugal and China. Portugal had no intention of actually controlling Macao, despite several small attempts. As Zhang, Yankholmes and Morgan stated in their paper “Promoting postcolonial destinations: Paradoxical relations between decolonization and ‘East meets West’” “(...) numerous decolonization narratives concentrate on explaining the Portuguese settlements in the 16th Century as commercial collaboration rather than imperialism.” It is also for this reason, and the “good performance” of post-colonial Macao, especially compared with Hong Kong SAR, mainland Chinese residents and Macao residents have relatively good comments and evaluation on Portugal.

As a platform and linkage between the two powerful countries, Macao, by hosting The Forum for Economic and Trade Co-operation between China and Portuguese-speaking Countries, not only fully leverages its own economic growth and function elevation, but also contributes to the economic and trade development of China and Portugal as a valuable and unique platform. As early as the arrival of Jorge Álvares in 1513 (Ramos, 1990), until nowadays the Forum Macao, the Portuguese can be considered old friends and good partners of the Chinese people.

“In 2018, during his visit to Beijing, Portuguese President Marcelo Rebelo de Sousa asserted that Portugal is the European country that knows China the best.” (Rodrigues, 2021)

Therefore, a different and favorable historical basis is a crucial prerequisite for the smooth development of the Belt and Road in Portugal. It is also destined that for China, Portugal is special and unique compared to other European countries. For Portuguese companies and local people who have lesser hostilities, China is not a completely unfamiliar country, which is extremely beneficial to the development of the project.

4.2 What did China bring to Portugal?

“China is now Portugal's largest trading partner in Asia. In 2018, the bilateral trade volume between China and Portugal reached 5.24 billion euros, a year-on-year increase of 7.27%. According to the latest data from the Portuguese Foreign Investment and Trade Agency (AICEP) (2019), China's current imports to Portugal are about 2.35 billion euros, an increase of 0.9% over 2018.” (Ma and Zhang, 2020)

According to the latest data on trade in goods between China and Portugal, China’s largest exports to Portugal are motors, electrical equipment, and relative accessories, which occupied 33.21% of all imports of Portugal. Nuclear reactors, boilers, machinery, mechanical appliance, and their accessories which occupied 15.97% of all imports of Portugal took the second place on the list. These two items accounted for nearly half of the total imported goods. (See Table 3)

Table 3

Table 3. Portugal’s top ten imports from China in February 2021 (according to international customs HS classification)

Ra nk	HS ch ap ter	Product description	Amount Unit: Million euros	Propor tion of import s%	Year on year %
		Volume total	514	100.00	-3.74
		Top 10 products	387	75.29	9.01
1	85	Electric motors, electrical equipment, and its parts; sound recording and playback equipment and its parts, accessories	171	33.21	17.25
2	84	Nuclear reactors, boilers, machines, mechanical appliances, and their parts	82	15.97	36.47
3	87	Vehicles and their parts and accessories,	26	5.04	-19.14

		except for railway and tramway vehicles			
4	29	Organic chemicals	22	4.24	-11.14
5	94	Furniture; bedding, mattresses, spring mattresses, soft seat cushions and similar padded products; unlisted lamps and lighting fixtures; luminous signs, luminous nameplates, and similar products; mobile homes	20	3.92	-28.92
6	39	Plastic and its products	17	3.32	-6.95
7	63	Other manufactured textile products; sets of articles; old clothing and old textiles; scraps of fabric	15	2.91	182.78
8	73	Steel products	12	2.30	-24.30
9	62	Non-knitted or non-crocheted clothing and clothing accessories	12	2.27	-25.79
10	90	Optical, photographic, film, measurement, inspection, medical or surgical instruments and equipment, precision instruments and equipment; parts of the above items, accessories	11	2.17	18.16

Source: Global Trade Observation System

Adaption: Xia Qian, Ruth Nogueira, Economic and Commercial Office of the Embassy in Portugal

According to table 3, it shows obviously that, the imports from China to Portugal contain completely almost all areas, which include electrical equipment, plastic, furniture, textile products, vehicles etc., largely revolve around processed products. According to the information provided by the Chinese Embassy in Portugal, China's investment in Portugal has exceeded 9 billion euros, and Portugal has become the fifth largest destination for Chinese investment in Europe. (Ma and Zhang, 2020)

In addition, Portuguese exports to China are also increasing steadily and robustly. (See Table 4)

Table 4

Table 4. Top 10 Portuguese exports to China in February 2021 (according to the International Customs HS classification)

Ra nk	HS Ch ap ter	Product Description	Amount Unit: million euros	Portion of exports %	Year on year %
		Volume total	104	100.00	48.77

		Top 10 products	78	75.00	77.27
1	74	Copper and its products	16	15.77	284.41
2	02	Meat and edible mince	13	12.02	118.44
3	25	Salt; sulfur; clay and stone; gypsum material, lime, and cement	10	9.88	31.87
4	47	Wood pulp and other fibrous cellulose pulp; recycled (waste shredded) paper or cardboard	10	9.87	2.02
5	85	Electric motors, electrical equipment, and its parts; sound recording and playback equipment and its parts, accessories	6	5.79	35.70
6	59	Impregnated, coated, covered, or laminated textiles; industrial textile products	6	5.64	77.44
7	45	Cork and cork products	5	5.02	104.16
8	84	Nuclear reactors, boilers, machines, mechanical appliances, and other parts	4	4.10	14.45
9	01	Alive animals	4	3.47	-
10	40	Rubber and relative products	3	2.94	41.24

Source: Global Trade Observation System

Adaption: Xia Qian, Ruth Nogueira, Economic and Commercial Office of the Embassy in Portugal

The data above have shown that, among the top 10 products exported by Portugal to China, copper, and its products (15.77%), meat (12.02%), salt (9.88%) and wood pulp (9.87%) etc. are at the first places of the rank. Such a statistical data has indicated that China and Portugal are complementary and mutually beneficial in many resource areas, and the import and export of commodities involves multiple areas. Through the exchange of resources, Portugal has expanded the market of its own products and introduced scarce resources. The exchange and recombination of resources is an important trend of future economic development.

“In addition to that, Portugal is the first EU country to formally establish a "blue partnership" with China, the first European country to issue UnionPay cards by an important local financial institution, and the first euro zone country to issue RMB bonds.” (Ma and Zhang, 2020) Therefore, it is obvious that Portugal has been very active in its economic and trade exchanges with China within the B&RI frame.

“Since 2011, several state-owned enterprises such as the China Three Gorges (CTG)

and the State Grid have invested and controlled several companies in Portugal. In 2011, State Grid invested in the Portuguese National Energy Network Company (Redes Electricas Nacionais, REN), which owns 25% of its shares; in 2015, Three Gorges Group invested 2.7 billion euros to purchase the Portuguese energy company (Energias de Portugal SA, EDP) for 21.35 % of the equity; in 2017, the Three Gorges Group's shareholding ratio in the Portuguese power company increased to 23.3%." (Le corre, 2018)

"In 2014, Shanghai Fosun Group acquired the largest insurance company in Portugal-Fidelidade for 1.1 billion euros, and subsequently acquired the private hospital group in Lisbon-Luz Hospital for 450 million euros." (Ma and Zhang, 2020)

After Portugal experienced the 2008 financial crisis, the economy continued to be in a downturn, and attracting foreign investment in Portugal has become the major choice of the government, and the investment of Chinese companies in Portugal just fulfills Portugal's needs.

"The initial stage of Chinese investment in Portugal was mainly based on the purchase of minority equity in state-owned enterprises as a strategy to prevent hostile attitudes in the local market. Since then, local people have gradually accepted China's foreign direct investment, which can be reflected in the increasing number of company acquisitions year by year." (Pereira, 2017 apud Ma and Zhang, 2020)

At the same time, another predominant means for Portugal to revitalize the economy is to vigorously develop tourism. Portugal has a long coastline, picturesque scenery in four seasons with a mild climate. Claudete Oliveira Moreira, in her article "Portugal as a tourism destination: Paths and trends" pointed out that "In 2016, Portugal won 24 awards and a lot of tourist enterprises won awards, Turismo de Portugal, was deemed Europe's Leading Tourist Board; Lisbon was considered Europe's Leading Cruise Destination and Lisbon's Port as Europe's Leading Cruise Port; the Algarve was singled out as Europe's Leading Beach Destination; Madeira as Europe's Leading Island Destination." At the same time, some relevant data was revealed in the same article "(...) with travel and tourism representing the largest share in Portugal's total exports of goods and services. Tourism contributes a lot to the

internationalization of the Portuguese economy. In 2016 it accounted for 6.4% of gross domestic product (GDP), with direct employment in tourism being about 8.1% of total employment.” Subsequently, attracting foreign tourists to Portugal for tourism can well stimulate economic growth and provide impetus for economic recovery.

Therefore, in 2017, China and Portugal opened direct flights, under this background with insatiable desire of Chinese students and tourists, which greatly facilitated the entry into Portugal and pave the way to boost the tourism and economy of Portugal. Although this route was once suspended from October 2018, but it was opened again at the end of August 2019. Until now, it is still a very important route connecting China and Portugal.

Speaking of significant policies between China and Portugal, we have no reason not to mention the golden visa policy. Portugal started this residence permit program in 2011 to draw the attention of foreign investment mainly from non-EU countries. “In Portugal specifically, the number of Chinese migrants has been growing consistently since the 1980s, and more steadily still since the turn of the century.” (Gaspar, Ampudia de Haro, 2020)

According to the data shown in the 2021 Relatório de Imigração Fronteiras e Asilo released by the SEF in May 2022, China still ranks first among applicants for the golden visa program.

Figure1

Nacionalidades mais Representativas

País	Total
China	270
Estados Unidos da América	101
Brasil	70
Rússia	65
Índia	34
África do Sul	34
Turquia	30
Líbano	21
Paquistão	20
Irão	17

Figure2

Total	865
	460.816.183,84 €
Postos de Trabalho	3
Transferência de Capitais	106
	51.450.030,71 €
Compra de Imóveis	756
	409.366.153,13 €

Source: Portuguese immigration and border service (SEF, 2022)

As we can see from the figures, China is in first place in terms of the number of applicants. Among them, property investment has been the mainstay of Portugal's golden visa program and is closely associated with Portugal's continuously soaring real estate market and investment returns. "In most of cases, property investment by Chinese citizens in Portugal is conceived as an instrumental tool to obtain a residence permit, allowing them to park their money in a safe haven place or to speculate their investment by renting property in exchange for solid annual yields." (Gaspar, Ampudia de Haro, 2020)

“In fact, one of the most important factors influencing these golden visa businesses among young Chinese is the high profits returned by the real estate market, when compared to other professional activities that are not so profitable and well-paid.” (Gaspar, Ampudia de Haro, 2020)

From this we can summarize that the golden visa program is indeed a win-win project for both Chinese immigrants and Portugal, each takes what he needs. However, in recent years, there have been disputes and debates over this phenomenon. Due to the limitations of this work, this issue will not be discussed further in depth here.

4.3 Portugal’s Concerns

In December 2018, the Portuguese and Chinese governments finalized the signing of a Memorandum of Understanding under the “One Belt, One Road” initiative, with a concentration on infrastructure investments. The launch of the belt and road initiative has attracted much attention in Portuguese media. In the Portuguese newspaper *O Público*, one article was titled “Costa oferece a Xi a visão europeia da Rota da Seda para fortalecer cooperação,” as well as another article called “Governo: Portugal quer Sines na Nova Rota da Seda.” Also in the newspaper *Correios da Manhã*, with headlines such as “Portugal quer ser ‘ponto de encontro’ na Nova Rota da Seda -- Secretário de Estado da Internacionalização.” In a general way, the way that the Portuguese media portrays the Belt and Road is reasonably optimistic. But still, is there any skeptical or disapproval voice echoing in Portugal?

The trend of Chinese large project investments landing in Portugal has been augmenting in recent years. But when it comes to Portugal’s concerns about the Belt and Road project, the first thing we need to analyze is some voices and controversies about the Belt and Road project in Europe as a whole.

For example, in a meeting with Macedonian Prime Minister Zoran Zaev in February 2018, Merkel stressed that China should not use its investments in the Western Balkans to gain political advantage. Previously, then-German Foreign Minister Gabriel had stated that “If a European strategy on China is not developed,

then China will probably succeed. If there is no European strategy on China, then China will probably succeed in dividing Europe.” French President Macron in January 2018 noted that “(...) some European countries are cooperating with China at the expense of European interests”, which puts China’s cooperation with European countries in a hinterland situation. (Liu, 2019)

As reported by Zuo Kui, Liu in his article “Europe and the B&RI: Responses and Risks”, “European elites have a relatively accurate and objective understanding of the fundamental purpose of China's Belt and Road strategic concept, that is, mainly to ‘promote economic, trade and investment cooperation with countries along the route’ and ‘connectivity with relevant countries’, which to a large extent shows that, although European media have repeatedly criticized the content of the Belt and Road Initiative for lack of clarity, in fact, they still grasp the basic spirit of the initiative.” According to Liu's survey of European elites, regarding whether China's active promotion of unimpeded trade will form a hedge against TTIP, such a sharp question, 38.2% respondents think it remains to be seen, however 25.5% think it is unclear. Simultaneously, 48.2% think, the main question that China and Europe are dealing with in the economic cooperation over B&RI is incomplete financial cooperation mechanism, secondly, 38.2% think the eurozone turmoil will be a conundrum, following that, 30% consider that the low level of internationalization of the renminbi is also a leading hindrance. As for the problems faced by people-to-people bond and cultural exchanges, more than half believe that human-to-human communication is a long-term problem and unlikely to achieve short-term results, furthermore, ideological differences are also a major issue.

One can find additionally another critical theory here, Mechanisms such 17+1 (recently due to Lithuania's withdrawal in 2021, has become 16+1) has aroused the “divide and rule” tactics concern among many European scholars. Jasper Roctus argued strongly in 2020 that an end to China’s “divide and rule” approach against the EU should be an unconditional red line throughout this process. An integrated Europe will obviously have greater economic influence and have more discourse in international affairs, but all signs point to the impossibility of complete unity in

Europe, because after all, each wants to retain its own language which represents the literature and glory. So based on this background, Portugal should give priority to its own interests. Joining the Belt and Road project is not the same as drawing a line with the EU. Portugal does not need to choose between China and the EU, it is sensible to pursue common interests on both sides.

The concerns of European countries about the Belt and Road are mainly focused on the following aspects:

- a) China will expand its political influence in Europe through the Belt and Road initiative
- b) Chinese capital will penetrate some of the main pillar industries in Europe, even state-owned enterprises
- c) Large foreign investments may strike national security and public order in Europe
- d) Chinese companies may have human rights problems for workers and clash with local corporate culture or regulations
- e) The Belt and Road project involves large amounts of money and may drag some countries into debt crises.
- f) The vagueness of the B&RI may bring uncertainties for subregional cooperation between China and European countries.

In response to the above points of questioning, we narrow down to the case study of Portugal from the Europe level. According to a report from People's Daily (2018), Portuguese Prime Minister António Costa stated that "(...) although China and Portugal are located at the eastern and western ends of the Asian and European continents, the two countries have a long history of interaction and mutual respect and trust. At present, Portugal-China relations are positively looking up, with a growing comprehensive strategic partnership and increasing bilateral trade and investment volumes."

"Facing the opportunities and challenges of the 21st century, the 'Belt and Road' initiative proposed by China has promoted interconnection between continents and countries, making an important contribution to strengthening economic and trade exchanges and international cooperation." Costa said that Portugal is highly

concerned about the “Belt and Road” initiative and is willing to actively participate in building the “Belt and Road” and learn from China’s experience in opening-up and development. Costa particularly mentioned the role of Chinese investment in promoting the economic development of Portugal, “In the process of economic recovery of Portugal, Chinese enterprises’ investment has played an important role. We welcome more investment from China, which is a uniquely advantageous partner.”

From the interview with Costa, we can see that at the state level, Portugal puts a positive attitude towards the Chinese Belt and Road project and highly values the improvement of the Portuguese economy by Chinese investments. Correspondingly, “according to Portuguese executives, China was the only country willing to step in at the height of the financial crisis in 2010, when the Lisbon government was under pressure from the European Commission, European Central Bank, and International Monetary Fund (the so-called troika) to sell state assets.” (Le Corre, 2018) Similarly, Carlos Rodrigues mentioned that in the aftermath of the 2008 financial crisis, the billions of euros that Chinese public and private companies pumped into the troubled Portuguese economy, which was thirsty for fresh money, fostered a very positive perception of China in Portugal. The Chinese ‘helping hand’ was then contrasted with the harsh attitude of the European Union - European Central Bank - International Monetary Fund ‘troika’.

Despite that, some dissenting opinions of these Chinese and Portuguese initiatives see them as a sell-off of Portuguese industry and assumes that Chinese investments in the EU have a political intention, even with scores of the investing companies themselves being Chinese state-owned enterprises. At a 2015 conference in Lisbon, former president of Banco Português de Investimento Fernando Ulrich said, “I am shocked with these big Chinese investments in strategic Portuguese companies, (...), Portugal has become a Chinese aircraft carrier into Europe.” (Le Corre, 2018) As a matter of fact, China has for example, bought up large amounts of unclaimed Portuguese government bonds. Although the EU has also provided some assistance, Portugal must meet an array of savings and reform conditions imposed by the “Troika”. “In fact, comparatively, it was the European financial crisis that moved the

Sino-Portuguese relationship into a new phase. The power of Chinese solidarity towards Portugal has been strengthened by the EU's initial indecision and scant action, which, as argued elsewhere, left a void for China to fill." (Rodrigues, 2021) Ana Gomes, a Portuguese MEP, complained that "It was the Troika that pushed Portugal into the arms of the Chinese." She said that she and her colleagues had warned about this many times at first, but the EU had repeatedly stressed the free regulation of the market. Gomes, who belongs to the same Portuguese Socialist Party as Prime Minister Costa, said, "Now the EU has received the bill for this policy." (Jochen, 2019)

Within the perspective inside Portugal, there is a strong signal at the national level that Portugal is willing to participate in the Belt and Road and actively and highly evaluates Chinese investments but there are still some dissenting voices arguing that Chinese investments in Portugal involve many companies and that this is due to the harsh policies of the EU and that the EU has not provided much useful help in the process. But predominantly, what Portugal needs to do is to balance the relationship between the EU and China wisely and maximize its own benefit. In fact, that Portugal is well aware of this, "The Portuguese government, although acknowledging those specificities rooted in history, has vigorously rebuffed an idea that, in essence, would place Portugal at odds with the EU and North Atlantic Treaty Organization (NATO)." (Rodrigues, 2021) Additionally as Rodrigues and Silva argued in 2019: "The 'universalistic' and multilateral principles shaping foreign policy prompt Portugal to dodge international tensions and dilemmas, without bringing into question its commitment to political frames of reference and values shared within the EU and NATO." Overall, it is obvious that Portugal consistently situated in a noticeably delicate position between China and EU, and its efforts to equilibrate China and EU are noteworthy.

4.4 Portuguese people's views on Belt and Road

Despite the fact that Portuguese officials and government-related personnel have expressed their opinions about Belt and Road's presence in Portugal, local residents'

perspectives are undoubtedly valuable and must be taken into account. To understand in detail, the specific views of the Portuguese ordinary people on the Belt and Road project, the author conducted semi-structured interviews with seven Portuguese ordinary people. “A semi-structured interview is a verbal interchange where one person, the interviewer, attempts to elicit information from another person by asking questions. Although the interviewer prepares a list of predetermined questions, semi-structured interviews unfold in a conversational manner offering participants the chance to explore issues that they feel are important.” (Longhurst, 2003) The interviews with the general Portuguese population gave the chance to understand the authentic opinions of the people which can be seen as primary sources for the research and the following table 5 contains detailed information about the interviewees.

The interviews were principally carried out during July 2021 and September 2021. The duration of each interview was about 10-15 minutes. The main target population of this part of the study is the ordinary Portuguese people, and the selection criteria for the study targets are

- (1) people of Portuguese nationality
- (2) being at least 18 years old
- (3) already working or half-studying and half-working

With the aim of accomplishing these objectives, the author obtained the respondents through snowball sampling, the respondents were numbered from I1 to I7. “Snowball sampling is one of the most popular methods of sampling in qualitative research (...) The researchers usually start with a small number of initial contacts (seeds), who fit the research criteria and are invited to become participants within the research. The agreeable participants are then asked to recommend other contacts who fit the research criteria and who potentially might also be willing participants, who then in turn recommend other potential participants, and so on.” (Parker et, al. 2019) The interviews were mainly one-on-one face-to-face interviews, with occasional online interviews. For the offline interviewees, the interview location was determined based on geographical inexpensiveness, the purpose of the interview was explained to the interviewees before the interview began, and prior consent was obtained from all

interviewees. In addition, for the purpose of writing the thesis and understanding the interviewees' narratives, the verbal narratives of the interviewees were "standardized" and transformed, i.e., the verbiage and insubstantial repetitions of the interview narratives were removed.

Conforming to the semi-structured interviews, the following findings were outlined.

1. Most of the interviewees have little knowledge of the Belt and Road project, some of them have not heard of it at all. Although some interviewees were not very familiar with the Belt and Road, they took the initiative to look up information about the project online, showing their interest and recognition of the project. Although the cooperation projects on the Belt and Road are widely discussed and even somewhat controversial at the official level, public awareness of the Belt and Road is very limited.

2. All respondents believed that the chief motivation for Portugal's participation in the Belt and Road is to promote trade and economic development, followed by infrastructure development and the promotion of tourism which coincides with the results we presented in the above.

3. Moreover, most of them considered that the Belt and Road project should benefit the fundamental interests of both Portuguese and Chinese people, and the availability of benefits to the public is key to the success of the project, as well as the availability of good investment projects.

4. When asked about the current challenges of the Belt and Road project in Portugal, most of the respondents said that Portugal's choice depends a lot on the overall attitude of the European Union, and therefore Portugal's acceptance of the Belt and Road will be influenced by the EU policy makers. The difference between Chinese and local corporate culture was also mentioned a lot.

5. Finally, a great deal of respondents believe that distrust of the Chinese government will be a major obstacle in the Belt and Road process. All respondents believe that the Belt and Road will be a win-win situation for both sides. Almost half of them hold a positive view of the future development of Belt and Road in Portugal, while the other half were unclear and remained to be seen.

Throughout the semi-structured interviews, the Portuguese people generally have a high level of education and finely appreciated a majority of the foreign investments, which can be considered due to the relatively stable political environment and advanced infrastructure in Portugal. The impact of Chinese investment and the promotion of tourism in Portugal has been significant and recognized by both the government and the private sector. Consistent with the argument in chapter 4.3, Portuguese people incline to consider overall European policy in the first place. However, problems and insufficiencies have emerged notably during the interviews. Most respondents expressed distrust of the Chinese government, contingent on Confucius philosophy, the trust of the people comes first in one country, accordingly, gaining people's trust is particularly important in the spread of the Belt and Road. Nonetheless, interviewees strongly believed that Belt and Road will end up in a win-win situation which reflects the overall upbeat perception of local people.

Table 5

Table 5. Portuguese interviewees							
Interviewee	I1	I2	I3	I4	I5	I6	I7
Age	26	21	25	72	63	24	46
Sex	Male	Male	Female	Male	Female	Female	Male
Working area	Service	Real Estate	Education	Economy	Education	Economy	computer management
Working years	2	1	1	30	35	2	20
Education	Bachelor's degree	Bachelor's degree	Bachelor's degree	Highschool	PhD	Bachelor's degree	Highschool

Table 6

Table 6. Survey Questions and Results									
Category	Subcategory	Interviewee							Amount
		I1	I2	I3	I4	I5	I6	I7	
I Do you know the China's Belt and Road initiative?	Very well informed								0
	Slightly informed	x		x	x	x			4
	Not informed at all		x				x	x	3
II Do you know the development of Belt and Road in Portugal	Very well informed								0
	Slightly informed	x		x					2
	Not informed at all		x		x	x	x	x	5
III Portugal's reasons for joining the Belt and Road Initiative	Infrastructure construction	x			x		x	x	4
	Trade and economic cooperation	x	x	x	x	x	x	x	7
	Strengthen tourism	x			x		x	x	4
IV Expectations for the	Portugal has no interest in joining								0
	Portugal and China can achieve mutual	x	x	x	x			x	5

Belt and Road Initiative	benefits								
	Good investment projects	x			x		x	x	4
	Promotion of cultural exchanges					x			1
	Low and manageable risk cooperation					x			1
	The Chinese side must have a clear and specific project plan				x		x	x	3
	Benefiting the ordinary people in Portugal	x			x		x	x	4
V Challenges of the “Belt and Road” Initiative	Impact of overall EU decision-making	x	x		x	x	x	x	6
	Resurgence of trade protectionism	x					x	x	3
	EU high standard regulations	x			x				2
	Differences with local corporate culture	x	x		x		x	x	5
	Project information is not open and transparent enough				x		x		2
	Distrust of the Chinese government		x	x	x	x	x	x	6
VI If the “Belt and Road” initiative a win-win project	Win-win project	x	x	x	x	x	x	x	7
	Only benefits China								0
VII Overall view of the Belt and Road initiative	Positive perception	x			x			x	3
	Negative perception								0
	Not sure		x	x		x	x		4

4.5 How to better promote the Belt and Road Initiative in Portugal

From the above study and results, one apparent fact is that in Portugal interviewees have no knowledge of the particular content of the Belt and Road, which is first related to its vague concept. China has been cooperating with many European countries and Portugal for a long time, much before 2013, in various fields, so it is often confusing to distinguish whether a project is under the framework of the Belt and Road, or whether all bilateral cooperation after 2013 belongs to the Belt and Road concept, which should be made more precise in terms of international discourse, to make the vague concepts more concrete.

“Discourse became a crucial factor for the international narrative of the countries.” (Costa, 2020) Although the rich Chinese traditions in the areas of philosophy and political thought, the truth is the intellectuals of this country lost their international voice when meeting the West, mainly because China failed to modernize herself and to integrate the international system as a peer.” (Qin, 2010 apud Costa, 2020) Similarly, Ma (2021) asserted in his book *China's Choice: The U.S.-China Game and Strategic Choices* that, “In retrospect, China has not been very good at explaining or defending its views. China has had a hard time finding a good spokesperson who can explain the Chinese point of view effectively with humor and keen insight.”

In order to avoid this, China should put more strength on its international discourse and dissemination of the core spirit of the B&RI through multiple methods, so as to promote the smooth and further implementation of the project.

Secondly, in the survey and when analyzing related materials, it is found that some people in Europe and Portugal are even resistant to the Belt and Road Initiative, which is completely imaginable, Portugal as a EU member, its decision-making and political tendencies are closer to the overall attitude of the EU, occasionally influenced by some other EU countries, hence people may question the purpose of the Belt and Road, and even extended conspiracy theory ideas, to this point, China should

strengthen its ties with various countries to avoid the B&RI being deliberately politicized and conspired, and strengthen the transmission of the mutual benefit goal and win-win in the public discourses, while it should make targeted alterations for the disparate domestic conditions of different countries, such as in the case of Portugal, where emphasized the historical bonds between China and Portugal and put it in a position that is incomparable to those of other countries. The trade history between China and Portugal dates back more than 500 years, which has laid the cornerstone of the relationship between the two countries and the reciprocal trust between the Portuguese people and the Chinese people.

Thirdly, China can gradually popularize the Belt and Road construction through student exchange learning, in which Confucius Institutes can perform as a bridge to allow a small group of students fully comprehend the Belt and Road project first, thus introduce it to more local people or friends they are close to.

Furthermore, the Belt and Road should arrange more job positions for the local people. Chinese enterprises in Portugal could potentially generate work positions for local Portuguese people as much as is feasible, who generally have a high level of English skill and well-grounded education, providing them with more jobs will help them integrate what they have learned in different fields, to gradually reduce misunderstandings caused by ideological differences and continuously bridge cultural inconsistency.

After this point, people-to-people bonds is another factor that the B&RI should give importance to, China should first insist on its cultural self-confidence while amplify its soft power by leveraging its influence in the entertainment sector. “One of the challenges for Chinese politicians is to find a way to transmit China’s national identity and culture in such a way that the international community understands and recognizes her perspectives.” (Costa, 2020) Many Europeans do not know the authentic contemporary China and even believe that it is still a backward and feudal country, an appropriate and effective cultural export will assist the local people in one country in embracing Chinese perspectives more smoothly. This also reflects in the big hit Korean TV series Squid Game, which was aired on Netflix platform and can

be seen as a successful example of South Korean cultural export. The immeasurable triumph made Squid Game go viral on the social media TikTok, Instagram etc. More and more people began to learn Korean and became fascinated by its culture and history. By contrast, China's film and television entertainment remains to work in a bleak situation. The involvement in the entertainment industry could earn an unexpected return for a very small effort.

Chapter V Limitations of the B&RI development

5.1 The ideological and cultural clashes

Along with the speedy unfolding of the B&RI in various countries, despite the fact that it has already achieved a few fruitful results, people may ask where this giant project is rolling and how far it will go, is there any problems or limitations surging up during this process and what factors may affect the practical expansion of B&RI?

All things considered; multiple factors may contribute to the possible limitations of the B&RI development in the future time. The very first one is as well the rooted one that is the ideological and cultural differences between China and other countries. As Phillippe Le Corre argued in his article "China's rise as a geoeconomic influencer: Four European Case studies", he mentioned that "Others insist on Portugal as belonging to the West for a long time to come. "We are not prepared to sacrifice democracy or our values," one senior corporate executive said." Similarly, a research report from pan-African network Afrobarometer (Afrobarometer is a pan-African, independent, non-partisan research network that measures public attitudes) was titled "Africans welcome China's influence but maintain democratic aspirations" Identically, when author Roctus addressed the delicate relationship between China and EU, he pointed out an imperative fact that "The Union must explore the fine line between its non-negotiable principles ("red lines") and the pragmatic reality that China is an authoritarian power that has shown great resilience to democratic reforms." Based on the opinions of the majority, not only other countries that are being cautious of

China's ideological essence, China on the other side, also holds a skeptical view towards some countries in return. In the same article, "Remolding China's 'Empty' Belt and Road Initiative: An Opportunity for the EU.", Roctus demonstrated that "Even Chinese scholars that have an overall positive attitude towards deepening cooperation with the EU seem to dread the memory of Brussels' constant promotion of democratization and human rights over the last few decades, which they have perceived as a direct attempt to overthrow the country's governmental system."

Even though the fact that the discourse of Belt and Road has always been related to economic sense, aiming to strengthen the connectivity among distinct races and people, in spite of the fact that the discourse has been updating, as Roctus showed: "This narrative shift had its due consequences for the discourse on B&RI, which started to include themes like multilateralism, green development, and anti-protectionism." Even so, the ideological clashes seem to be a notable barrier for the future development of B&RI.

If we put the ideological dissimilarity in a not extremely crucial position, then the cultural difference will be another noteworthy factor that may impede the long-term advancement of B&RI. "An argument could be put forward that the cultural differences in approaching long-term strategic thinking between China ("Confucian, collectivistic, inclined to start with constructing a grand narrative") and Europe ("Christian, individualistic, inclined to start with making clear and feasible plans"), have caused certain misunderstandings surrounding B&RI's objectives, or lack thereof." (Roctus, 2020) In Western countries that emphasize individualism above all else, the collectivist style of doing things that the Chinese promote seems out of place. In the Chinese enterprise culture, rat race seems a hot word in recent years, which is highly contradicted to the European company culture and the culture in other non-east Asian companies. A small detail might affect the whole, as Zhang stated in 2020, "Some Portuguese respondents mentioned that some African Portuguese-speaking countries do not like Chinese companies and prefer European companies because they provide them with coffee and snacks" Some of these small details are also indispensable for the whole B&RI project. Identically, in the semi-structured

interviews conducted by the author, distrust is a remarkable aspect, one interviewee (male, 27) assumes that it is difficult for the Portuguese to accept and fathom the Chinese way of thinking and its relevant diplomatic philosophy in a short period of time. The communication between people is constantly strengthening, but the ideological clash remains very significant.

5.2 Debt crisis and transparency conundrum

Why did the debt problem attract so much attention in recent years? From the statement of Bandiera and Tsiropoulos (2019) the answer is unraveled: “Public debt in Emerging Markets (EMs) has been rising, reaching levels not seen since the 1980s. (...) Similarly, debt risks in low-income developing countries (LIDCs) have risen substantially over recent years and the share of countries at high risk of debt distress or in debt distress has doubled since 2013 to about 40 percent (IMF and World Bank, 2018). In this context, large debt financing, especially in foreign currency and on non-concessional terms, may lead to a rapid deterioration of already heightened debt vulnerabilities over the medium term”

The term “debt-trap diplomacy” was first created by Indian scholar Brahma Chellaney in 2017. “In an article titled “China's Debt Trap Diplomacy,” Chellaney argued that through the Belt and Road Initiative, China has supported infrastructure projects in strategically important developing countries, generally by giving huge loans to their governments, and that these countries have fallen into a debt trap, making them highly vulnerable to China’s influence.” (An, 2020) Some hold an even more aggressive view towards this “A Chinese “debt trap” would imply an intentional attempt to ensnare the continent in debt and should be refuted.” (Carmody, 2020 apud Carmody et al., 2022) some may have sent the alert: “a Moody’s executive cautioned: “Unless African investment financed by Chinese loans generates substantial economic gains that boost debt servicing capacity of Sub-Saharan African governments, the credit implications of such lending include higher debt burdens, weaker debt

affordability and weaker external positions.”” (Carmody et al., 2022)

The case that has been repeatedly mentioned is the construction of the Hambantota Harbor in Sri Lanka. The project added to Sri Lanka’s debt burden, and to offset the debt, the country leased the Hambantota port to a Chinese company on a 99-year lease in 2017. However, the debt crisis in some countries is increasing due to the impact of the COVID-19 outbreak in 2019. Zambia, for example, defaulted on its debt in 2020, and more and more countries are asking China for debt relief. Thus, a relevant problem has emerged, do most of the foreign debts of African countries come from China? “(...) on average, only 20% of African government external debt is owed to China, and around 17% of external interest payments by African governments were identified as being made to China. At the same time, 32% of African government external debt is owed to private lenders, and 35% to multilateral institutions such as the IMF (Jubilee Debt Campaign 2018). Reckless lending to the continent by the Western capitalist world, in particular the immense quantities that may be reasonably characterized as odious debt (Ndikumana and Boyce 2011), has been far more destructive to Africa.” (Carmody et al., 2022) Hence, most of the “Chinese debt trap” theory was often exaggerated.

As a matter of fact, we must keep in mind that the signing of relevant debt agreements is a common method in international cooperation, because for some poverty-stricken countries in Africa, their economic capacity being relatively vulnerable, and due to the political instability in those countries, many factors of instability often arise, at the same time, because some African countries generally have low creditworthiness, relative risks are greater, from this background, debt agreements are actually a type of insurance for borrowing countries.

“The Jubilee Debt Initiative analyzed 15 African countries defined by the IMF as high risk for debt and found that the ratio of debt owed to China to overall external debt was below 18 percent in 12 countries, but above 24 percent in three countries, including Djibouti (68 %), Zambia (30 %), and Cameroon (29 %). That is, only three African countries have debt growth linked to China, and regardless of the specifics of these three countries' debt problems, it is clearly untrue to attribute Africa’s overall

debt sustainability problems primarily to China.” (Zhou,2020) According to the statements above, it would be biased to assume that creating a debt crisis and tethering some developing countries with the Belt and Road project was China’s original intent. “And there is a commonsense error in the Chinese debt trap theory, which assumes that African countries are in a weak position in China’s debt negotiations and that China can use the debt terms to achieve corresponding political, economic and strategic objectives.” (Zhou, 2020) It must be stated however, that in practice, African countries have a great deal of choices of financing methods, while, in the absence of well-built international lawful and supervision mechanisms, China is in a relatively passive position in debt negotiations.

“However, Chinese loans have recently increased substantially, and in the context of the B&RI, there are signs that several African nations involved in the initiative are now in danger of debt distress, with financial arrangements for infrastructure projects being the main problem. Given its growing loan portfolio on the continent, China is also implicated in the looming debt crisis for the continent as a whole in the context of COVID.” (Carmody et al., 2022)

With the increase loan in Sub-Saharan African countries, some of them do have debt crises in the process of participating in the Belt and Road. From this point of view, Belt and Road should adjust its strategy appropriately and actively propose solutions to the problems revealed, for example, through appropriate debt relief, debt reconstructing, debt moratorium, etc. For the reason that China will not benefit from the debt crisis either but coordinate the problems that arise so that both sides can profit from it. “And, as a consequence of the COVID-19 pandemic and its economic impact, African governments are now seeking to renegotiate the terms of loans provided by Chinese lenders and increasingly calling on Beijing to provide debt relief measures.” (Carmody et al., 2022)

Debt issues may be one of the chief complications in the execution of the Belt and Road Initiative on the African continent. While in the process of the specific implementation of B&RI, the lack of transparency hinders the advance on some occasions. Conforming to the survey conducted by Liu (2019), some European elites

give immense importance to “deep and transparent” cooperation. For instance, in the anonymous survey number 41, respondent suggests that “The B&RI should adopt a more transparent and clear mechanism and to adopt market-oriented policies.” Hillman (2018) stated that “Greater transparency is often described as beneficial to B&RI partners.” As a whole, transparency is a major concern, regardless of the country. As argued by Shah in 2018 “Transparency in economic dealings, concern for the impacts (both positive and negative) of massive fundings on local economies and institutions and compliance with ‘governance-related conditionalities’ even if at minimal level are some of the essential prerequisites that China should consider while pursuing OBOR project.”

In addition to the transparency of the project itself, in the process of implementation in the host country, the issue of transparency is a top priority for the local residents. In this point, Angola can be a typical example, firstly, as an indispensable partner of B&RI in Africa, Angola’s corruption level would be the first underlying obstacle. “Transparency International’s 2018 Corruption Perceptions Index placed Angola in 165 places among 180 countries and territories, confirming a very high level of its corruption.” (Transparency International, 2018 apud Jureńczyk, 2020) Simultaneously, the high level of corruption mirrored in the implementation of B&RI. “The lack of a requirement for transparency in spending funds created the possibility of embezzlement of some funds by Angolan officials at various levels.” (Hao and Zweig, 2016 apud Jureńczyk, 2020) This phenomenon has severely impaired the credibility of the government. Such problem is widely reflected in Angola. “(...) in 2001, Angola promised the IMF it would introduce structural reforms, including increasing transparency in oil revenues, reducing fuel subsidies, raising water rates, reducing borrowing, and privatizing several state-owned companies. Although Angola did not keep these promises (...)” (Jureńczyk, 2020) Due to the lack of openness in the contacts between China and Angola, “Contracts between Chinese enterprises and Angola's elites, however, have no transparency and are associated with deep corruption.” (Jureńczyk, 2020), with the opacity of the project itself, Chinese enterprises and workers became easy targets for the locals to vent their anger and

dissatisfaction. “The Angolan president José dos santos, who has been in power since 1979, has been accused of a severe lack of transparency through his direct control of Chinese loan disbursement through the National Reconstruction Office, led by a close ally. Without the possibility to ask their government to disclose information, some Angolans want China to disclose loan information instead, which is often rejected; without the possibility to speak out against the government, these people turn against Chinese companies” (Jiang, 2012)

As a consequence of the transparency conundrum in Angola, Chinese companies and businessmen are frequently being attacked. Belt and Road indeed had abundant fulfillments in Angola, however with the intensified contradictions between locals and government over the transparency problem, if China can't figure out a feasible solution, Chinese companies and the development of the Belt and Road will be hindered in the next stage of B&RI's expansion.

Chapter VI Results and discussion

A quantitative research method was used to demonstrate what has B&RI accomplished in Portugal by using statistic data. Portugal and China are highly complementary in exchanging resources, Portugal's imports from China revolve mainly around technology products which occupied 54% while Portugal's exports to China majorly concentrated on natural resources and alimentary resources. (Table 3, table 4) China consequently invested in large companies in Portugal since 2011 which injected a massive cash flow. Direct flights from China to Portugal launched in 2017 boosts Portuguese tourism. Chinese investors ranked first in the number of applicants for the Golden Visa program in 2021. (Figure 1) Real estate investment ranked first among all projects. (Figure 2) Portugal's view of B&RI contains two dimensions, the national level, and the general public level. On the national level, some believed that China's investments brought energy into Portugal, and some argued that it was troika that pushed Portugal into China's arms. On the public level, B&RI was not recognized

commonly but people held positive opinion towards it. Ideological and cultural differences, debt crisis and transparency problem are the underlying potential limitations for Belt and Road's growth.

The results above indicate that under the Belt and Road framework, based on a good historical background, China and Portugal have intensified bilateral communication and cooperation in various fields, fruitful results can be seen. The data contributes a clearer understanding of the implementation of the B&RI in Portugal, showing that most of the collaborations are demonstrating an upward trend. The study indicates a correlation between Portugal's view and the possible limitations of the B&RI. Due to the existence of ideological clash, some remain cautious and skeptical while considering B&RI's intention however the unclarity of the concept and the lack of suitable means of transmission also left the local people disoriented. In the long term, concerns over the debt crisis issue and the topic of transparency of the project may continue to grow, B&RI still has many urgent intractable issues that need to be addressed. These results should be taken into account when considering how to better promote B&RI and how to adapt it under different circumstances. This analysis supports the commercial liberalism theory that trade among interdependent states can lead to peace, a harmonious world is the cornerstone of human development, trade protectionism and unilateralism are not conducive to the formation of a harmonious society, and the promotion of the Belt and Road has greatly strengthened the connection between people and has significant reference value for future inter-regional cooperation. The generalizability of the results is limited by the choice of the country, Portugal as the only developed country in CPLP, its research has reference significance to other Portuguese-speaking countries but not universal significance, however the research of Portugal is of considerable referential importance for other middle-income developed countries in the EU, such as Spain. Still, the snowball sampling has its own limitations too, 7 interviewees cannot be considered to be representative of the population being studied. Nonetheless snowball sampling is yet the most adequate sampling method for conducting partially structured interviews at this stage and under the influence of COVID-19 pandemic.

Chapter VII Conclusion and recommendations

7.1 Conclusion

The research has provided brief answers to three fundamental questions surrounding China's belt and road initiative in Portuguese speaking countries (case study of Portugal):

- (1) What has the B&RI accomplished in Portuguese-speaking countries since its launch, having Portugal as the case study?
- (2) How does Portugal view the Belt and Road Initiative?
- (3) What are the possible limitations of the B&RI development?

Responding to the first question, the author used both qualitative and quantitative methods, analyzing the background of the launch of B&RI under the Confucianism and commercial liberalism theoretical framework, combining the data from General Administration of Customs of the People's Republic of China, Ministry of Commerce of China, SEF, etc. to demonstrate that within the B&RI, complementary resources, massive cash flows, tourists and foreign investments through golden visa program have been introduced, subsequently all of these have provided impetus for economic recovery in Portugal.

Answering the second question, the author analyzed interviews with Portuguese prime minister António Costa, articles from media and some concerns under the Europe Union scope then narrowed down to Portugal, combined with opinions from government-related officials, in result, optimistic perspectives and dissenting voices coexist. Views such as divide and rule tactics concern, spread of "Chinese values", sell-off of the industry are echoing occasionally. Skeptical voices argued that "troika" played a crucial role in Sino-Luso relationship which means that a series of restriction rules imposed by "troika" left a vacancy for China to fulfill. Even though, Portugal will not sacrifice its commitment to political frames and the common values shared

with EU and NATO. In addition, with the semi-structured interviews with Portuguese people, local dissemination of Belt and Road has great limitations, based on the ancient China they've learned and the modern China in their perspectives, all of the interviewees think it will be a win-win project for China and Portugal.

To explore the possible limitations for B&RI in the future, the research adopted qualitative methods, showing that the ideological factor is embedded and will not be overcome easily in a short time. Cultural differences can be another factor that will hinder the expansion of B&RI from details. Chinese debt trap theory is untenable and mostly exaggerated. Nevertheless, with more and more investments, in some less developed countries, China should actively hedge against the potential troubles of a debt crisis. The progress of the project should be properly disclosed, avoiding the non-transparency issues, because broader engagement and more solid development will require common consensus of shared prerequisites.

While business-related results are very complicated to predict in a short time, one of the intentions of China, for example, through the Confucius theory, was to create harmonious relations with other countries. Having considered that, by increasing the trade ties with Portugal under the B&RI framework, China achieved the goal by seeking cooperation of mutual benefits. When it comes to soft power, countries are highly dependent on those that they trade with, and the more they trade, the less they want to go to war with each other, otherwise, this harmonious balance will collapse. This is where commercial liberalism comes in, which, just like Confucianism, aims at increasing the chances of peace while enhancing interconnections with other countries.

Confucius says that “The junzi (*person with good virtues/ explained by the author*) harmonizes but does not seek sameness, whereas the petty person seeks sameness but does not harmonize” (君子和而不同，小人同而不和) (Analects 13.23, apud Li, 2006) According to the original background of the proposal of harmony by Confucius, it means that different instruments together can make melodious music, each country resembles one instrument, only when they play together but remain their own characteristics, a good symphony can be composed. “For Yan Zi, Good music (e.g., a

symphony) requires a variety of sounds in various modes” (Li, 2006)

China and Portugal share scores of dissimilarities and are two separate and independent countries, nonetheless the harmonious correlation between the two justified explicitly the concept of Confucian philosophy of “harmony but not uniformity”. The experiences of China and Portugal are instructive and enlightening for other B&RI-related countries that based on Confucius’ thought, every country is junzi, is an instrument, when they cooperate and coexist while maintaining their features, a harmonious world order will eventually be formed.

7.2 Recommendations for further research

Avenues for future research can be introduced from 3 factors: research country choice, methodology adoption and comparative study.

Further research could focus on some rarely mentioned Portuguese speaking countries and the relevant B&RI progress in such countries, for instance, Guinea-Bissau, Mozambique. Research on these countries could shed light on other similar underdeveloped countries and provide development models for reference.

Future studies should take into account the effect of different methodology, questionnaires can be used to understand the general views from more samples which will increase representativeness of the population, but at the same time should also take into consideration the depth of the questions if possible.

In regard to the existing studies of Belt and Road’s progress so far, many scholars chose only one country or a group of countries from the same continent as research targets, while further research is needed to establish correlation between unlike countries under the same framework, case in point, Angola and Brazil can be studied together as representative countries from the global south but different continent under the CPLP framework, building comparative studies on this basis for the purpose of analyzing distinct development approaches of B&RI under divergent contexts and providing enlightenment for further mega-projects.

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Appendix 1 Interview script

Guide for interviews- B&RI in Portugal

Introduction and professional experience

1. Can we start the interview with some personal information?
 - a. Age?
 - b. Profession?
 - c. Work age in related fields
 - d. Education level?
2. Do you know the China's Belt and Road initiative?
 - a. If yes, do you know the development of Belt and Road in Portugal?
 - b. If no, do you have the interest in learning more about this initiative?

Motivations and expectations for the B&RI initiative

3. What do you think are the reasons for Portugal to participate in the Belt and Road?
4. The main expectations you have for the Belt and Road Initiative?

Challenges facing of the B&RI and personal views on the B&RI

5. What do you think are the challenges that the B&RI is currently facing?
6. Do you think that the "Belt and Road" initiative will be a win-win project?

7. What is your overall view of the Belt and Road initiative?

Appendix 2 Interview consent

INFORMED CONSENT

The present study arises in the context of a master's dissertation underway at **Iscte - Instituto Universitário de Lisboa**. This study concerns to the development and limits of the Belt and Road Initiative in Portuguese-speaking countries.

The study is carried out by Qiu Saiying (qginu@iscte-iul.pt) who can be contacted if you have any questions or comments.

Your participation in the study, which will be highly valued as it will contribute to the advancement of knowledge in this field of science, consists of an interview about your opinions on the B&RI which will last 10-15 minutes. There are no significant expected risks associated with participation in the study.

Participation in the study is strictly **voluntary**: you can freely choose to participate or not to participate. If you choose to participate, you can stop your participation at any time without having to provide any justification. In addition to being voluntary, participation is also **anonymous** and **confidential**.

The data are intended merely for statistical processing and no answer will be analyzed or reported individually. You will never be asked to identify yourself at any time during the study.

I declare that I have understood the objectives of what was proposed and explained to me by the researcher, that I have been given the opportunity to ask all the questions about the present study, and for all of them, to have received an enlightening answer, and I accept participation in it.

_____ (location), ____ / ____ / _____ (date)

Name: _____

Signature: _____