Final Report

Market Research for Hong Kong Planning and Development Surveyors in Belt and Road Countries: Case Studies of Vietnam, Thailand, and Malaysia

To

Planning & Development Division

The Hong Kong Institute of Surveyors

Submitted by

Dr Guibo Sun, Assistant Professor

Miss Yao Du, PhD Student

Department of Urban Planning and Design,

Urban Analytics and Interventions Research Lab,

The University of Hong Kong

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Executive Summary

Abstract of the market research

China announced the Belt and Road Initiative (BRI) in 2013, a project that seeks to promote trade and investment by connecting countries in Asia, Europe, and Africa through infrastructure development. The Southeast Asian countries, in particular, has been identified as a significant focus of the initiative due to its potential for economic growth. Hong Kong, with its robust professional services sector and close ties with Southeast Asian countries, is expected to play a crucial role in the success of the BRI.

The participation of Hong Kong's professional services, including the surveying services, in the BRI is based on their established expertise and adherence to international standards, which have been vital in driving the development of the initiative and China's economy. However, the BRI's vast scope has posed challenges in information collection and project implementation for Hong Kong surveying professionals, and they are seeking ways to channel their skills and knowledge toward BRI projects.

This market research study has been initiated to identify the opportunities and challenges in expanding their business network in the Southeast Asian region under the BRI, faced by the planning and development surveying professionals from the Hong Kong Institute of Surveyors (HKIS). The study aims to explore strategies to provide services in Southeast Asian countries under the BRI initiative,

thus helping Hong Kong's professional services sector to contribute effectively to the development of the BRI and capitalise on the opportunities presented by this ambitious project.

Research methods

In this market research, we used a mixed method, including desktop research, questionnaire survey, and semi-structured interviews, to find answers to our research questions. During the survey process, we engaged with surveying professionals from the different divisions of the Hong Kong Institute of Surveyors (HKIS), including the Planning and Development Division, Quantity Surveying Division, Building Surveying Division, General Practice Division, Land Surveying Division, Property & Facility Management Division. Our research has allowed us to understand the decision-making processes of different stakeholders and has enabled us to develop strategies that are reflected in this research report. The Planning and Development Division (PDD) at the HKIS has developed a network to facilitate communication and collaboration.

- **Desktop research**

We used a structured review process to form the basis of understanding the research questions:

1) Search strategy: We used specific search terms to look for literature and information (e.g., "BRI and Southeast Asia," "Planning control in Thailand," and "Surveying service in Malaysia"). We searched for academic publications, reports, news, policies, and laws using various search tools, including web-based search engines, library catalogues, and organisation databases;

2) Inclusion/exclusion criteria: We screened the identified publications, reports, and news according to specific inclusion criteria. We thus excluded publications, reports, and news that were not focused on the BRI concept, not focused on the urban development system or development control system, or published before 2010;
3) Document selection: We then reviewed the titles and/or abstracts of the identified publications, reports, and news. After removing duplicates, we screened the remaining documents and excluded those too specific to a niche problem or focusing on village development. After the screening process, 428 documents were selected;
4) Data extraction and analysis: We conducted an extensive document analysis of the selected publications, reports, news, laws and regulations, and policies. We used a content analysis approach to extract line-by-line descriptions of study findings or key information into a data sheet. We formulated a preliminary coding scheme and employed it on every line. Subsequently, we assessed and merged the codes to form broader groupings. Through this process, we analysed comprehensive patterns and subordinate patterns to ascertain the existence, implications, and interconnections of these notions, thereby deducing insights about the messages conveyed in the texts.

- **Questionnaire survey**

A questionnaire was developed to gather insights from 35 Hong Kong surveyors in private developers, consulting firms, private funds, and surveying firms. The questionnaire was developed using theories and information gathered from desktop research. Prior to its distribution, preliminary

versions were shared with experienced Planning and Development surveyors for their input and suggestions. The final version of the questionnaire had five parts, with questions regarding the respondents' experiences in Southeast Asia, difficulties encountered, strategies used to overcome these difficulties, opinions about the BRI initiatives, and background information.

The questionnaire survey aimed to collect information and insights from the surveyors to develop effective strategies to expand their business network and provide services in Southeast Asian countries under the BRI initiative. Numerous techniques were used to analyse the survey data, including calculating percentages for frequencies, numbers, and yes/no responses. For questions concerning views and opinions, the respondents scored their agreement on a 5-point Likert scale, and the mean values were utilized for analysis. The Cronbach's alpha coefficients were used to assess the reliability of the scales employed in the questionnaire.

- **Semi-structured interviews**

Following the online questionnaire survey, follow-up interviews were conducted to obtain more profound and professional insights from the HKIS surveyors. The research team undertook the interviews through face-to-face meetings or online discussions, and 9 semi-structured interviews were conducted between July 2021 and December 2022. The interviewees had prior working experience in Southeast Asian countries, with some exploring market opportunities in Southeast Asia. The interviews covered various topics, including the key skills required for providing surveying services in Hong Kong and Southeast Asia, descriptions of overseas projects and challenges faced during

implementation, the advantages and disadvantages of Hong Kong surveyors to provide services in the case countries, and the BRI impacts on overseas business opportunities for Hong Kong surveyors.

We used framework analysis to analyse the qualitative data from follow-up interviews with surveyors. The technique was separated into five steps to obtain a complete picture of the data and investigate the relationships between the codes. The five steps included familiarization, thematic Analysis, indexing, charting, and interpretation. During the analysis, we looked for themes and subthemes to clarify the research topic, and a coding scheme was produced. The transcript material was allocated to each topic and subtheme, and the data was restructured according to the indexed themes, making it easier to summarize the results. The final stage of the analysis involved looking into how the notions and typologies came to be and the relationships between them. The insight generated from the final stage was used to develop a more thorough understanding of the larger picture regarding the opportunities and challenges for surveyors from HKIS to expand their business under BRI.

Summary of challenges and recommendations to Hong Kong surveyors

This study focuses on identifying opportunities and challenges of Hong Kong surveying services in Southeast Asian countries under the BRI. BRI is a concept used to describe the international trade routes that link China to South Asia, Southeast Asia, Europe, and East Africa. With the support of its state-owned banks and funds, China has financed large-scaled infrastructure projects and encouraged mainland Chinese businesses to invest Foreign Direct Investment (FDI) projects in participating

countries. The BRI initiative has given Southeast Asia a high-priority position because of its political and economic ties to China. We have observed the BRI's deep involvement in the development of Southeast Asian countries, from China's direct investment in various sectors in the region and large-scale infrastructure construction such as railways and ports. BRI increased business opportunities for stakeholders from mainland China and participating countries and Hong Kong professionals with high capacity to provide cross-border service. However, our findings show that Hong Kong surveyors hold a view of whether they could directly benefit from the development of BRI in Southeast Asian countries.

Our findings have produced 7 strategies with the objective of surmounting the recognised obstacles and enhancing capabilities to fully unleash potentials. The 7 strategies and suggestions encompass three themes:

1. Challenges for Hong Kong surveyors in operating business in Southeast Asia

The study found that Hong Kong surveyors face significant challenges when operating their businesses in BRI countries. According to our survey, the lack of knowledge about local planning and development knowledge was identified as the most significant challenge, and language barriers and cultural differences were also seen as major obstacles. The surveyors felt that they were not competitive in the Southeast Asian market due to these difficulties. However, the study suggests that Hong Kong surveyors can overcome these challenges by committing to ongoing learning and professional development and collaborating closely with local companies and experts to better understand the local

context. In subsequent sections, the study will elaborate on three strategies to help overcome these challenges.

Strategy 1: Collect local planning and development knowledge by self-learning

Hong Kong surveyors would benefit from familiarising and collecting local planning and development knowledge, increasing their work efficiency and making them more competitive in the surveying industry. We compared the urban planning systems and development control systems between Hong Kong and the three Southeast Asian countries in Section 4.1, to make a foundation for HKIS members to learn further and accumulate information and knowledge of Southeast Asian countries.

- **Urban planning system**: Malaysia, Vietnam, Thailand, and Hong Kong have a set of urban plans, particularly master plans and detailed plans, and city development strategies. In Malaysia, the planning authority creates and implements the urban planning system. The country's National Physical Plan serves as a guide for the development of Malaysia's cities and towns, with state governments responsible for implementing the plan at the local level. Vietnam's urban planning system is relatively new and still evolving, but it is undergoing significant changes as it rapidly urbanizes. Vietnam's planning system is also characterized by decentralization, with local authorities playing an important role in the development of urban areas. Thailand also adopts a decentralized approach. Municipalities are responsible for planning and development within their respective jurisdictions at the local level. Hong Kong has one of the most sophisticated and

advanced urban planning systems in the world. Planning Department is responsible for formulating land use and development plans, while the Lands Department is responsible for managing and administrating public land. The Town Planning Board is an independent statutory body that advises the government on urban planning and development matters. The Board is responsible for considering and approving statutory plans and for hearing objections and representations from the public. Table 1 and Table 2 show the institutional framework and level of planning in the three case countries, compared with Hong Kong.

Table 1. Institutional framework for planning in three case countries, compared with Hong Kong.

Country	**State capital**	**Local institution in charge of formulating plan**	**Local institution in charge of enforcing plan**	**Pertinent law**
Malaysia	Kuala Lumpur	Master Plan Department	Town Planning Committee, Urban Development Department	Town and Country Planning Act 1976
Vietnam	Hanoi	Department of Planning and Architecture or Department of Construction	Local-level People's Committee	Law on Urban Planning
Thailand	Bangkok	Department of Public Works and	Town Planning Board	Town and Planning Act 1992

		Town and Country Planning		
Hong Kong SAR, China	Hong Kong SAR, China	Town Planning Board	Town Planning Board	Town Planning Ordinance

Table 2. Levels of planning in Hong Kong and three case countries

Country	**Planning levels**	**National plan**	**Regional plans**	**Municipal/urban master plans**	**Detailed plans**	**Project plans**
Malaysia	Four: National, State, City and (optional) detailed plans	National Physical Plan	Regional Structure Plan	Structure Plans, Planning Department	Local plans or Action Area Plans	Detailed plans prepared by projects
Vietnam	Four: National, regional, city/ provincial and local plans	Orientation of Comprehensive National Urban Development Plans; National Strategy for Socioeconomic Development	Regional Spatial Plans; regional socio-economic plans	Master Plans; city/ provincial socioeconomic plans	Zoning Plans; Detailed Plans of districts, wards, industry zones	Detailed plans of development projects

Thailand	Five: National, regional, provincial, local plans and detailed project plans	National spatial plans; National Economic and Social Development	Regional and Subregional Plans	Comprehensive Plans	Specific Plans	Detailed Project Plans (e.g., Urban Renewal Plans and Urban Development Plans)
Hong Kong SAR, China	Two: Territorial, local district				Outline Zoning Plans (OZP); in areas not covered by OZP, Development Permission Area Plans	Layout Plans prepared by projects

- Urban planning in Hong Kong and the three case countries - Malaysia, Vietnam, and Thailand - share a similar pattern of imposing regulations, standards, and administrative procedures, and relying on master plans. These regulatory systems are primarily based on ideas promoting gradual, steady development, originating from either the colonial era or a specific foreign country (typically a Western country such as the UK or France, or the Soviet Union).

Furthermore, these systems have been retained after the countries gained independence (Malaysia, Vietnam). The former legal frameworks and professional practices continue to function at present and significantly impact future land development within these cities.

- **Development control system:** the development control system comprises three levels: planning, land, and building controls. The control tools share similarities and differences between Hong Kong and the three case countries, establishing the overall land development regulatory mechanism. Table 3 compare the development control system of Malaysia, Vietnam, Thailand, and Hong Kong.

Table 3. The development control systems in Hong Kong and the three case countries

Countries	Planning control		Land control		Building control	
	Type	Instrument	Tenure type	Instrument	Instrument	Law
Malaysia	Discretionary	Planning permission	Private land	Applications of land sub-division, amalgamation, partition and conversion	Approval/ rejection of building plans	Street, Drainage and Building Act
Vietnam	Discretionary+ Regulatory	Planning permit; Detailed project plan	State land	Land use right certificate	Construction permit	Construction Law

Thailand	Regulatory	Land-use zoning plan	Private land	Land development license	Construction permit *(serving as "planning permission")*	Building Control Act
Hong Kong SAR, China	Discretionary+ Regulatory	Outline Zoning Plan	State land	Lease condition	Approval/ rejection of building plans	Buildings Ordinance

Planning control

- Planning control system could be classified into two paradigms based on their degrees of conformance to official statutory plans for decision-making (Booth, 2007). The first paradigm is a *discretionary control system*, which depends on local planning authorities' discretion to examine all projects on a case-by-case basis until they are ultimately authorised or rejected by the authority. The second approach, called *regulatory development control*, relies on legal plan documents (e.g., the zoning codes) to decide whether a development should be approved. If a project fulfils all the criteria for ex-ante statutory plans, the project will be approved automatically.
- In most parts of the world, planning control systems lie somewhere between traditional discretionary and regulatory approaches rather than either extreme. Hong Kong has been using a 'hybrid' system. It comprised a British discretionary permission process within a framework of

statutory zoning plans. Outline Zoning Plans are the main instruments to exercise control on land development by the planning authority.

- Planning control in Malaysia focuses on approving or rejecting development applications to evaluate, regulate, and monitor urban growth. It follows the British discretionary system. Planning applications are decided based on the provisions in the development proposals submitted by investors. Any development that involves a new building or change of use requires planning permission from a local government, for which an application must be submitted.
- In Vietnam, unlike in Malaysia and Hong Kong, planning control is state-enforced involvement rather than spontaneous market activities. As a result, it relates to a power struggle between development control agencies and developers or other stakeholders. Because the local government is responsible for most new development, new developments tend to follow the master plan and zoning plan. Developers must first obtain a planning permit, then seek the approval of the detailed project plan from the District People's Committee. These two instruments ensure that all developments conform to the plans and regulations. Still, the instruments provide local authorities with discretion during the decision-making process. Thus, Vietnam uses a hybrid planning control system.
- Unlike Malaysia and Vietnam, Thailand has a regulatory control system to control development within urban areas. There are two types of plans that regulate local-level land use and urban development: Comprehensive Plans and Specific Plans. The Specific Plans include land-use zoning schemes. Thus, planning control is based on detailed development plans and established

rules. Development application decisions are based on whether they violate any legal restrictions, such as zoning.

Land control

- Land management measures vary within different contexts, and the measures have a significant effect on the spatial development of cities. The land leasehold system is applied in Hong Kong. There, the government can lease public land to individuals for a specified time. That system is one of the most important tools for the government to control urban growth.
- In Malaysia, private individuals have full land ownership. Private land can be transacted through the open market, while public land can be directly sold to private individuals or through competitive methods, such as auctioning and bidding. Land development control could be achieved by accepting or rejecting land sub-division, amalgamation, partition, and conversion applications.
- Thailand also has private land ownership. People can buy land from open markets. However, all large-scale development works require submitting a development license application to the Land Development Board for approval before construction commences. This powerful tool allows the government to exercise control over land development.
- In Vietnam, private individuals only have the use right to land. Land is identified as a 'public property' under the 'entire people' ownership and 'represented and uniformly managed' by the central government. The country establishes a land market managed by the government via land-use rights. Individuals can obtain land in three ways, competitive methods, administrative

land allocation, or transaction markets. The precondition of issuing land use certificates is that building, and land use must conform to statutory land-use plans and specific planning regulations. Thus, the land management system has evolved into a legal tool for the government to maintain proactive intervention in land development.

Building control

- Building control instruments regulate the shape and appearance of new construction, which also shapes the city. According to the Buildings Ordinance, all private building and construction projects in Hong Kong must receive prior permission from the Building Authority. The authority should verify that the planned development does not violate any legislative or administrative requirements by reviewing the building plan submitted by private developers.
- The same system is being applied in Malaysia. Developers in Malaysia must also obtain building plan approvals before beginning construction work on site, ensuring that buildings comply with the stipulated planning regulations, building laws, and regulations.
- In Vietnam and Thailand, construction permits are a powerful tool for governments to exercise control over land development. Developers must obtain a permit from the building department before construction commences. However, since developers in Thailand are not required to get planning permission, local governments use the Building Control Acts as guidelines for planning implementation when approving construction projects. This Act has prompted ministerial regulations and municipal ordinances, forming the so-called 'planning permission system.'

Strategy 2: Collaborate with local professionals

Hong Kong surveying firms operating in Southeast Asian markets should adapt to the development context of the host country, and the most effective way of adaptation is to collaborate with local professionals. They could hire local experts to involve in specific projects, or form a partnership. These local professionals can help translate legal documents, advise using local experiences, and communicate with local authorities and contractors. Transferring knowledge between Hong Kong and local surveying professionals could make the project operation efficient. It also should be noted that Hong Kong surveying firms must develop ways of assembling a multinational team of professionals to respond more effectively to the clients' demand for integrated cross-national surveying services.

Strategy 3: Establishing partnerships with BRI sectors and local organisations

Hong Kong Institute of Surveyors (HKIS) can help Hong Kong surveyors "go global" under the BRI by establishing more partnerships with surveying institutions in countries, organising more seminars and professional expos, building a connection with the Trade Development Council, establishing effective information platforms, building platforms for connecting with foreign countries' firms and authorities, incorporating BRI or overseas market elements into their training programs, including comprehensive education and exposure to global relations and political economy, and cooperating with universities to support student interaction and exchange activities between BRI countries, Hong Kong, and local students, thereby strengthening mutual-understanding.

2. Challenges to participate in BRI projects in their mobilisation stages

Hong Kong surveyors are interested in participating in BRI projects, but face significant challenges. While they have a positive attitude toward the potential impact of BRI on Hong Kong's future development, surveyors have reported that there are limited channels for them to participate in BRI-related projects. Furthermore, a lack of understanding of BRI implementation creates complications for surveyors who want to participate in the initiative. Hong Kong surveyors are unfamiliar with business practices in mainland industries and have insufficient experience working with Chinese SOEs, the most participating BRI actor. They also face intense competition from mainland consulting firms and have limited access to government networks, resources, and funding. To overcome these obstacles, Hong Kong surveyors need to build relationships with Chinese state-owned enterprises and collaborate with mainland consulting firms, and access information through Hong Kong official platforms to expand their business network and opportunities.

Strategy 4: Connect with mainland surveying firms or institutes

The Hong Kong professional surveying community can benefit from the BRI by providing high-quality professional services to BRI-participating Chinese enterprises. Hong Kong's surveying service professionals comply with international business practices and are well-acquainted with international standards, making them a trusted service provider. But their participation in BRI projects is limited due to their unfamiliarity with mainland's business culture and practices. To overcome this obstacle, Hong Kong professionals can establish partnerships with mainland

consulting firms or planning and design institutes, enabling them to leverage the mainland companies' network and become sub-consultants for large-scale BRI projects.

The Greater Bay Area (GBA) launch also provides opportunities for partnership associations between Hong Kong surveying firms and mainland consulting firms, and planning and design institutes, helping them penetrate the BRI and GBA markets. The collaboration between Hong Kong and mainland surveying professionals could provide a one-stop-shop for overseas surveying services for mainland companies and parties within the framework of "one country, two systems," ensuring that clients could leverage the advantages of Hong Kong surveyors without worrying about their capability of conducting certain business practices. By reflecting on its weaknesses and improving its performance and competitiveness, Hong Kong surveyors can find a suitable position in the BRI.

We provide information on some branded consulting firms and design institutes from Guangdong province. This information may help Hong Kong surveyors to find potential mainland collaborators for cross-border services.

Table 4. Information of mainland surveying professionals

Name	Cooperation with Hong Kong	Business focus	Nature	Size	Contacts
Guangdong Urban &	Yes	Planning design,	Public institute	400 employees	Tel:020-34399113, Email：jyb@gdupi.com,

Rural Planning and Design Institute		engineering design and consultancy and policy study			Website: https://www.gdupi.com/en.php
Guangzhou Planning Institute	Yes	Architecture design, urban planning, surveying, mapping and project management	Public institute	3000 employees	Tel:020-83887315, Website: https://www.gzpi.com.cn/
Urban Planning & Design Institute of Shenzhen	Yes	Urban planning and design, low -carbon development, urban renewal, transport planning, smart city and public policy	Public institute	1400 employees	Tel: 0755-83788333 Email：updis@upr.cn, Website: https://www.upr.cn/
Zhuhai Institute of Urban	Yes	Urban planning, municipal design,	Public institute	550 employees	Tel: 0756-2651666, Email: zhghy@zhghy.com, Website: http://www.zhghy.com/

Planning and Design		architecture design, and consultancy services			
Shenzhen Investigation and Research Corporation	Yes	Land surveying and investigation, engineering surveying, quantity surveying, urban planning and others.	Private firm	800 employees	Tel: 0755-83328287, Email: Business@sziri.com, Website: http://sziri.cn/
Hechaung Corporate	Yes	Quantity surveying, engineering consultancy, construction project management and others.	Private firm	2800 employees	Tel: +86-755-83048876, Email：szhcjl@sina.com.cn, Website: www.szhcjl.cn
Guangzhou Municipal Construction	Yes	Engineering supervision, quantity	State-owned enterprise	200 employees	Tel: 020-87371285, Email：gzc-sjl@126.com,

Project Supervision Cooperation		surveying, mapping, project consulting, and others			Website: http://www.gz-cjjl.com/
Guangdong Zhongdi Corporate	No	Real estate projects: surveying, planning and design	Private firm	80 employees	Tel: 020 - 82407188, Email：zd@zdpg.com.cn, Website: http:/www.zdpg.com.cn

Strategy 5: Expand the business network through Singapore office

The Belt and Road Initiative (BRI) presents a range of business opportunities for Hong Kong surveyors. In addition to large-scale infrastructure projects, Hong Kong surveyors can find business opportunities in small and medium construction projects burgeoning in Southeast Asian countries. These projects could include shopping malls, office buildings, and other facilities needed to support local development. Some interviewees believe that the Hong Kong surveying firms could explore more business opportunities through BRI countries, by setting up a branch office or subsidiary in Singapore. Singapore is ideal for such an expansion due to its favourable tax policies, straightforward company formation procedures, and convenient access to other countries in the ASEAN region. Moreover, Singapore's central location within Southeast Asia allows easy access to market information and business networks in the region.

Despite concerns about the risks of doing business abroad, collaboration with other professionals from Hong Kong and the host country can help mitigate risks and increase business opportunities. By working together, Hong Kong surveyors can better understand the local market conditions and regulations, identify and mitigate potential risks, and leverage existing relationships and networks. Collaboration can also help to ensure that Hong Kong surveyors are well-positioned to meet the challenges of a rapidly changing and increasingly competitive market. Furthermore, establishing a one-stop shop with Hong Kong and local partners in Southeast Asia could connect clients from the mainland, Hong Kong, and Southeast Asia through deal-sourcing and deal-matching services. This approach could bring in more clients and investors from Hong Kong and China, while the host country provides investment opportunities and local demand.

In Table 5, we summarise the information on three types of business entities in Singapore to help a Hong Kong firm decide the best structure most suited to their particular needs.

Table 5 Comparison of Singapore branch office, representative office and subsidiary.

	Branch office	Representative office	Subsidiary
Legal type	Not a separate legal entity but an extension of the parent company	Has no legal status, a temporary administrative arrangement	Separate legal entity distinct from its parent company

Liabilities	Liabilities incurred by the branch office extend to parent company	Liabilities incurred by the representative office extend to parent company	Parent company can limit liabilities to subsidiary
Entity Name	Must be the same name as the parent company and sign contracts under the parent company name	Must be the same as parent company plus must include 'Representative Office'	Can be the same or different from parent company
Allowed Activities	Limited to the same range of activities as the parent company	Can only conduct market research or feasibility studies. Not allowed to conduct business activities that yield profit.	Can be the same or different from parent company
Validity Period	Registered forever until closed	Has to be renewed every year up to a maximum of 3 years. RO status is evaluated and renewed yearly.	Registered forever until closed
Taxation	Taxed a flat corporate tax rate of 17% as non-resident entity, local tax benefits and exemption not available	Not applicable as representative office cannot generate income	Taxed a flat corporate tax rate of 17% as Singapore resident entity, local tax benefits available
Bank Account	Can open a new corporate bank account in Singapore	Can open bank account in Singapore to run the cost	Can open bank account in Singapore

	or use the same as the parent company	centre operations. Must be funded by the parent company.	
Staff Hiring	No restrictions on hiring local or foreign staff	Chief Representative must be a staff member from the parent company. Can have only five employees.	No restrictions on hiring local or foreign staff
Appointment of Officers	Must appoint at least one local authorised representative	Must appoint a Chief Representative who will relocate from headquarters	Must appoint at least one local resident director
Normal Registration Time	1-2 days	3-4 days	1-2 days
Registration Procedure	1.Name approval: The branch office must have the same name as the parent company. Typically, the name will be approved within an hour. Note that the name cannot be identical to an existing	1. Register with the Enterprise Singapore, a department of the Ministry of Trade and Industry. 2. Registration fees are SG$200 (US$144) and must be paid annually. Evidence of incorporation and the latest audited accounts must	1. Register online with ACRA through Bizfile, an electronic filing system. ACRA will issue a notice of incorporation and the registration number of the company. Bizfile provides a one-stop business facilitation service at the

	company in Singapore or be vulgar in nature. 2.Entity registration: Once all the documents have been provided to the filing agent, the branch office can be registered with Accounting and Corporate Regulatory Authority (ACRA). If the filing agent has all of the documents completed in time, the registration process can take as little as 20 minutes.	be provided upon registration. 3. Representative offices which decide to continue their presence in Singapore after three years should register their operations with ACRA.	point of registration which includes: • Reserving domain names. An application fee of SG$15 (US$11) is applicable for each approved company name. • Registration with the Inland Revenue Authority of Singapore (IRAS) for the goods and services tax (GST). • Activating a Customs Account and application for a corporate bank account. • Purchase of the Business Profile at a cost of SG$300 (US$216). 2. Make a company seal at a cost between SG$40

			(US$29) and SG$70 (US$50). This generally takes between one and three days. 3. Sign up for Employee Compensation Insurance at an insurance agency. This is a mandatory requirement under the Work Injury Compensation Act.

Strategy 6: Take advantage Hong Kong government's platforms

Hong Kong government has proactively supported the BRI and engaged with companies interested in pursuing projects in Belt and Road countries. The Hong Kong Trade and Development Council and the Belt and Road Summit are good platforms for Hong Kong surveyors to expand their business network and access market information. They could help them build connections with authorities and companies in BRI host countries, mainland local government, state-owned companies, and Hong Kong developers and companies.

Hong Kong Trade Development Council Belt and Road Information Platform

The Hong Kong, Trade Development Council creates a platform to assist Hong Kong companies in searching for market information on BRI projects, including projects databases (website: https://beltandroad.hktdc.com/en/project-database) and service providers databases (Website: https://beltandroad.hktdc.com/en/service-providers).

Professionals in surveying may find the annual Belt and Road Summit, which is hosted by the Hong Kong government and the Hong Kong Trade and Development Council (HKTDC), to be an opportunity to grow their business networks, access market data, and establish connections with potential investors and collaborators. Over 280 investment projects in the fields of energy, natural resources, public utilities, innovation and technology, urban development, and transportation and logistics infrastructure are on showcase at the summit, which gathers top government officials, business executives, project owners and operators, investors, and service providers from all over the world. Surveying professionals can attend the event to meet potential clients. This is also a valuable opportunity for them to establish relationships and build connections with BRI host countries, mainland local governments, state-owned companies, and Hong Kong developers and companies.

3. Green BRI brings new opportunities for Hong Kong surveyors

Chinese government proposed the green development of BRI, representing China's efforts to foster progress of BRI projects and establish a more environmentally friendly BRI. While the implementation of the BRI has brought about favourable outcomes such as economic growth and job creation in BRI countries, it has also resulted in unforeseen strains on resources and the environment.

To achieve environmentally sustainable development, it is crucial to undertake detailed planning, engage in improved communication with local communities, and give due consideration to the perspectives of diverse stakeholders during project design. Hong Kong's surveying professionals, possessing extensive expertise in eco-friendly construction and international practices, can play a significant role in advancing the green BRI agenda. Furthermore, the escalating demand for green initiatives in Southeast Asia presents an opportunity for Hong Kong surveyors to expand their influence within this region.

Strategy 7: Tapping the green projects opportunities

The increasing demand for green projects in Southeast Asian countries is a business opportunity for Hong Kong professional surveyors, who can offer their expertise and services to help organisations in Southeast Asia design and develop green projects. A great advantage of Hong Kong surveyors lies in their "know-how" of green project construction. Their expertise and knowledge are essential for ensuring that green projects are carried out accurately and efficiently. By promoting their expertise in surveying practice and project management, Hong Kong professional surveyors can show the value they can bring to Southeast Asia and grab the attention of potential clients and partners in the region. Another key strategy that Hong Kong professional surveyors can use to take advantage of the increasing demand for green BRI projects in Southeast Asia is to help Chinese enterprises understand and comply with local regulations and standards for sustainable development, thus ensuring the implementation of green projects in the region.

1. Introduction

1.1 Background

The Belt and Road Initiative (BRI) provide more business opportunities for Hong Kong planning and development surveying professionals from the Hong Kong Institute of Surveyors (HKIS). China proposed the Belt and Road Initiative (BRI) in 2013, and the initiative has gained wide attention since then (He, 2019). Due to its advantageous geographical location and robust professional service industries, Hong Kong is in a favourable position to reap substantial advantages from the Belt and Road Initiative (BRI) (Liang, 2020; Lin et al., 2019). Land development and infrastructure projects are probably BRI's most intensive actions. The increased need for sustainable land development in developing Southeast Asian countries along the BRI provides unprecedented opportunities for Hong Kong real estate companies to fund such projects or surveying firms to offer professional services for higher financial returns. This signifies the potential of such an initiative in providing market opportunities for Hong Kong investors, developers, and surveying professionals.

However, things are not straightforward regarding Hong Kong planning and development (P&D) surveyors participation in BRI-related projects. It seems that Hong Kong investors and developers have increased opportunities to participate in oversea land development projects since inter-country cooperation diminishes the business barriers. The past few years have witnessed a growth in foreign direct investments from Hong Kong to the construction sector in Southeast Asia BRI countries (Gong, 2019). However, Hong Kong surveying firms, often perceive barriers when accessing the market information of BRI-related projects, connecting with the project stakeholders, or trying to involve

themselves in related projects. This may be because the operational and business model of BRI is still unclear to Hong Kong surveying professionals. BRI does not yet provide concrete channels for Hong Kong surveyors to be recruited for specific projects.

P&D surveyors can involve in various scales of BRI projects, including large-scale infrastructure or town planning projects led by the public sector and small-scale property development projects invested by private developers. With the BRI as an ongoing endeavor in which more projects are being launched, and business opportunities continue to materialise, this research aims to understand Hong Kong's role in BRI, focusing on Hong Kong P&D surveyors to explore the potential market-entry strategies. We aimed to conduct market research in Vietnam, Thailand and Malaysia:

1. What projects has BRI brought to Southeast Asian countries?
2. What is the role of Hong Kong P&D surveyors in BRI-related projects?
3. What is the difference in planning and development control systems between Hong Kong and Southeast Asian countries?
4. What are the key challenges of providing service in the case countries?
5. How can Hong Kong P&D surveyors' business network be expanded in Southeast Asia under BRI?

This research was funded by the Planning and Development Division (PDD) of the Hong Kong Institute of Surveyors (HKIS) in 2020. This study is the first market research for P&D surveyors in BRI countries. This study is based on three case countries from Southeast Asia using both quantitative and qualitative methods. The results reflect the current situation of Hong Kong surveying professionals

in providing services in this region. The research scope is also extended to include the impact of BRI on Hong Kong surveyors from other divisions, such as the Quantity Surveying Division. In summary, this study explores the market need of Hong Kong surveyors in the Belt and Road countries and contributes to the BRI developments.

1.2 Research objectives

This study investigates the opportunities and challenges for Hong Kong P&D surveyors in providing services in Southeast Asian countries under the BRI initiative. The underlying goals of this project are to provide market research and assist the HKIS in formulating effective strategies for overseas business. Our objectives were to provide the following:

1. A systemic review of Belt and Road development in Southeast Asia, focusing on the role of Hong Kong professional surveyors;
2. A detailed comparison of the urban planning systems and development control systems between Hong Kong and the three case countries;
3. Opportunities and challenges of the Hong Kong professional planning and development surveyor industry in providing services in these oversea markets;
4. Strategies for Hong Kong surveyors to conduct business and professional activities in the Southeast Asian countries under the Belt and Road Initiative.

1.3 Structure of the report

This report is divided into seven chapters. Chapter 1 introduces the problem statement and the research aims and objectives. Chapter 2 demonstrates the proposed research methods for achieving the study's objectives. Chapter 3 discusses the BRI development in Southeast Asian countries, with case projects of Vietnam, Malaysia, and Thailand. Chapter 4 reports on the challenges to provide surveying services in Southeast Asia, focusing on a lack of local planning and development knowledge. We then provide an analysis of the urban planning system and development control systems in the case countries, and propose two strategies to overcome such barriers. Chapter 5 discusses the related challenges for P&D surveyors to engage in BRI projects, and we offer strategies for Hong Kong surveyors to access BRI-related projects. Chapter 6 emphasises the future development of BRI and how this trend relates to Hong Kong P&D surveyors. Chapter 7 provides the conclusion of this report.

2. Research methods

2.1 Research framework

This study aims to investigate the market opportunities and challenges under the BRI initiative from the P&D surveyors' perspective. Figure 2.1 illustrates the study's research framework. Both quantitative and qualitative approaches were used in this study, including desktop research, an online questionnaire survey, and semi-structured interviews with Hong Kong professional surveyors.

We first investigated the background of the case countries through desktop research and identified key issues and projects. Collaborating with PDD Council members, we deliberated and determined key topics. Before the survey, the researchers and PDD Council members reached out to potential interviewees, briefing them on the research and ascertaining their interest and availability to partake in the project as informants. Subsequently, we conducted an online questionnaire survey followed by in-depth interviews. The final phase entailed the consolidation of data into thematic categories, analysing it, and composing the present report.

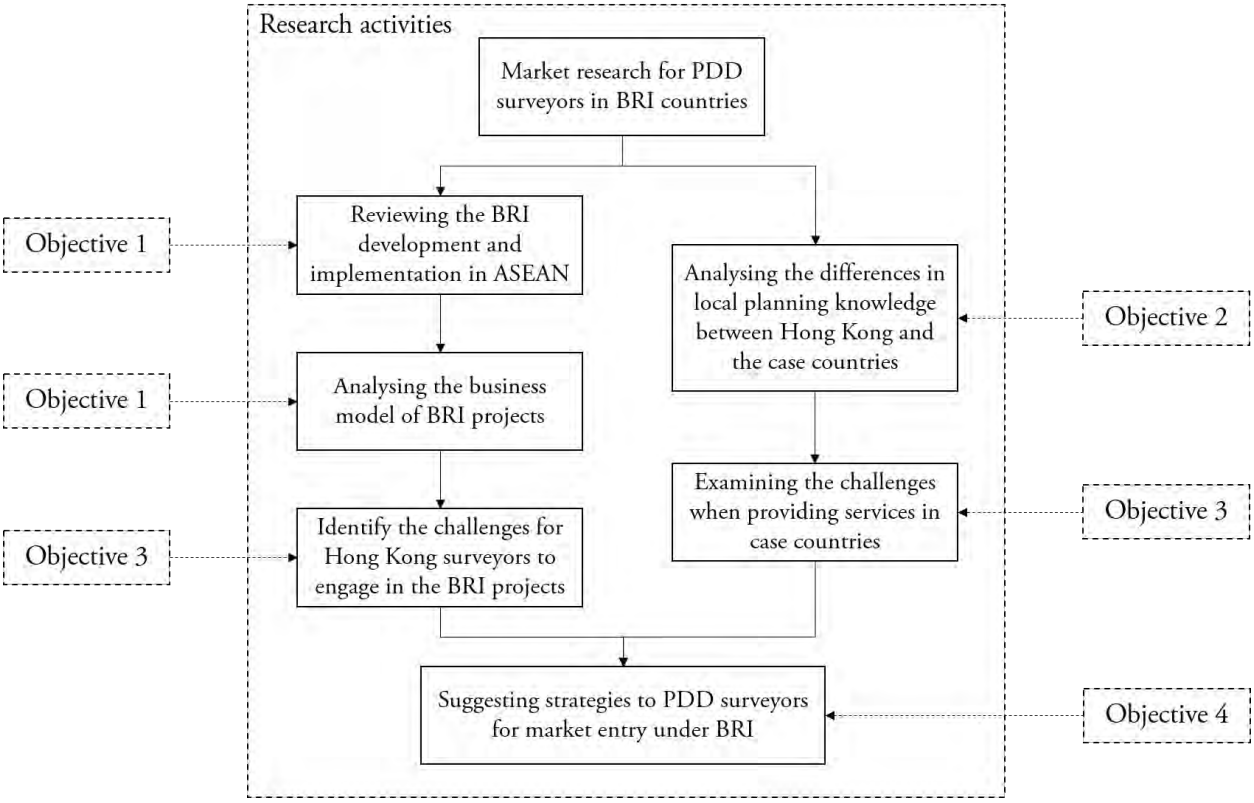


Figure 2.1 Research Framework

2.2 Research methods

The study included both quantitative and qualitative data and analysis, taking a mixed approach. The main data was collected through questionnaire surveys, semi-structured interviews, and desktop research. The information was utilized to determine the main issues and promote the development of specific strategies.

2.2.1 Desktop research

Desktop research is a method of collecting and analysing data and information from existing sources rather than conducting primary research through surveys, experiments, or field observations. This type of research is often used to gather background information, identify trends and patterns,

and gain a deeper understanding of a particular research topic. We conducted the desktop research with a structure review process to form the basis of understanding our research questions. This part of the work prepared us with the knowledge to design the survey questionnaires and formulate interview guides with HKIS surveyors to gather in-depth information and insights.

Search strategy

This study considers several types of literature and information concerning the BRI and urban development in Southeast Asia, including academic publications (articles, books), reports, news, policies, and laws. Our data collection strategy is mainly based on a computerised search.

- **Academic publications**: To ensure comprehensive coverage aligned with the extensive scope of Belt and Road Initiative (BRI) literature, a systematic yet broad method was employed to identify pertinent documents. Multiple sources were utilized for literature exploration, encompassing web-based search tools such as article databases, e-sources, and the University of Hong Kong library's electronic catalog. Furthermore, conventional web search engines like Google Scholar were leveraged to trace cited references and locate publication titles for subsequent investigation within the university library. The search was conducted between 2020 and 2021, using the search terms “Belt and Road”, “BRI development in ASEAN”, “BRI development in Hong Kong”, “Urban planning”, “Development control system”, “Planning law”, “Land law”, “Building ordinance” AND “Land market”, “Real estate market”, “BRI project”, “ASEAN”, “Vietnam”, “Malaysia” and “Thailand”. Reference lists of documents included for full review were also reviewed for additional articles.

- **Reports**: existing reports were identified through three internet databases: the search engine "Google", the government websites, and organisation databases. The search term was similar to the academic literature search. To capture the most up-to-date situation and considering that significant earlier works would likely be cited in reference lists, the publication date was restricted to the last decade, starting from 2010 onwards. When utilising Google, the search was confined to PDF files, and link summaries on the results pages were carefully reviewed. The analysis was limited to the initial 30 pages of results, as it was determined that the relevant information had reached a saturation point by that stage. For government websites, the search was focused on agencies or authorities responsible for BRI, land, and urban development in Vietnam, Malaysia, Thailand, and Hong Kong. For organisation websites, we searched the report on the Asian Development Bank website, the World Bank website, and the ASEAN website.
- **Local and international news**: the primary source of local and international news was Google News. The search was composed of these keywords: "Belt and Road", "land development" or "Urban development" AND "Vietnam", "Malaysia", "Thailand", "Southeast Asia", "ASEAN" or "Hong Kong". The search was repeated with international newspapers such as the New York Times, the Guardian, and Bloomberg. The investigation was limited to the period of 2013-2022. Due to the search source, the news found was written in English, while those in the local language were not included in this study.

- **Policies and laws**: we searched the latest policies and laws on land, planning, building control, foreign investment, and BRI implementation in Vietnam, Malaysia, and Thailand from their government websites.

Inclusion/exclusion criteria

The titles and/or abstracts of the academic publications, reports, and news identified in the first stage were reviewed for inclusion using the following criteria:

- The work should focus on the BRI and its impact on Southeast Asian countries.
- The work should report the development of the urban development system and practice in the case countries.
- The work must be officially published (e.g., peer-reviewed journals, conference proceedings, or official reports but not including working papers).

The exclusion criteria were:

- Published in languages other than English.
- Not directly focused on the BRI concept.
- Not focused on the urban development system or development control system.
- Not focused on the three case countries (Vietnam, Malaysia, and Thailand) or the Southeast Asia
- Published before 2010.

Document selection

Database searches were conducted from August 2020 to September 2022, eliminating the possibility of overlooking any new documents. The search yielded a total of 7628 documents (1438 academic publications, 225 reports, 5878 news articles, and 87 policies and laws) as depicted in Figure 2.2. After removing duplicates (n=3271), 4357 unique documents remained. The research team carefully reviewed the titles and/or abstracts of these 4357 documents and excluded 3929 that did not meet the inclusion criteria. The two authors then conducted a thorough examination of the remaining 428 documents in their entirety. Four articles were subsequently excluded after a comprehensive reading of the full text due to their excessive focus on a specific niche issue or village development.

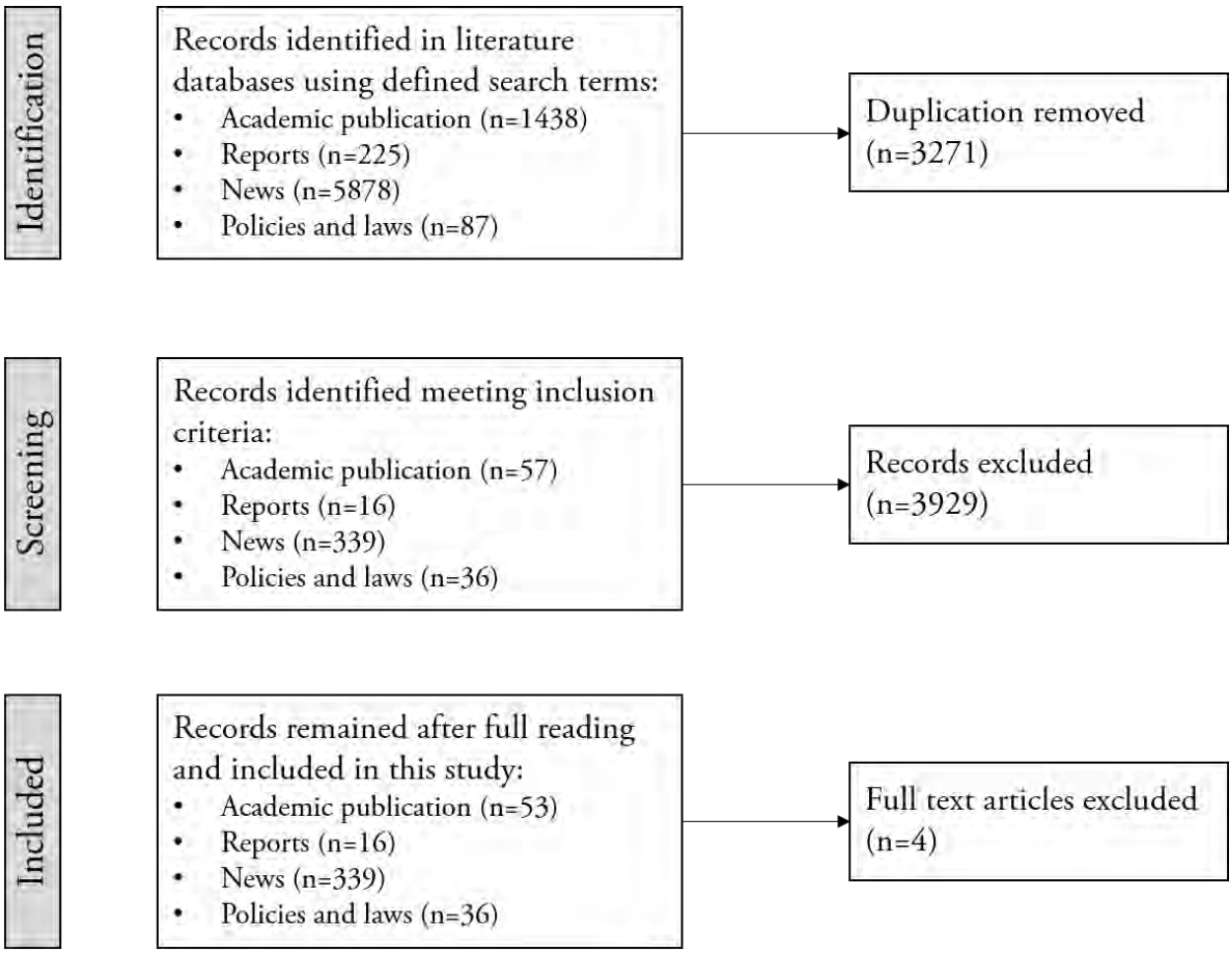


Figure 2.2 Scoping review process

Data extraction and analysis

An extensive analysis of the documents was conducted to account for the variety of documents utilised. Document analysis encompasses the examination of the substance presented in a wide array of documents, including textual content, figures, and tables. Content analysis was employed to scrutinise the documents, wherein line-by-line depictions of study findings or essential information were extracted and recorded in a data sheet. A preliminary coding scheme was developed and applied to each line, followed by a comprehensive assessment and amalgamation of the codes into broader

categories. These categories served as the basis for analysing overarching themes and subthemes, with a focus on discerning the presence, significance, and connections among these concepts, ultimately drawing inferences about the messages conveyed within the texts.

2.2.2 Questionnaire survey

To gather information and insights from Hong Kong surveyors regarding the Belt and Road Initiative (BRI) and its impact on their business network in Southeast Asia, a questionnaire was developed. The questions were based on the theories and knowledge acquired from the desktop research conducted earlier. The research samples comprised 35 Hong Kong surveyors employed in private developers, consulting firms, private funds, and surveying firms.

Before disseminating the questionnaires, draft versions were sent to professional Planning and Development (P&D) surveyors for review and feedback. Their feedback was used to improve the draft questionnaires, ensuring they were appropriate and relevant to the research objectives. The final version of the questionnaire consisted of five parts:

The first part of the questionnaire contained questions regarding whether the respondents had already worked in the Southeast Asian market, and if so, where and what kinds of services they provided. In the second part, the respondents were asked to evaluate their previous working experiences in Southeast Asia or other countries. The third part of the questionnaire required the respondents to identify the difficulties and obstacles they had encountered in Southeast Asia and describe the strategies and methods they used to resolve them. The fourth part of the questionnaire focused on the respondents' opinions about the possible impact of the BRI initiatives on promoting

Hong Kong professional surveying services in Southeast Asia. Finally, the last part of the questionnaire collected the respondents' background information. Samples of the questionnaires are shown in Figure 2.3.

問卷調查：香港測量師學會資助研究項目：香港測量師在一帶一路國家市場潛力調查的研究

Questionnaire for the HKIS Funded Research: Market Research for Hong Kong Surveyors in Belt and Road Countries

香港大學城市規劃與設計系的研究團隊正與香港測量師學會（HKIS）合作進行一項關於香港測量師在一帶一路國家市場潛力調查的研究，旨在探討香港測量師在海外開展工作的優勢及劣勢，以及機遇與困境。現邀請規劃及發展測量師、建築測量師、產業測量師及工料測量師參與此項研究，撥冗填寫以下一份耗時約10分鐘的問卷，所搜集數據將對研究此問題提供寶貴的資料。問卷完成後，您有機會被邀請參與後續訪談，用於收集您對此研究課題更深入的看法及觀點。是次參與純屬自願性質，您可隨時終止參與是項行動。所收集的資料只作研究用途，並絕對保密。本項目研究由香港測量師學會資助（RC1920/042，研究名稱：Market Research for Hong Kong Planning an d Development Surveyors in Belt and Road Countries: Case Studies of Vietnam, Thailand and Malaysia），並已通過香港大學研究操守委員會批准（EA210243)。如有查詢，請聯繫杜小姐 （yydu@connect.hku.hk）。

We are a research team from the Department of Urban Planning and Design, the University of Hong Kong, and are collaborating with The Hong Kong Institute of Surveyors to conduct market research for Hong Kong Planning and Development Surveyors in Belt and Road Countries. The purpose of the study is to collect information from Hong Kong surveyors on their experience, advantages and disadvantages in providing services in these overseas markets, and business and professional development opportunities and challenges. Planning and development surveyors, building surveyors, general practice surveyors and quantify surveyors are all welcome to participate in the survey. The survey is very brief and will take about 10 minutes to complete. You may also wish to agree to a follow-up interview to find out more about you r thoughts and perspective. Participants will not be identified in any report of the completed study. Participation is entirely voluntary. All information will be kept strictly confidential and will be used for research purposes only. This research is funded by The Hong Kong Institute of Surveyors with research ID (RC1920/042， Research Title: Market Research for Hong Kong Planning and Development Surveyors in Belt and Road Countries: Case Studies of Vietnam, Thailand and Malaysia). This research protocol is approved by Human Research Ethics Committee at the University of Hong Kong (EA210243). Please feel free to contact Miss Du (yydu@connect.hku.hk) if you have any inquiries.

姓名 Signature：_____

1.您是否曾經參與东南亞相關業務? Have you been involved in any overseas projects?

☐ 有 Yes ☐ 没有，结束问卷 No,end survey

2.主要在哪個國家（可多選）? Which country have you worked before? Multiple choices are allowed.

☐ 泰國，Thailand ☐ 越南，Vietnam

☐ 馬來西亞，Malaysia ☐ 其他 Other, please be specific:_____

3.您曾參與過多少個海外項目? How many overseas projects have you participated in?

☐ 0 ☐ 1-3 ☐ 4-6 ☐ 7-9 ☐ ≥10

4.您公司在東南亞或其他海外國家的主要業務類別是什麼？（可多選）What types of projects did you work on in Southeast Asia or other foreign countries? Multiple choices are allowed.

☐ 物業發展可行性研究 Development feasibility study
☐ 土地管理 Land administration inputs
☐ 城市規劃申請 Town planning applications
☐ 發展項目管理 Development project management
☐ 項目評估 Project evaluation
☐ 城市規劃相關資訊服務 Town planning
☐ 項目規劃諮詢服務 Site planning
☐ 地產開發 Real estate development
☐ 工程造價管理Management of Construction Cost
☐ 其他 Other, please be specific:_____

5.您公司在東南亞或其他海外國家的主要客戶是（可多選）： Your clients are (multiple choices are allowed):

☐ 當地政府部門 Local government
☐ 當地開發商 Local developer
☐ 香港開發商 Hong Kong developer
☐ 內地開發商 China mainland developer
☐ 其他 Other, please be specific:_____

6. 我認為香港測量師在東南亞市場很有競爭力 I believe Hong Kong surveyors are competitive in Southeast Asian markets.

☐ 非常不同意 Strongly disagree
☐ 不同意 Disagree
☐ 中立 Neutral
☐ 同意 Agree
☐ 非常同意 Strongly agree

7. 我認為東南亞國家與香港的城市開發控制體系方面有很大差異 I believe there are significant differences in development control system between Hong Kong and Southeast Asian countries.

	非常不同意	不同意	中立	同意	非常同意
	Strongly disagree	Disagree	Neutral	Agree	Strongly agree

(1) 土地控制 Land control	□	□	□	□	□
(2) 規劃控制 Planning control	□	□	□	□	□
(3) 建築控制 Building control	□	□	□	□	□

8. 我需要花費較多時間去研究當地土地開發與規劃方面的法律法規才能順利開展工作 I need to make efforts to learn local laws, regulations and policies in urban planning/land development in order to provide cross-border service.

□ 非常不同意 Strongly disagree
□ 不同意 Disagree
□ 中立 Neutral
□ 同意 Agree
□ 非常同意 Strongly agree

9. 請選擇您對以下陳述的評估 Please indicate your evaluation of the following items.

	最消極	消極	中立	積極	最積極
	Most negative	Negative	Neutral	Positive	Most positive
(1) 一帶一路的整體發展 Overall development of BRI	□	□	□	□	□
(2) 一帶一路對香港的影響 BRI' s impact for Hong Kong	□	□	□	□	□
(3) 一帶一路對您公司的影響 BRI' s impact for your company	□	□	□	□	□
(4) 您公司對參與一帶一路項目的意願 The intention of your company to participate in BRI	□	□	□	□	□
(5) 您的客戶對參與一帶一路項目的意願 The intention of your clients to participate in BRI	□	□	□	□	□

10. 我認為一帶一路政策能幫助我公司開拓東南亞市場 I believe my company can leverage the BRI policy to expand Southeast Asian markets.

□ 非常不同意 Strongly disagree
□ 不同意 Disagree
□ 中立 Neutral
□ 同意 Agree
□ 非常同意 Strongly agree

11. 您公司曾與中國國有企業合作過多少次? How many times did your company collaborate with China state-owned enterprises?

□ 0 □ 1-3 □ 4-6 □ 7-9 □ ≥10

12. 您公司曾與內地開發商合作過多少次? How many times did your company collaborate with China mainland developers?

□ 0 □ 1-3 □ 4-6 □ 7-9 □ ≥10

13. 您公司對與國有企業在東南亞市場合作的意願程度是：The intention of your company to collaborate with China state-owned companies in Southeast Asian markets:

☐ 最不強烈 Lowest
☐ 不強烈 Low
☐ 中立 Neutral
☐ 強烈 High
☐ 最強烈 Highest

14. 您公司對與內地開發商在東南亞市場合作的意願程度是：The intention of your company to collaborate with China mainland developers in Southeast Asian markets:

☐ 最不強烈 Lowest
☐ 不強烈 Low
☐ 中立 Neutral
☐ 強烈 High
☐ 最強烈 Highest

15. 您公司的海外項目中在該國家首都開展的項目大概佔比多少？What percentage of projects did your company conduct in the capital city?

☐ <20%　☐ 20%-40%　☐ 40%-60%　☐ 60%-80%　☐ 80%-100%

16. 您公司主要通過哪種方式贏得合約？（可多選）How did your company get the opportunity to work overseas?

☐ 直接委託 Directly selected and appointed by the client
☐ 競標 Tendering, bidding
☐ 第三方介紹 Introduced by the third party
☐ 其他 Other, please be specific:_____

17. 您公司對在海外國家開展項目的經濟收益滿意嗎？Did your company satisfied with the economic returns of the overseas projects?

☐ 非常不滿意 Very dissatisfied
☐ 不滿意 Dissatisfied
☐ 中立 Neutral
☐ 滿意 Satisfied
☐ 非常滿意 Very satisfied

18. 您在東南亞或其他國家開展項目時遇到最大的挑戰是什麼？What have been the biggest challenge when providing services in Southeast Asia or other countries?

☐ 語言交流困難 Difficult to communicate with clients
☐ 難以與當地客戶交際應酬 Difficult to socialize with local people
☐ 難以認識當地政策及法律體系 Difficult to understand planning related policies and legal systems in foreign countries
☐ 難以適應當地生活環境 Difficult to adjust to living in foreign country
☐ 其他 Other, please be specific:_____

19.您採用怎樣的方法應對該挑戰？How did you deal with the challenge?

_____

20. 您認為香港專業協會或政府部門對於開拓海外市場可以提供怎樣的協助? What can the Hong Kong government/institute do to assist surveying companies in developing overseas markets?

☐ 專業協會提供對接海外資源的機會 HKIS or other institutions provide the opportunity to connect with overseas markets

☐ 香港貿發局或發展局聯繫國際加強相關領域合作 HKTDC and HKDB strengthen cooperation in the area of surveying through international connection

☐ 多提供參與高層次國際論壇及展覽的機會 Provide opportunity to attend high-level forum and international exhibitions

☐ 建設國際法律及爭議解決服務中心 Establish a center for international legal and dispute resolution services

☐ 其他 Other, please be specific:_____

21. 您的組別 Your division

☐ 規劃與發展組 Planning and development division
☐ 建築測量組 Building surveying division
☐ 產業測量組 General practice division
☐ 工料測量組 Quantity surveying division
☐ 土地測量組 Land surveying division
☐ 物業設施管理組 Property & facility management division
☐ 青年組 Young surveyors division

22. 您的就職企業/機構 Your employer

_____

23. 您的職位 Your job title

_____

24. 您的工作內容 Your job responsibilities

	<20%	20%-40%	40%-60%	60%-80%	80%-100%
(1) 物業發展可行性研究 Development feasibility study	☐	☐	☐	☐	☐
(2) 土地管理 Land administration inputs	☐	☐	☐	☐	☐
(3) 城市規劃申請 Town planning applications	☐	☐	☐	☐	☐
(4) 發展項目管理 Development project management	☐	☐	☐	☐	☐
(5) 項目評估 Project evaluation	☐	☐	☐	☐	☐
(6) 城市規劃相關資訊服務 Town planning	☐	☐	☐	☐	☐
(7) 項目規劃諮詢服務 Site planning	☐	☐	☐	☐	☐
(8) 工程造價管理Management of Construction Cost	☐	☐	☐	☐	☐
() 其他 Others	☐	☐	☐	☐	☐

25. 您有多少同事是規劃與發展組測量師? How many of your colleagues are HKIS PDD surveyors?

☐ 0 ☐ 1-3 ☐ 4-6 ☐ 7-9 ☐ ≥10

Figure 2.3 Questionnaire sample

Through the questionnaire survey, the research team aimed to gain a deeper understanding of the opportunities and challenges Hong Kong planning and development surveying professionals face when expanding their business network in Southeast Asia under the BRI initiative. The questionnaire was designed to obtain in-depth information and insights from the surveyors, which would inform the formulation of effective strategies to expand their business network and provide services in Southeast Asian countries under the BRI initiative.

The analytical approaches employed were tailored to the specific data collected through the questionnaire survey. To illustrate, frequencies, numerical values, and binary responses (yes/no) from the questionnaire items, covering aspects such as respondent background, overseas work experience, types of overseas projects, client sources, and collaboration with mainland companies, were used to compute percentages. On the other hand, when it came to assessing perceptions and opinions, respondents were asked to evaluate their agreement with the Belt and Road Initiative (BRI) and its impact on expanding business for Hong Kong surveyors using a 5-point Likert scale. Mean scores were

utilized for analysis in this context. The reliability of the scale employed in the questionnaire was evaluated using Cronbach's alpha reliability coefficients, which serve as a popular measure of internal consistency for a scale (Pallant, 2010). The alpha coefficient can range from 0 to 1, with higher values indicating greater reliability in grouping variables. A reliability coefficient exceeding 0.7 is generally considered "good" in reliability testing (Sharma, 1996).

2.2.3 Semi-structured interviews

After the online questionnaire survey, follow-up interviews were conducted with HKIS surveyors who had participated in the survey. These interviews aimed to gain deeper insights into the research subject, validate the research findings, and obtain professional insights from the surveyors. The research team invited over 20 interviewees to participate in the follow-up interviews conducted by face-to-face meetings or online discussions. Between July 2021 and December 2022, 9 semi-structured interviews were conducted to reach information saturation.

Most of the interviewees and their organizations had working experience in Southeast Asian countries, and some were actively exploring market opportunities in Southeast Asia at the time of the interviews. The interviews were conducted with strict rules of confidentiality to ensure that the data collected was used only for research purposes. The interviews were semi-structured, with pre-determined subject areas and open-ended questions covering various topics. The subject areas of the interviews included the key skills required for providing surveying services in Hong Kong and Southeast Asia, descriptions of overseas projects and challenges faced during the implementation

process, advantages and disadvantages of Hong Kong surveyors to provide service in the case countries, and BRI impacts on overseas business opportunities for Hong Kong surveyors.

1. Can you please tell me more about your job?

Supplemented questions:

- How long have you worked as a surveyor? What kind of projects have you been involved in?
- Please tell me more about your company (e.g., company history, structure, leadership team, business scope, project type).
- What skills or knowledge do you think are most important for your job? Why?

2. Can you describe your working experience in Thailand/Vietnam/Malaysia?
   Take a moment and think. Can you describe the most impressive project?

Supplemented questions:

- How long did the project last? How many employees were involved in the project?
- How did you be engaged in the project?
- Who were the key actors implementing the project?
- Has your company achieved the expected returns? Are you still interested in developing local markets there?

3. What are the advantages/disadvantages of Hong Kong surveyors in providing services in the South Asian market? Why?

Supplemented questions:

- What are the key differences in providing planning and development surveying services between Hong Kong and the case country?
- What are the key differences in the development control system between Hong Kong and the country? (e.g., law, development strategy, planning application procedure, land management) Please elaborate on your answer.

- What are the biggest institutional challenges for involving Hong Kong companies in the planning and development surveying industry in the country?
- What are the main conflicts before securing a contract? Please give me an example of the most challenging negotiations.
- What are the main difficulties during project implementation? How were they resolved?
- What's your company's strategy to overcome the above challenges?

4. What do you think about the Belt and Road Initiative (BRI)? Do you agree that Hong Kong surveyors can use the BRI policy to expand the Southeast Asian market? Why or why not?

Supplemented questions:

- Has your company tried to participate in BRI projects?
- Do you know any organisations trying to assist Hong Kong companies in BRI projects?
- Has your company ever collaborated with China state-owned enterprises? What are the benefits of collaborating with them?
- Do you have any advice on developing Southest Asia markets under BRI?

The information of interviewees is shown below:

Table 2.1 List of interviewees and their backgrounds.

Respondent Code	Nature of the interviewees' company	Countries that worked before	Business type	Numbers of involved oversea projects	Time	Venue
A	Hong Kong surveying firm	Thailand, Laos	Residential project	1-3	August 2022	Tsim Sha Tsui

B	Hong Kong surveying firm	Malaysia, Canada, UK	New factory	1-3	August 2022	Tsim Sha Tsui
C	Hong Kong consulting firm	Thailand, Malaysia, Philippine,	Office building, shopping mall	4-6	September 2022	Kowloon
D	Global engineering consulting firm	Vietnam, Thailand, India	Highway infrastructure, and others	1-3	November 2022	Online
E	Hotel Corporate	Vietnam, Malaysia, Thailand, Sri Lanka	Hotel	4-6	November 2022	Online
F	Hong Kong consulting firm	Malaysia, Singapore, Macao	Office building	7-9	November 2022	Online
G	Private fund	Singapore, Vietnam, Malaysia	Shopping mall, residential project	>10	November 2022	Online
H	Hong Kong surveying firm	Malaysia, Australia, Sweden	Office building	4-6	November 2022	Tsim Sha Tsui
I	Hong Kong – based engineering consulting firm	Vietnam, Thailand, Myanmar, Singapore	Factory, residential project	7-9	December 2022	Online

Framework analysis was applied in this study. This technique of analysis is separated into five steps to analyse qualitative data. It's comparable to content analysis in that it starts with summarising and coding data within a theme framework, but it then requires rearranging the data to summarise it so that the study may get a complete picture of the data and investigate the relationships between the codes. Meanwhile, this method's systematic approach allows researchers to identify themes while also more precisely correcting for bias. The five steps of analysis include:

- **Familiarization**: the two authors familiarised themselves with the data by listening to the interview tape and reviewing the field notes. We had a thorough comprehension of the information connected to the research questions.
- **Thematic analysis**: we adopted the inductive coding method. This was a process of looking through the data in-depth to find themes and subthemes that assist in clarifying the research topic, and the coding would continue until no new themes emerged. The coding scheme was produced, including remarks on what is covered by the code and what is not.
- **Indexing**: We allocated the transcript material to each topic and subtheme using cut and paste. The transcripts were separated into manageable sections using codes in this manner.
- **Charting**: we restructured the data according to the indexed themes, making setting up the results summary easier.
- **Interpretation**: we looked into how the notions and typologies came to be and the relationships between them. The insight was then generated from the final stage. It was used to develop a more thorough understanding of the larger picture regarding the opportunities and challenges for surveyors from HKIS to expand the business under BRI.

3. Belt and Road in Southeast Asia

3.1 BRI overview

> "I heard BRI mainly through the news but am not familiar with the specific policies or other details, so I cannot imagine how to connect ASEAN markets through this initiative."
>
> *--Interview with Respondent B from a Hong Kong surveying firm on August 2022*

To unravel BRI's impacts on Hong Kong professional surveyors, we first need to understand the BRI initiative. Generally, BRI includes the Silk Road Economic Belt, which encompasses various overland routes connecting Asia and Europe, and the Maritime Silk Road, which encompasses overseas trade routes linking mainland China to South Asia, Southeast Asia, Europe, and East Africa (Figure 3.1). The BRI used to focused on infrastructure development but gradually expanded its scope to encompass a wide range of sectors, including digital, cultural, arctic, and outer space domains. Originally, the BRI was conceived around six primary economic integration corridors across Eurasia, emphasising enhancements in infrastructure connectivity. Subsequently, the concept of a "Digital Silk Road" was introduced, covering the Internet and its associated networks of fibre optic cables and satellites. In January 2018, China extended the BRI to include the Arctic through the introduction of the "Polar Silk Road," which outlined plans to exploit new shipping routes. Initially targeting developing economies, the BRI attracted 49 countries in 2015, and by May 2022, 150 countries had signed a memorandum of understanding (MoU) with China, including developed economies like Italy and Korea (Hughes et al., 2020). The BRI reflects China's aspirations to assume an active role in

reshaping the economic landscape of the Asia-Pacific region and the global governance structure (Gong, 2019; He, 2019), representing both a comprehensive strategy to address internal economic demands and an opportunity to foster closer ties with neighbouring countries across the region (Callahan, 2016; Huang, 2016; Hughes et al., 2020).

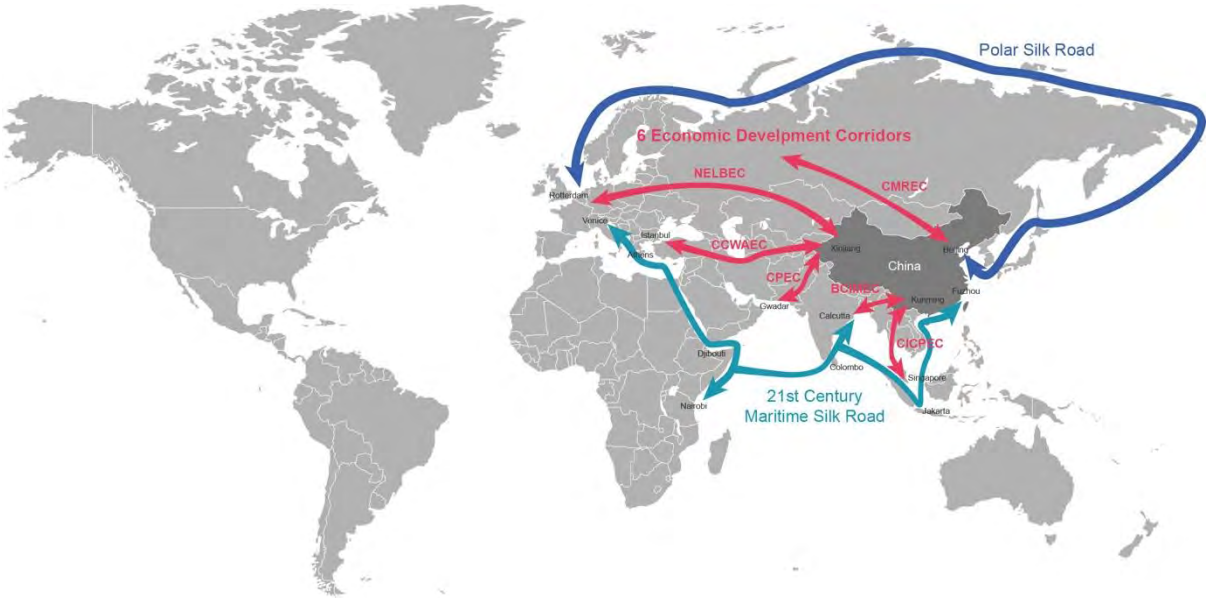


Figure 3.1. The Belt and Road Initiative (Source: Macquarie University, 2020)

BRI has the potential to establish connectivity within the Eurasia region, fostering socio-economic development and offering abundant business prospects. As part of the Initiative, China has financed extensive infrastructure projects through state-owned banks and funds, while encouraging Chinese firms to engage in Foreign Direct Investment (FDI) projects in participating countries (He, 2019). These efforts create a network of transnational economic corridors, multimodal transportation routes, oil and gas pipelines, and power grids, mitigating geopolitical risks associated with single trade routes for both China and participating countries. Multinational and domestic businesses have a keen

interest in monitoring and taking advantage of developing business possibilities resulting from BRI projects given the ambitious scope and breadth of the BRI (Punyaratabandhu & Swaspitchayaskun, 2018). Notably, BRI-related infrastructure initiatives entail extensive planning and execution, necessitating a high demand for professional and advisory services encompassing project management, financial oversight, legal consultancy, and more. Companies engaged in the Belt and Road venture seek the expertise of experienced partners, thereby creating prospects for the professional service sector, including surveying firms. Additionally, China's increased FDI in countries along the BRI route fosters private sector cooperation, bolstering business growth and industry development while supporting route connectivity (Punyaratabandhu & Swaspitchayaskun, 2018). Nonetheless, it is crucial for companies to acknowledge the challenges inherent in conducting business and providing services within specific Belt and Road countries, considering the complexity of the geopolitical landscape, local policy risks, and potential cultural and social conflicts.

3.2 BRI in Southeast Asia

BRI has a global reach and extensive scope, but it is the countries of the Association of Southeast Asian Nations (ASEAN) in Southeast Asia that have played a central role in this initiative (Gong, 2019). Under the BRI, Southeast Asia is the third route of the "Silk Road Economic Belt," connecting mainland Southeast Asian countries such as Laos, Myanmar, Cambodia, Thailand, Vietnam, peninsular Malaysia, and Singapore with China (IEMS, 2020). Moreover, Southeast Asian countries also serve as a crucial link in the second route of the "21st-century Maritime Silk Road." All Southeast Asian countries were initially included in the list of 65 countries along the BRI routes, which later

expanded to encompass all countries willing to participate in the BRI. From an economic perspective, Southeast Asia holds significant importance as a priority region for the BRI due to the ASEAN group's status as China's largest trading partner (IEMS, 2020; Liu & Lim, 2019). In recent years, countries in this area accounted for over half of all trade with mainland China and 44% of FDI from mainland Chinese investors among the BRI countries (ASEAN, 2020). Geographically, Southeast Asian countries, being China's neighbours, have been politically and economically connected with it since ancient times (Zhao, 2019). The Chinese diaspora in Southeast Asia constituted an important part of local communities. Moreover, as a hub, Southeast Asia connects China with South and West Asian countries. The Strait of Malacca, second only to the Strait of Hormuz, is one of the busiest shipping lanes in the world.

Recent years have witnessed the BRI's deep involvement in the development of Southeast Asian countries. The railway link between Kunming in China and Singapore is considered the BRI flagship project, representing the substantial infrastructure investments from the Chinese government to the participating countries (IEMS, 2020). In the Southeast Asian region, Chinese companies have also participated in many construction projects. For example, China has supported Vietnam in constructing Long Jiang Industrial Park (see more details in Section 3.2.2) and cooperated with Thailand to develop the Thai–Chinese Rayong Industrial Zone. Projects in the maritime Southeast Asian region include Malaysia–China Kuantan Industrial Park under the "Two Countries, Twin Park" concept in Malaysia. These are typical examples of China's active involvement in the economic development of Southeast Asian countries following the launch of the BRI. Meanwhile, the Chinese government and multinational companies have also established several economic and trade

cooperation zones in the region, along with the development of economic corridors, through supporting policies from both central and local authorities in China (Shi et al., 2021).

The economic value of the Belt and Road Initiative (BRI) in Southeast Asia has been extensively discussed in previous research. According to Yu (2019), the BRI is fundamentally a national economic development policy that stems from the need to transform the domestic economic model. Du and Zhang (2018) found that the BRI is driven by infrastructure development since a significant increase in Chinese investments in infrastructure in ASEAN following the BRI announcement. Kang et al. (2018) find a positive correlation between Chinese investments and the BRI, with Chinese investments increasing by 46.2% during the post-BRI period of 2014-2015. Some scholars critically argue that the BRI's facilitation of foreign direct investments (FDI) in ASEAN is natural, given its government support, specific focus on locations and trade, which reinforce the existing favourable factors for FDI in ASEAN. These factors include well-established political and economic relations, open markets, geographical proximity, and abundant natural resources (Liao et al., 2021).

Numerous pieces of evidence support that BRI has had a significant impact on the level of Chinese foreign direct investment (FDI) in Southeast Asia. According to Liu et al. (2018), the BRI plays a crucial role in influencing the location decisions of Chinese investments, prompting more firms to invest in BRI countries. Prior to the BRI, Chinese FDI in Southeast Asia primarily focused on seeking access to large and open markets, particularly in Singapore, Malaysia, and Indonesia, where there were cultural affinities due to a significant ethnic Chinese population (Liu and Lim, 2019). However, after the launch of the BRI, Chinese investments expanded to encompass all Southeast Asian countries, with a particular emphasis on mergers and acquisitions by state-owned enterprises (SOEs)

targeting natural resources and strategic assets in countries with less marketization, such as Vietnam (Kang et al., 2018). Comparing the period before the BRI (2010-2013) with the post-BRI era, annual FDI investments by Chinese companies in Southeast Asian countries increased by 85%, and the value of construction projects, which presents employment opportunities for surveyors, grew by 33% (IEMS, 2020). The majority of this FDI is directed towards green industries, including investments in green buildings and new factories (IEMS, 2020). While other forms of FDI, such as brownfield investments and mergers and acquisitions, initially constituted a smaller share, they experienced a nearly four-fold increase after the introduction of the BRI (IEMS, 2020).

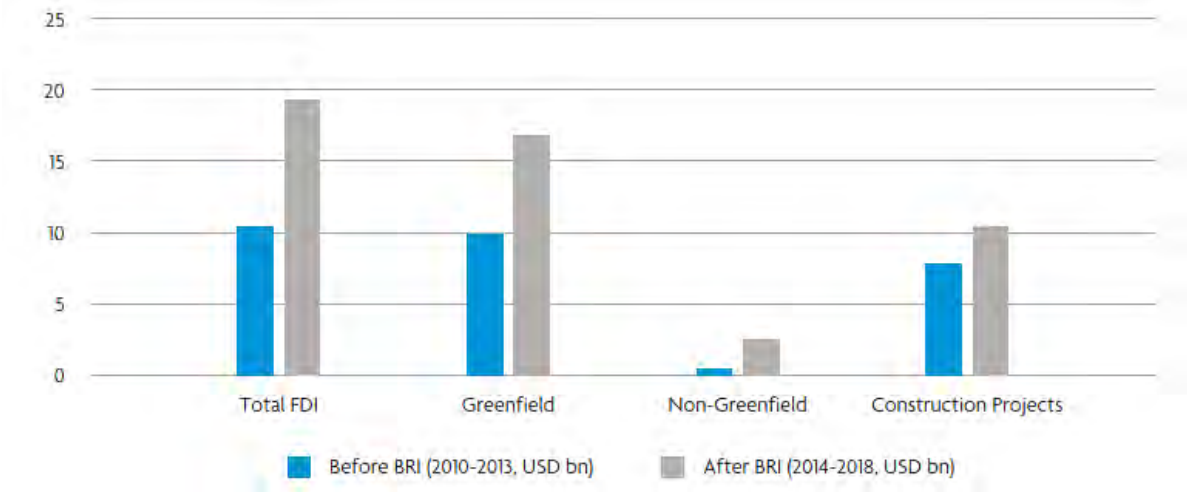


Figure 3.2. Southeast Asian development projects with FDI from the mainland China before and after the BRI (Source: IEMS, 2020)

As greenfield investments composed the majority of mainland Chinese FDI, we begin by introducing the volume of greenfield foreign direct investment (FDI) from mainland China in the three selected countries. It is notable that Malaysia attracted the highest amount of mainland Chinese

FDI both before and after the commencement of the Belt and Road Initiative (BRI). This outcome can be attributed to Malaysia's advanced development status, as well as its favourable governance quality and ease of doing business scores. In the context of the BRI, Vietnam emerged as the next significant recipient of mainland Chinese FDI, benefiting from its sizeable and rapidly expanding market along with relatively sound governance practices. Surprisingly, Thailand experienced relatively lower levels of FDI, despite being the region's second-largest market and second-most developed country. This discrepancy may be attributed to substantial inflows of FDI from Japan and South Korea, aimed at supporting Thailand's transition to higher technology industries. Consequently, the demand for FDI from mainland China may have been overshadowed by these alternative investment sources (IEMS, 2020).

Moving on to construction projects, which are closely tied to the work of PDD surveyors, we now present the distribution of mainland Chinese construction projects across Southeast Asian nations. Once again, we observe the highest volume of construction projects in Malaysia, with a doubling of the previous numbers. However, the patterns differ for the remaining two countries in terms of FDI. Notably, there was a significant increase in construction projects in Thailand, albeit from a smaller initial base (with a tenfold increase) (IEMS, 2020). Conversely, Vietnam experienced a substantial decline in construction projects from a previously high level (IEMS, 2020). It is worth noting that construction projects exhibit greater year-to-year variability compared to FDI due to the substantial capital disbursements involved in infrastructure development.

Although BRI could benefit Southeast Asia economically, implementing BRI projects has encountered multiple challenges. First, many projects fall behind schedule (Liu & Lim, 2019;

Punyaratabandhu & Swaspitchayaskun, 2018). These projects are mainly mega transport infrastructure such as Kunming–Singapore rail network and Malaysia–Singapore high-speed rail. Second, many countries are worrying about debt because of huge infrastructure investments. The new Malaysian government had suspended several infrastructure projects, such as pipeline construction and the East Coast Rail Link, considering Malaysia's poor financial structure. Third, most construction projects might not have directly benefited the local economy and people (Liu & Lim, 2019). The Forest City construction project in Johor, Malaysia is a case in point, which is discussed in detail in Section 3.2.1.

The challenges revealed that the implementation of BRI projects in Southeast Asia is a complex process, requiring reaching a balance of local and foreign investors' needs. On the one hand, the controversy of such projects creates barriers for Hong Kong PDD surveyors to engage in these construction projects. Hong Kong surveyors are often unable to access BRI-related market information before the launch of specific projects. On the other hand, Hong Kong surveyors with international backgrounds and working experiences have an advantage of such cross-border services as they can deal with disputes with local stakeholders and understand how to fulfil local needs. In sum, the development of BRI in Southeast Asian countries brings excellent opportunities and challenges not only to the recipient countries but also to Hong Kong professional PDD surveyors.

3.2.1 BRI project in Malaysia

Malaysia has emerged as a significant recipient of foreign direct investment (FDI) from mainland China. Starting from 2008, Malaysia has become one of the major trading partners of China

in Southeast Asia (World Bank, 2021). In 2019, trade between Malaysia and mainland China accounted for 17.2% of Malaysia's total business, amounting to a value of US$73.94 billion (RM315.9 billion) (World Bank, 2021). This increase in trade could be attributed to the trade tensions between the United States and China, as Malaysia benefitted from import substitution due to its well-established production networks in industries such as liquefied natural gas and communication equipment. The close relationship between China and Malaysia has further facilitated the growth of trade and investment flows between the two countries (Khin et al., 2019).

Chinese firms maintain an important position in Malaysia's construction sector, accepting contracts for several public and private projects, including infrastructure development and residential and commercial real estate. The Construction Industry Development Board stated that, in 2015, Malaysia granted 18.7% of its building projects to foreign contractors, totalling US$6,467 million (IEMS, 2020). Among these contractors, Chinese companies took the lead with projects worth 8 billion RMB. The value of construction contracts received by foreign firms experienced a significant surge in 2017, approaching 37% of the total (US$20,754 million) (IEMS, 2020). However, there was a notable decline in 2018 (Khin et al., 2019). Currently, large-scale residential and commercial developments, as well as other development projects, are being constructed in Malaysia led by Chinese companies. Additionally, plans are being made to build a high-speed rail link between Singapore and Kuala Lumpur. Forest city is one of the most prominent Chinese projects in Malaysia, which is a gated community designed and constructed by a Chinese large real estate developer, Country Garden Holdings (Moser, 2018).

Forest City exemplifies the challenges Chinese companies face when doing business overseas under BRI. The project also shows whether and how Chinese investment could align with the policy goals of host countries and fulfil a grand strategy to achieve hegemony in Southeast Asia (Moser & Avery, 2021). The complexity of the local policy risks, local needs, and potential cultural and social conflicts create uncertainty. A connector (e.g., surveying experts with international experiences) between Chinese investors and local actors is thus essential to guarantee the implementation processes of master-planned mega-projects (Moser, 2018).

Forest City is a large-scale residential development project situated on four islands at the southern tip of the Malay Peninsula, facing Singapore across the Johor Strait. It is located within the Iskandar Malaysia Special Economic Zone (SEZ), which is Malaysia's second economic development region following the Multimedia Super Corridor near Kuala Lumpur (Figure 3.3). While Forest City is not unique in its concept of creating a new "city" from scratch, it is part of a larger trend of over 150 similar projects planned or underway primarily in emerging economies since the 1990s, with China alone hosting hundreds of such developments (Packierisamy et al., 2015). However, what sets Forest City apart is that it is constructed by a Chinese company with the intention of housing Chinese nationals in a foreign country. This distinguishes Forest City in terms of its scale and strategic location, reflecting China's increasing global influence and its approach within the BRI practice (Moser, 2018).

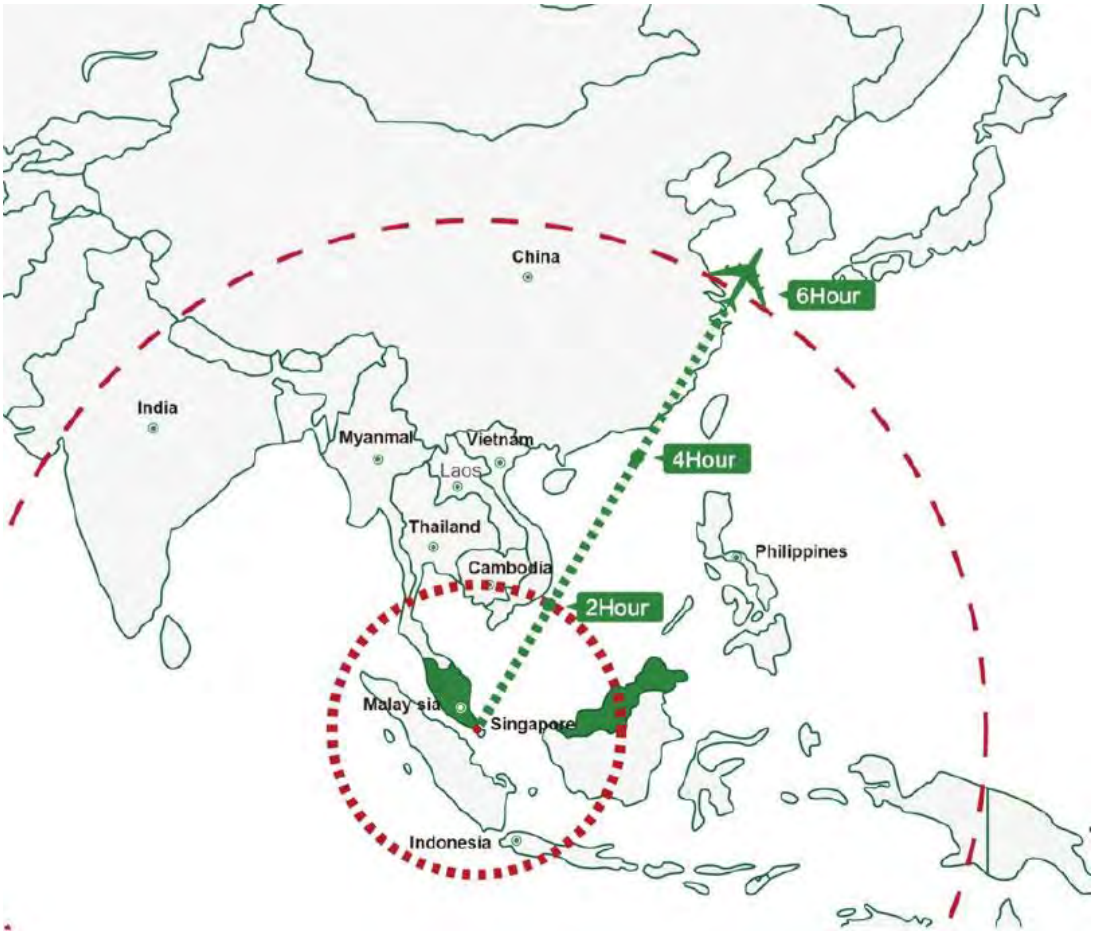


Figure 3.3 Locate of Forest City (Source: Forest City website, accessed in October 2022)

However, the support of this project among residents has been inconsistent due to various factors. First, the developer's insufficient commitment to environmental protection has been a concern. The land reclamation activities at Forest City have resulted in increased sedimentation, altered water currents, and exacerbated pollution, adversely affecting the livelihoods of local Malay and Indigenous Orang Asli villagers who rely on fishing and mussel farming (Serina, 2017). Although Country Garden has incorporated a "green everywhere" aesthetic within the new city, there has been limited effort to incorporate local flora or provide spaces like kitchen gardens or fruit trees that hold cultural

significance for the Malay population and villagers in the vicinity (Moser & Avery, 2021). Second, Forest City has faced controversy due to its sale of "freehold" properties, deviating from the common practice of offering 99-year leases to foreign buyers in Singapore and Malaysia. Foreign investors also had the opportunity to expedite their acquisition of permanent resident visas through Malaysia's "Malaysia My Second Home" program after purchasing property in Forest City. Moreover, Forest City's unique status as a "Special Economic Zone within a Special Economic Zone" provides investors with additional tax incentives, further contributing to the controversy surrounding the project (Moser, 2018). Finally, the company was criticised for not hiring Malaysian workers and injecting more foreigners into Malaysia (Moser & Avery, 2021). Such labour force practice had aggravated not only local unemployment conditions, but also caused social issues. All these make the project run behind schedule, and the investor might not be able to receive expected economic returns. This suggests a need for involving experts and consultants when Chinese companies “go out” to conduct business.

3.2.2 BRI project in Vietnam

Vietnam and China have a strong economic relationship. Mainland China has been Vietnam’s largest trading partner for over a decade, and Vietnam has become one of the biggest trading partners of China among Southeast Asian countries. Bilateral trade in 2021 reached US$612 billion (World Bank, 2022). Vietnam was China’s 5th most important export destination and 10th most important source of imports. China's investments in Vietnam between 1991 and 2010 were mostly focused on the consumer and light industrial sectors (IEMS, 2020). After the announcement of BRI, China's FDI

in Vietnam has shifted strongly towards real estate, infrastructure, manufacturing, energy, and the digital economy (IEMS, 2020).

Among the various projects under the Belt and Road Initiative in Vietnam, the Longjiang Industrial Park stands out as a prominent example of an overseas economic and trade cooperation zone established by China (Zhao et al., 2020). Situated in the Tan Lap 1 commune, Tan Phuoc District, Tien Giang (Figure 3.4), the Longjiang Industrial Park spans an area of 600 hectares and is slated for a 50-year construction period. Its planning, development, and operation are undertaken by Zhejiang Qianjiang Investment Management Corporation. According to the "Report on the Construction and Development of China Overseas Industrial Parks under the Belt and Road Initiative" (2018), the Longjiang Industrial Park has achieved an impressive evaluation score of 88.21, securing the top ranking. As a result, it has emerged as a significant platform for fostering bilateral industrial cooperation and facilitating economic and trade dialogues between China and Vietnam. Notably, the Longjiang Industrial Park serves as a successful model for small and medium-sized Chinese enterprises to collectively expand their presence overseas, a concept often referred to as "going abroad in groups" (Ye et al., 2020; S. Zhao et al., 2020). The park places considerable emphasis on attracting new industries and nurturing traditional sectors where Vietnam holds a competitive advantage, such as auto and motorcycle parts, electronic machinery, and food. Conversely, it avoids introducing enterprises that exhibit high pollution levels, substantial energy consumption, low added value, or limited technical content.

Figure 3.4 Locale of the Longjiang Industrial Park (Source: Long Jiang Industrial Park website, accessed in October 2022)

As the job nature of PDD surveyors focuses on town planning and property surveying, we mainly discussed the construction experiences of this project. According to the Detailed Construction Plan from 2007, the Longjiang Industrial Park occupies a total area of 600 hectares, with 540 hectares designated for industrial use and 60 hectares for residential services (Ye et al., 2020). The park primarily consists of industrial land, covering 357.36 hectares, which represents 66.18% of the park's total area. Infrastructure and public services are planned to be developed with the concept of "nine supplies and one level," which includes amenities such as ATM machines, telecommunication stations, substations, water supply plants, sewage treatment plants, and other facilities to ensure efficient park

operations (Ye et al., 2020). However, after the 2007 plan was approved, it faced challenges in land acquisition, causing subsequent adjustments and the release of the 2015 version. The two versions differ in three main aspects (Ye et al., 2020; S. Zhao et al., 2020). Firstly, there have been significant changes in the land-use structure. The 2015 version reduced the land allocated for water areas, greeneries, roads and so on, while increasing the land designated for industry. Secondly, notable spatial pattern changes occurred, which included relocating the entrance to the northwest and removing the pool square at the entrance. Lastly, the production land area was divided into smaller patches, transitioning from 12 large plots to 139 smaller patches. This change aimed to enhance the park's flexibility in attracting investments and accommodating enterprise settlements.

The Chinese investor also faced challenges during the construction of the industrial park as well. Longjiang Industrial Park was initially scheduled to be completed in three phases by 2018. In that year, the land area used for the park's development amounted to approximately 420 hectares (Zhao et al., 2020). The implementation rate of the original plan reached around 70%, falling short of the expected progress. The delay in plan execution was primarily influenced by the international economic situation and the relationship between China and Vietnam. These factors caused fluctuations in the implementation process, leading to significant changes in the scale of investment attraction and the number of participating enterprises. Despite facing challenges such as delays, imbalanced profits and losses, and various other issues, the development and construction persevered for over a decade. As a result, the park has transitioned from the planning and construction phase to the stage of operation and management.

According to Zhao et al. (2020), Longjiang Industrial Park demonstrates positive outcomes, including the sustained profitability of operators, consistent tax revenue for host governments, ongoing efforts to protect and enhance the regional environment, and the generation of job opportunities for residents. These accomplishments have led to significant overall benefits, effectively balancing the output and capacity of planning implementation. However, the park also encounters challenges such as delays, imbalances in profit and loss, varying degrees of objective achievement, a lack of a refined planning control system, and insufficient coordination between the park and urban planning (Ye et al., 2020). To enhance the development of the industrial park and economic zone, it is recommended that Chinese companies receive clear guidance regarding planning formulation, implementation evaluations, and the integration of sustainable development principles. This could be achieved by engaging professional service providers such as PDD surveyors.

3.2.3 BRI project in Thailand

Thailand has emerged as an appealing destination for investments from mainland China under the Belt and Road Initiative (Punyaratabandhu and Swaspitchayaskun, 2018). The implementation of the Go Global strategy during the early years of the century facilitated a significant influx of Chinese investments into Thailand. In recent times, mainland China's role in Thailand's foreign direct investment (FDI) inflows has become increasingly prominent. In 2018, mainland Chinese companies submitted 126 investment project applications worth US$1.55 billion, positioning mainland China as the third most significant source of FDI for Thailand (IEMS, 2020). During the first half of 2019, mainland Chinese companies accounted for the second largest source of FDI projects in Thailand,

with 81 applications to the Board of Investments valued at US$816 million (IEMS, 2020). Notably, the actual influence of mainland China might be even more substantial as several Chinese companies invest through subsidiaries based in Hong Kong. In 2018, Hong Kong investors filed 42 Board of Investments projects amounting to US$582 million, and in the first half of 2019, Hong Kong companies utilized 32 Board of Investments projects valued at US$256 million (IEMS, 2020). This surge in FDI flows has also had a positive impact on trade between the two countries. According to the Chinese Ministry of Commerce (2021), the bilateral trade volume between mainland China and Thailand reached US$80.1 billion in 2020, marking an 8.7% increase compared to the previous year.

However, regarding the BRI projects, the selection of projects is limited, and the progress has been slow, especially when compared with BRI projects in countries such as Malaysia or even Indonesia (Xing, 2019). So far, the Thai government has agreed to cooperate with the Chinese government in infrastructure construction, such as China-Thailand Highway and China-Thailand high-speed rail. One of our interviewees has participated in the high-speed rail project:

> "I am a surveyor from a global service company in building critical infrastructure in transport, water, energy, and telecommunications. Our transport team has participated in the rail designing in the past few years."
>
> *--Interview with Respondent D from a global engineering consulting firm in November, 2022*

Thailand took years to negotiate high-speed rail projects with China. In May 2014, following the military junta's seizure of power, a decision was made to proceed with the construction of four railway lines, both high-speed and medium-speed (Figure 3.5) (Lauridsen, 2020). The Northeast-

South line, which involved Chinese state-owned enterprises, was eventually scaled down to a medium-speed railway. Towards the end of 2014, Thailand and China reached a memorandum of understanding outlining the construction of an 873-kilometer MSR line. This railway would connect the deep eastern seaport of Map Ta Put to the northeastern city of Nong Khai, passing through Bangkok (Lauridsen, 2020; Ploywarin et al., 2018). In March 2016, Thai Prime Minister General Prayuth Chanocha announced that Thailand would assume full ownership of the project. The initial stage, spanning 253 kilometers from Bangkok to Nakhon Ratchasima, was approved in September 2016. By June 2017, Prayuth stated that the remaining issues pertaining to the project had been resolved using the decree powers of the military junta. As per the agreement, Thailand would provide the financing and most of the materials, while China would contribute expertise and oversee the project's execution. The first Sino-Thai contracts, focusing on design and technical advice, were signed in September 2017 (Lauridsen, 2020).

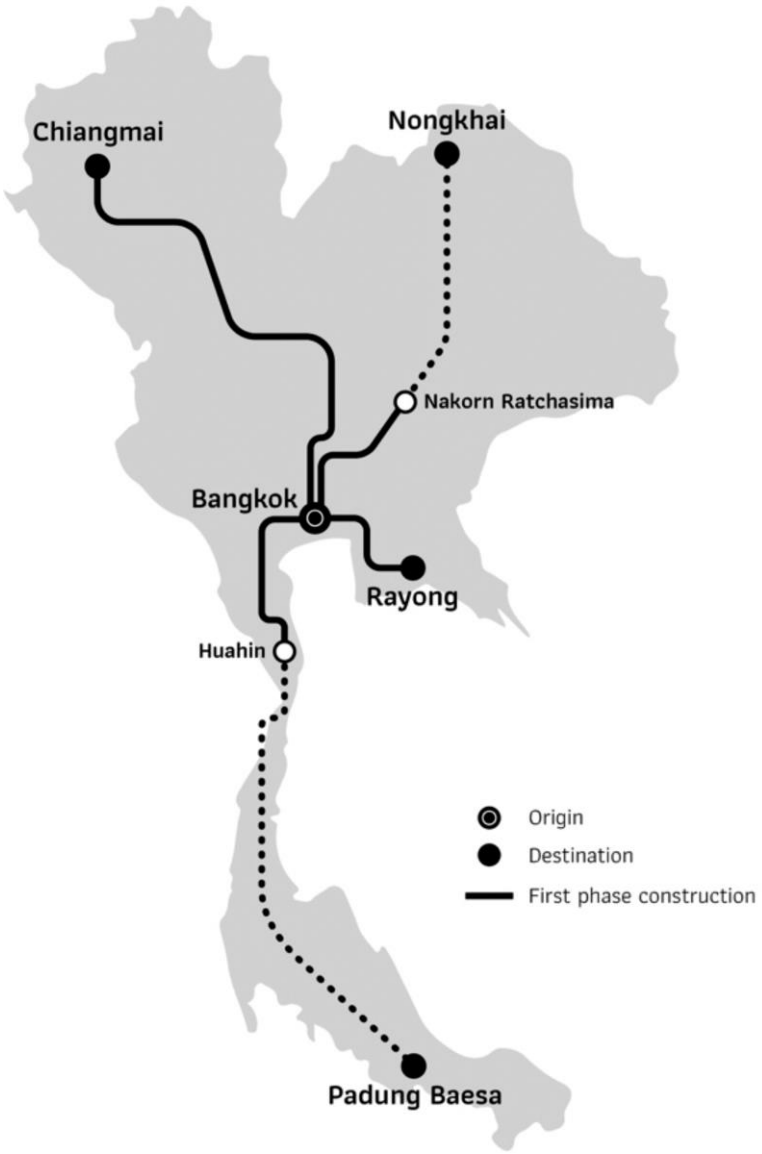


Figure 3.5 Thai's proposed high-speed rail projects (Source: Lauridsen, 2020)

Thailand's north-eastern high-speed rail project is the focus of China's BRI outreach. Yet the project has proceeded at a snail's pace, finishing only a 3.5-kilometer portion in six years (Ploywarin et al., 2018). This is not because either of Thailand's feuding coalitions opposes cooperation with China, but because the long-standing political contestation motivates opponents to criticise the

efficiency of the project (Renliang, 2016). As a result, Thai elites often balance performance-based legitimation and the particularistic narrative of national autonomy to mitigate potential criticism. The former necessitates a higher level of engagement with China. The latter, however, requires that the government cautiously cooperate with the Chinese government. Adding to this is the junta's lack of procedural legitimacy, which leads to fear and hesitation among the bureaucracy, thus leading to slow implementation of the high-speed rail project (Renliang, 2016).

Unlike the other two case projects in Malaysia and Vietnam, the high-speed rail project poses a different challenge for the implementation of large-scale infrastructure projects under BRI. The intertwined influences between domestic politics and bi-national relations added uncertainties to these BRI projects. Under this circumstance, a pure Hong Kong-based surveying service firm seems challenging to engage in such projects. Chinese investors tend to select familiar mainland service firms, and the Thai government prefers global companies.

3.3. Cooperation between Southeast Asia and Hong Kong

Hong Kong has unique strengths in its cooperation with Southeast Asia. Hong Kong is located in the heart of the Asia-Pacific region, facing Southeast Asia and backed by the Chinese Mainland. It is an essential hub of international transportation and a shipping centre of the world, with a leading status in logistics and shipping (Hong Kong Trade and Industry Department, 2022). As the freest and the most open economy in the world, Hong Kong is also an international centre of trade and commerce, boasting good infrastructure and a sophisticated market mechanism. Such unique strengths provide strong support for establishing bilateral relations with Southeast Asia.

ASEAN and Hong Kong are economically complementary, which serves as the foundation for the extensive cooperation between the two sides. Southeast Asian countries are emerging economies with rapid growth, vast markets, rich resources, and low labour costs. Hong Kong's investment in ASEAN mainly covers labour-intensive sectors such as textile, food, and rubber. And with its highly developed service industry, Hong Kong is investing increasingly in sectors with higher added values, such as services, finance, tourism, and real estate. According to the ASEAN Investment Report (2021), Hong Kong emerged as the fourth largest investor in the ASEAN region in 2018, contributing to 7% of the total foreign direct investment (FDI), which was comparable to the direct investments from mainland China. Notably, Hong Kong's FDI in Southeast Asian nations experienced a significant 83% increase between 2019 and 2020 (ASEAN Investment Report, 2021). The primary destinations for Hong Kong's FDI among the three countries examined in the report were Thailand and Malaysia. In terms of trade, ASEAN constituted 16% of Hong Kong's imports, 16.9% of domestic exports, and 7.7% of re-exports, establishing ASEAN as Hong Kong's second largest trading partner after mainland China (Hong Kong Trade and Industry Department, 2022).

3.4 The role of Hong Kong surveying professionals

Hong Kong’s professional service sector plays a positive role in building ties and cooperation with BRI countries. The surveying field is an integral part of the "professional services industry," which constitutes one of the key sectors in Hong Kong's economy known as the Four Pillar Industries (Gong et al., 2021). Since the initiation of the Belt and Road Initiative (BRI) in 2013, concerns have arisen globally regarding cross-border projects. Hong Kong, being a longstanding link between China and

other nations, has amassed substantial practical experience within its professional services sector over the years (Lin et al., 2019). This chapter delves into the role of Hong Kong's professional surveying services within the context of the BRI's development in Southeast Asia. The subsequent sections outline the evolving perspectives on the involvement of Hong Kong's professional services in the BRI, categorized into three distinct phases (Li et al., 2020).

3.4.1 Phase 1: the “super-connector”

The initial phase pertains to the earlier years of the BRI initiative, approximately from 2013 to 2016, during which the Chinese government, the Hong Kong government, and various business stakeholders contemplated the framework of the BRI policy and Hong Kong's role within it (Lin et al., 2019). This phase reached its culmination when the Hong Kong government, after several years of promoting the concept, officially designated Hong Kong as a "super-connector" in the Chief Executive's Policy Address in May 2017 (Figure 3.6). This recognition highlights Hong Kong's distinctive strengths, including proximity to the Mainland market, internationally commercial and legal systems, as well as robust market-oriented institutions and professional services.

Figure 3.6 The "super-connector" role of Hong Kong under BRI (Source: HKTDC, accessed in July 2022)

The role highlights the traditional responsibilities of Hong Kong as a gateway between China and the global community, while also emphasizing several key aspects for future growth within the context of the BRI. These include the expansion of dispute resolution facilities. The Hong Kong government actively encouraged the business sector to assume a prominent position in bridging mainland and international markets, particularly leveraging its status as an international financial centre (Li et al., 2020). However, there was a mixed sentiment within the Hong Kong community, as individuals generally struggled to see how they could personally benefit from the initiative (Li et al., 2020).

3.4.2 Phase 2: the "soft power hub"

Following a period of implementation, concerns began to arise regarding several Chinese investment ventures in BRI nations, primarily due to financial strains, political and legal uncertainties, and challenges in garnering public approval within the host countries (Man & Chan, 2020). The financing aspect has become progressively unsustainable for both China and the host nations, given the immense scope of the infrastructure projects under the BRI and the extended period required for returns. Certain large-scale infrastructure projects have faced allegations of burdening BRI countries with debt, particularly impacting those with fragile financial systems and inadequate governance structures.

Simultaneously, ineffective project execution and communication have contributed to the inability to garner local community support, as discussed in Section 3.2.1 of the Forest City project (Gong et al., 2021). This raises concerns regarding the extent to which BRI projects are truly benefiting the local population. For example, the opposition faced by the Forest City project in Malaysia, stemming from environmental and legal concerns, exemplifies the significance of conducting thorough feasibility studies and engaging in sufficient consultations during project planning and design. These identified risks have underscored the potential role of Hong Kong professionals. In terms of environmental sustainability, Hong Kong has been relied upon to provide skilled surveying experts well-versed in international regulations and professional service providers capable of assisting Chinese companies in enhancing the performance of BRI projects. Furthermore, **the central government has expressed a desire for Hong Kong professionals to elevate the planning, surveying, and engineering standards of Chinese construction projects. This could be achieved by improving**

the assessment of project feasibility beforehand and enhancing oversight during the construction process.

Boasting a strong talent pool, professional services of an international calibre, and a sound legal system in line with international standards, Hong Kong government has a bright prospect in building an international professional platform as one of the key BRI strategies (Li et al., 2020). Due to the significant potential, there are strong expectation for the involvement of Hong Kong professional services in the BRI, and many Chinese stakeholders have pushed Hong Kong to take a more active role. However, certain interviewees have expressed frustration, citing a perceived "lack of enthusiasm in exploring the BRI market" and "insufficient understanding of Chinese BRI policies" (Respondent C, E, G, and I, 2022). The reality is more complex, as even the Hong Kong branches of Chinese state-owned enterprises have had limited collaboration with Hong Kong surveying professionals. Hong Kong surveyors are rarely involved in the early stages of project decision-making and often contribute primarily to the technical aspects of project execution.

3.4.3 Phase 3: strengthened influence due to the Greater Bay Area scheme

To some extent, the exploration of pathways to enhance Hong Kong's involvement in the BRI prompts a deeper discussion on the Guangdong-Hong Kong-Macao Greater Bay Area (GBA) initiative (Lin et al., 2019). The GBA is intended to fulfil two strategic roles: it will be a priority region for Hong Kong to improve its relationship with mainland China and it will act as a catalyst for increasing Hong Kong's influence over BRI implementation and broader national development (Li et al., 2020). Hong Kong enjoys a higher strategic status in the overarching policy framework, with the GBA playing

a significant role. The GBA's vision capitalizes on its unique characteristics of "one region, two systems," where institutional differences between the two systems can drive innovation and reforms (Li et al., 2020). Through close cooperation between Guangdong and Hong Kong, the GBA can enhance its soft power and facilitate institutional reforms.

Many still perceive the GBA as a comprehensive plan for regional economic integration and growth. From this perspective, the unrestricted movement of production factors is seen as crucial for achieving efficient allocation. However, the presence of diverse systems and institutions in Hong Kong, Macao, and the nine mainland Chinese cities creates obstacles to seamless integration, which need to be mitigated or eliminated (Li et al., 2020). Therefore, the consolidation of the GBA strategy focuses on harnessing the unique institutions and soft skills found in Hong Kong and Macau. The current vision emphasizes Hong Kong's role within the GBA, considering it as a platform for implementing institutional reforms and fostering innovation, capitalizing on the distinctive advantages of the "one region, two systems" model.

Our interviewee believes that Hong Kong professional surveyors could have an active role to play in the BRI construction under the GBA scheme (Respondent A, 2021). First, countries along the Belt and Road have strong demand for town planning and land development, which Hong Kong surveyors can provide. Second, Hong Kong's surveying services are aligned with international standards, as illustrated by international companies in the city and mutual recognition agreements with worldwide countries. In promoting the BRI strategy, Hong Kong's surveying service industry on par with international standards can assist Chinese Mainland enterprises "going global" in project management, architectural planning, engineering surveying, and so forth. Third, Hong Kong's

surveying professionals have rich international experience. They are familiar with the cultural, economic, investment, and trade conditions of different countries. And they have extensive networks of contacts around the globe. Their advantages can be fully brought into play and be aligned with the GBA and BRI, thus have been expected to play a positive role by both Hong Kong and mainland China.

Furthermore, Hong Kong's professional services have the potential to enhance soft power by promoting Chinese "institutions and norms," which extends beyond the focus on physical connectivity emphasized in infrastructure development discussions within the BRI. China aims to have a say in shaping international standards, but there are significant obstacles to overcome. Hong Kong surveyors possess a potential advantage in transferring Chinese standards to BRI countries (Gong et al., 2021). Specifically, the mutual recognition of professional licenses under the GBA scheme allows for the transfer of Chinese standards to Hong Kong (Gong et al., 2021). During this process, Hong Kong assimilates Chinese standards and adapts them to be more acceptable to foreign companies and nations. Leveraging its established reputation in the global community, Hong Kong's professional surveyors can advocate for the adoption of Chinese standards in the implementation of BRI-related projects through the practice of knowledge transfer.

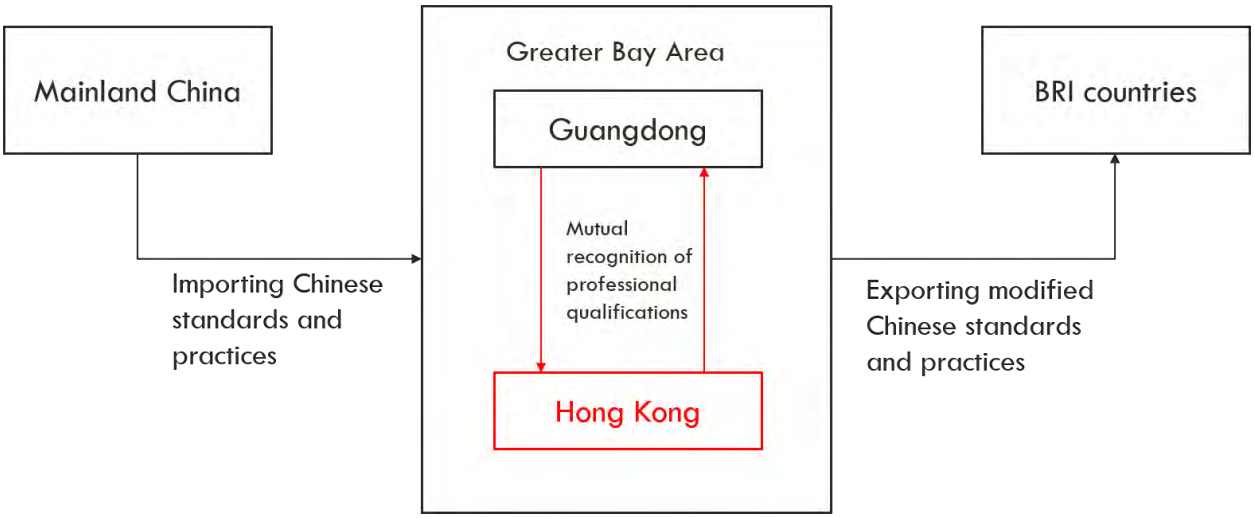


Figure 3.7 Hong Kong's role in transplanting Chinese standards to BRI countries (Source: Gong et al., 2021)

The governments of Hong Kong and mainland China, along with stakeholders in BRI destinations, have set high expectations for the involvement of Hong Kong professional services in the BRI. However, Hong Kong professionals, particularly those in the surveying field who are actively involved in construction projects, have faced difficulties in aligning with the level of enthusiasm expressed by officials. As a result, their actual participation in BRI projects has been inconsistent and relatively limited.

4. Challenge 1: Lacking local planning and development knowledge is a barrier to operating business in BRI countries

According to our interviewees, Hong Kong surveyors have great challenges operating businesses in the BRI countries. These challenges include unfamiliarity with planning knowledge and regulations in other countries, language barriers, and unfamiliarity with local cultures and lifestyles. The region is a diverse and rapidly developing area, and Hong Kong surveyors unfamiliar with the local context may struggle to deliver effective plans and solutions.

> "Hong Kong surveyors have more disadvantages than advantages in surveying services in Southeast Asian countries. These disadvantages include communication problems and a lack of local land development knowledge and practices. For example, many grey areas exist regarding applicable laws (e.g., plot ratio fitted by law vs. real plot ratio). Foreigners would find it difficult to handle the rules under the table."
>
> *--Interview with Respondent E from a Hotel Corporate in November, 2022*

- **Lacking local planning and development knowledge**

The lack of knowledge about the planning and development regulations in Southeast Asian countries is a significant challenge for Hong Kong surveyors. These regulations are often unique to each country and can differ greatly from the rules in Hong Kong. This can create difficulties for

surveyors trying to understand the local planning context, as they may not be familiar with the legal requirements and procedures in the region (Respondent A, C, D, E, G, H, and I, 2022).

Meanwhile, this lack of knowledge may result in errors or incorrect decisions by the surveyors, which may have negative consequences for their clients. For example, surveyors may not be aware of specific regulations regarding building codes, land use, or environmental protection, resulting in projects that do not comply with local laws (Respondent I, 2023). This can lead to delays, additional costs, and even legal action against the surveyor and their client.

Furthermore, surveyors who do not have a deep understanding of the local planning regulations may be unable to provide accurate and effective solutions for their clients (Respondent A, 2022). They may be unable to identify the most appropriate and sustainable development options, which may lead to suboptimal outcomes for the project. This can harm the reputation of the surveyor and reduce their ability to provide services in the region in the future.

- **Language barriers**

Language barriers can also pose a significant challenge for Hong Kong surveyors working in Southeast Asia (Respondent B, C, E, 2022). While English is widely spoken in the region, it is not always the primary language of communication, and local terminology and expressions may differ from those used in Hong Kong. This can create difficulties for Hong Kong surveyors to communicate effectively with local authorities, clients, and other stakeholders.

Using local terminology and expressions can lead to misunderstandings and miscommunication, which can negatively impact the quality of the services the surveyor provides (Respondent B, 2022).

For example, the surveyor may not understand the precise requirements of the local authorities, or they may misunderstand the needs and expectations of their clients. This can result in errors in the surveyor's work, which can cause delays, additional costs, and even legal action.

Moreover, language barriers can make it difficult for Hong Kong surveyors to build strong relationships with local authorities and other stakeholders (Respondent C, 2022). Building trust and rapport is critical to providing high-quality services, and the inability to communicate effectively can make it challenging for surveyors to establish strong partnerships with local organizations and communities.

- **Unfamiliarity with local culture and lifestyles**

Another challenge Hong Kong surveyors may face when providing services in Southeast Asia is unfamiliarity with local cultures and lifestyles (Respondent G, 2022). This may lead to difficulties for surveyors trying to understand the needs and preferences of local communities and develop solutions suitable for the local context.

Cultural and religious beliefs can play a significant role in the development of a particular area, and surveyors who are not familiar with these beliefs may miss important considerations when making decisions. For example, some communities may have strong attachments to their local environments and may not be willing to accept changes that are seen as intrusive. Surveyors unfamiliar with these cultural and religious beliefs may not be able to effectively engage with local communities and may not understand the reasons behind their objections (Respondent H, 2022).

In line with the interviews, the results of the questionnaire survey reflect that our respondents hold a rather negative attitude towards their capability to participate in business in BRI countries, focusing on lacking local planning and development knowledge. Our participants believed they were not competitive in the Southeast Asian market (score=2.04; 1= not competitive, 5=very competitive). Possible explanations are 81.3% of participants feel it is difficult to understand local planning knowledge, and 12.5% believed language barriers limited their capacity to operate the business in host countries (Figure 4.1). Meanwhile, our participants agreed BRI countries' planning and control systems are quite different from Hong Kong's (65% agreed or strongly disagreed with the statement), thus requiring them to spend extra time on knowledge learning to ensure project operation (87.6% agreed or strongly opposed the statement).

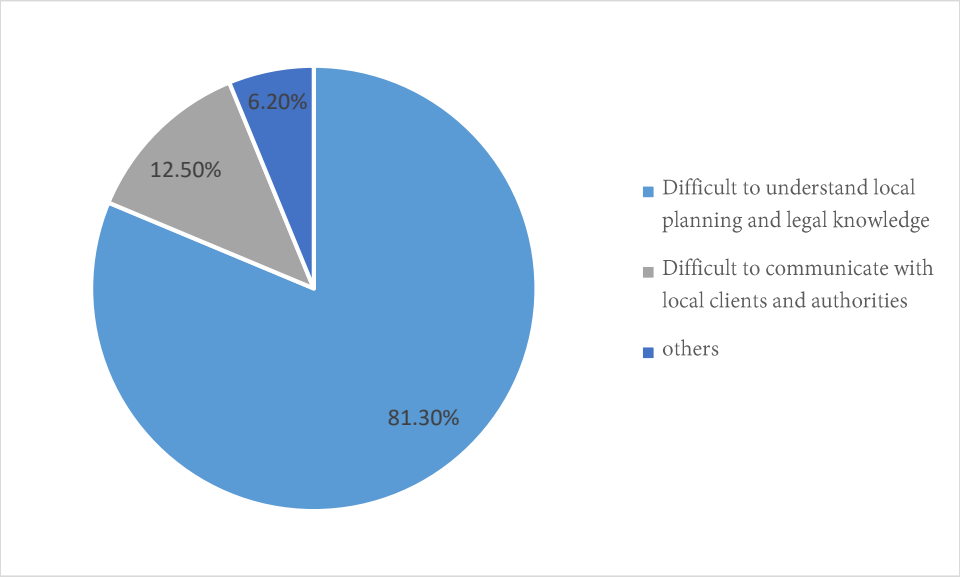


Figure 4.1 Barriers to conducting surveying service in Southeast Asia

Among all the difficulties, Hong Kong surveying professionals were not that confident about expanding business in Southeast Asian countries along the BRI route, mainly due to the lack of local

planning and development knowledge. This may be because professional surveying services firms' products are about their knowledge and expertise. The specialised knowledge (e.g., planning and development law, surveying knowledge) of surveyors is the basis of the services delivered to its clients. Therefore, Hong Kong surveyors need to thoroughly understand the planning and development knowledge in Southeast Asian countries to provide the best possible service to their clients. This requires a commitment to ongoing learning and professional development, as well as close collaboration with local experts who deeply understand the local context (Respondent B, D, E, H, 2022). By doing so, Hong Kong surveyors can help to ensure the success of their client's projects and contribute to the sustainable development of Southeast Asian countries.

In the following sections, we will elaborate on the three strategies which help overcome the major challenge Hong Kong surveyors face when operating business in Southeast Asian countries along the BRI routes.

4.1. Strategy 1: Collect local planning and development knowledge by self-learning

Hong Kong surveyors would benefit from familiarising local planning and development knowledge, increasing their work efficiency and making them more competitive in the surveying industry. As discussed above, Hong Kong surveyors, well-known for their expertise in surveying and evaluating services, encountered great challenges when working in Southeast Asian countries as they lacked local planning knowledge. Although they could overcome this challenge by collaborating with

local experts, it is also crucial for Hong Kong surveyors to understand the local planning and development systems in these countries.

The policies and procedures for land development may vary greatly between countries. For example, the requirements for obtaining planning permission in Southeast Asian countries may differ significantly from those in Hong Kong. Hong Kong surveyors need to understand the procedures and requirements for obtaining planning permission in each country they work in to avoid delays or complications in the development process. Similarly, the use of land in Southeast Asian countries may have different restrictions and conditions. Hong Kong surveyors need to understand the local laws and regulations regarding land use to ensure that their work complies with these laws and regulations.

By familiarizing themselves with local planning and development knowledge, Hong Kong surveyors can increase their work efficiency by understanding the local context more deeply. This allows them to make informed decisions, avoid any delays or complications in the planning and development process, and deliver quality work that aligns with local standards. Additionally, a good understanding of local planning practices can improve communication with local authorities and other stakeholders. This can help avoid misunderstandings and mistakes, leading to better client outcomes.

Understanding local planning and development knowledge can also make Hong Kong surveyors more competitive in the surveying industry. In a highly competitive industry, expanding the understanding of planning knowledge could set Hong Kong surveyors apart from their competitors as they will be able to offer a wider range of services and expertise. This can help them win new business and establish long-term client relationships. Additionally, knowledge of planning and development

systems in different regions can increase their credibility and reputation in the industry, making them a more attractive choice for clients.

In this chapter, we first provide an overview of the three case countries' profiles, then discuss the urban planning and development control systems in Malaysia, Vietnam, and Thailand, and finally compare the development control system between Hong Kong and the three case countries.

4.1.1 Country profile

- **Malaysia**

Malaysia is a Southeast Asian country located on the Straits of Malacca between the Pacific and Indian Oceans. It is known for its diverse landscape, which includes tropical rainforests, stunning beaches, and towering mountains. Malaysia is a culturally rich country with Malay, Chinese, Indian, and indigenous cultures. The main ethnic groups are the Malays (62%, though no census has been conducted for many years), Chinese (21%), and Indians (6%).

Demographic changes directly impact the overall human capital, land development for infrastructure, and the supply and demand for labour. According to the most recent census in 2022, Malaysia's population was 32.7 million, up from 32.5 million in 2020, with an annual growth rate of 0.4%. During this period, the percentage of young people (0-14 years) decreased slightly from 23.5% to 23.3%, while the rate of working adults (15-64) decreased slightly from 69.8% to 69.7%. On the other hand, the percentage of older adults (65 and above) increased from 6.7% to 7.0% (Department

of Statistics, 2022). Overall, the rate of people living in cities has increased by 1% each year, from 76.2% in 2019 to 77.2% in 2021 (Department of Statistics, 2022).

Figure 4.2 Map of Malaysia

The country has a federal constitutional monarchy system of government, with the King serving as the head of state and the Prime Minister serving as the head of government. Under this system, the King acts as a symbol of unity and national identity. At the same time, the Prime Minister and the cabinet hold executive power and are responsible for the day-to-day administration of the government. In terms of foreign policy, Malaysia is a supporter of the BRI initiative. The Malaysian government has taken a proactive approach to participate in the BRI, investing in infrastructure projects and

regional initiatives such as the China-ASEAN Free Trade Area. The government has also signed several memorandums of understanding with the Chinese government to collaborate on infrastructure and trade projects under the BRI framework.

The economy of Malaysia is one of the most developed in Southeast Asia, focusing on exports, particularly in electronics, petroleum, and palm oil. These industries have played a significant role in driving the country's economic growth and development over the years. In addition, Malaysia has a well-developed financial sector, with a thriving stock market and a strong banking system, which has helped to attract foreign investment and further strengthen the economy.

Before the COVID-19 pandemic, Malaysia's economy thrived, with a nominal GDP of US$364.7 billion in 2019 and steady growth of 4.3% and 4.8% in the preceding two years. However, the pandemic has had a notable impact on the economy, leading to varying GDP projections for 2022, ranging from a decline of -5% according to the World Bank (2021). Although there are expectations of improvement in 2021, the level of uncertainty surrounding these forecasts remains significant. In terms of economic composition, the services sector was the largest contributor in 2019, accounting for 57.7% of the economy, followed by manufacturing at 22.3% and agriculture at 7.1% (World Bank, 2021). Within the services sector, key segments include wholesale and retail trade, information and communication technology (ICT), and financial services. The country's economic growth is primarily driven by strong private consumption, which has experienced an annual growth rate of approximately 8% in recent years, mainly supported by sectors such as food and beverage, retail trade, communications, and hotel services.

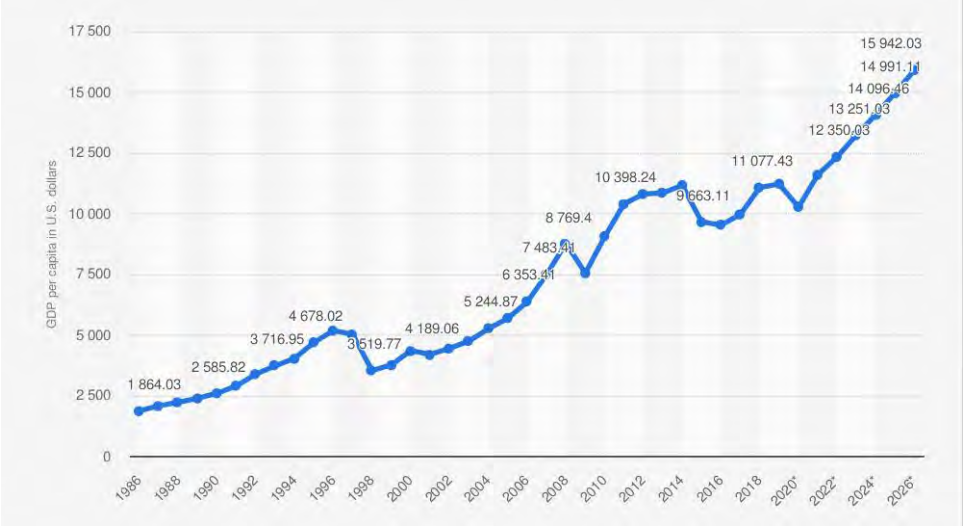


Figure 4.3 GDP of Malaysia between 1986 and 2026 (source, World Band, 2021)

Malaysia is transforming into a predominantly urban society, with a continuous population concentration in cities and metropolitan areas that is key to the country's growth and modernization. From 2000 to 2020, the proportion of Malaysians living in cities rose from 62% to 77%, reflecting the country's rapid development (World Bank, 2021). By 2025, this figure is expected to rise to 87% of the population (Department of Statistics, 2020). There is a projected need for modern, integrated infrastructure and green spaces in the coming years due to this urbanization.

- **Vietnam**

The Socialist Republic of Vietnam spans 331,699 square kilometres and extends 3,000 kilometres from its northern border with China to a narrow strip of land to the south (see Figure 4.4). In some areas, the country is as thin as 15 kilometres, bordering Laos and Cambodia on the west and the South China Sea on the east. The terrain broadens out and extends into the ocean towards the

southwest, separating the Gulf of Thailand from the South China Sea. Vietnam is home to 97 million people, making it the fifth most populous country in the world (General Statistics Office of Vietnam, 2022). Ho Chi Minh City is the country's commercial and financial hub, with an estimated population of 8.8 million. At the same time, Hanoi, located in the north, has a population of 4.8 million (General Statistics Office of Vietnam, 2022).

Figure 4.4 Map of Vietnam

Vietnam's population was approximately 96.5 million in 2019, with the majority (69.2%) between the ages of 15 and 64 (General Statistics Office of Vietnam, 2022). The elderly (65 years and older) comprised 7.6% of the population. The country is diverse, with 86% of the population being Viet (Kinh) and the rest belonging to 54 ethnic groups, including the Tay, Thai, Hoa (Chinese), Khmer, and Hmong. The Chinese minority is less than 1% of the total population and is mainly located in Ho Chi Minh City and the Mekong Delta region.

The Communist Party of Vietnam leads the government system of Vietnam and operates as a single-party socialist republic. This means that the Communist Party is the only political party in power, and the country operates under a socialist economic system, where the means of production are owned and controlled by the state. Regarding its political structure, the President serves as the head of state and is responsible for representing the country on the international stage. In contrast, the Prime Minister serves as the head of government and is responsible for leading the executive branch of government and overseeing the implementation of government policies. The government operates through a system of executive, legislative, and judicial branches, with the National Assembly being the highest legislative body. The country's political structure is designed to support its goals of achieving economic and social development and maintaining political stability and social order. In terms of foreign policies, Vietnam has been participating in the BRI initiative. The country invested in several key infrastructure projects such as ports, highways, and bridges that align with the Initiative, as well as establishing strategic partnerships with other countries involved in the project.

Vietnam's economy has rapidly grown in recent decades, making it one of the fastest-growing economies in the region. The country focuses on exports, with electronics, textiles, and agriculture being the main drivers of its economy. Moreover, tourism has also become a significant contributor to the country's economy, attracting millions of visitors each year to witness its stunning landscapes, rich heritage, and unique culture. With the growing popularity of its tourist destinations, the country has made significant investments in its tourism infrastructure, ranging from hotels and resorts to transportation services, to ensure that it continues to attract tourists from all over the world. In addition, the country's favourable business climate, low labour costs, and favourable demographics have attracted foreign investors, making it an attractive destination for investment. In 2022, Vietnam's GDP was recorded as US$308 billion (World Bank, 2021). While the agricultural sector remains significant, its contribution to the GDP has gradually decreased from 18.4% in 2010 to 14.0% in 2022. On the other hand, the services sector has consistently grown from 36.9% in 2010 to 41.6% in 2022. The industry sector's contribution to GDP increased from 32.1% in 2010 to 34.5% in 2022.

Foreign direct investment has been a significant driving force behind the growth of Vietnam's economy, particularly in key cities such as Hanoi and Ho Chi Minh City. In 2022, foreign investment accounted for nearly 30% of the country's gross fixed capital formation, compared to 17% in 1995 (World Bank, 2022). The concentration of these investment inflows in Hanoi and Ho Chi Minh City, as well as second-tier coastal cities such as Da Nang, has resulted in a two-tiered economic structure in which the Red River Delta region surrounding Hanoi and the Southeast economic region cantered around Ho Chi Minh City form the first tier. In contrast, the remaining four regions make up the second tier.

For decades, Vietnam's rapid economic development has been accompanied by urbanization and spatial transformation. In 1986, less than 13 million people, or 20% of the Vietnamese population, resided in officially designated urban areas (World Bank, 2020b). By 2021, that number would have risen to 30 million, or 39 % of the population, with urban regions accounting for more than half of the country's GDP (World Bank, 2020b). However, if looking at statistics based on the official government's definitions of urban areas, Vietnam maintains a relatively low level of urbanization. In 2019, the proportion of the country's population living in urban areas was lower than that of urban areas in East Asia and the Pacific developing nations. Despite this low degree of urbanization, Vietnam's agricultural industry produced around 15% of the country's total gross value added (GVA) in 2017 (World Bank, 2020b).

Vietnam's rapid economic growth has been accompanied by its urbanization for decades. In 1986, 20% of the country's population lived in urban areas, with less than 13 million people. However, by 2020, that number had risen to 30 million, or 39% of the population, with urban regions generating more than half of the country's GDP (World Bank, 2020b). Despite this increase, Vietnam's level of urbanization is still considered low compared to other East Asian and Pacific developing countries, as only 39% of its population lives in urban areas per official government definitions (Figure 4.5).

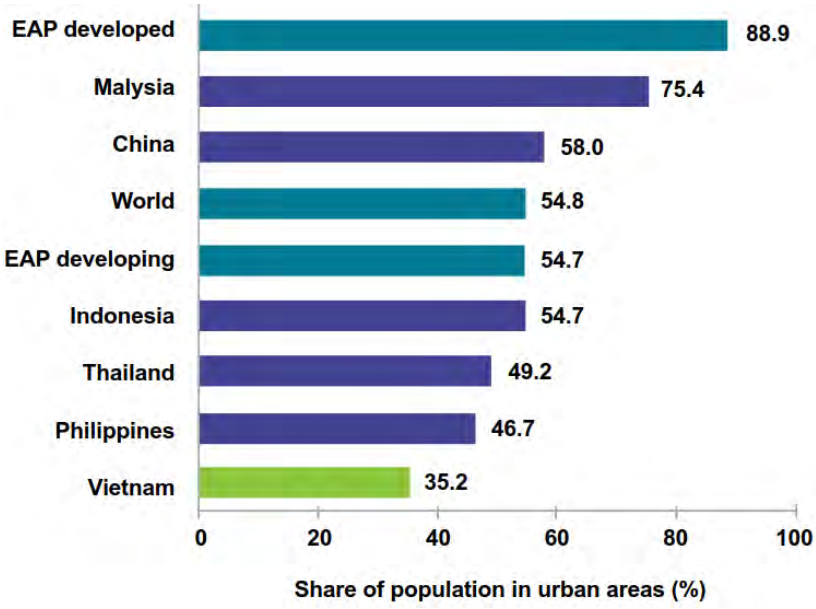


Figure 4.5 Vietnam remains at a low level of urbanization (Source: World Bank, 2020b)

- **Thailand**

Thailand is situated in Southeast Asia (Figure 4.6). It ranks as the 50th largest country globally in terms of land area, spanning a total of 513,120 square kilometres. The nation is geographically divided into 76 provinces, 2000 municipalities, and 878 districts, with its capital city being Bangkok. The governance of Bangkok is under the Bangkok Metropolitan Administration, which functions as an autonomous local government entity (World Bank, 2012).

As of 2022, the population of Thailand was estimated to be approximately 69 million people, with a majority of its citizens aged between 15 and 64 years old (70.8%) and 12.4% of the population aged over 65 years of age. With 132 persons per square kilometre, the country is the sixth most densely

inhabited ASEAN nation (ASEAN, 2022). The country is multi-ethnic. The majority of the population is Thai, with significant populations of Chinese, Vietnamese, and Cambodian ethnic groups. And Thai Chinese makes around 14% of the total population.

Figure 4.6 Map of Thailand

Thailand has a constitutional monarchy with a parliamentary system of government, where the King of Thailand serves as the ceremonial head of state, and the Prime Minister serves as the head of government and head of the executive branch. Despite the long history of political stability in Thailand, the country has experienced military coups from time to time, which has led to a shift in the balance

of power between the army and civilian authorities. The country operates as a parliamentary democracy and has a vibrant civil society. In recent years, Thailand has also become an active participant in the Belt and Road Initiative. Thailand has identified key infrastructure projects aligning with its economic development goals, including upgrading its transportation networks, developing new energy facilities, and improving its port infrastructure. The country sees the Belt and Road Initiative as a major opportunity to improve its economic competitiveness and integration into regional and global trade networks.

Thailand has a mixed economy, with agriculture, tourism, and exports being the main drivers of economic growth. Agriculture is a major sector of the economy, with rice, cassava, rubber, and maize being the main crops. The country is also a major producer of seafood, such as shrimp and tuna. Tourism is another major contributor to the economy, with millions of tourists visiting each year to experience the country's rich culture, beautiful landscapes, and exotic beaches. In addition, Thailand is a major exporter of goods such as electronics, textiles, and automobiles.

Thailand's economic growth has been slower than other countries in this region in recent years. In 2020, the country's exports were negatively affected by unfavourable conditions in both the regional and global markets. Additionally, the COVID-19 pandemic has had an impact on domestic private consumption and investment. As a result, the country's GDP growth decreased from 4.2% in 2018 to 2.4% in 2019, further declining to 2% in 2021 (World Bank, 2022). This slowdown in economic growth has affected various industries and has caused some challenges for the Thai government and businesses. However, the government has been working on multiple initiatives and policies to boost

the economy and maintain stability, such as the Eastern Economic Corridor Development Plan. **Figure 4.7 shows the** GDP of Thailand between 1985 and 2019 (World Band, 2022)

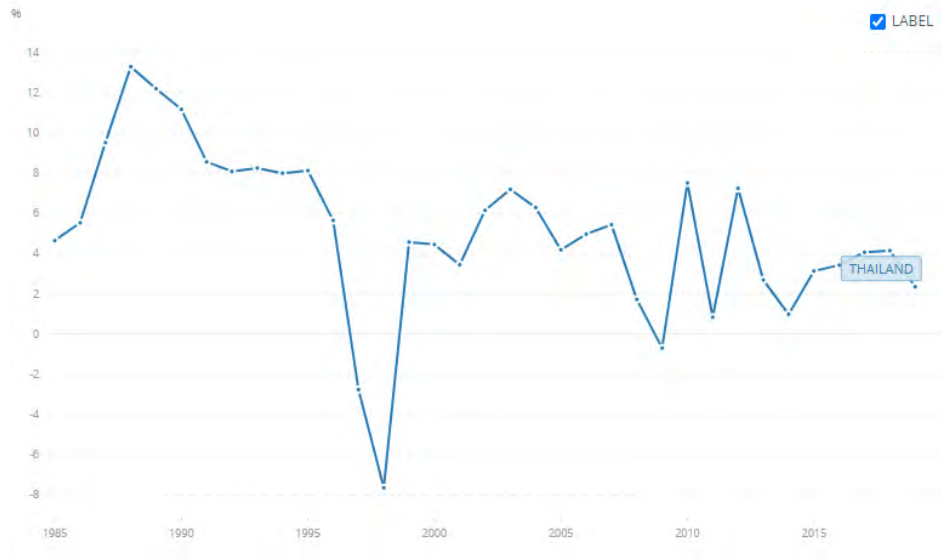


Figure 4.7. the GDP of Thailand between 1985 and 2019 (source, World Band, 2022)

Thailand has been transforming since the 1970s, and has made significant progress in developing its industrial sector and becoming more urbanised. This growth has resulted in several changes, such as rural-urban migration, increased urbanization, and a shift towards smaller nuclear households (Friend et al., 2016). The country's urbanisation rate rose from 42.5% in 2009 to over 50% in 2021, meaning that nearly half of the population now lives in cities and urban areas (United Nations, 2021). This trend is expected to continue, with projections suggesting that the urbanization rate will reach 72% by 2050. This rapid increase in urbanization is not unique to Thailand, but is a characteristic of many countries in Southeast Asia.

4.1.2 Development control systems in Southeast Asian countries

4.1.2.1 What is the development control system?

The term "development control" comes from the British Town and Country Planning Act of 1947, which refers to a set of government regulations on land use and development activities under a "plan-led" system ("Town and Country Planning Act," 1947). The broader notion encompasses all of the regulatory systems and procedures used to assess, control, and manage land development to meet specific public-sector criteria, including planning control, land control, and building control. This research applies a wide concept of "development control" to land development issues in Southeast Asian countries and Hong Kong.

- **Planning control**

Planning control is the backbone of the development control system. The planning control system is divided into two paradigms based on their degree of conformance to formal statutory plans for decision-making (Booth, 2007). The first type is the discretionary control system, which depends on the discretion of local planning authorities to examine all projects on a case-by-case basis until they are ultimately approved or rejected by the authority. The second kind, known as regulatory planning control, focuses on the legal plans to decide whether or not development should be allowed. If a project fits all of the criteria of statutory plans, it will be approved automatically.

Discretionary planning control systems include those like the United Kingdom and those in Commonwealth nations that have followed British practice (Booth, 2007). They are based on a case

law tradition and a pragmatism that has been sceptical of efforts to anticipate the whole course of action in advance — it is difficult to predict all of the circumstances that may arise before a judgment on a specific planning application. There is no absolute connection between the plan and the land development decisions in discretionary systems, which may be influenced by variables other than the plan. Thus, there is a considerable lack of certainty in such systems.

Regulatory systems evolved from nations with administrative law or a written constitution outlining rights and privileges (Booth, 2007). In such scenarios, planning control must be explicit in identifying people's rights as landowners and the exact limitations of those rights. This kind of planning control system exists in the United States. Development control must therefore be based on a complete description of what is allowed in advance; nothing can be left until the decision is made. There are many ramifications to this. Decisions on planning applications have less weight than in discretionary systems; in general, they are little more than confirmation that the proposed project complies with the provisions in the plan. On the other hand, the plan is very important since it includes all of the criteria against which an application may be evaluated. A precise description of rights also allows for the potential of dispute and remedy. A high value is put on certainty: the certainty of knowing what is permissible in advance and the certainty of getting a favourable judgment if all rules are fulfilled.

- **Land control**

Land management, also known as land governance, is putting land resources to good use. It plays an essential role in enforcing development plans and providing built and natural environments.

It includes all actions related to land resource management that are needed to ensure sustainable development. Land management generally refers to the official and informal rules, procedures, processes, and institutions that govern how land is accessible, utilized, controlled, and transferred, as well as how land-related disputes are resolved (Enemark et al., 2005). It is specifically concerned with property rights, land valuation systems, and laws that govern property development.

Land management organizational systems vary greatly among various nations and regions across the world. Land management's operational component is the collection of land administration tasks that provide effective management of land resources in terms of rights, limits, responsibilities, and risks. Land, land value, land usage, and, increasingly, land development is all included in these activities. The roles collaborate to accomplish policy objectives, supported by appropriate land information infrastructures such as cadastral and topographic databases. The four land administration systems are described in detail below (Williamson et al., 2009):

- Land tenure: this includes the allocation of land rights, the explanation of uncertainty and disagreements over rights, legal surveys to determine parcel boundaries, and the transfer of property or use from one party to another through sale or lease.
- Land value: this includes the evaluation of land value; and revenue collection via taxes
- Land use: this includes the regulation of land use via the adoption of planning policies and regulations and the resolution of land use conflicts.
- Land development: this includes creating new constructions, changing land use via approval and issuing of permits, and implementing construction plans.

Land management is an issue that all governments have to address. The four functions of land tenure, land value, land use, and land development must be managed. The land administration system acts as a useful instrument for managing growth. It includes the procedures regulating land use and property development, land sales, leasing, and tax revenue collections (Enemark et al., 2005). Benefits accrue from land administration are ensuring ownership, and security of tenure; assisting in asset management; facilitating efficient land transfers and land markets; and providing basic information in development control processes. Thus, the system operates an institutional framework that leads to successful development control.

- **Building control**

Governments prioritize the establishment and upkeep of high-quality built environments, with building control systems playing a central role in achieving this objective. Building regulations are present in the majority of countries and share similar goals, although the methods of regulation may vary, ranging from public agencies to private organizations entrusted with control. The processes and conventions surrounding building control in most nations aim to oversee the construction of buildings in order to safeguard public health and safety. Building regulations emerged as a response to concerns such as drainage, fire hazards, rights to light, and structural stability. They encompass a set of technical or functional requirements that buildings must adhere to, representing the fundamental performance standards established by the government. These requirements encompass various aspects, including provisions for adequate drainage systems for both foul water and surface water, as well as specifications to ensure that buildings can safely bear anticipated loads.

- **Connecting to P&D surveyors' job nature**

Knowledge of the development control system is essential for P&D surveyors to deliver high-quality service to the client. First, one of the primary responsibilities of surveyors is to provide advice on the feasibility of development proposals. This involves conducting site assessments, preparing topographical surveys, and providing information on land use and planning policies. The planning and land regulations and policies are critical in this process as it determines the types of developments permitted on a particular site, the level of permissible density, and the required setbacks and open spaces. Surveyors must understand the development control system as it directly affects the feasibility of development proposals and the advice they provide to clients.

Second, the development control system also guides the design and construction process. Surveyors are often involved in preparing plans and specifications for building projects, and the building control system provides guidelines and standards for the design and construction of buildings. This includes requirements for fire safety, accessibility, and energy efficiency, among others. By understanding these regulations, surveyors can ensure that their designs and construction plans comply with the rules and standards, and that their projects receive the necessary approvals and certifications.

In addition, the development control system also plays a critical role in the valuation and sale of properties. Surveyors are often involved in the valuation of properties for various purposes, including mortgage lending, insurance, and sale. The development control system regulates the use and development of land and property, and it affects the value of a property. By understanding the

development control system, surveyors can provide accurate valuations and advise clients on the potential for development and the implications for property values.

4.1.2.2 Urban planning system in Hong Kong

Hong Kong's planning system consists of territorial development strategies and several statutory and departmental plans (Hui & Ho, 2003). These plans are developed per Hong Kong's Planning Standards and Guidelines, considering relevant development policies and public opinion.

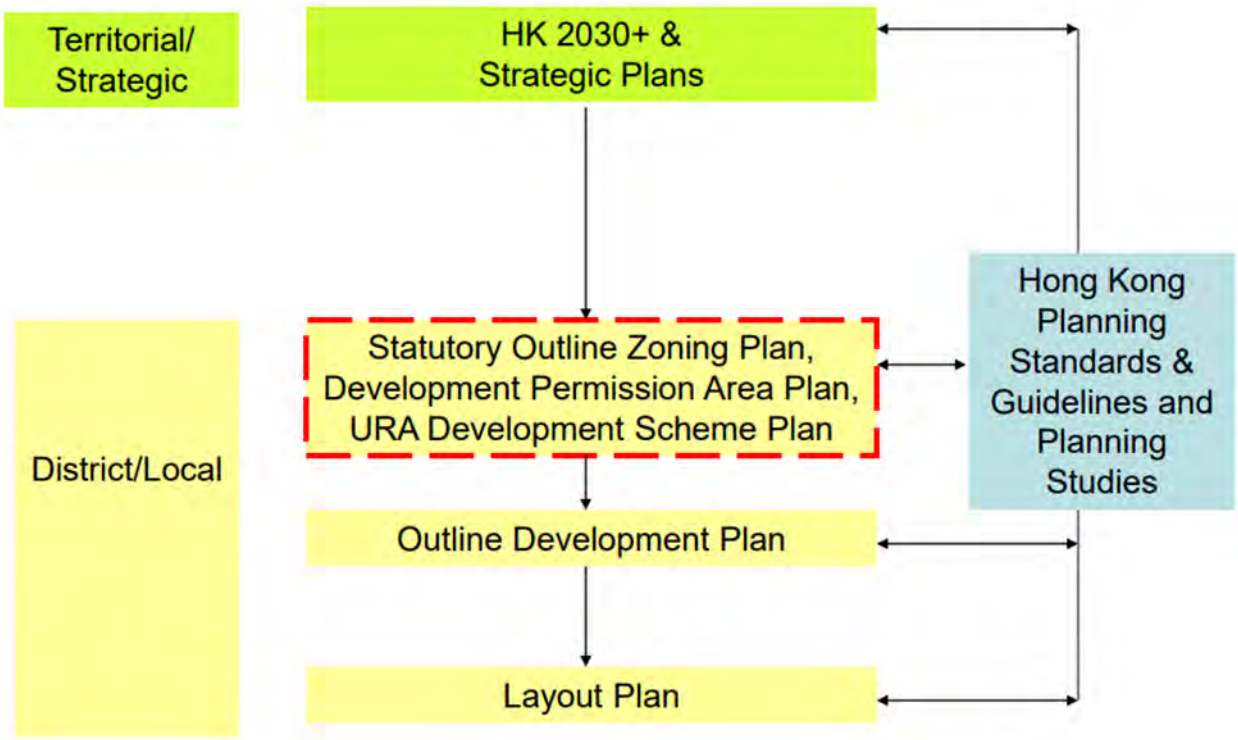


Figure 4.8. Urban Planning System in Hong Kong (Source: Tang, 2021)

- **Territorial Development Strategy**

The Territorial Development Strategy was issued in 2007 in response to a government request for an action plan for the next ten years. It is a policy document that examines Hong Kong from three perspectives – society, economy, and environment – and presents planning strategies to address challenges facing the city. The Strategy considers Hong Kong's geographical features, social, economic and environmental conditions, and major development programs. It also ensures sustainable development for the future with a broad range of policies and measures to enhance productivity, quality of life and maintain our competitive edge. The strategy aims to set a comprehensive planning framework for future growth and supply of crucial infrastructure. It also acts as a foundation for the design of district plans. The most recent assessment, titled "Hong Kong 2030: Planning Vision and Strategy" ("Hong Kong 2030"), was issued in 2007, and revised as the "Hong Kong 2030+: Towards a Planning Vision and Strategy Transcending 2030" ("Hong Kong 2030+"). As a spatial planning tool, "Hong Kong 2030+" offers a framework for future land-use planning, and the shaping of Hong Kong's built and natural environments. With "Hong Kong 2030" as a guide, the government is creating a people-centred development plan to elevate Hong Kong to Asia's World City.

- **Statutory Plans**

The Town Planning Board develops and publishes two kinds of statutory plans under the Town Planning Ordinance. The Town Planning Ordinance was amended in 2004 to streamline the application process, improve the openness of the urban planning system, and expand planning implementation in rural New Territories.

The first type is the Outline Zoning Plan, which outlines the district's land use zones, development constraints, and major road networks. In general, outline zoning plans designate specific parcels of land for residential, commercial, industrial, or public use. The Schedule of Notes is a legal document included with Outline Zoning Plans. It indicates which uses or projects are always permitted in Column 1 and which need prior permission from the Town Planning Board in Column 2.

Development Permission Area Plan is the second type of statutory plan. To serve as interim planning control and development direction for rural regions, a Development Permission Area Plan is developed for rural areas of the New. Development Permission Area Plans illustrate wide land-use zones and are supplemented by Notes Schedules that show Columns 1 and 2 uses. These plans will be phased out after three years and replaced with OZPs.

- **Departmental plans**

Departmental plans are administrative plans developed according to development strategies and zoning plans. These departmental plans include outline development plans and layout plans that describe development concepts on a much wider scale, including site borders, access points and footbridge locations, and land reserves for particular purposes. If authorized by local governments, these plans guide "development planning, development control, land sales, and the reserve and distribution of government sites" (Chiu, 2007).

- **Hong Kong Planning Standards and Guidelines (HKPSG)**

Hong Kong Planning Standards and Guidelines is a government document that outlines the criteria for evaluating the location, size, and requirements of different land use. Its purpose is to guarantee that the government reserves sufficient land to enable social and economic growth, as well as suitable public amenities to fulfil the requirements of the public, throughout the planning process. Various local authorities will periodically develop, evaluate, and modify the planning standards and guidelines that come under their jurisdiction, considering the most recent policy considerations.

4.1.2.3 Development control system in Hong Kong

Hong Kong's development control system comprises three levels: planning, land, and building controls (Tang & Tang, 1999). Three separate administrative bodies manage these controls. The control tools also differ for each system, establishing the overall land development regulatory mechanism.

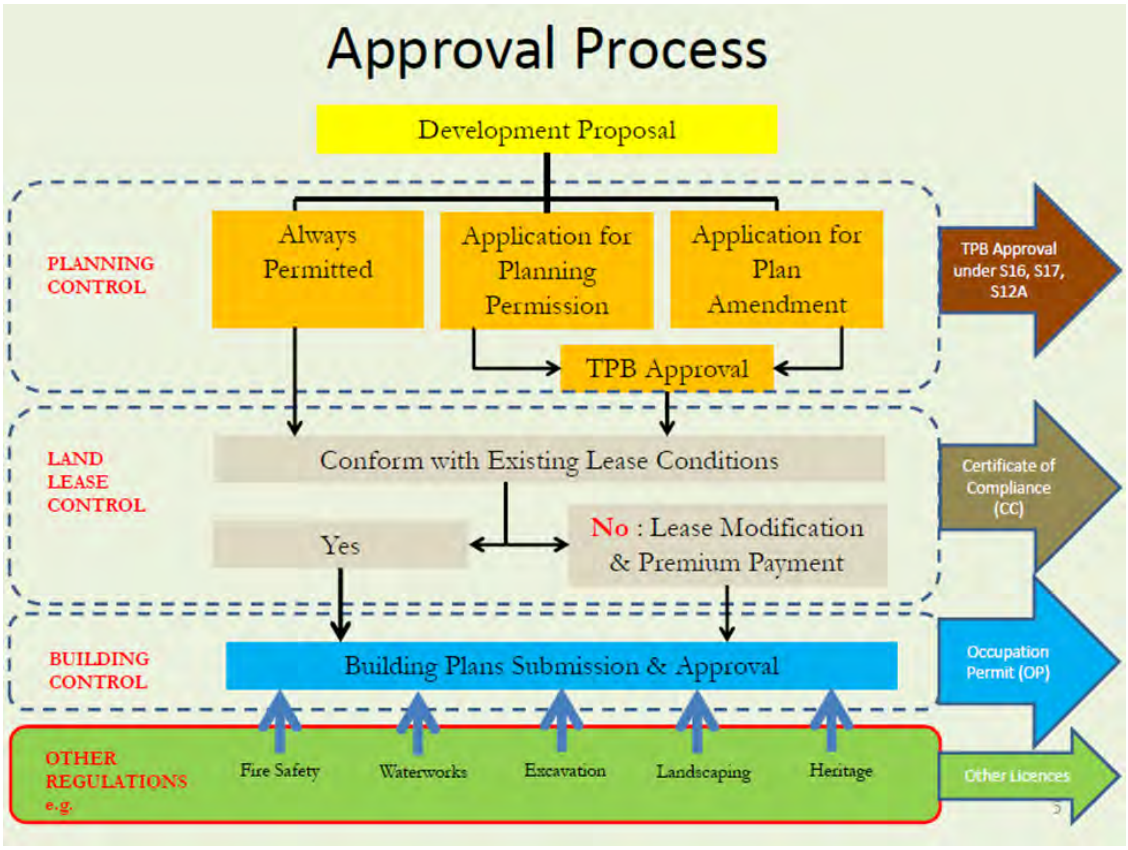


Figure 4.9 Development control system in Hong Kong (Source: Tang, 2020)

- **Planning control**

Hong Kong embraces a hybrid planning control system, which converges the UK's discretionary permission system into a regulatory land-use zoning framework (Tang et al., 2000). As a result, several development control decisions may not be directly related to the statutory plans. The planners believe that this approach has the benefits of both predictability and flexibility in controlling land development (Tang et al., 2000).

The Town Planning Ordinance is the foundation statute that establishes the legal framework for Hong Kong's planning control system. In 1939, the Ordinance was adopted. Its mission is to

"promote the community's health, safety, convenience, and general welfare by establishing a system for the systematic preparation and approval of plans for the layout of areas of Hong Kong, as well as the types of buildings suitable for erection therein, as well as for the preparation and approval of plans for areas within which development permission is required" (HKSAR Government, 2007).

Each parcel of land in Hong Kong is allocated a land-use zone. Planning authorities control land development primarily via Outline Zoning Plans and Development Permission Area Plans. Over half of Hong Kong's land area has Outline Zoning Plans and Development Permission Area Plans created. None of these legislative measures apply to areas inside national parks. An Outline Zoning Plan includes a land-use plan and a schedule of notes, both legal documents. The notes schedule shows which land uses are always permitted in Column 1 and which need Town Planning Board permission in Column 2. Indeed, anybody may apply, and that person may submit the application on their own or via the representation of an agent. No development is allowed unless and until the intended purpose is specified in these two columns. Under statutory planning rules, land use, intensity, and constructed form are the primary land development components (Tang et al., 2000).

Indeed, the system seeks to compromise government oversight and market efficiency. This approach can make sure compliance while also allowing private efforts to find out different land-use plans. The Town Planning Board is a statutory body given power under the Town Planning Ordinance by the Chief Executive in Council to undertake certain tasks such as plan formulation and planning control. The Board is responsible for preparing plans for particular regions, designing layouts, and making decisions on specific land uses and building designs.

- **Land control**

Another level of development control is land lease control (Tang et al., 2000).. The land leasehold system is used in Hong Kong. Except for St. John's Cathedral, the government owns all land in Hong Kong. The Lands Department oversees all land administration issues in Hong Kong.

The government uses land leases as an effective tool to control land development. The government has the authority to set any lease conditions. The grantee and the government sign a contract known as a land lease. The term "user clause" is frequently included in a land lease. This clause restricts the uses of land and building designs, such as land use, site coverage, building height, and public facilities (Tang et al., 2000). Additionally, the lease specifies that the land must be developed within a certain period. Thus, the leases stipulate the grantee's property rights.

The developers may request that the lease terms are changed, or that land be exchanged. Nonetheless, the Lands Department is not obligated to approve the suggested alteration and land exchange petitions (Tang & Tang, 1999). Land allocation to individuals in Hong Kong must always be done via a competitive process, such as a public auction. However, where there are compelling reasons, such as specific design needs, the allocation may be decided via a bidding process. When the land is for communal use or cannot be sold individually, it will be allocated via a private treaty grant. The time spent in the stage of lease control varies because land allocation is decided in various ways, and some land requires lease modification or land exchange (Tang et al., 2000).

- **Building control**

The Buildings Ordinance gives the Buildings Department authority to control buildings and land development following applicable building codes. The Ordinance aims to regulate the planning, design, and construction of buildings and associated works, as well as the safe rendering of dangerous structures and land. This implies that the technical aspects of land development are considered by building control (Tang et al., 2000). For example, it controls planning criteria, design aspects (lanes, space between buildings, lighting, and ventilation), fire safety, access, and vehicle parking (Tang et al., 2000).

The Buildings Department must approve all building design plans before beginning construction. The government may use this method to exercise control over land development (Tang et al., 2000). Since the Town Planning Ordinance does not provide the Town Planning Board or the Planning Department with enforcement power on this issue, the Buildings Ordinance, as well as land leases, provide the legal framework for implementing statutory plans in metropolitan areas.

Buildings (Planning) Regulation is as important as the Buildings Ordinance (Tang et al., 2000). For example, the first scheduled Building (Planning) Regulation sets legislative restrictions on the maximum site coverage and plot ratio of all land for residential and non-residential buildings in Hong Kong. The Buildings Ordinance affects the duration of a project. While the Buildings Department is obliged to review building plans within a certain period, the department can reject designs and compel applicants to submit new ones. Consequently, the time spent in the building control stage varies according to the circumstances.

4.1.2.4 History of urban development in Southeast Asia

Countries vary in their development history, but cities in Southeast Asia showed a similar pattern, which has been through four types of cities (Dick & Rimmer, 1998):

Pre-colonial city: the early towns in Southeast Asia were constructed around the ruler's palace, encircled by upper-class compounds and their dependents and commercial quarters (usually Chinese or Indian quarters). They were typically open spaces with no walls.

Colonial city: the Europeans introduced walled towns to Southeast Asia. The first was Malacca, which was constructed in the fifteenth century. Except for Bangkok, the European model town spread to all cities as colonial authority was entrenched throughout the nineteenth century. Almost all Southeast Asian cities had been split into upper and lower towns. The lower town had its central business area (CBD), which was bordered by a considerably more populated Chinese quarter but with few Europeans. The upper town was made of European garden suburbs geared for family life, including hotels, clubs, contemporary shopping centres, and other entertainment.

Third World city: in the 1960s, these colonials changed and became more hazardous for Westerners because of political unrest, initially against colonial rule and then between communists and non-communists. Transition to the " Third World Cities" occurred during this period. The loss of colonial control accelerated migration from rural to urban areas. Settlers started constructing their shacks on any vacant site throughout the city as informal sector job opportunities grew. The urban breakdown was shown by infrastructure overload, traffic congestion, overpopulation, poverty, and pollution. Cities seemed to be unmanageable by governments. However, in hindsight, cities in

Southeast Asia have continued to operate and develop at a remarkable pace of industrialization and economic growth, notwithstanding these numerous problems.

Global city/national city: by the 1980s, city development patterns had converged once again with those of the First World. In Southeast Asia, increasing incomes and middle class have produced a new urban dynamic. High-rise offices, gated residential communities, and massive shopping malls have already become important components in restructuring urban space.

4.1.2.5 Urban planning system in Malaysia

Numerous planning legislations govern the design and implementation of plans in Malaysia. As a former British colony, its regulations have often been modelled by British planning laws (Omar & Leh, 2009). Urban planning evolved from pre-British colonial periods, through the British colonial era, and into the post-independence period, until the Town and Country Planning Act 1976 was enacted (Act 172). Despite its designation as a copy or imported version of the 1971 British Town and Country Planning Act, the Act was a watershed moment in Malaysia's growth and progress of urban and land use planning (Omar and Leh, 2009; Samsudin, 2014). The Town Board Enactment (1947) was replaced by Act 172, which introduced a new set of development plans, including the Structure Plan, Local Plan, and development control. It assigns the authority to each state to develop and implement a comprehensive strategy for the planning and land use under their control. Local governments were also granted the right to serve as a local planning authority. Local planning authorities are responsible for regulating, controlling, and planning the city's development under their

jurisdiction. The Act has been modified four times since its establishment (Wan Mohamad Mukhtar, 2010).

Act 172 establishes several plans in Malaysia, including the National Physical Plan, which the National Physical Planning Council produces; the Structure Plan, which is prepared by each State Director of Town and Country Planning; the Local Plan, developed by the State Director of Town and Country Planning or local planning authority; and Special Area Plan, developed by the State Director of Town and Country Planning or a local planning authority (the connection between all of these plans, as specified by the Act 172, is shown by Figure 4.10). The governments regulated development via the planning permission, development fee, and appeal board processes. Malaysia has consistently used legislative planning processes to plan, monitor, and control land use and development activities (Rameli, 2009).

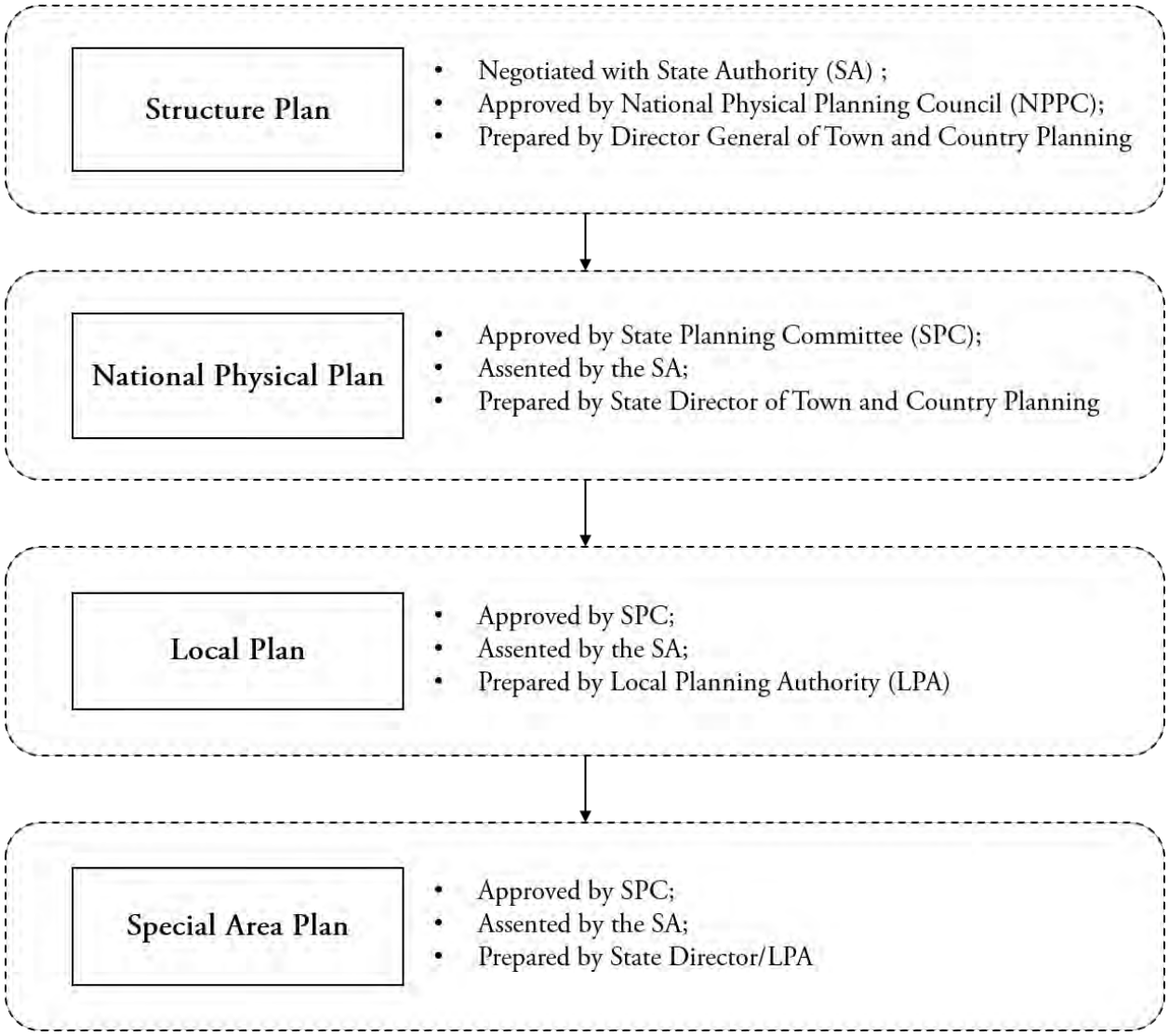


Figure 4.10. Malaysian planning system (Source: Samsudin, 2014)

National Physical Plan: The National Physical Plan is a comprehensive document outlining the country's plans for developing physical infrastructure. It is developed through cooperation between the federal and state governments and drafted by the Federal Department of Town and Country Planning. The plan aims to promote urbanization and other sectoral objectives. The plan includes a translation of national physical and spatial planning strategies and policies for each state to ensure clear

guidance in developing State Structure Plans. Existing approaches are simplified and made explicit through strategic orientations, strategies, and specific actions to improve implementation.

Figure 4.11 National Physical Plan 4 (Source: Planmalaysia, 2020)

State Structure Plans: The National Physical Plan's policies and strategies are incorporated into the State Structure Plan, which pertains to a specific state. The State Structure Plan focuses on creating guidelines and recommendations for enhancing the physical living conditions, managing traffic, improving socioeconomic wellbeing, boosting economic growth, and supporting long-term development. It aims to align social, economic, and physical components with national development objectives (Samsudin, 2014). Structure plans outline development goals for each state and suggests significant economic and infrastructure projects. These plans have a 20-year horizon and are created by each state individually. If a region has critical interstate development issues that need to be addressed, regional plans are developed to cover projects across two or more states.

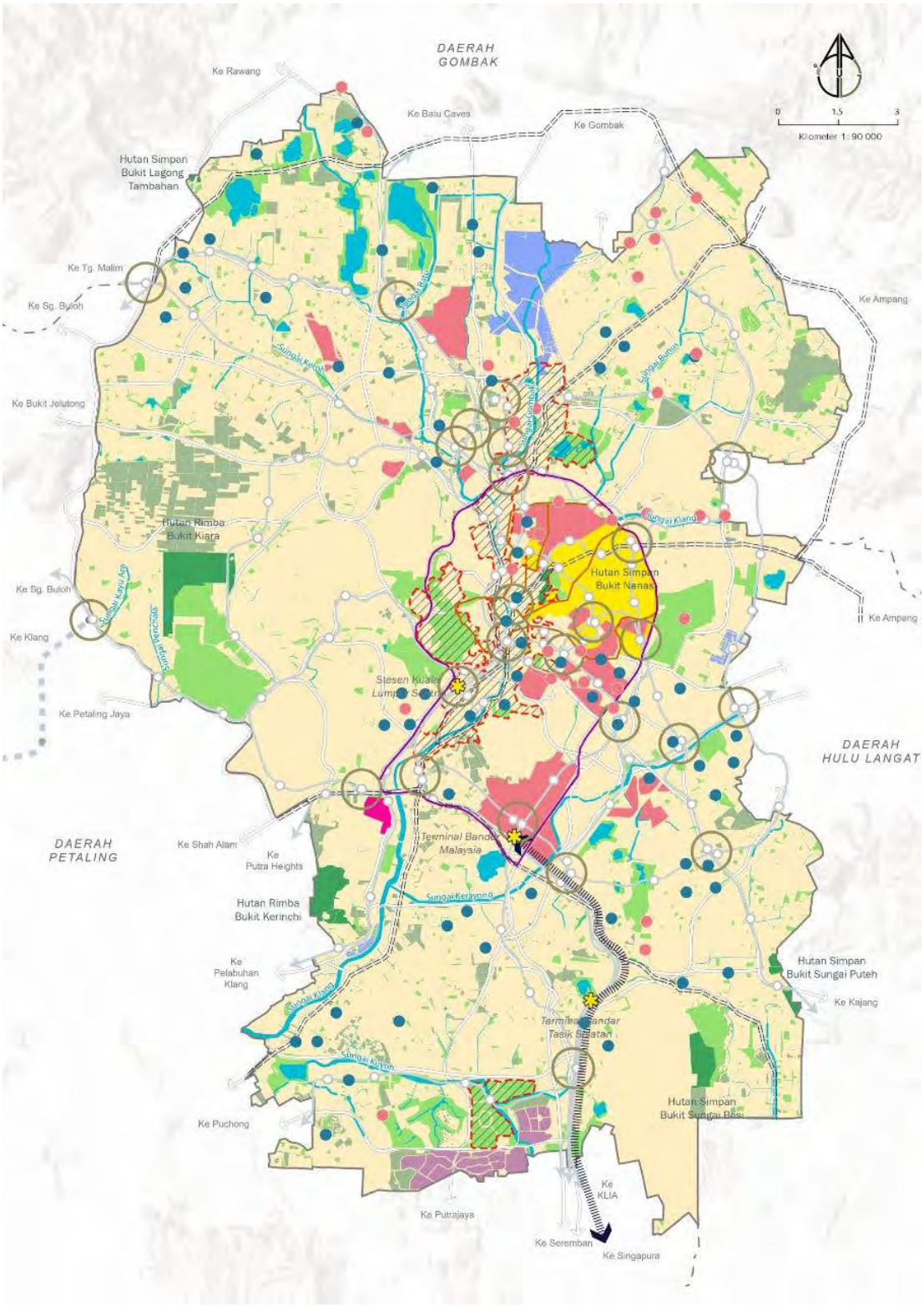


Figure 4.12 Kuala Lumpur structure plan 2020

Local Plan: Local planning agencies are responsible for land-use planning through the creation of local plans and special area plans. These plans are meant to elaborate on the policies and strategies outlined in the state structure plan. The local plan must align with the approved state structure plan according to Act 172. The focus of local plan preparation has changed from being centred around cities to being centred around local planning authorities since 2001(Omar & Leh, 2009).

The main aim of the local plan is to put forward a comprehensive development strategy that involves the future zoning of land use and implementation plans (Samsudin, 2014). This plan in Malaysia has proposals for land-use zoning, similar to the zoning concept in the United States General Plan and Area Plan, but has its roots in the UK's Local Plan. As per Act 172, the local plan must include a map and a written document that outlines proposals for land development and usage, environmental protection, preserving and enhancing building character and appearance, and traffic management.

Figure 4.13 Kuala Lumpur Local Plan 2020

Special Area Plans: According to Section 16B of Act 172, there is a requirement for creating a Special Area Plan, which is the fourth tier of development plans. This responsibility of developing a plan for a specific area to undergo special or in-depth treatment through development, redevelopment, or management practices is given to the State Director of Town and Country Planning or the local planning authority involved. The Federal Town and Country Planning Department has published the Guideline for Special Area Plans 2004 to explain this concept further. According to the guideline, these plans are short-term development plans with the goal of implementation. They result in a development action plan that contains design layouts and management plans for specific projects, along with suggestions for the development phase, cost, implementing agency, and implementation methods (Ahmad et al., 2013). Special area plans can be useful for local planning authorities when planning and managing areas requiring unique development projects.

The key components of the four official development plans are outlined in the provided table. These plans serve as a basis for decision-making during the planning process. Prior to the development of any land or building, it is necessary to seek approval from the local planning authority. Planning permission will only be granted if the proposal aligns with the legally mandated Local Plan, meets the necessary technical criteria, and does not face any objections from the public.

Table 4.1. Details in the four tiers of plans (Source: Ahmad et al., 2013)

	Related Act	**Purpose**	**Affected area**	**Main output**	**Explanation**
National Physical Plan	Section 6B	Interpret national socio-economy into	Peninsular Malaysia	Indicative Plan	Written statement summarising strategic policy and direction of

		spatial dimension			national physical planning
Structure Plan	Section 7,8,9,10	Interpret national and state policy	Whole state	Main diagram covering whole state	Written statement explain policies and state strategic planning
Local Plan	Section 12,13,14,15,16A	Interpret policy of Structure Plan; Guidelines for development control	Whole area of local planning authority	Proposed plan: Land use details; and accompany plans	Proposed detailed land use plans supported by written statements explaining the proposals
Special Area Plan	Section 16B	Implementation	Depends on the size of the plan	Development action plan: Layout plan, management plan or both	Detailed planning for implementation

4.1.2.6 Development control system in Malaysia

Land development in Malaysia is a complicated and tightly controlled process. Following land acquisition, property developers or investors must seek a number of permissions governed by numerous laws and regulations of various authorities, as illustrated in Figure 4.14. The approvals include (Zulkifli et al., 2015):

- Approval of land development applications (conversion, sub-division, and amalgamation) by the State Authority or land administrators (enacted under the National Land Code 1965),
- Approval of planning permission by the local planning authority (under Act 172),
- Approval of building plan by the local authority (under the Street, Drainage and Building Act, 1974).

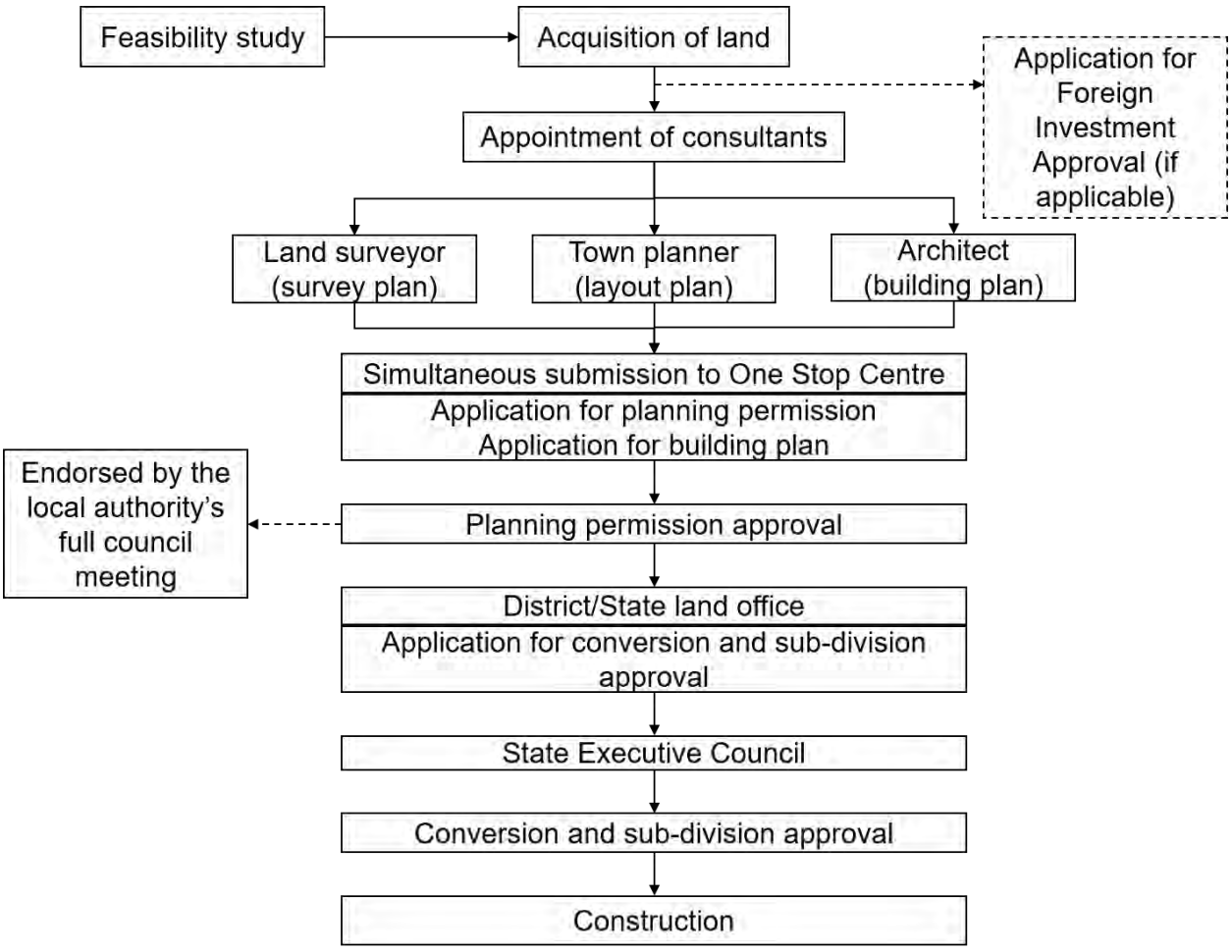


Figure 4.14 Land development process in Malaysia (Source: Zulkifli et al., 2015)

Before 2007, obtaining permissions required separate applications, but now the local government in Peninsular Malaysia has set up a one-stop centre where applications for planning permission, building plans, and other related plans can be submitted together (KPKT, 2007). Although applications are submitted in one place, approvals are still granted separately, except small projects like flatted housing complexes for which land conversion and sub-division permits have already been given. Before a decision is made on each application by the One-Stop Centre Committee,

various technical agencies are consulted to ensure that the development plans meet each department's criteria (Ahmad, 2012).

- **Planning control**

Act 172 established a planning control system to be administered by local government authorities, to ensure that land development adheres to the policies and proposals outlined in development plans. Before 1976, planning control operations were conducted under the Town Board Enactment. The Act gives the Board the power to reject any development proposal that does not align with the structure plan and local plan (Marzukhi et al., 2012).

Before any development proposals can be implemented, they must go through the planning authorization process and receive approval from the local planning authority, which varies by state (in Kuala Lumpur, this authority is the Town Planning Board) (Marzukhi et al., 2012). When implementing planning control, reference must be made to the recommendations and implementation methods outlined in the local plan, including the proposed land use zone for the future (Marzukhi et al., 2012). According to Section 18(1) of the legislation, no property or building can be used in a way that goes against the local plan. The local planning authority must also consider additional factors listed in Act 172, Section 22(2), when deciding on a planning application. This includes the following:

- Provisions of structure plan;
- Directions are given by the State Planning Committee;

- Provisions that the local planning authority thinks are likely to be made in any development plan under preparation or to be prepared;
- Development proposal report;
- Objections by the neighbouring landowners (Section 21, Act 172)

After considering all relevant factors listed in Section 22(2), the local planning authority may grant planning approval unconditionally or with appropriate restrictions or reject the application. The local planning authority is not allowed to grant planning approval if the proposed development goes against any provisions outlined in the development plan (Section 22(4)(a)). According to Act 172, a planning application must be submitted to the local planning authority along with the necessary documents, plans, and fees as required by the Planning Control (General) Rules of each state. Along with the required documents and drawings, applicants must also submit a development proposal report. The process of obtaining planning permission is illustrated in Figure 4.15.

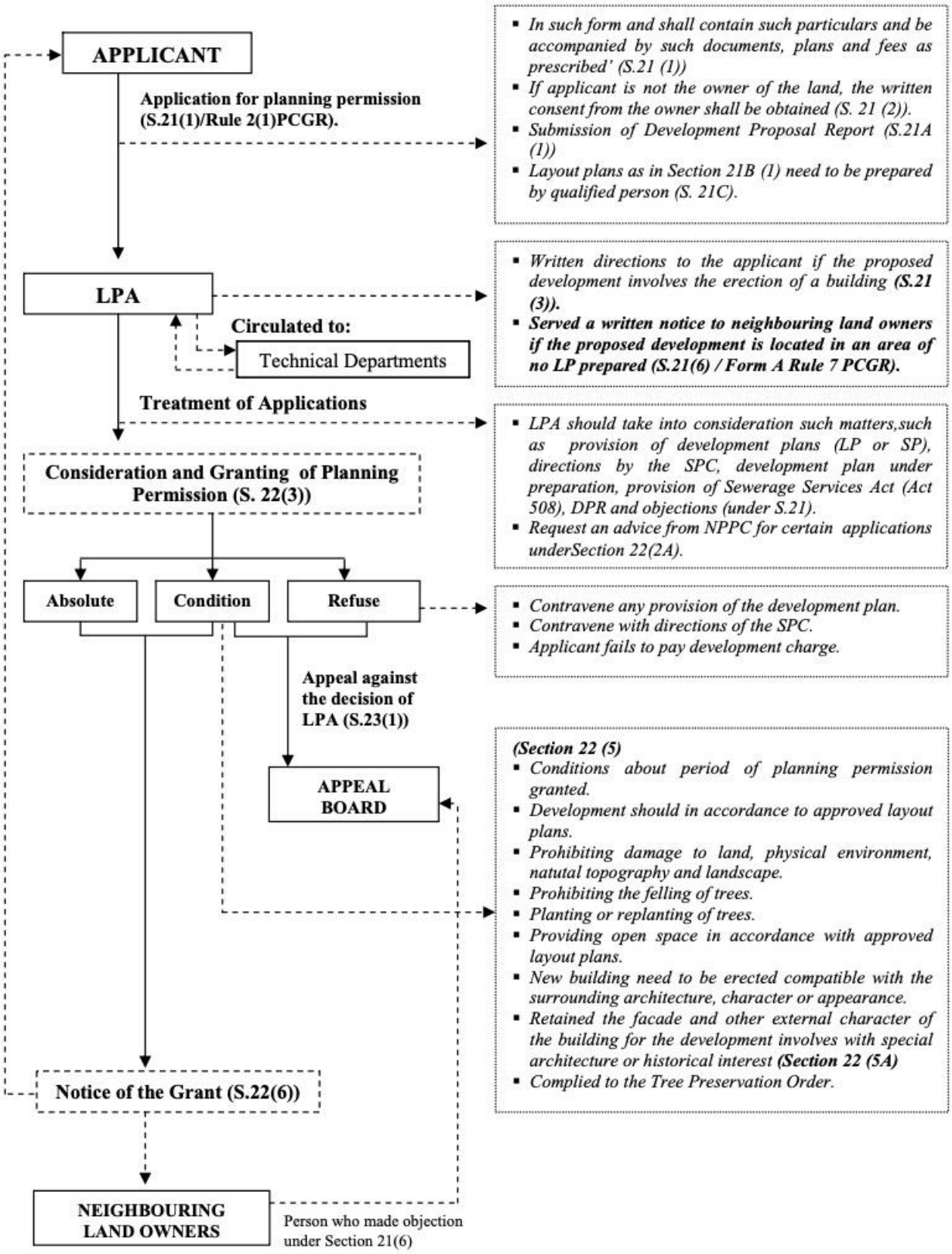

APPLICANT
Application for planning permission (S.21(1)/Rule 2(1)PCGR).
In such form and shall contain such particulars and be accompanied by such documents, plans and fees as prescribed' (S.21 (1))
If applicant is not the owner of the land, the written consent from the owner shall be obtained (S. 21 (2)).
Submission of Development Proposal Report (S.21A (1))
Layout plans as in Section 21B (1) need to be prepared by qualified person (S. 21C).
LPA
Circulated to:
Technical Departments
Written directions to the applicant if the proposed development involves the erection of a building (S.21 (3)).
Served a written notice to neighbouring land owners if the proposed development is located in an area of no LP prepared (S.21(6) / Form A Rule 7 PCGR).
Treatment of Applications
LPA should take into consideration such matters,such as provision of development plans (LP or SP), directions by the SPC, development plan under preparation, provision of Sewerage Services Act (Act 508), DPR and objections (under S.21).
Request an advice from NPPC for certain applications underSection 22(2A).
Consideration and Granting of Planning Permission (S. 22(3))
Absolute
Condition
Refuse
Contravene any provision of the development plan.
Contravene with directions of the SPC.
Applicant fails to pay development charge.
Appeal against the decision of LPA (S.23(1))
APPEAL BOARD
(Section 22 (5)
Conditions about period of planning permission granted.
Development should in accordance to approved layout plans.
Prohibiting damage to land, physical environment, natutal topography and landscape.
Prohibiting the felling of trees.
Planting or replanting of trees.
Providing open space in accordance with approved layout plans.
New building need to be erected compatible with the surrounding architecture, character or appearance.
Retained the facade and other external character of the building for the development involves with special architecture or historical interest (Section 22 (5A)
Complied to the Tree Preservation Order.
Notice of the Grant (S.22(6))
NEIGHBOURING LAND OWNERS
Person who made objection under Section 21(6)

Figure 4.15 The procedure of planning control in Malaysia (Marzukhi et al., 2012)

Malaysia's planning control procedure is mainly similar to the one used in the United Kingdom, which is based on a discretionary control system. This type of system is used in the UK to assess, regulate, and oversee urban development (Marzukhi et al., 2012). In the UK, planning applications are decided based on the provisions outlined in the development plans.

However, in Malaysia, the application of planning control has been controversial, with criticisms focusing on decision-making efficiency and efficacy. This has led to debates over the effectiveness and efficiency of the system in Malaysia and calls for reforms to address these issues. Despite these criticisms, the discretionary control system remains a widely used method for planning control, both in Malaysia and the UK, as it allows for flexibility in decision-making and the consideration of unique and specific circumstances in each development proposal. Nevertheless, it is important for the government to continuously evaluate and improve the planning control procedure to ensure that it is serving its intended purpose effectively and efficiently.

- **Land control**

In Malaysia, a federal country, states are responsible for their land matters (Azmi et al., 2019; Zulkifli et al., 2015). The Malaysian constitution protects the private ownership of property, including land, and the National Property Code of 1965 reinforces this by establishing a comprehensive and well-organized system for land ownership registration and trading, ensuring the stability of land titles.

The constitution designates the right to land as a state issue, and each state has its land management system. There are also local land policies within the third tier of the administrative system.

In the Peninsular region of Malaysia, the land registration system is based on recording land transactions in the land market (Zulkifli et al., 2015). The goal of the system is to help in registering land ownership and recording the rights, limitations, and obligations that come with it, through the use of precise surveying methods. The cadastral system maintains its accuracy, which allows the basic geographic data included in spatial data infrastructure to play a crucial role in overall land management operations. This system is established through field surveys and the registration of land ownership titles in the land registry.

Meanwhile, land administration is the responsibility of each state. As a result, the procedures for handling lands, such as conversion, division, partition, or merger, vary from one state to another. From the perspective of land administration, land development refers to altering the original usage of a piece of land in a way that affects its restrictions, conditions, and classification of land use. The National Land Code of 1965 sets regulations and restrictions to govern and control land development.

Approving development applications in Malaysia involves a surrender and re-alienation method (Azmi et al., 2019). This method is in accordance with the regulations outlined in the National Land Code of 1965. Applications for various land development projects, including subdivision, amalgamation, partition, and conversion, can all be submitted as a single application. To receive approval, the applicant must submit the land application to either the District Land Office or the State Authority. Before the application is presented to the State Executive Council, the District Land

Office/State Land and Mines Department acts as a secretariat. This procedure is mandatory for proposed projects larger than 4 hectares (10 acres). During this step, the opinions of three agencies are considered: the local authority, the District Land Office, and the Department of Town and Country Planning.

- **Building control**

The building regulations in Peninsular Malaysia are overseen by the Street, Drainage, and Building Act of 1974 and the Uniform Building Bylaws of 1984. East Malaysia (Sarawak and Sabah) are regulated by the Building Ordinance of 1994 and the Building Bylaws of 1951 (World Bank, 2015). The government enforces construction standards across the country and assigns special rules to the relevant jurisdiction. The Fire Services Department is responsible for implementing fire control regulations as specified in Parts VII and VIII of the Uniform Building Bylaws of 1984 and ensuring compliance through the Fire Services Act 1988. The same regulations apply to water and sewerage connections, though the contractors responsible for new utility connections may face different standards and processes.

Before starting any building work on a project, a developer must obtain Building Plan Permission according to the Uniform Building By-Laws and the Street, Drainage, and Building Act 1974 (Act 133). The submission of a building plan is typically required for permanent construction projects such as commercial buildings, schools, offices, shops, industries, and homes. The building specifications and structural calculations for the proposed building work must be submitted for approval before the construction of new projects can begin. In some cases, a Development Order is

also needed when applying for a Building Plan, and different departments within local governments are involved in the approval process. This approval process can take up to six months for a concurrent application.

Local departments typically set the submission requirements for construction plans. Each department has its own set of guidelines for submitting building plans. Payment receipts for plan fees, fee calculation sheets with proper calculations, and architect/engineer-endorsed building plans that include a key plan, site plan, and floor plan are required for submission (as per the Street, Drainage, and Building Act 1974).

4.1.2.7 Urban planning system in Vietnam

Vietnam's urban planning system, inspired by the former Soviet Union, was initially created to be used within a centrally controlled economic framework (Matsumura et al., 2017). However, after the Doi Moi economic reforms 1986, the country shifted from central control to a socialist-oriented market economy (Matsumura et al., 2017). During this transition period, the government aimed to achieve two objectives: to gradually open up the market to attract capital while promoting administrative decentralization. Marketization led to local capital and foreign investment development, reducing the local economy's dependence on the central government. Decentralization enhanced local autonomy and transformed the central-local relations of administrative authority. Since then, the rapid marketization in the land sectors have had a significant impact on Vietnam's cities' physical landscapes, where both private individuals and interest groups drive development.

The economic liberalization in Vietnam led to a rise in private housing and spontaneous urban development. Both the government and corporations have taken on formal urban development projects to bring modernity to the cities. As a result, Vietnam's planning system has become more structured, aligning with implementing broader market reforms. It's necessary to move from the communist planning approach to a modern planning system that includes legal measures to address conflicting interests. The subsequent part will elaborate on Vietnam's urban planning laws and policies.

Vietnam's urban planning is structured into five levels, as the 2009 Law on Urban Planning outlines. These levels include national, regional, city/provincial, zone (within the city), and project. The socioeconomic planning outlines the growth strategy and main directions at the national, regional, and city/provincial levels. At the same time, the spatial plans, including land-use plans, construction plans, and sectoral plans, are developed at the regional, city/provincial, and zone/district levels (see Table 4.2).

Table 4.2 Planning System in Vietnam (Source: Matsumura et al., 2017; World Bank, 2020b)

Planning level	Plan	Content	Elaboration and approval authorities
National planning	Socioeconomic development plan (SEDP), five years	The general direction in key fields: set economic, social, and environmental goals and detailed production and investment targets.	Ministry of Planning and Investment —approved by the prime minister

Regional planning, 1/25,000 or 1/100,000 scale (interprovincial)	Land use master plan, 10 years	Determine land use targets for agricultural, non-agricultural, and unused land (19 land use categories).	Ministry of Natural Resources and Environment —approved by the prime minister
	Sectoral plan	Sectoral plans (land use, education, transport, industry, health, tourism, and so forth) are devised separately.	Different ministries—approved by the prime minister
	Socioeconomic development plan (SEDP)	General direction in key fields: set economic, social, and environmental goals and detailed production and investment targets.	Ministry of Planning and Investment / Department of Planning and Investment —approved by the prime minister
	Regional master plan	Define objectives of development, main spatial orientations, and functional zoning for residential areas, industrial zones, natural areas, socioeconomic facilities, and technical infrastructure.	Ministry of Construction —approved by the prime minister
Provincial/city planning (centrally-run cities, provincial cities, towns, townships, and	Socioeconomic development plan (SEDP)	General direction in key fields: set economic, social, and environmental goals and detailed production and investment targets.	Ministry of Planning and Investment / Department of Planning and Investment —approved by prime minister/Provincial People's Committee

new urban centres)	Land use master plan	Determine the areas of land types previously designated in the national master plan for land use and the areas of land types designated in response to provincial land use needs; identify land use zones according to land use function.	Department of Natural Resources and Environment —approved by prime minister/Provincial People's Committee
	Construction master plan at 1/25,000 or 1/50,000 scale	Determine the nature and function of urban centers, the development potential, driving forces, and orientations of urban expansion, the organization of urban social and technical infrastructure systems in both the inner city and suburbs, and the requirements for strategic environmental assessment.	Department of Planning and Architecture or Department of Construction —approved by prime minister/Provincial People's Committee
	1/25,000 or 1/50,000 scale sectoral plans	Technical infrastructure (e.g., urban transportation) is a component of master , zoning, or detailed planning, most notably in centrally managed cities. Separately, technical infrastructure planning is undertaken. Separate sector plans (for land use, education, transportation, industry, health, and tourism, for example) are included.	Technical departments—approved by prime minister/Provincial People's Committee
Zone/district planning	1/2,000 or 1/5,000 scale zoning plan (areas within	A zoning plan must specify the use functions for each parcel of land, the principles of spatial organization and landscape for the entire planning area, the regulations governing population, land	People's Committee of district or Department of Planning and Architecture / Department of

	cities, towns, and new urban centres)	use, and technical infrastructure for each street block, the arrangement of social infrastructure facilities in accordance with their intended use, and the network of technical infrastructure facilities. and environmental strategic assessment	Construction — approved by Provincial People's Committee
	Land use master plan	Determine the areas of the land types already allocated in the provincial master plan on land use and the areas of land types in accordance with land-use demands of the district and communes; determine land use zones by land-use function for each commune-level administrative unit.	People's Committee of district or Department of Natural Resources and Environment — approved by Provincial People's Committee
Project	1/500 scale detailed plan (areas to meet urban development and management requirements or construction investment needs)	Must specify population, social, and technical infrastructure criteria, as well as requirements for spatial organization and architecture for the entire planning area; must arrange social infrastructure facilities in accordance with their intended uses; must specify land use regulations and requirements for architecture work for each lot of land; must arrange the network of technical infrastructure facilities.	Investor—approved by Provincial People's Committee

The planning system in Vietnam is highly institutionalised. Two main forms of planning aim to regulate land use and spatial development: (a) land-use planning which is overseen by the Ministry

of Natural Resources and Environment, and (b) construction planning which the Ministry of Construction manages (World Bank, 2020b). Land-use planning involves assigning and dividing the land for use in different sectors based on socioeconomic needs, security, environmental preservation, national defence and climate change adaptation. This plan is created for a specified time frame and considers the potential and requirements of different sectors. On the other hand, urban construction planning focuses on the physical design and layout of a city. However, due to the close relationship between plans and political administration, these two types may not always align, making expert planning and development consulting services necessary for successful urban development projects.

4.1.2.8 Development control system in Vietnam

In Vietnam, the local governments are responsible for overseeing urban development. They exercise strict planning control over all urban development activities and require investors or developers to obtain necessary permits and certifications before beginning construction. Figure 4.16 outlines the various types of permissions that developers must obtain, which are governed by different laws and regulations, including planning permits, land use rights certificates, and construction permits. Among them are the following:

- *Planning permit.* Under the 2009 Law on Urban Planning, the investor must seek permission from the District People's Committee to undertake urban planning, prepare a building project proposal, and conduct construction. Depending on the type of construction, planning permission is valid for no more than 24 months.

- *Approval of detailed plan.* The investor should get the District People's Committees to approve the project's detailed plan, which defines the target demographics, social and technical infrastructure, architectural style, distribution of social infrastructure relevant to residents' needs, land use types , and architectural requirements for each land plot.
- *Land use rights certificate.* Under the 2013 Land Law, the investor or developer shall acquire an acknowledgment of complete user rights for the piece of land in accordance with the authorised purposes by the District People's Committee.
- *Construction permit.* The investor or developer must get authorization from the District People's Committee to begin building work at the site assigned or leased by the government, in accordance with the approved construction design and detailed plan.

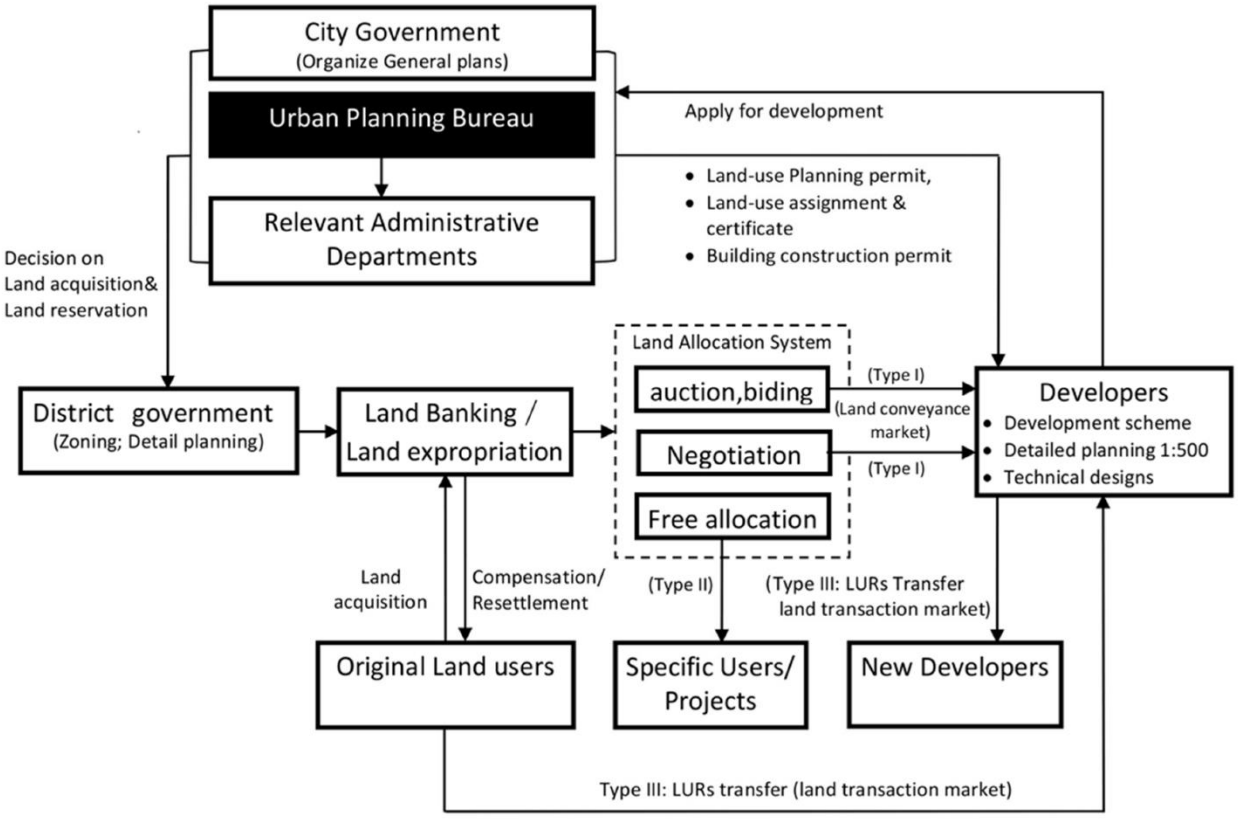


Figure 4.16 Land development process and planning control (Source: Huynh, 2015)

- **Planning control**

In Vietnam, local governments have turned to spatial and land-use planning to control urban expansion. The state implements a combination planning control system. Due to the centralized land management system, local governments require a legal planning document to regulate and organize land markets (Leducq & Scarwell, 2018; Matsumura et al., 2017). At the same time, local governments have a certain degree of discretion in the decision-making process for specific urban development projects.

Since implementing the Doi Moi economic reforms, the planning control system in Vietnam has developed into an effective tool for local governments to regulate land development. The country's land use and housing laws have significantly changed due to political and economic reforms. In 1993, the Land Law defined "land-use rights," which led to the growth of a land market and the commercialization and privatization of metropolitan areas (Matsumura et al., 2017). The first planning policy document after Doi Moi, Decree No. 91 published in 1994, divided the urban planning system into two levels: (1) master planning, which involves creating a 20-year vision for entire cities and their districts, and (2) detailed planning, which focuses on the physical form of specific projects at 1:2000 and 1:500 scales. At the master planning level, land development issues are generalized. In contrast, detailed planning concentrates solely on the physical form of specific projects and overlooks balanced socioeconomic growth at the district or county level.

The framework for urban planning in Vietnam has been reorganized since implementing the 2009 Law on Urban Planning. Zoning has been introduced to complement detailed planning at a scale of 1:2000 and has become a level of planning between master and detailed planning. Unlike detailed planning, zoning focuses on land use planning at the district level and clarifies the responsibilities and requirements for urban land use. In urban areas, zoning involves establishing regulations for using each piece of land and creating infrastructure networks for social and technological benefits. As a result, zoning has strengthened local governments' ability to manage urban areas and has evolved into a legal framework for controlling development in specific regions (Matsumura et al., 2017).

The local People's Committee has the authority to issue planning permits (see Table 4.3) for projects that comply with development plans (including district-level master plans, zoning plans, and detailed plans) or to reject projects that contravene any requirements.

Table 4.3 Application for planning permit

	Detailed information
Responsible department	Department of Construction or Department of Planning and Architecture
Granting authority	Local-level People's Committee
Required Document	• Application form; • Chart of the land parcel proposed for issuance of planning permit • Planned scope and borderlines of the land parcel, criteria about the use of planned land; • Planned investment matters, project size, and total investment; • Reports on legal and financial qualifications for project implementation
Period	30 days

- **Land control**

The land law in Vietnam is based on Karl Marx's political economy, which promotes the idea of government ownership or collective ownership of all property, with private ownership of land being abolished. The Vietnamese Constitution reflects these beliefs and declares land as a crucial resource for national development, treating it as "public property" owned by the "entire people" and managed by the government (Mellac et al., 2010). Households, communities, and other entities who are granted land by the state only have "use rights," not "ownership rights" (Mellac et al., 2010).

The government manages the land market by allocating land use rights, which are divided into categories such as land allocation, recognition, and leasing. Land allocation is the closest form of freehold land ownership and can only be accessed by domestic entities. These land use rights may require payment of a land use charge, but the final decision is made by the District People's Committee. Recognized land use rights are also limited to domestic entities and may come with associated costs. The most common form of land use right is a lease, the only type accessible to foreign entities. Leases typically last for 25 to 50 years and can be renewed at the discretion of the District People's Committee or relevant authority. Land leases may also be subject to land use rent (The Land Law, 2013).

Land use designation is linked to established development objectives, requiring government approval for any changes to the plans. This can lead to the state rescinding land use rights and reallocating the property with a new designation. The requirement for construction and land usage to comply with municipal land-use plans and overall planning laws is a key factor in issuing a land use right certificate. The government of Vietnam uses planning as a tool for actively controlling land

supply. As per the Land Law 2013, local government plans approved by the central government can reserve land for future development. The law mandates local governments to abide by statutory land use plans in all land allocation processes, whether administrative or market-based. Thus, land management has become integrated into every aspect of current planning (Dan et al., 2020; Matsumura et al., 2017).

- Building control

Vietnam's building control system is a comprehensive framework for regulating construction activities. The primary objective of this system is to ensure that all construction projects are carried out in compliance with relevant laws, policies, and regulations, as well as to protect the rights of the residents and the environment.

To obtain construction permission at the District-level People's Committee, the developer must comply with all necessary procedures once the development is approved and the land use right certificate has been issued (World Band, 2020b). This certificate is a critical document that verifies that the developer has the right to use the land for construction purposes. The permit should be granted based on the legal documentation of land use rights and project ownership, minimum hygiene conditions for the project, requirements for urban architectural planning, the project's aesthetic appearance, and all parameters explicitly outlined in statutory plans (World Band, 2020b). A construction firm must submit the application form for a construction permit and then obtained it from the local building department. The Department of Construction has 30 working days from receiving the completed file to grant or reject the construction permit, depending on whether the

application complies with relevant planning and building laws and policies. The construction firm must submit written notice of the start date to the People's Committee at the commune level, where the project is located, within a time limit of 7 working days after receiving the construction permit. This notice is a critical step in the building control system, as it informs the local community about the construction project and allows them to express their opinions and concerns.

The government uses the building control system to exert control over land development. By regulating the construction activities through this system, the government can ensure that the development projects are consistent with the national development goals and priorities and with the local communities' environmental, social, and cultural needs.

4.1.2.9 Urban planning system in Thailand

Urban planning in Thailand has undergone significant changes since the country transitioned from absolute monarchy to constitutional monarchy in 1932 (Chaowarat, 2010). The early years of city planning in Thailand were focused primarily on the growth of Bangkok, with numerous acts on city planning being published during this time. However, it wasn't until the issuance of the Town and Country Planning Act of 1952 that urban planning in Thailand truly evolved to a new level (Chaowarat, 2010). This act was modelled after the Town and Country Act of 1944 in England and outlined the procedures that local governments must follow in designing their town planning.

In 1957, the American firm Litchfield Whiting Bowne & Associates was hired to design the first comprehensive plan for Bangkok. The firm recommended that the Thai government amend the Town and Country Planning Act of 1952 to align it with the forthcoming plan. This led to the drafting of a new town planning statute with the assistance of the Litchfield Whiting Bowne & Associates firm, which was eventually issued in 1975 as the new town planning legislation.

The 1975 act established the Board of Town Planning and the Comprehensive Land-use Plan, granting the Board of Town Planning national jurisdiction over the Comprehensive Land-use Plan. The law also became more democratic, requiring public notice and a venue for local people to express their opinions on each town planning project (Chaowarat, 2010). This involved the participation of multiple agencies, including the Department of Public Works, the Department of Town and Country Planning, the Ministry of Interior, the Ministry of Agriculture and Cooperatives, the Ministry of Transport, and the Ministry of Industry.

The Town and Country Planning Act of 1976 was amended in 1992, creating two distinct levels of city land use for planning purposes: Comprehensive Master Plan and the Specific Plan, both of which are administered by the minister in accordance with applicable town planning laws. In 2002, the cabinet directed the Departments of Public Works and Town & Country Planning to develop a national urban plan, which resulted in developing a national-regional plan to create development policies, strategies, and metrics to serve as frameworks for spatial development and planning at all levels.

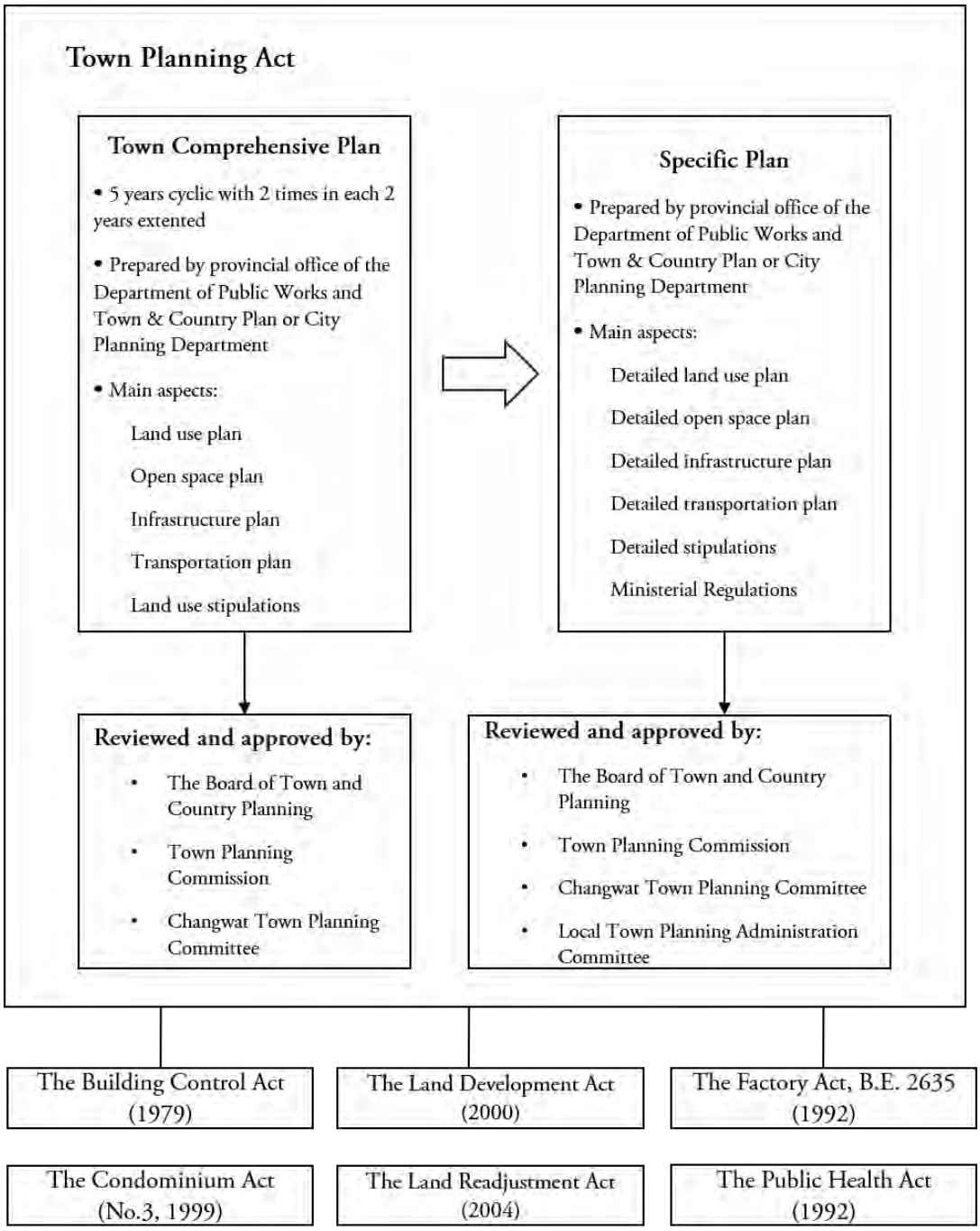


Figure 4.17 City planning system and regulations (Source: Department of Public Works and Town & Country Planning, 2016)

Comprehensive Plan: According to the Town and Country Planning Act of 1992, the comprehensive plan is a master plan enforced by the government agency. All parties, including private and government entities, must abide by this statutory plan, and those who violate it may face legal consequences. The comprehensive plan includes several key elements such as the plan's objectives, boundary map, land use plan, open space plan, transportation plan, public facilities plan, and policy and action plan. The details of each comprehensive plan can vary from one province to another.

While the comprehensive plan contains specific regulations for the entire city, it is considered more of a guide rather than an absolute enforcement. It provides an overall picture of the city's development to assist all stakeholders in adhering to it. For instance, if the comprehensive plan states that a particular area will be used for a public route in the future, it prohibits all other uses besides the current service or repair until the property is acquired through expropriation. The comprehensive plan has legal implications that impact people's rights, but due to the limitations of absolute enforcement, it is implemented through ministerial rules rather than the entire act.

Specific Plan: The Specific Plan outlines the regulations for zoning and development within a designated area. This plan provides a detailed description of land use, construction, and local utility provisions. It acts as a detailed map or code for the specific area, implementing the provisions outlined in the comprehensive plan.

The Specific Plan is a concrete plan that follows the guidelines set by the comprehensive plan. For instance, if the comprehensive plan states that a certain area will be used as a public route, the specific plan must specify the exact land that will be taken through expropriation to construct public amenities. This plan serves as a tool for enforcing the comprehensive plan's provisions.

The development of urban planning in Thailand has come a long way since its early days, with the issuance of the Town and Country Planning Act of 1952 marking a significant milestone in the evolution of urban planning in the country. Today, Thailand has a comprehensive urban planning system that involves the participation of multiple agencies and provides a democratic platform for local people to express their opinions.

4.1.2.10 Development control system in Thailand

The development control system in Thailand is governed by three primary laws that aim to ensure sustainable and orderly urban and land development. The Town Planning Act, the Building Control Act, and the Land Development Act play crucial roles in regulating and controlling various aspects of development in Thailand.

1. The Bangkok Metropolitan Administration uses the Town Planning Act to plan the development of Greater Bangkok and by the Department of Public Works and Town & Country Planning to plan development across the country. This legislation outlines the various environmental and land-use limitations for every building project, ensuring that the development process is carried out sustainably and orderly. The comprehensive plan and the specific plan, administered by the minister, are the two distinct levels of city land use for planning purposes under the Town Planning Act.
2. The Land Development Act, which the Central Land Development Board enforces, governs the development of land in Thailand. The act outlines the procedures for acquiring

and developing land for various purposes, including housing, commercial, industrial, and agricultural purposes. The act also provides for the protection of agricultural land and forests, ensuring that land development is orderly and sustainable.

3. The Building Control Act, enforced by the Bangkok Metropolitan Administration and the Public Works Department, governs the construction of buildings in Thailand. The act sets out the technical and safety standards for building construction and ensures that the buildings are built according to the approved plans and specifications. The act also provides the legal framework for the inspection and approval of building plans, and the issuance of building permits.

- **Planning control**

In Thailand, local governments are in charge of enforcing development plans and policies. The Town Planning Act provides the framework for this system and outlines the two main plans used to regulate development: Comprehensive Plan and the Specific Plan. Local governments enforce these plans, while the Department of Public Works and Town & Country Planning is responsible for developing them.

A Comprehensive Plan is the overarching framework for development in a given area. Once a Comprehensive Plan is in place, relevant local governments can create an associated Specific Plan. Local governments may also request that the Department of Public Works and Town & Country Planning draft their Comprehensive Plan; if there is no Comprehensive Plan in place, the minister

may request one from the department or local governments. Before a Specific Plan can be implemented, local governments must receive permission from the Town Planning Board.

Despite the Town Planning Act making it illegal to contravene these plans, they are not effectively enforced. Developers or individuals are not obligated to obtain planning approval before developing their property. This leads to difficulties in determining whether the plans have been violated, as it requires a thorough examination of land use and a review of Ministerial Regulations governing site designation and density limits. The land use maps are often not detailed enough, and the density limits are too vague, making it challenging to enforce the plans properly (Keattisak, 2018).

Unlike countries with a discretionary planning system, obtaining approval for development projects is viewed as more perfunctory, lacking the level of scrutiny and decision-making authority seen in other countries. Decisions on planning applications are typically limited to confirming that the proposed project aligns with the provisions outlined in the plan, rather than serving as a comprehensive evaluation of the project's feasibility and impact. The plan itself is considered the most important aspect of the planning control system, as it lays out all of the criteria that an application must meet to be considered for approval.

- Land control

Thailand's land control system is regulated by the Land Law which was enacted in 1954, laying the foundation for the current legal system governing land rights in the country. Historically, all of Thailand's land was owned by the King. In 1872, King Chulalongkorn established methods to acknowledge private property rights. Then in 1901, a title system was established inspired by the Torrens System in New South Wales. In 1954, a comprehensive land law was put into effect, forming

the basis of Thailand's current legal system for land rights. An individual could possess land rights if they acquired it before implementing the 1954 Land Code, through a title deed following the Code's provisions, or through another law as defined in the Code. The Minister of Natural Resources and Environment heads the National Land Allocation Committee, responsible for developing land allocation plans and policies, authorizing land allocation-related projects by public bodies, regulating land allocation, and enacting laws or regulations connected to land allocation.

The process of buying or selling land in Thailand requires several steps. First, the buyer and seller should go to the land office, where the parties must provide their identity cards and title certificates for verification. The land office then calculates the registration fee and any other expenses, and collects the fee, withholding tax, and special business taxes, which are paid to the Ministry of Finance. When an entire plot of land is sold, the process starts with the Land Officer documenting the transaction and submitting the necessary paperwork to the registration division. The application is then reviewed and approved by the Land Registrar. If the property needs to be subdivided, the Land Officer will arrange for a boundary survey and send the necessary documentation and a cover letter to the Survey Division. The Survey Officer will then review the documents, notify the relevant parties, and hold a cadastral survey meeting with the buyer, seller, and neighbours to establish the new property boundaries. The Surveyor will measure the parcel, set boundary markers, and prepare a parcel plan that all parties must sign. The Surveyor will then create a cadastral map and record the transaction in the cadastral records, with some documents kept by the Registration Division and others by the Survey Division. After the Land Registrar approves the documents, the records are updated, and a title

certificate is issued. The seller will receive one copy of the sale agreement, and the buyer will receive the second copy and the title certificate.

Foreigners are generally prohibited from holding freehold land in Thailand, but they can own a 100% stake in a Thailand land lease. The foreigner can lease the land or property from a Thai native, who still owns it, and the lease has a maximum term of 30 years. The lease must be written in Thai, documented, and maintained at the local Land Office, and any lease extension is a private agreement. After 30 years, the buyer has no formal legal rights.

- **Building control**

Thailand's building control system is a comprehensive framework that governs the construction process and ensures the safety and stability of buildings. The Building Control Act, which was first established in 1979, and its accompanying ministerial regulations provide the legislative framework for regulating building permits and other licenses, as well as matters relating to safety and fire prevention (DPT, 2020).

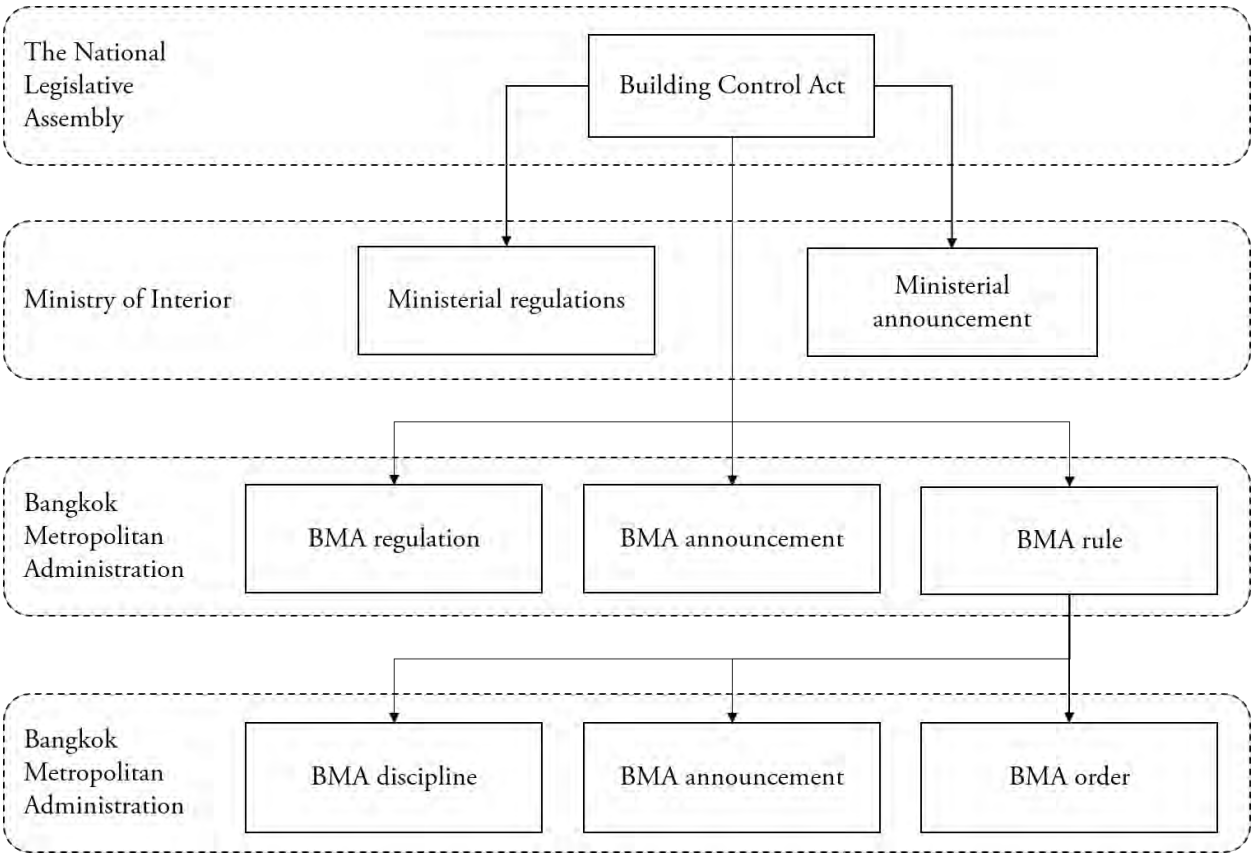


Figure 4.18 The Law of Building Control (Source: DPT, 2020)

The Building Control Act is used as a reference by local and national governments when making planning decisions, especially in regard to approving building projects. This act provides a source of guidance if there is no Comprehensive or Specific Plan in existence, and it also requires the establishment of ministerial regulations and municipal legislation, both of which contribute to strengthening the planning permission system. Regarding urban planning, these regulations and ordinances can limit growth in certain regions by making it easier to prevent new construction, rehabilitation, or repurposing of structures.

The original emphasis of the Act was not on land use but on particular architectural characteristics such as scale, height, open space, and site cover. The 1992 amendment to the Act modified the regulations that apply to certain buildings based on the Land-use Comprehensive Plan's zoning. For example, in Low Residential Zones, the maximum number of storeys allowed was restricted, while in Commercial Zones, buildings must be set back from the main road (DPT, 2020).

The Act is more concerned with using buildings in relation to the intended use of the land, rather than appropriating specific locations. It also formalizes rules relating to structural resilience, fire resilience, health and safety, environmental appropriateness, urban planning, design, and traffic-related concerns (DPT, 2020). Thus, the Building Control Act, its accompanying ministerial regulations, and the procedures for the application process for building permits and other licenses provide a strong foundation for regulating the construction industry in Thailand.

4.1.3 Comparisons of development control system between Hong Kong and the case countries

4.1.3.1 Urban planning system

Since the 1990s, decentralization policies have been adopted by Malaysia, Vietnam, and Thailand, making local governments crucial for the management and development of their cities. These governments play a key role in creating a legal foundation for urban planning through a regulatory framework that outlines the steps for creating, executing, and enforcing plans. This framework often includes regulations on land use, such as zoning and planning, as well as processes for appeals. In many Commonwealth countries, mainly former British colonies like Hong Kong and Malaysia, this framework is based on the 1947 British Town and Country Planning Act (Yuen, 2010).

As a result, urban planning laws have been established in these countries, with planning power typically centralized at the national level.

Table 4.4 Institutional framework for planning in three case countries, comparing with Hong Kong

Country	**State capital**	**Local institution in charge of formulating plan**	**Local institution in charge of enforcing plan**	**Pertinent law**
Malaysia	Kuala Lumpur	Master Plan Department	Town Planning Committee, Urban Development Department	Town and Country Planning Act 1976
Vietnam	Hanoi	Department of Planning and Architecture or Department of Construction	Local-level People's Committee	Law on Urban Planning
Thailand	Bangkok	Department of Public Works and Town and Country Planning	Town Planning Board	Town and Planning Act 1992
Hong Kong SAR, China	Hong Kong SAR, China	Town Planning Board	Town Planning Board	Town Planning Ordinance

Each of the three case countries and Hong Kong have urban plans, including master plans and detailed plans, and city development strategies (see Table 4.5). In Hong Kong, the territorial development strategy "Hong Kong 2030+" guides future planning and land and infrastructure development. Since the late 1990s, several Southeast Asian nations such as Thailand, Malaysia, and Vietnam have created city development strategies with support from the World Bank (Yuen, 2010). These strategies help cities evaluate their conditions and link economic growth and poverty reduction goals (Yuen, 2010).

Table 4.5 Levels of planning in Hong Kong and three case countries

Country	Planning levels	National plan	Regional plans	Municipal/urban master plans	Detailed plans	Project plans
Malaysia	Four: National, State, City, and (optional) detailed plans	National Physical Plan	Regional Structure Plan	Structure Plans, Planning Department	Local plans or Action Area Plans	Detailed plans prepared by projects
Vietnam	Four: National, regional, city/ provincial	Orientation of Comprehensive National Urban Development Plans; National	Regional Spatial Plans; regional socio-economic plans	Master Plans; city/ provincial socioeconomic plans	Zoning Plans; Detailed Plans of districts, wards, industry zones	Detailed plans for development projects

	and local plans	Strategy for Socioeconomic Development				
Thailand	Five: National, regional, provincial, local plans and detailed project plans	National spatial plans; National Economic and Social Development	Regional and Subregional Plans	Comprehensive Plans	Specific Plans	Detailed Project Plans (e.g., Urban Renewal Plans and Urban Development Plans)
Hong Kong SAR, China	Two: Territorial, local district				Outline Zoning Plans (OZP); in areas not covered by OZP, Development Permission Area Plans	Layout Plans prepared by projects

Urban planning in Hong Kong and the three case countries, which include former colonies (such as Hong Kong and Malaysia) and transitioning economies (such as Vietnam), share not only a

pattern of setting standards and procedures for implementation, but also a reliance on master plans. These regulatory systems are rooted in concepts that promote slow and consistent growth from a previous era (the colonial period) or a particular nation (usually a Western country or the Soviet Union). Despite being unchanged for many years, these frameworks continue shaping current and future city land development decisions (Yuen, 2010).

4.1.3.2 Development control systems

- **Planning control**

The cornerstone of the development control system is planning control. There are debates surrounding the planning control regime, particularly regarding what should be allowed based on the authority's discretion and how to regulate that discretion. Booth (1996) divides the planning control system into two paradigms based on their compliance with official statutory plans for decision-making. The first paradigm is the *discretionary control system*, which grants local planning authorities the discretion to review all projects on a case-by-case basis before granting or denying authorization. The second paradigm is *regulatory development control* and relies on legally established plan documents, such as zoning codes, to determine whether a development project should be approved. A project will be approved automatically if it meets all the criteria outlined in these ex-ante legislative plans.

Most parts of the world have planning control systems located somewhere in the middle of the spectrum between traditional discretionary and regulatory approaches, rather than at extremes. The three case countries embrace different systems of planning control. Like the British discretionary system, planning control in Malaysia primarily focuses on evaluating, regulating, and monitoring

urban growth through the approval or rejection of development applications (Marzukhi et al., 2012). Development applications are based on the provisions outlined in the development plans. Any building construction or change of use requires planning permission from local government, which must be obtained through a submitted application. National approval may also be granted for specific activities, such as small activities carried out by governmental bodies or in an unregulated industry like agriculture.

The planning system in Vietnam is shaped by the country's political ideology and operates through a two-tier system established in the 1960s, consisting of master plans and detailed plans. This system is heavily influenced by state enforcement rather than market forces, resulting in a political power struggle between development control agencies, developers, and other stakeholders. Most new developments follow the master plan and zoning plan set by the local government. For private projects, developers must first obtain a planning permit and then gain approval for the detailed project plan from the District People's Committee. These instruments ensure compliance with plans and regulations, but also allow for some discretion in decision-making by local authorities. Therefore, Vietnam has a hybrid planning control system.

The planning control system in Thailand is based on a regulatory control approach, different from that of Malaysia and Vietnam (Keattisak, 2018). There are two main types of plans that govern land use and urban development at the local level: Comprehensive Plans and Specific Plans. The latter includes zoning schemes for land use. The planning control process is established by prior detailed development plans and rules, and decisions on property development applications are made based on

whether they comply with legal restrictions such as zoning. There is no requirement for individuals to seek planning approval before developing land.

- **Land control**

The measures used for land management vary in different countries, while all have a significant effect on a city's growth and expansion. In Hong Kong, the government employs a land leasehold system, granting leases of public property to the public for a predetermined period. This system is a crucial tool for the government to regulate urban development.

Malaysia establishes a freehold system, where people can secure full land ownership. Private land can be bought and sold in the open market, while public land can be sold directly to individuals or through competitive methods such as auctions or bidding. The control of land development can be exercised by approving or denying applications for land division, consolidation, partition, or conversion. In Thailand, a freehold system is conducted. In the past, all land in Thailand was owned by the monarch. In 1872, King Chulalongkorn established procedures for recognizing private land rights, and individuals now have access to land through the open market. However, all large-scale development projects must have a development license application approved by the Land Development Board before construction can start, giving the government control over land development.

Vietnam is the only country in the study where private individuals have exclusive land-use rights. The land is classified as public property that belongs to the entire population, and is managed and administered by the central government. This results in a government-controlled land market through the granting of land-use rights. People can acquire land through competitive methods such as auctions

and bidding, administrative allocation without lease payments, or transactions. Importantly, obtaining a land-use rights certificate requires that any construction and land use align with official land-use plans and comprehensive planning regulations (as outlined in the Law on Land, 2013). The land management system has evolved into a legal tool that allows the government to actively control land development.

- **Building control**

The regulations for building control play a major role in determining the appearance of new construction and ultimately shaping the look of the city. In Hong Kong and Malaysia, all private building projects must receive approval from the respective Building Authority before construction can begin. The authority reviews the submitted building plans to ensure they comply with legislative and administrative requirements. The same system is enforced in Malaysia through the Street, Drainage, and Building Act of 1974. It requires developers to obtain building plan approvals to ensure that their projects comply with planning regulations, building laws, and other regulations.

In Vietnam and Thailand, building permits are a significant tool by which the government controls land development. Before starting construction, developers must receive approval from the building department. In Thailand, where developers do not need planning permission, local governments rely on the Building Control Acts as a framework for implementing planning when approving construction projects. This has led to the creation of ministerial rules and municipal regulations that substitute for a formal planning permission system.

Table 4.6 Development control system in Hong Kong and the three case countries

Countries	Planning control		Land control		Building control	
	Type	**Instrument**	**Tenure type**	**Instrument**	**Instrument**	**Law**
Malaysia	Discretionary	Planning permission	Private land	Applications of land sub-division, amalgamation, partition, and conversion	Approval/ rejection of building plans	Street, Drainage, and Building Act
Vietnam	Discretionary+ Regulatory	Planning permit; Detailed project plan	State land	Land use right certificate	Construction permit	Construction Law
Thailand	Regulatory	Land-use zoning plan	Private land	Land development license	Construction permit *(serving as "planning permission")*	Building Control Act
Hong Kong SAR, China	Discretionary+ Regulatory	Outline Zoning Plan	State land	Lease condition	Approval/ rejection of building plans	Buildings Ordinance

4.2. Strategy 2: Collaboration with local professionals

> "I believe almost all Hong Kong surveyors would hire local professionals to help with document translation when implementing projects in Southeast Asian countries. This is the most effective way."
>
> *--Interview with Respondent D from a Global engineering consulting firm in November 2022*

Hong Kong surveying firms operating in Southeast Asian markets should adapt to the context of the host country, and the measures of adaptation depend on their stage of expansion. Most interviewees from Hong Kong surveying firms mentioned their companies entered Southeast Asian markets to serve Hong Kong clients abroad. In this 'client-following' stage, there is no pressure on local adaptation or knowledge integration as their duty is relatively simple, such as drafting the contracts with the contractors (Respondent C, E, and F, 2022). The Hong Kong surveyors mainly rely on clients' local partners to translate the contracts, negotiate with the contractors, and deal with the issues related to local authorities (Respondent A, 2022).

However, the collaboration would go more profound when the Hong Kong surveying firms aimed to expand their presence in the Southeast Asian markets (Respondent G, 2022). **Some surveying companies have entered a phase of seeking new markets, aiming to expand their services to clients in Southeast Asia and foreign companies operating in the region. In doing so, they are actively establishing global networks of offices through collaborations with local firms or the establishment of subsidiaries.** At this stage, they need to set up a team that could operate

more efficiently than local competitors. This requires Hong Kong surveyors to speed up the adaptation process by engaging local professionals in the firm operating (at least in the branch office or subsidiary).

Take Respondent E's experiences as an example. He has participated in some projects in Southeast Asian countries. One was a hotel construction project in Thailand which started in 2018 (and is still unfinished, due to the COVID-19 pandemic). As his firm already has a branch office in Thailand, the team could easily access local resources and cost databases before the project commenced. He travelled to Thailand frequently in the initial stages to help with bidding and closing contracts with contractors; after that, he usually visited once or twice a month to evaluate the construction work. According to Respondent E (2022), the most challenging part of project implementation was acquiring knowledge of local standards, policies, and practices. The firm's strategy is to hire local surveying assistants responsible for providing the required information and advice. **These local employees would be trained in Hong Kong for a few weeks, focusing on familiarising themselves with the Hong Kong team's working style.** They assisted with preliminary project implementation work, but all documents required approval by the Hong Kong team. However, this process increased decision-making time. Respondent E mentioned if local employees could have some authority in some instances, they could work more efficiently.

Respondent E's experience shows that engaging local professionals is not the end but a start. Hong Kong surveying firms need to enhance their strategies for forming diverse global teams comprising professionals who can efficiently cater to the integrated cross-national service requirements of multinational clients. The capability to assemble such teams has emerged as a crucial factor for gaining a competitive edge in the professional services industry. **The competitive advantage of a**

global surveying firm lies in its proficiency to create teams spanning various practices and locations, enabling them to effectively handle global client relationships and execute intricate transactions more proficiently compared to independent or collaborative firms. In this context, local partners or employees are given more authority to better mobilize and coordinate firm-wide resources.

Additionally, Hong Kong firms in the "market-seeking" phase should dedicate substantial efforts to effectively manage their corporate cultures, highlighting the significance of transnational collaboration and resource exchange. These efforts are backed by diverse multinational mobility initiatives, training schemes, and networking gatherings designed to expose employees to novel work approaches, diverse cultures, varied perspectives, and, ultimately, cultivate professionals capable of operating across national boundaries. Novel systems for rewarding and acknowledging achievements will have been introduced to further underscore the value of collaboration and encourage knowledge sharing. Through these ways, Hong Kong surveying firms could facilitate the transfer of experiential knowledge and resources between both Hong Kong and Southeast Asian countries, thus making it possible to signal service quality and build a reputation abroad.

4.2.1 Surveyor in Malaysia, Vietnam, and Thailand

Hong Kong surveyors could seek collaboration with local surveyors when operating businesses in Southeast Asian countries. We summarise the information of three firms under the regulation of RICS in Malaysia, three such firms in Vietnam, and one in Thailand. These regulated firms follow RICS Rules of Conduct for Firms. They are held to a higher standard in staff training, professional

indemnity insurance, dispute handling, and English communication. Hong Kong surveyors could consider these RICS-regulated firms as potential partners or talent pool if they needed support when implementing projects in these two countries.

Table 4.7 shows more details of the eight companies:

Table 4.7 RICS regulated firm in Vietnam and Thailand

	Location	Type of surveyor	Working scope	Surveying services	Contacts
Baharuddin Ali & Low Sdn Bhd	Kuala Lumpur, Malaysia	Chartered Quantity Surveyor	Residential and Commercial	Quantity surveying	Tel: 603 – 9285 3744 Email: balow@balow.com.my
Contract Solutions-I PLT	Kuala Lumpur, Malaysia	Chartered Quantity Surveyor	Residential and Commercial	Contract administration; Contract management; Dispute resolution; And project management	Tel: +603 6206 2000 Email: info@contractsolutions-i.my
Paragon Consultants	Kuala Lumpur, Malaysia	Chartered Quantity Surveyor	Residential and Commercial	Quantity surveying	Tel: +603 3322 3797 Email: info@paragonconsultants.org

BK Vietnam Co. Ltd.	Ho Chi Minh, Vietnam	Chartered Quantity Surveyor	Residential and Commercial	Quantity surveying	Tel: 0084903911313 Email: cjohnston@bkasiapacific.com
DCF Vietnam Corporation	Ho Chi Minh, Da Nang, Vung Tau, Lam Dong, Vietnam	Chartered Valuation & Estate Agents; Chartered Valuation Surveyor	Residential and Commercial	Valuation	Tel: 0965 304430 Website: http://dcfvietnam.com/
Mark Olive Consultants Co. Ltd.	Ha Noi, Vietnam	-	Residential and Commercial	Quantity surveying; Building surveying; Contract management; Dispute resolution	Tel: +84 0903-217-832 Email: Mark.Olive@MOAC.com.vn Website: https://moac.vn/
Altus Group	Bangkok, Thailand	-	Commercial contracts	Quantity surveying; Project management	Tel: +66 2 259 8545 Email: thailand@altusgroup.co.th Website: https://www.altusgroup.com/

4.3. Strategy 3: The role of Hong Kong Institute of Surveyors

During the interviews and questionnaire survey, many surveying professionals highlighted the role of the Hong Kong Institute of Surveyors (HKIS) in helping Hong Kong surveyors "go global" under the BRI. The most frequently mentioned suggestion is establishing more partnerships with surveying institutions in countries along the BRI. Respondent A from a local surveying firm said:

> **"Hong Kong surveying firms were small in scale and lacked the resources to develop business networks in Southeast Asia. The most advantage of Hong Kong surveyors is their international backgrounds, recognised by both RICS and HKIS. HKIS could play a role in aligning RICS professional standards and guidelines with those in Thailand, Malaysia, and other South Asian countries. Thus, we will find more opportunities in that region."**
>
> *-- interviewed Respondent A from a local surveying firm on August 2022*

Other suggestions from interviews with HKIS include the following:

- Organise seminars and professional expos

HKIS has a crucial role in promoting and advancing the surveying profession in Hong Kong. HKIS can help achieve this goal by organizing more seminars and professional exhibitions (Respondent C, 2022). These events can be held both within Hong Kong and in other countries, and they should be designed to provide opportunities for professional practitioners in Hong Kong to showcase their services and expertise to potential clients.

By hosting these events, HKIS can create a platform for professional practitioners in Hong Kong to network and collaborate with others in the industry and interested potential clients. For example, by setting up booths at these events, Hong Kong surveyors can display information about their services and demonstrate their expertise and experience through presentations and workshops. This is an excellent opportunity for them to market themselves and to get their names and services out in front of potential clients.

Furthermore, by organizing these events in other countries, HKIS can help to showcase the high level of expertise and quality of surveying services available in Hong Kong. This can help raise Hong Kong's profile as a hub for surveying services and attract more international clients looking for high-quality and reliable services. This, in turn, can lead to increased business opportunities for Hong Kong surveyors and help contribute to the overall economic growth of the region.

- **Build a connection with the Trade Development Council**

HKIS should strive to establish a close relationship with the Trade Development Council (TDC) to better support Hong Kong professionals as they venture into international markets (Respondent C and F, 2022). By partnering with the TDC, HKIS can access the council's extensive network of international trade contacts, market intelligence, and other resources to help Hong Kong surveying professionals succeed abroad. The TDC is well-positioned to help Hong Kong businesses penetrate new markets and establish themselves as credible, competitive players.

Moreover, with the TDC's resources, HKIS can provide its members with the advice and support they need to succeed in foreign markets. This might include resources such as market research,

regulatory guidance, and local business contacts. The TDC can also help Hong Kong professionals identify key market trends and opportunities and help them develop effective strategies for engaging with potential clients and partners.

In addition, a close relationship between HKIS and the TDC would be beneficial for both organizations, and for the surveying profession in Hong Kong as a whole. HKIS would gain access to the TDC's resources and expertise, and be better equipped to support its members as they venture into international markets. The TDC would gain access to a network of knowledgeable, experienced professionals who can help Hong Kong businesses succeed abroad. By working together, both organizations can help the surveying profession in Hong Kong achieve new levels of success and recognition globally.

- **Establish an information platform**

HKIS could play an important role in facilitating the engagement of Hong Kong surveyors in the BRI projects by establishing a more effective information platform (Respondent B, C, and G, 2022). The information related to the BRI is often scattered and fragmented, making it difficult for professionals and potential participants to access the information they need. To address this issue, HKIS could work to create a more centralized and user-friendly platform for BRI information. This platform could include interactive features, such as discussion forums, virtual events, and webinars, to help users engage with the information and connect with potential clients and other professional experts in the field.

By providing a centralized source of information and resources, HKIS could help streamline the BRI consultation process for Hong Kong professionals looking to participate in the initiative. This would also increase the visibility of Hong Kong professionals and promote the participation of local businesses in the BRI. Additionally, HKIS could work with other organizations, such as the Trade Development Council, to provide additional support and resources for professionals looking to participate in the BRI. This could include training and professional development opportunities and help navigating the complexities of participating in a large-scale international development project.

- **Add BRI market elements in training courses**

To further improve the competitiveness of Hong Kong's surveying professionals in the BRI and foreign markets, the HKIS could consider incorporating additional BRI or foreign market elements into their training courses (Respondent F, 2022). This would involve providing a more comprehensive and holistic training experience, focusing on preparing professionals for the unique challenges and opportunities that come with working in the BRI and foreign markets.

The expanded training curriculum could include courses on international relations and political economy, cultural studies, and strategic management, which are crucial for success in these markets. Furthermore, surveying professionals need to be familiar with the laws and regulations of the countries in which they operate. As such, HKIS could include courses on foreign laws and regulations in their training programs, focusing on the BRI and other key markets. This would provide surveying professionals with a strong foundation in the legal frameworks they will encounter in these regions and help them operate more effectively and efficiently.

Moreover, knowledge of multilateral institutions such as the World Trade Organization (WTO) and the World Bank can also be beneficial, as these organizations play a critical role in shaping the global economic and trade environment. By including information on these institutions in their training programs, HKIS can help surveying professionals understand the broader context in which they are operating, and equip them with the tools they need to succeed in a rapidly changing global marketplace.

- **Collaborate with the universities in Hong Kong**

HKIS could promote cultural understanding and exchange between students from countries along the BRI and local students in Hong Kong (Respondent I, 2022). One way to achieve this is by collaborating with universities to support more interaction and exchange activities. These activities could include student exchange programs, study abroad opportunities, or cultural events and workshops.

By strengthening relationships with the BRI countries, HKIS, and universities can open the doors for greater collaboration and business opportunities in these regions. This can lead to more investment and growth in the surveying industry locally and abroad. Moreover, students will gain valuable exposure to different ways of thinking and cultural experiences, which can broaden their perspective and help to enhance their knowledge and skills in the surveying profession.

- **Build platforms with foreign authorities and firms**

With the increasing demand for surveying services and the need for professionals to expand their reach beyond the local market, HKIS could proactively build more platforms for connecting with foreign countries' firms and authorities (Respondent A and G, 2022). This would provide significant benefits to small and medium-sized surveying firms, who often struggle to afford the cost of expanding their business overseas. The platform could serve as a directory of surveying firms, allowing potential clients to search for and find the services they need easily. Additionally, the platform could offer information and resources to help firms understand the business and regulatory environment in different countries, making navigating new markets easier. Another benefit of such a platform is the ability for surveying firms to network and collaborate. This could be particularly useful for firms looking to form partnerships, join forces on projects, or share resources and expertise. The platform could provide a space for firms to connect and share information, allowing them to work together more effectively and efficiently.

To make the platform as effective as possible, HKIS could consider incorporating interactive features such as forums, discussion boards, and chat rooms. This would encourage participation from surveying firms and potential clients, and help build a community of professionals and experts in the field. Additionally, an effective information platform could help simplify finding and engaging with potential clients and partners. With a central hub for information and resources, firms could quickly and easily find the information they need, reducing the time and resources required to reach out to new partners and clients.

In the following few sections, we provide a summary of the surveying institutions and relevant authorities in the Southeast Asian region. This information will give insight into the current landscape

of the surveying profession in these countries and highlight the efforts made by the HKIS to establish partnerships and collaborations with these organizations. This overview aims to provide a better understanding of the opportunities and challenges that exist for HKIS in building relationships with these countries and institutions.

4.3.1 Royal Institution of Surveyors Malaysia

Royal Institution of Surveyors Malaysia (RISM) comprises four distinct but closely related Divisions, including Geomatics and Land Surveying Division, Quantity Surveying Division, Property Surveying Division, and Building Surveying Division. RISM members who are Registered Quantity Surveyors of BQSM or Registered Valuers of BOVAEP can directly become RICS Chartered Surveyors if meets the direct entry requirements (RISM, 2001):

- are professional members of RISM;
- have a minimum of five years of relevant professional experience;
- are Registered Quantity Surveyors of BQSM or Registered Valuers of BOVAEP; and
- maintained a clean record and are CPD compliant at BQSM or BOVAEP.

The direct entry requirements represent the close cooperation between RICS and RISM. As the Malaysian surveying profession also applied RICS standards and guidelines, Hong Kong surveyors would not encounter barriers in surveying practices when providing services in Malaysia. Contacts of RISM are shown below:

Tel	Email	Website
603 – 79551773 / 79569728	secretariat@rism.org.my	https://rism.org.my/

4.3.2 ASEAN Quantity Surveyors Association

The ASEAN Quantity Surveyors Association (AQSA) is a regional organization that aims to promote and enhance the quantity surveying profession in Southeast Asia. It was established in 2020 as a platform for quantity surveyors across the ASEAN region to network, share knowledge, and exchange ideas. AQSA comprises national quantity surveying organizations from Southeast Asia, including the Royal Institution of Surveyors Malaysia, the Quantity Surveyors Association of the Philippines, and the Association of Indonesian Quantity Surveyors.

The main objectives of AQSA are to extend cooperation among ASEAN countries through Quantity Surveying services mobility, fostering close working relationships, and establishing baseline standards for practices and education development. AQSA organizes regular events such as conferences, workshops, and training sessions to achieve these goals. Also, it publishes a newsletter to keep members up-to-date with the latest developments in the industry. Contacts of RISM are shown below:

Tel	Email	Website
+6012 812 3387	enquiry@aqsa.world	https://www.aqsa.world/

HKIS can collaborate with the AQSA in numerous ways. One of which is to form a mutual recognition agreement. This agreement would allow the two organizations to recognize each other's qualifications, certifications, and memberships and provide professional development and exchange opportunities. This agreement would enable HKIS members to practice as qualified surveyors in ASEAN. Another way HKIS and AQSA could collaborate is through joint training and professional development programs. HKIS could offer training programs for AQSA members, while AQSA could provide training opportunities for HKIS members. This would help to enhance the professional development of both organizations and promote greater understanding and collaboration between their members.

4.3.3 Reciprocal Agreement with the RICS

HKIS has extended its mutual recognition agreement with the Royal Institution of Chartered Surveyors (RICS) between the Planning and Development Division (PDD) and its Planning and Development Pathway in 2021. PDD members have the opportunity to apply for RICS membership and join the Planning and Development Professional Group, granting them access to all the benefits and privileges associated with RICS membership, contingent upon satisfying the following conditions (RICS, 2022):

- one-year post-qualification as a Corporate Member of the Planning and Development Division of HKIS and professional practice relevant to the Planning and Development profession,
- the successful completion of the RICS ethics assessment before admission,

- a professional interview conducted at the discretion of RICS to verify the applicant's competence and suitability for access to the Planning and Development Professional Group.

The mutual recognition offers a streamlined application process for professional surveyor membership qualifications, allowing planning and development surveying professionals to practice in global markets, ultimately benefiting their portfolio and raising their membership standing worldwide.

RICS actively supports and advocates for the utmost global professional qualifications and standards in the realm of land development, real estate, construction, and infrastructure management. The widely embraced RICS valuation standards, commonly referred to as the "Red Book," have achieved widespread implementation across the globe. Through this reciprocal acknowledgment agreement, RICS strengthens the assurance of quality and credibility for Hong Kong professionals engaged in international valuation standards within the global market.

Given the progress of large-scale infrastructure and construction endeavours linked to the BRI and GBA initiatives, the reciprocal membership recognition serves as a strategic initiative by the HKIS PDD department to provide advantages and professional prospects to its members. Additionally, surveying experts possessing dual RICS and HKIS qualifications are well-positioned to actively engage in foreign-assistance ventures as Mainland companies collaborate with BRI nations, thereby enhancing their international presence.

4.3.4 Mutual recognition with Mainland China

The mutual recognition agreements between the Hong Kong Institute of Surveyors (HKIS) and mainland surveying institutions have greatly enhanced collaboration and exchange between the two regions. The agreements were signed under the Closer Economic Partnership Arrangement (CEPA) between Hong Kong and the Mainland and are designed to promote reciprocity and cooperation in the surveying profession. The agreements provide a framework for the recognition of professional qualifications, allowing surveyors to work in either region while also increasing the mobility and competitiveness of the surveying industry.

The first agreement was signed in 2003 between the HKIS and the China Institute of Real Estate Appraisers and Agents (CIREA). Under the terms of the agreement, members of the HKIS' General Practice Division (GPD) who have satisfactorily completed a 3-day training and test session conducted by CIREA are eligible for recognition of their professional qualifications. Currently, around 200 practitioners from the HKIS' GPD have been recognized by CIREA. They are able to practice on the Chinese mainland if they are employed by a firm with a valuation license granted by the Ministry of Housing and Urban-Rural Development.

In 2005, the HKIS entered into a reciprocity agreement with the China Engineering Cost Association (CECA) with respect to professional qualification recognition. Two training and assessment sessions held in 2005 and 2011 followed this agreement. As a result of these agreements, over 300 quantity surveyors from HKIS have gained professional qualifications on the mainland and can practice as quantity surveyors there.

In 2006, the HKIS entered into a mutual agreement with the China Association of Engineering Consultants (CAEC) for the purpose of recognition. This agreement enabled qualified members of the HKIS's Building Surveying Division (BSD), who possessed at least five years of relevant experience, to apply as engineering consultants in mainland China. As a result of this agreement, more than 200 BSD members of the HKIS have acquired professional qualifications on the mainland. They adhere to the registration system established according to the existing regulations of the Ministry of Housing and Urban-Rural Development.

Under these agreements, Hong Kong surveyors' professional qualifications would be recognised by the industry in mainland China. This helps to strengthen their relationships with Mainland surveying institutions and industry associations, providing opportunities for collaboration and exchange of best practices in the surveying profession. Moreover, Hong Kong surveyors can work on BRI projects on the mainland with greater ease and efficiency, providing valuable services to clients and contributing to the growth and development of the surveying industry in the Mainland. By engaging in BRI projects, Hong Kong surveyors can demonstrate their technical and professional capabilities, expand their knowledge and experience, and expand their professional network.

However, the mutual recognition agreements have not yet been extended to the Planning and Development (PDD) Division, which could limit the opportunities for Hong Kong surveyors in this area. This creates a disadvantage for Hong Kong PDD surveyors that could result in a lack of representation in BRI projects related to urban planning and land development. To address this, HKIS should put more effort into promoting mutual recognition between Hong Kong and mainland surveyors in the Planning and Development Division. By expanding the agreements, Hong Kong

surveyors will have greater opportunities to engage in BRI projects and contribute to the success of these projects.

5. Challenges in participating in the BRI projects

> **"Many of my colleagues in the surveying field believe that the Belt and Road Initiative holds a lot of potential, but taking advantage of these opportunities can be tough. There's still a lot of confusion about what the BRI entails and how the projects are carried out, making it challenging for us to grow our businesses and establish a presence in these unfamiliar countries along the BRI routes. Another issue is that there is no obvious pathway for surveyors in Hong Kong to get involved in BRI projects."**
>
> *--Interview with Respondent H from a Hong Kong Surveying firm in November 2022*

Hong Kong surveyors are facing challenges in being involved in BRI projects. We collected Hong Kong surveying practitioners' views on BRI during 2021 and 2022. The study included in-depth interviews with 9 HKIS surveyors and an online questionnaire survey of 35 surveying practitioners. We found that despite having a positive attitude towards the potential impact of BRI on the future development of Hong Kong, many surveyors reveal that there is no clear channel for Hong Kong surveyors to participate in BRI-related projects. According to the questionnaire survey, 43.75% of the participants had a positive attitude towards the impact of BRI on Hong Kong, but 50% believed that their firms would not directly benefit from the BRI constructions. The follow-up in-depth interviews with surveying experts helped to deepen the understanding of the perception of BRI by Hong Kong surveyors. Many interviewees believed BRI would bring great opportunities, but they were challenging to seize (Respondent A, C, D, E, G, and H, 2022). They were still confused about

BRI and how the BRI projects are planned and implemented, making it difficult to expand their businesses and open offices in unfamiliar countries along the BRI routes. The lack of basic knowledge about BRI implementation and the lack of recruiting channels were the major obstacles for the HKIS surveyors to participate in the BRI development fully.

One of the challenges for HKIS surveyors is the lack of a clear understanding of the BRI and its requirements (Respondent A, C, and E, 2022). The vast scale of the initiative and the many different countries and regions involved can make it difficult for surveyors to fully grasp the scope of the projects and what their role in them would be (Respondent A, 2022). This is partly due to the changing nature of the BRI concept, which has led to uncertainties and ambiguities in understanding among stakeholders. The prevalence of multiple interpretations results from the lack of a clear, official guideline for the BRI implementation. This highlights the lack of clarity within the policy sphere and the ad hoc nature of BRI implementation (Dunford & Liu, 2019). The progress of projects has exceeded initial expectations, yet there is inadequate readiness and capability to effectively handle the implementation process. Communication of messages within the extensive and multi-layered bureaucracy is ineffective (Narins & Agnew, 2020). This has led to the unclear message received by the HKIS surveyors.

Furthermore, the lack of standardization in the guidelines, methods, and business models for implementing the BRI creates complications for surveyors in Hong Kong who want to participate in the initiative. Without standardization, it becomes difficult for surveyors to determine how the initiative will be carried out and what their involvement in the projects might entail. This lack of clarity and consistency can lead to confusion and uncertainty, which makes it challenging for surveyors

to effectively engage in BRI projects. Without clear and consistent guidelines, implementation methods, and business models, surveyors may struggle to understand the scope of the projects, the specific requirements and expectations, and the potential outcomes of their involvement. This could hinder the effective participation of surveyors in the BRI and limit their ability to make informed decisions about their role in the initiative.

Another challenge lies in the distinction between the responsibilities of the government and the involved corporations, whether they are state-owned or private (Wang, 2019). Some BRI projects originate from agreements reached between top government leaders, establishing a "strategic collaboration" framework. Subsequently, relevant government departments are tasked with detailed planning, financing arrangements, and project implementation. However, thorough feasibility assessments are often overlooked, leading to significant financial risks for participating companies (Wang, 2019). Consequently, many companies involved in BRI projects are state-owned enterprises, as private companies are hesitant to engage in projects with substantial financial uncertainties. Given this, the specific role that Hong Kong surveyors would play in BRI projects is yet to be determined as they are not the first option of Chinese state-owned companies.

The surveying service sector in Hong Kong can provide high-quality services to Chinese enterprises, Hong Kong companies, and local stakeholders when implementing the BRI project, as Respondent H described:

"A Chinese-Malaysia joint venture company plans to establish a factory in Kuala Lumpur. The services we provide include: (1) conducting a feasibility study; (2) land surveying; (3) drawing contracts with the contractors; and (4) monitoring the construction progress."

- Interviewed with H in November 2022

However, HKIS surveyors are seldom involved in BRI-related projects. This is due to several reasons. First, few clear channels exist for Hong Kong surveyors to participate in the BRI (Respondent C, E, and G, 2022). This makes it difficult for them to collect market information, stay informed about new BRI projects that are coming up, and identify opportunities to participate in BRI projects. Meanwhile, lacking knowledge about BRI projects makes it difficult for Hong Kong surveyors to network and build relationships with potential clients and partners (Respondent E, 2022). The surveying industry is built on relationships and referrals. Without access to the correct information, Hong Kong surveyors struggle to connect with the right people and find suitable projects to participate in, making it challenging to expand their business and increase their market share.

Second, HKIS surveyors face intense competition with mainland consulting firms. Many mainland consulting firms have a significant advantage over their Hong Kong counterparts regarding access to government networks, resources, and funding for BRI projects. In addition, mainland consulting firms have long-established relationships with Chinese SOEs and have developed deep ties with key stakeholders, including decision-makers and influencers. As the main contractors for these projects, state-owned enterprises play a critical role in determining which firms will be selected. The close connections give them an edge in the bidding process and make it easier for them to win contracts.

For example, even when Hong Kong surveying firms come across tender documents issued by host countries or Chinese state-owned enterprises, the chances of success are low as the successful bidder is usually assigned to their most familiar partners (Respondent G, 2022).

Finally, Hong Kong surveyors have insufficient experience in "packaging" a project to suit the goals of Chinese SOEs and local countries (Respondent C, 2022). Many BRI projects are in developing countries, and local governments have specific project requirements and plans. Hong Kong surveyors may not have the expertise or experience to understand the local context and tailor their proposals to meet the goals of local governments. This can limit their chances of securing contracts for BRI projects.

Given these challenges, Hong Kong surveyors must formulate strategies to expand their business network and working opportunities under the BRI. This can be achieved through building relationships with Chinese state-owned enterprises, collaborating with mainland consulting firms, and collecting information through Hong Kong official platforms.

5.1 Strategy 4: Connecting with mainland consulting firms and planning and surveying institutes

One of the key ways for the Hong Kong professional community to partake in the benefits of the BRI is by offering top-notch professional services to Chinese enterprises involved in the initiative. Hong Kong has played a vital role as a crucial link connecting China and the Western world. Hong Kong has long been a window for China's economic cooperation with foreign countries and the preferred service platform for mainland companies "going out." With surveying service professionals

who comply with international business practices and are well-acquainted with the habits and culture of mainland firms, it is a trusted service provider for mainland and BRI companies (Lin et al., 2019).

When asked about the distinctive strengths of surveying professionals in Hong Kong, the majority of respondents promptly outlined the following advantages: **(1) high level of English proficiency, (2) international network, (3) professional conduct, and (4) good communication skills (Respondent A, B, D, E, G, H, and J, 2022).** However, as the discussions delved deeper, the interviewees consistently expressed scepticism about the initial claims of strength. For instance, (1) the English proficiency of mainland Chinese graduates was deemed comparable to that of Hong Kong graduates, (2) mainland surveyors were believed to have stronger social networks than their Hong Kong counterparts, and (3) **mainland surveyors were considered more adept at communicating with state-owned enterprises**. Among the mentioned competitive advantages, only "professional conduct" received unanimous agreement from all interviewees as a strength of Hong Kong surveyors. This aspect holds significant importance since many participants in BRI projects have faced criticism for lacking soft power, such as disregarding local community sentiments. Hong Kong surveying professionals who engage in BRI projects can serve as exemplars of professional conduct to other participants, yielding substantial benefits for BRI development.

It is of utmost importance for Hong Kong surveyors to secure a favourable position within the BRI and carefully assess its shortcomings in order to enhance their performance and competitiveness. Nevertheless, the involvement of Hong Kong surveyors in BRI projects has been constrained thus far. For example, some surveying practitioners pointed out that Chinese companies along the BRI should be able to seek engineering or surveying consultancy through professional service firms with

international experience (Respondent E and G, 2022). However, over the past years, mainland professionals still mainly conduct BRI projects as **Hong Kong professionals are unfamiliar with the mainland's business culture and practices.** Hence, Hong Kong professionals have limited opportunities for engagement. However, as an increasing number of projects associated with the BRI are initiated, there is an anticipated rise in the demand for Hong Kong professional services. **A strategy Hong Kong professional could adopt is establishing partnerships with mainland consulting firms or planning and design institutes. Thus, they could leverage the mainland companies' network and become a sub-consultant for large-scale BRI projects.**

> **"Several mainland design institutes or firms in Guangdong Province have developed strategic alliances with Hong Kong professional services firms. When we need the support of a Hong Kong designer or surveyor with broad international experience, we prefer to hire a joint-venture firm over a pure Hong Kong firm because they understand both mainland and international business operation."**
>
> *-- Mr. Ding Yanzhang, Chairman, Power Construction Corporation of China at Belt and Road Summit 2022*

The launch of GBA provides more opportunities for partnership associations between Hong Kong and mainland surveying firms/planning and design institutes. This enables more Hong Kong surveying firms to form a specialised general partnership or develop strategic alliances with a mainland firm in Guangdong and provide surveying services in the name of an associated surveying firm. The collaboration between Hong Kong and mainland surveying professionals provides a one-stop shop for

overseas surveying services for mainland companies and parties within the framework of "one country, two systems" so that clients can leverage the advantages of Hong Kong surveyors without worrying about their capability of conducting certain business practices. This measure should help Hong Kong surveying practitioners penetrate the BRI and GBA markets gradually.

5.1.1 Information of mainland surveying professionals

In this section, we summarised the information of some branded surveying firms and design institutes from Guangdong province. This information may help Hong Kong surveyors to find potential mainland collaborators for cross-border services.

Table 5.1 Information of mainland surveying professionals

Name	Cooperation with Hong Kong	Business focus	Nature	Size	Contacts
Guangdong Urban & Rural Planning and Design Institute	Yes	Planning design, engineering design, and consultancy, and policy study	Public institute	400 employees	Tel:020-34399113, Email：jyb@gdupi.com, Website: https://www.gdupi.com/en.php

Guangzhou Planning Institute	Yes	Architecture design, urban planning, surveying, mapping and project management	Public institute	3000 employees	Tel:020-83887315, Website: https://www.gzpi.com.cn/
Urban Planning & Design Institute of Shenzhen	Yes	Urban planning and design, low-carbon development, urban renewal, transport planning, smart city and public policy	Public institute	1400 employees	Tel: 0755-83788333 Email：updis@upr.cn, Website: https://www.upr.cn/
Zhuhai Institute of Urban Planning and Design	Yes	Urban planning, municipal design, architecture design, and consultancy services	Public institute	550 employees	Tel: 0756-2651666, Email: zhghy@zhghy.com, Website: http://www.zhghy.com/

Shenzhen Investigation and Research Corporation	Yes	Land surveying and investigation, engineering surveying, quantity surveying, urban planning and others.	Private firm	800 employees	Tel: 0755-83328287, Email: Business@sziri.com, Website: http://sziri.cn/
Hechaung Corporate	Yes	Quantity surveying, engineering consultancy, construction project management and others.	Private firm	2800 employees	Tel: +86-755-83048876, Email：szhcjl@sina.com.cn, Website: www.szhcjl.cn
Guangzhou Municipal Construction Project Supervision Cooperation	Yes	Engineering supervision, quantity surveying, mapping, project	State-owned enterprise	200 employees	Tel: 020-87371285, Email：gzc-sjl@126.com, Website: http://www.gz-cjjl.com/

		consulting, and others			
Guangdong Zhongdi Corporate	No	Real estate projects: surveying, planning and design	Private firm	80 employees	Tel: 020 - 82407188, Email：zd@zdpg.com.cn, Website: http:/www.zdpg.com.cn

5.2. Strategy 5: Two offices – expand the business network through Singapore office

Besides large-scale construction or infrastructure projects, BRI also helps attract foreign direct investments in small and medium-scale construction projects (e.g., shopping malls, and office buildings) along the route, which provides more business opportunities for Hong Kong surveyors. Our interviewees agreed that exploring more business opportunities through the BRI countries would benefit the industry. Those, such as a representative from a medium-sized company (Respondent I, 2022), who supported the idea of venturing into new markets along the BRI, expressed their belief that the potential for business growth in Hong Kong is restricted, thus requiring Hong Kong surveyors to go out to seek more opportunities. Singapore is his first choice due to its huge economic and political influence within ASEAN countries. In addition, as mentioned by other interviewees, the surveying industry in Mainland China has experienced significant growth and has reduced its dependency on surveying professionals from Hong Kong. These two factors combined necessitate that Hong Kong surveying professionals seek business prospects overseas by establishing branch offices or subsidiaries in locations such as Singapore or other countries.

"I have been closely observing the market trends and the competition in the industry. I have concluded that the future of our profession lies outside the boundaries of Hong Kong. The surveying profession in Mainland China has come a long way, and they have become self-sufficient, which has led to a reduction in the demand for surveying professionals from Hong Kong. This, coupled with the limited growth opportunities in Hong Kong, is why I believe it is crucial for Hong Kong surveyors to explore new business opportunities overseas.

Singapore, in my opinion, is the ideal place to start. Its strong economic and political influence within ASEAN countries provides a solid foundation for surveying professionals to establish a foothold in the region. The city-state has a well-developed infrastructure, a thriving business community, and a stable political environment. These factors make it an attractive destination for surveying firms looking to expand their business.

There are several advantages to setting up a branch office or subsidiary in Singapore. Firstly, it provides a gateway for Hong Kong surveyors to access the ASEAN market. ASEAN countries have a growing demand for infrastructure development, which presents a significant opportunity for surveying professionals. Secondly, Singapore is well connected to the rest of the region, providing easy access to other potential markets.

Thirdly, the city-state has a strong legal framework, which provides high protection for foreign investors.

Hong Kong surveyors need to take a strategic approach to make the most of these opportunities. This involves thoroughly understanding the local market, the competition, and the regulatory environment. In addition, they need to develop a clear business plan that outlines their goals and strategies for growth. This approach will allow Hong Kong surveyors to overcome the challenges they face in the Mainland China market and position themselves for future growth. By taking a proactive approach, they can build strong relationships with local partners and create a sustainable business model that can withstand the challenges of a rapidly changing market."

--Interview with Respondent I from a Hong Kong-based engineering consulting firm in December 2022

According to an interviewee, Respondent C from a consulting firm, who has work experience in several Southeast Asian countries, agrees Southeast Asia has great market potential. His company has taken various approaches to explore markets in Southeast Asia. The most effective one is to set up branch companies or liaison offices in Singapore and provide cross-boundary services from Hong Kong headquarters by flying in and out of Southeast Asia when necessary. After setting up a liaison office in Singapore, he mentioned having received more clients from diversified backgrounds—including local authorities in Southeast Asia, international banks, Hong Kong developers, mainland Chinese developers, and Singapore, Malaysia, and Thailand developers. Hong Kong surveyors could only

secure working opportunities for other regions without branches from Hong Kong or mainland Chinese developers.

> "I have seen the great market potential of Southeast Asia through my work experience in several of its countries. My company has taken various approaches to explore these markets, but the most effective one has been setting up a liaison office in Singapore. By having a presence in the region, we have been able to provide overseas services from our Hong Kong headquarters while still flying in and out of Southeast Asia as needed.
>
> This approach has paid off for us, as we have received clients from a much more diverse background after establishing a liaison office in Singapore. This includes local authorities in Southeast Asia, international banks, Hong Kong developers, mainland Chinese developers, and developers from Singapore, Malaysia, and Thailand. In contrast, for regions where we do not have a branch or liaison office, our ability to secure working opportunities is limited to only Hong Kong or mainland Chinese developers.
>
> So I believe setting up a branch or liaison office in Southeast Asia is a crucial strategy for Hong Kong surveyors looking to tap into the market potential of the region. By having a presence in the area, they will have access to a wider range of clients and be able to provide more comprehensive and effective services to their customers."
>
> *--Interview with Respondent C from a Hong Kong consulting firm in September, 2022*

The trend in recent times has seen an increasing number of professional services companies setting up in Singapore as they look to tap into the burgeoning Southeast Asian market. For Hong Kong surveying firms, establishing a presence in Singapore would be a wise move, given the country's favorable tax policies, straightforward company formation procedures, outstanding infrastructure, and, most importantly, convenient access to other countries in the ASEAN region.

Singapore's central location within Southeast Asia, as shown in Figure 6.1, allows for easy access to market information and business networks in the region. The World Bank has also ranked Singapore as the most accessible country to do business globally for nine consecutive years (World Bank, 2023). The country's efficient, corruption-free regulatory framework for incorporating foreign-owned companies or branch offices and the simple compliance requirements make the process quick, taking only 1-3 working days.

Moreover, **HKIS has a reciprocity agreement with the Singapore Institute of Surveyors and Valuers (SISV) regarding mutual qualification recognition, established in 2004** (as detailed in section 5.2.2). Under the terms of this agreement, members of the HKIS who meet the requirements are eligible for recognition by the SISV following one year of practice in Singapore and a professional interview conducted by the latter. While the agreement is currently limited to the Building Surveying Division, Land Surveying Division, Quantity Surveying Division, and General Practice Division, most planning and design (P&D) surveyors could also benefit from it, as they often have a cross-discipline background and hold multiple qualifications within the surveying division. The HKIS should expand the agreement to include the P&D division.

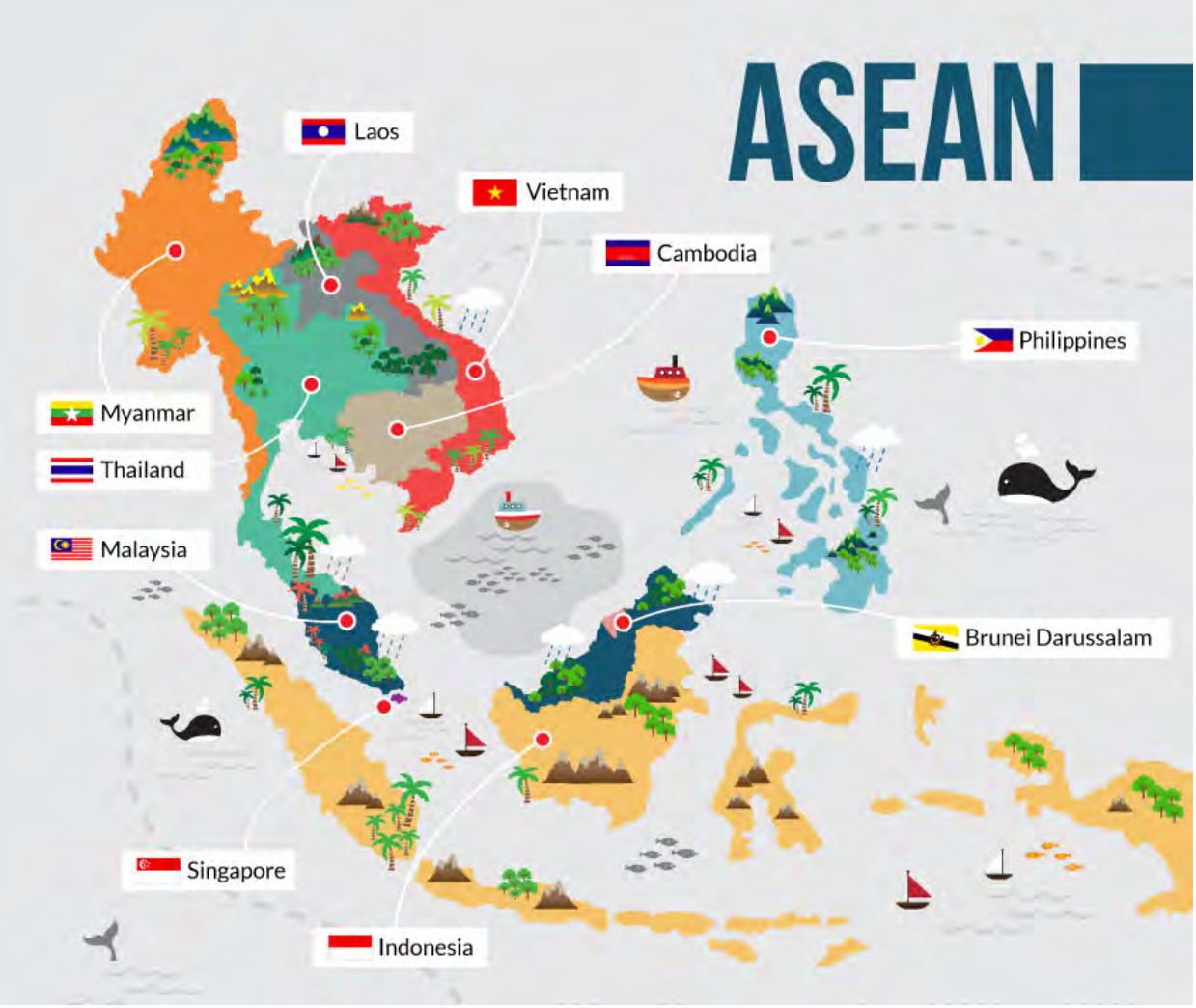


Figure 5.1. Location of Singapore in ASEAN

Despite the potential benefits of setting up a branch in Singapore, some interviewees expressed concerns about the risks of doing business abroad. According to Respondent D (2022), a senior surveyor from a large surveying firm, the chances of going abroad are not necessarily lower than staying in Hong Kong. He explained that when operating in a foreign country, surveyors face various new challenges and uncertainties, such as language barriers, cultural differences, and unfamiliar regulations and laws. This can make it difficult to establish a successful business and can expose the surveyors to

unexpected risks. Another interviewee, Respondent F (2022), who has experience working in Southeast Asia, pointed out that the business environment in some countries can be unpredictable and unstable, making it challenging to do business there. For example, the political climate in some countries may be unstable, making it difficult to plan for the long term. Furthermore, local competitors may not play fair and engage in unethical business practices, making it difficult for foreign surveyors to compete on a level playing field.

One potential solution to address the concerns about the risks is to establish partnerships and collaborate with other professionals from Hong Kong. This approach, as suggested by Respondent B (2022), can help to mitigate risks and ensure that the transition to new markets is smoother. By working together, Hong Kong surveyors can pool their resources and knowledge, which can help them better understand the local market conditions and regulations, and identify and mitigate potential risks. Moreover, collaboration can also help to leverage existing relationships and networks, which can be particularly important in establishing a presence in a new market. By working with other Hong Kong professionals, surveyors can gain access to a wider pool of potential clients and partners, which can help to increase their visibility and reach in the market. Finally, collaboration can also help to ensure that Hong Kong surveyors are well-positioned to meet the challenges of a rapidly changing and increasingly competitive market. By working together, they can offer comprehensive services to clients conducting business in countries along the Belt and Road Initiative, from the initial planning to the operational phase. Engaging in BRI projects requires conventional surveying and planning services and a comprehensive solution involving surveying, accounting, engineering, and legal services. Therefore, if Hong Kong surveying professionals are looking to expand their business in BRI countries

through a branch in Singapore, it would be wise for them to broaden their network of business partnerships. Instead of going it alone, it is more advantageous to collaborate with other service professionals to provide a more diverse range of services and create more business opportunities.

Another example presented by Respondent H (2022) suggests collaborating with a Singapore company. This interviewee is from a Hong Kong-based engineering consultancy firm that recently established a presence in the Southeast Asian market through a partnership with a Singapore consultancy firm. The interviewee stated that their company has been interested in expanding its presence in Southeast Asia since 1997 and aimed to build a comprehensive property professional services platform, including various aspects such as architecture, interior design, master planning, surveying, construction monitoring, sales, investment advisory, branding, and marketing. However, they realized that doing everything on their own in a foreign market would not be efficient, so they teamed up with a local company that excelled in design and built, property branding, and marketing.

The Hong Kong and local partners in Southeast Asia have a symbiotic relationship. The Hong Kong professionals bring in clients and investors from Hong Kong and China, while the host country provides investment opportunities and local demand. To make the most chance of participating in the BRI project, Hong Kong firms could establish a one-stop shop with Hong Kong and local partners, connecting clients from the mainland, Hong Kong, and Southeast Asia. This would involve deal-sourcing and deal-matching services.

5.2.1 Procedures for setting up a branch office, representative office, or subsidiary in Singapore

Hong Kong surveying companies exploring the possibility of establishing a presence or expanding their operations in Singapore have multiple options to consider regarding their company structure. This section presents a comparison of three types of business entities, aiding Hong Kong firms in determining the most suitable structure that aligns with their specific requirements.

Table 5.2 Comparison of Singapore branch office, representative office, and subsidiary (Source: GuidemeSingapore, accessed in 2022: https://www.guidemesingapore.com/business-guides/incorporation/foreign-company-registration/singapore-branch-vs-subsidiary-vs-rep-office)

	Branch office	Representative office	Subsidiary
Legal type	Not a separate legal entity but an extension of the parent company	Has no legal status, a temporary administrative arrangement	Separate legal entity distinct from its parent company
Liabilities	Liabilities incurred by the branch office extend to parent company	Liabilities incurred by the representative office extend to parent company	Parent company can limit liabilities to subsidiary
Entity Name	Must be the same name as the parent company and sign contracts under the parent company name	Must be the same as parent company plus must include 'Representative Office'	Can be the same or different from parent company

Allowed Activities	Limited to the same range of activities as the parent company	Can only conduct market research or feasibility studies. Not allowed to conduct business activities that yield profit.	Can be the same or different from parent company
Validity Period	Registered forever until closed	Has to be renewed every year up to a maximum of 3 years. RO status is evaluated and renewed yearly.	Registered forever until closed
Taxation	Taxed a flat corporate tax rate of 17% as non-resident entity, local tax benefits and exemption not available	Not applicable as representative office cannot generate income	Taxed a flat corporate tax rate of 17% as Singapore resident entity, local tax benefits available
Bank Account	Can open a new corporate bank account in Singapore or use the same as the parent company	Can open bank account in Singapore to run the cost centre operations. Must be funded by the parent company.	Can open bank account in Singapore
Staff Hiring	No restrictions on hiring local or foreign staff	Chief Representative must be a staff member from the parent company. Can have only five employees.	No restrictions on hiring local or foreign staff

Appointment of Officers	Must appoint at least one local authorised representative	Must appoint a Chief Representative who will relocate from headquarters	Must appoint at least one local resident director
Normal Registration Time	1-2 days	3-4 days	1-2 days
Registration Procedure	1.Name approval: The branch office must have the same name as the parent company. Typically, the name will be approved within an hour. Note that the name cannot be identical to a company in Singapore or be vulgar. 2.Entity registration: Once all the documents have been provided to the filing agent, the branch office can be registered with Accounting and Corporate Regulatory Authority	1. Register with the Enterprise Singapore, a Ministry of Trade and Industry department. 2. Registration fees are SG$200 (US$144) and must be paid annually. Evidence of incorporation and the latest audited accounts must be provided upon registration. 3. Representative offices which decide to continue their presence in Singapore after three years should	1. Register online with ACRA through Bizfile, an electronic filing system. ACRA will issue a notice of incorporation and the registration number of the company. Bizfile provides a one-stop business facilitation service at the point of registration which includes: • Reserving domain names. An application fee of SG$15 (US$11) is applicable for each approved company name.

	(ACRA). If the filing agent has all of the documents completed in time, the registration process can take as little as 20 minutes.	register their operations with ACRA.	• Registration with the Inland Revenue Authority of Singapore (IRAS) for the goods and services tax (GST). • Activating a Customs Account and application for a corporate bank account. • Purchase of the Business Profile at a cost of SG$300 (US$216). 2. Make a company seal at a cost between SG$40 (US$29) and SG$70 (US$50). This generally takes between one and three days. 3. Sign up for Employee Compensation Insurance at an insurance agency.

			This is a mandatory requirement under the Work Injury Compensation Act.

5.2.2 Singapore Institute of Surveying and Valuers

The Singapore Institute of Surveying and Valuers (SISV) was established in 1982 through the merger of the Singapore Institute of Surveyors and the Singapore Institute of Valuers. The institute consists of three divisions: the Land Surveying Division, the Quantity Surveying Division, and the Valuation and General Practice Division (SISV, 2022).

The role of P&D surveying encompasses various stages of a construction project, from acquiring land to design and implementation to final handover and operation. This requires expertise in multiple disciplines, leading many current P&D surveyors to have additional surveying qualifications, such as General Practice or Building Surveying (SISV, 2022). As a result, Hong Kong P&D surveyors may be eligible for membership in Singapore through the HKIS and SISV Reciprocity Agreement. This agreement stipulates that a corporate member in good standing from HKIS may be granted membership in SISV, provided that they meet certain requirements (SISV, 2022):

1. **One year's practice in Singapore in circumstances that will enable a corporate member of SISV to confirm the professional activities undertaken. During the period, applicants will be required to maintain a detailed record of their experiences, followed by:**

2. **A professional interview conducted by SISV to test the applicant's knowledge of law and practice in Singapore;**
3. **Subsequent election to fellowship is subject to the Bye-laws and Regulations of SISV.**

Applicants will join the relevant Division, including Building Surveyors, Land Surveyors, Quantity Surveyors, and Valuation and General Practice Surveyors.

5.3. Strategy 6: Take advantage of the Hong Kong government's platforms

The Hong Kong government has actively supported and encouraged participation in the BRI by collaborating with companies interested in undertaking projects in BRI countries. To facilitate these efforts, the government established the Infrastructure Financing Facilitation Office (IFFO) within the Hong Kong Monetary Authority and the Belt and Road Office (Belt and Road Office: https://www.beltandroad.gov.hk/) in 2016. Additionally, Hong Kong became a member of the Asia Infrastructure Investment Bank in 2017. The Hong Kong Trade and Development Council (HKTDC: https://beltandroad.hktdc.com/en) also organizes an annual Belt and Road Summit, which aims to connect businesses with opportunities in BRI countries. These initiatives and platforms provide a valuable opportunity for Hong Kong surveyors to expand their business network, access market information, and build connections with authorities and companies in BRI host countries, mainland local governments, state-owned companies, and Hong Kong developers and companies. The government's platform and the Belt and Road Summit are excellent resources for Hong Kong surveyors to tap into to expand their BRI countries' business prospects.

5.3.1 Hong Kong Trade Development Council Belt and Road Information Platform

The Hong Kong, Trade Development Council creates a platform to assist Hong Kong companies in searching for market information on BRI projects, including projects and service provider databases. Hong Kong companies could find potential business opportunities in Southeast Asia by searching for investment projects (See Figure 5.2, website: https://beltandroad.hktdc.com/en/project-database). They could match their project location, sector, and investment size needs with the existing projects in BRI countries. HKTDC could be a bridge to connect Hong Kong companies with foreign business opportunities.

Region | Project Sector | Format of Cooperation | Search

Recommendations for you

SUBMIT NEW PROJECT

Decongestion of city center by new electric micro vehicle for rent

Construction Last updated: 14 Oct 2022

Project Location	Mainland China | Hong Kong
Sectors	Manufacturing | Roads and Highways | Warehouse and Logistics Parks | Hospitality & Tourism | Smart City Development
Looking for	Equal Shareholdings
Capital Required (USD)	15,000,000
Company	

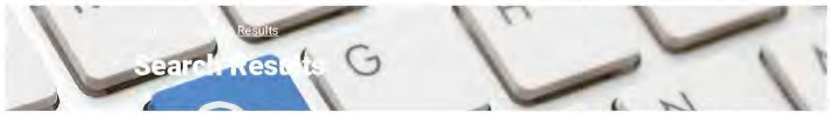
Russia - 40,000 hectares land development on cross-border platform. Creation of an energy...

Operations Last

Project Location	Central and Eastern Europe | Russia
Sectors	New Town Development
Looking for	Open for Negotiation
Capital Required (USD)	Not Specified
Company	

Figure 5.2 Search investment BRI projects

More importantly, the HKTDC builds service provider databases (See Figure 5.3, Website: https://beltandroad.hktdc.com/en/service-providers). By listing in the database, Hong Kong surveying firms can be seen by developers and investors all over the world. Hong Kong surveyors also can search for potential local partners on the platform, which meets the firm's expanding strategy. It would be an effective branding channel, and may increase Hong Kong surveyors' participation in BRI projects.



Filters

Clear all

Region

- Select all
- Mainland China 61
- Africa 24
- Australasia 26
- Central Asia 13
- Central and Eastern Europe 23
- Latin America 13
- Middle East 28
- North America 23
- Northeast Asia 24
- South Asia 30
- Southeast Asia 34
- Western Europe 27

Sector

- Environmental Services
- Financial Services
- Infrastructure and Real Estate-Related Services
  - Select all
  - Advisory & Consultancy 24
  - Risk Management (IRES) 1
  - Energy Management (IRES) 1
  - Environmental Engineering (IRES) 1
  - Environmental Management & Consultancy (IRES) 7
  - Green Building Solutions & Services (IRES) 1
  - Architectural Services 23
  - Building & Construction Services 20
  - Construction Engineering 16
  - Infrastructure & Town Planning 21
  - Infrastructure / Utility Investment 13
  - Rail and Mass Transit 13
  - Real Estate Services 15
  - Resource Recycling (IRES) 1
  - Surveying & Valuation 12
  - Waste Management (IRES) 16
- Logistics and Transportation Services
- Professional Services
- Telecommunications and ICT Services

Search

sort by name

Your search generated *53* results

10 DESIGN

Infrastructure and Real Estate-Related Services

Major Markets	Africa | Central and Eastern Europe | Latin America | Middle East | North America | Southeast Asia | Western Europe | Mainland China
Worldwide Network	Mainland China | United Arab Emirates | United Kingdom | USA | Hong Kong
Business Nature	Architectural Services | Infrastructure & Town Planning

AD+RG Architecture Design and Research Group Ltd

Environmental Services | Infrastructure and Real Estate-Related Services

Major Markets	Mainland China | Southeast Asia
Worldwide Network	Mainland China | Macau
Business Nature	Green Building Solutions & Services (Environmental Services) | Architectural Services | Infrastructure & Town Planning

AECOM Asia Co Ltd

Infrastructure and Real Estate-Related Services | Logistics and Transportation Services

Major Markets	Africa | Australasia | Central Asia | Middle East | South Asia | Southeast Asia | Mainland China
Worldwide Network	Australia | Azerbaijan | India | Indonesia | Kazakhstan | Kyrgyzstan | Malaysia | Myanmar | Philippines | Singapore | Sri Lanka | Tajikistan | ...
Business Nature	Architectural Services | Building & Construction Services | Construction Engineering | Infrastructure & Town Planning | Infrastructure / Utility Investme...

Aedas Limited

Infrastructure and Real Estate-Related Services | Environmental Services

Major Markets	Africa | Australasia | Central and Eastern Europe | Middle East | North America | Northeast Asia | South Asia | Southeast Asia | Western Europe | ...
Worldwide Network	Mainland China
Business Nature	Advisory & Consultancy | Architectural Services | Green Building Solutions & Services (Environmental Services) | Infrastructure & Town Planning | Rail...

AIM Group Limited

Infrastructure and Real Estate-Related Services

Major Markets	Africa | Middle East | Northeast Asia | Southeast Asia | Western Europe | South Asia
Worldwide Network	Hong Kong | Singapore
Business Nature	Building & Construction Services | Construction Engineering | Infrastructure & Town Planning | Advisory & Consultancy

AMCG Partners

Infrastructure and Real Estate-Related Services

Figure 5.3 Search investment BRI projects

In a recent case, HKTDC helped a Hong Kong enterprise build a data centre in Thailand. The company, OneAsia, is a Hong Kong-based data centre operator. The OneAsia Network team reached out to HKTDC's Thailand office using official channels and communicated their business requirements for expansion in Thailand. As part of their expansion plan, the team aimed to initiate land acquisition. HKTDC provided the company with information about the local real estate market and recommended trustworthy telecommunications companies, legal professionals, accounting firms, and recruitment agencies. From the initial contact to the completion of land purchase, investment, and construction, the entire process was successfully accomplished within a year.

As the founder of OneAsian said, “HKTDC introduced a Hong Kong-related chamber of commerce in Thailand to help us understand the local business environment. These valuable free advice and market information, contacts, and introductions of business partners, together with our data research, were complementary and immensely helped us start the first stage of essential work. Generally speaking, foreign companies can only own 49% of the land and company titles in Thailand, but with the help of the Thailand Board of Investment, OneAsia Network has successfully obtained 100% ownership of the land and company purchased, and the total investment in the whole Thai investment project has reached 90 million US dollars. " This case supports that, to expand business in BRI countries, taking advantage of HKTDC’s one-stop advisory and assistance services could be a good strategy for Hong Kong surveying firms.

Table 5.3 HKTDC Branches in Malaysia, Vietnam, and Thailand

	Location	Contacts
HKTDC Malaysia	Suite 27-1, Level 27, Menara Dion, 27 Jalan Sultan Ismail, 50250 Kuala Lumpur, Malaysia	Tel: 60-(3) 2381 1061 Email: kuala.lumpur.office@hktdc.org
HKTDC Vietnam	Suite 701-702, Saigon Tower Office Building, 29 Le Duan Street, District 1, Ho Chi Minh City, Vietnam	Tel: 84-(8) 3823 5883 Email: hochiminh.city.office@hktdc.org
HKTDC Thailand	Sathorn Square, 9th floor, Room 906, 98 North Sathorn Road, Silom, Bangrak, Bangkok 10500, Thailand	Tel: 66-(2) 343 9000 Email: bangkok.office@hktdc.org

5.3.2 The Belt and Road Summit

The annual Belt and Road Summit is a flagship event jointly organized by the Hong Kong government and the Hong Kong Trade and Development Council (HKTDC), which serves as a platform for participants from all over the world to explore BRI opportunities. The event offers an excellent opportunity for surveying professionals to expand their business network and access market information. It could help them build connections with authorities and companies in BRI host countries, mainland local government, state-owned companies, and Hong Kong developers and companies.

HKIS members, who are surveying professionals in Hong Kong, could greatly benefit from attending the BRI Summit. The summit provides a platform for surveying professionals from all over the world to exchange information, establish business networks and connect with potential partners for investment and collaboration. More than 280 investment projects were presented at the 7th BRI Summit. These projects offered a wide range of business opportunities for surveying professionals, especially those interested in participating in smart city development, and transport infrastructure projects.

The BRI Summit is also a great opportunity for surveying professionals to meet and network with potential clients from around the world. During the 7th BRI Summit, more than 800 one-to-one matching sessions were held between project owners and attendees. These sessions provided a platform for surveying professionals to present their projects and discover potential clients. The business matching and project pitching sessions at the summit remain popular among project owners

and attendees and provide an excellent opportunity for surveying professionals to build relationships with these holders in BRI countries.

6. New opportunities: urban sustainability and Green BRI

The Belt and Road Initiative (BRI) has the potential to contribute to the economic development of Southeast Asian nations. However, alongside the positive impacts on economic development and employment, the implementation of the BRI has also brought unforeseen environmental challenges (Jiang et al., 2022). Host countries have exhibited a varied response to the initiative. While they appreciate the potential benefits of increased resources, there are reservations and sometimes outright opposition due to perceived risks and issues associated with new investment activities, particularly related to environmental pollution and degradation.

Li et al. (2020) Chinese state-owned enterprises often emphasize the positive intentions behind their investments in host countries. They highlight the internal challenges within the Chinese system and the extensive efforts made by the Chinese side to benefit the host country through the BRI investments. According to this perspective, criticisms from locals regarding the projects stem from issues with local governance and domestic politics, which are the responsibility of the host government rather than Chinese enterprises. International criticisms are seen as driven by the self-interest of respective countries and biases against China's peaceful rise as a new global power. Consequently, the enterprises feel little obligation to proactively address local grievances, often only expressing dissatisfaction with the host government's response. However, as little action is taken to alleviate local complaints about the projects, dissatisfaction grows, and tensions escalate, posing a threat to the long-term sustainability of the projects.

To contain the sustainability risks, the Chinese government proposes the “green” standards and goals in BRI projects. Achieving environmentally sustainable development necessitates thorough

planning, improved engagement with local communities, and greater incorporation of perspectives from various stakeholders during project design. By implementing these measures, project performance will improve, and the desired vision of sustainable co-development under the BRI can be more effectively realized.

6.1 Green BRI under Chinese vision

The concept of the green BRI embodies China's efforts to foster development along the BRI routes while prioritizing environmental considerations. In 2017, the Ministry of Ecology and Environment, Ministry of Foreign Affairs, National Development and Reform Commission, and Ministry of Commerce collaboratively issued the Guidance, alongside other supporting documents, with the objective of "promoting green development, strengthen eco-environment protection, and jointly build a green silk road" (Jiang et al., 2022).

The 2017 Green Guidance, which can be considered as the operational strategy for the Chinese State Council's Action Plan on the Belt and Road Initiative, outlines the principles and objectives for advancing a Green BRI. According to the 2017 Green Guidance, the promotion of a Green BRI serves three primary purposes: (1) to internally propagate China's philosophy of ecological civilization and achieve sustainable development, (2) to actively engage in global environmental governance and advocate for green development principles, and (3) to foster collaborative communities characterized by shared interests, collective responsibility, and a shared future (*Green Guidance, 2017*).

Moreover, the **Chinese government also issued an ecological and environmental cooperation plan and a statement on vision and action in the Belt and Road energy development**

(Elkind, 2019). It states, for example, that call for "enterprises to play the major role in environmental governance." It also provides for a number of best-practice and information-sharing efforts, such as codes of conduct that can be developed by industry associations and chambers of commerce on "eco-environment behaviours for overseas investments" and the regular publication of reports and plans for implementing environmental laws and regulations, including through internet-based systems. Another official document, *the vision and action plan on energy development*, is more general than the environmental cooperation plan. The vision and action plan underscore the commitment of the BRI to energy development that is mutually beneficial, market-oriented, safe and secure, green and efficient, and "harmonious" in terms of social impacts.

Green BRI has two dimensions (Nedopil, 2022). The first dimension involves encouraging Chinese enterprises to adhere to international environmental regulations, as well as the local environmental laws and standards of the host countries. The second dimension aims to export Chinese environmental standards to countries along the Belt and Road with lower levels of development. This particular aspect is often not fully comprehended. The 2017 Green Guidance outlines China's objectives, which include: (1) establishing environmental standards and codes for infrastructure construction, promoting energy efficiency and environmental practices in sectors such as transportation, buildings, and clean energy, and advancing environmental protection in areas such as water, air, soil, and biodiversity; (2) fostering green trade and sustainable production and consumption, such as incorporating environmental protection requirements into free trade agreements, negotiating and implementing relevant agreements concerning the environment and trade, and enhancing the

verification of compliance with environmental measures in trade activities; and (3) enhancing the environmental management of overseas investments and developing a green financial system.

However, it should be noted the Green BRI should not be viewed as a strict environmental regulation policy (Nedopil, 2022). Environmental regulations typically impose immediate obligations on companies to control pollution, invest in abatement measures, and meet emission standards (). Based on the "Pollution Halo Hypothesis," suitable environmental regulations can stimulate corporate innovation. This innovation can help offset the costs associated with environmental regulations and enhance firms' competitiveness (Nedopil, 2022). However, the Green Belt and Road Initiative aims to provide guidance and encouragement for Chinese enterprises to adopt environmentally friendly practices.

The primary focus of the green BRI is to send a clear policy message to Chinese enterprises investing in BRI countries. One aspect of this initiative is to promote green credit, providing reduced financing costs for environmentally friendly enterprises. Additionally, the policy signal aims to incentivize companies to adopt more stringent environmental standards (Jiang et al., 2022). As a result, these enterprises may pursue technological advancements that lead to reduced emissions and increased productivity. These mechanisms differ from technological innovation driven by the pressure of environmental regulations. And some criticised whether Chinese enterprises' performance can be affected by this mechanism.

While the Chinese government aspires to promote a green Belt and Road by exporting its environmental standards, the reality presents a hurdle for Chinese investments to succeed in foreign countries due to environmental risks. It is widely recognized that Chinese enterprises excel in the

technical execution of infrastructure projects, but their overall sustainability and environmental standards are comparatively weak. According to some interviewees, the environmental protection measures implemented by Chinese enterprises are minimal, raising significant concerns regarding the social and environmental impact of BRI projects. When comparing Chinese enterprises with European companies presented with the same project and profit benchmarks, they pointed out that local communities tend to prefer European enterprises due to their perceived superior performance in fulfilling social responsibilities.

To ensure the success of Chinese investments in the Southeast Asian region as part of the BRI, it is imperative to prioritize the protection of the local environment and ensure long-term sustainability. In addition to adhering to international and host countries' regulations, it is essential for the Chinese government to take on the responsibility of regulating Chinese activities along the Belt and Road. What is currently lacking in the pursuit of a green Belt and Road is an efficient compliance framework that holds Chinese companies accountable for maintaining rigorous environmental standards in the region.

As sustainability in Hong Kong has undergone progressive developments more recently, Hong Kong could promote Green BRI by developing green finance and strengthening green building construction.

6.2 Hong Kong's role in promoting Green BRI

6.2.1 Hong Kong's green bond market

Green bond is a type of green finance. Investors usually tend to purchase green bonds for a lower price than the market interest rate. While issuers could benefit by issuing green bonds, they must first receive certification proving they have followed environmental protection regulations. Following that, unbiased third parties evaluate the projects on a monthly basis to make sure they adhere to the environmental criteria stated in the bond issuing terms. In general, ensuring that businesses issuing green bonds really use the fund obtained to support ecologically beneficial activities is the key to developing the market for green bonds (Li et al., 2020). However, research conducted by the Hong Kong Trade Development Council reveals that this is precisely the principal drawback of Chinese enterprises:

First, in China, there is a deficiency of established standards and guidance concerning the scope, procedures, and reporting requirements for certification service providers. Moreover, there are no prerequisites or self-regulatory principles in place to govern these certification institutions within the market. Consequently, the third-party certification reports lack credibility (Li et al., 2020). Secondly, China lacks a comprehensive information disclosure system (Li et al., 2020). Based on the certification reports issued within mainland China, there is insufficient qualitative and quantitative analysis to support assessments. As a result, investors do not possess adequate information to fully comprehend the basis, measurement standards' characteristics, and potential risks associated with projects financed through green bonds (Li et al., 2020).

Therefore, Hong Kong has the potential to address the aforementioned limitations effectively. With its well-established green bond market, Hong Kong offers a promising solution. According to the annual report of HKBC (HKBC, 2022), while other bond investments declined by 18% due to the impact of the COVID-19 pandemic, green bond investments in Hong Kong experienced an annual increase of approximately 2%. This growth showcases Hong Kong's capacity to support sustainable financing initiatives. In particular, Hong Kong can play a crucial role in assisting Chinese enterprises in expanding their financing options by facilitating the issuance of green bonds to fund their projects in BRI countries. As one of the world's most active fundraising hubs, Hong Kong possesses a robust certification system. Consequently, if companies intend to issue green bonds for BRI projects, Hong Kong can provide comprehensive services, including certificate application, due diligence procedures, and bond issuance support, all under one roof.

6.2.2 Green Buildings in Hong Kong

The development of green buildings in Hong Kong has been a significant trend in recent years, and the city is widely recognized as a leader in this field. Green building refers to the practice of design, construction, and operation of buildings in an environmentally responsible manner. This can include using energy-efficient technologies, renewable energy sources, sustainable materials, and strategies for reducing water and waste. The city's commitment to sustainable building practices can be seen in its ambitious energy and carbon reduction targets and its various policies and initiatives that support the development of green buildings. For example, the Hong Kong Building Energy Code sets minimum

energy performance standards for new buildings, and the city's green building certification scheme, known as the "BEAM Plus" system, provides recognition and incentives for buildings that meet high environmental performance standards.

Hong Kong boasts an extensive urban landscape with a substantial number of buildings, comprising more than 42,000 private buildings and over 8,000 government buildings (HKGBC, 2022). As a result, there is a pressing need to promote sustainable energy consumption practices in the region. The energy, electricity, water, and material consumption in Hong Kong are predominantly attributed to buildings, accounting for approximately 90% of the total electricity consumption and roughly 60% of the overall carbon dioxide emissions annually (HKGBC, 2022). Consequently, it is imperative to address emissions from both new and existing buildings to effectively decarbonize the building sector.

In light of this, as a component of the Climate Action Plan 2030+ implemented by the Hong Kong Environment Bureau, which aims to achieve a carbon intensity reduction target of 65-70% by 2030 compared to the 2005 level, the city has embraced a stringent set of green certification standards developed by the Hong Kong Green Building Council (HKGBC) known as BEAM Plus (HKGBC, 2022). To obtain a BEAM Plus certification, building developers must satisfy a comprehensive array of performance criteria encompassing various sustainability aspects, spanning from the planning and construction phases to the operation and maintenance of the building (HKGBC, 2022). This holistic approach ensures a fair and objective evaluation of a building's overall performance throughout its entire life cycle, thereby promoting transparency across multiple facets. By adhering to these criteria, green buildings in Hong Kong can effectively address numerous sources of carbon emissions

simultaneously. A notable illustration of this green certification can be observed in the case of K11 Atelier King's Road, a prominent urban office redevelopment project situated in North Point on Hong Kong Island (refer to Figure 6.1). Upon completion, this development integrated over 70 sustainability features, exemplifying the commitment to environmental excellence.

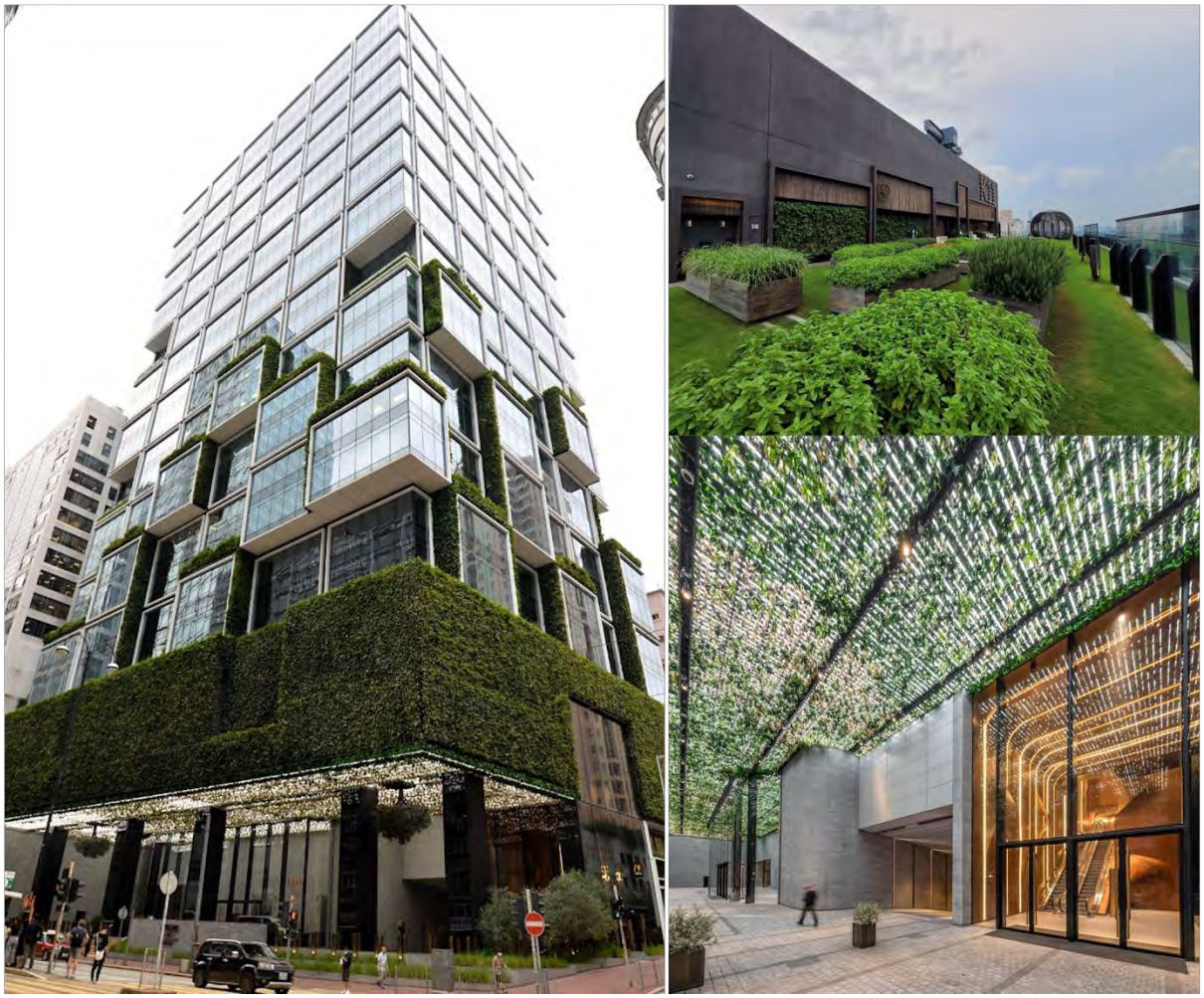


Figure 6.1 K11 Atelier King's Road

By sharing its experience and expertise in green building development, Hong Kong can help to promote the sustainability of BRI projects that are carried out in Southeast Asia. This can involve providing guidance and advice on incorporating sustainable features into the design and construction

of buildings and other infrastructure, such as using renewable energy sources and energy-efficient technologies. Hong Kong can also help to build capacity among participating countries by providing training and technical assistance on sustainable building practices. In addition to its experience in green building development, Hong Kong can contribute to promoting sustainable development in the BRI through its strong financial sector and its role as a regional hub for trade and investment. The city's financial institutions can support the financing of sustainable infrastructure projects. At the same time, its position as a major trading and logistics hub can facilitate the flow of goods and services among participating countries.

In conclusion, Hong Kong's experience in green building development can play a valuable role in promoting the sustainability of the BRI. By sharing its expertise and knowledge and leveraging its financial and trade capabilities, Hong Kong can help to ensure that the BRI projects are environmentally responsible and have a positive impact on the participating countries and their communities.

6.3. Strategy 7: Tapping the green project opportunities

Southeast Asia holds a significant position in the BRI, with various ongoing or future infrastructure and construction projects. These projects have the potential to deliver substantial economic advantages for the involved countries. However, if not executed sustainably, they might also have adverse effects on the environment and local communities. Consequently, there is an increasing need for green projects, which can help to minimise these negative impacts and support the long-term success of the BRI.

Green projects, including green buildings and infrastructure, play a vital role in promoting the sustainability of the BRI. These projects incorporate renewable energy sources, such as solar panels and wind turbines, to generate electricity for various structures. Additionally, hydropower, geothermal energy, and other forms of renewables are explored. By embracing renewable energy, these initiatives contribute to reducing greenhouse gas emissions and air pollution while also offering economic advantages by decreasing dependency on fossil fuels and lowering energy expenses. Furthermore, apart from emphasizing renewable energy integration, green projects enhance BRI's sustainability through sustainable design principles and construction practices. This involves utilizing sustainable materials like recycled steel and concrete along with implementing strategies that reduce water consumption and waste generation. Such eco-friendly measures ensure long-term environmental viability.

The growing demand for green projects in Southeast Asian countries offers an excellent business opportunity for professional surveyors from Hong Kong. These experts can leverage their knowledge and skills to assist organizations in Southeast Asia with the¬ planning and development of environmentally-friendly initiatives. One¬ major advantage of Hong Kong surveyors is their expertise in green project construction, which ensures accurate¬ and efficient implementation. Specifically, their services encompass surveying assessments and detailed plans that guide the¬ design and construction of sustainable buildings. This is particularly important in the context of green building construction, where the precise placement of a building on a site can significantly impact its environmental performance.

In addition, Hong Kong surveying professionals possess not only exceptional surveying expertise but also offer valuable guidance and advice for incorporating environmentally sustainable features into

green building projects. They can provide recommendations on utilizing renewable energy sources, such as solar panels and wind turbines, while¬ also suggesting strategies to reduce water and energy consumption. These skilled professionals play a crucial role in ensuring that green projects are executed with minimal impact on local communities and ecosystems, while striving for equitable distribution of project benefits.

By promoting their expertise in surveying practice and project management, Hong Kong professional surveyors can show the value they can bring to green projects in Southeast Asia. They could emphasize their experience and knowledge¬ of sustainable building practices, highlighting the benefits of their services such as reduced environmental impacts, improved project efficiency, and positive outcomes for local communities. By effectively promoting their skills, Hong Kong professional surveyors can capture the attention of potential regional clients and partners.

Another key strategy that Hong Kong professional surveyors can use to take advantage of the increasing demand for green BRI projects in Southeast Asia is to help Chinese¬ enterprises and local organizations in understanding and adhering to the specific regulations and standards for sustainable development in each region. Throughout Southeast Asia, organizations must comply with particular guidelines to undertake eco-friendly initiatives. For instance, in Malaysia, developers are required to conduct environmental impact assessments or obtain green building certification before commencing any project. By offering their expertise and guidance, Hong Kong professional surveyors enable Chinese¬ enterprises investing in Southeast Asia to navigate these¬ requirements effectively, ensuring successful implementation of green BRI projects throughout the region.

7. Conclusion

7.1 Main research findings

The main goal of this research is to examine the potential and obstacles faced by surveyors in Hong Kong's Planning and Development (P&D) sector when offering their services in Southeast Asian nations as part of the Belt and Road Initiative (BRI). Throughout the study duration, the research team has consistently focused on this overarching objective. In section 1.2, four specific objectives were identified within this broader aim. These objectives have been successfully implemented and achieved. Table 7.1 presents the correlation between these objectives and the key findings, which have significantly contributed to their attainment.

Table 7.1 Research objectives and findings

Objectives	Findings
1. A systemic review of Belt and Road development in Southeast Asia, focusing on the role of Hong Kong professional surveyors;	Chapter 3
2. A detailed comparison of the urban planning system and development control systems between Hong Kong and the three case countries;	Section 4.1
3. Opportunities and challenges of the Hong Kong professional planning and development surveyor industry in providing services in these oversea markets;	Chapter 4, 5 & 6
4. Strategies for Hong Kong surveyors to conduct business and professional activities in Southeast Asian countries under the Belt and Road Initiative.	Section 4.2, 4.3, 5.2, 5.3, & 6.3

This section provides a comprehensive examination and description of the key discoveries made in this study, which can be categorized into five distinct areas. Each area will be individually explored and analysed in the following discussion. These five areas include:

7.1.1 BRI development in Southeast Asia and the role of HKIS surveyors

7.1.2 Challenge of the HKIS surveyors in operating overseas business and the strategies formulated to overcome the challenge

7.1.3 Comparison of development control systems between the case countries and Hong Kong

7.1.4 Challenge of the HKIS surveyors in getting involved in BRI projects and the strategies formulated to overcome the challenge

7.1.5 New opportunities come with the Green BRI

7.1.1 BRI development in Southeast Asia and the role of HKIS surveyors

BRI development in Southeast Asia

Southeast Asian countries have been at the center of the BRI Initiative since the start, as they are a priority region for the BRI. The countries of Association of Southeast Asian Nations (ASEAN) serves as a bridge linking mainland Southeast Asian countries with China, and the Strait of Malacca is one of the busiest shipping lanes in the world. The BRI has led to the development of Southeast Asian countries through construction projects, industrial parks, economic and trade cooperation zones, and the establishment of economic corridors. Chinese investments in infrastructure have increased significantly in ASEAN after the announcement of the BRI. Meanwhile, the BRI has affected the amount of mainland Chinese FDI in Southeast Asia, with Malaysia receiving the most mainland

Chinese FDI for construction projects, followed by Vietnam and Thailand. However, implementing BRI projects has encountered multiple challenges, including delays in project completion, debt concerns, and the controversial nature of some projects. Despite the economic benefits brought by the BRI, implementing BRI projects in Southeast Asia is a complex process that requires professional services to ensure the implementation of these projects.

HKIS surveyors's role in BRI

Hong Kong's professional service sector, including the surveying profession, has played a crucial role in connecting China with Southeast Asian countries and promoting the development of the BRI. HKIS surveyors have extensive practical experience, including expertise in international standards, legal systems, and market-based institutions, making them vital to the BRI. The role of Hong Kong professional services in BRI has gone through three phases, starting from the "super-connector" to the "soft power hub" and, finally, the "strengthened influencer." Hong Kong surveyors have a significant role in BRI construction, providing town planning, land development, project management, architectural planning, engineering surveying, and more. Hong Kong's professional service can also contribute to the enhancement of soft power by promoting Chinese "institutions and standards." The governments of Hong Kong and mainland China, along with stakeholders in BRI destinations, have set high expectations for the involvement of Hong Kong professional services in the BRI. However, their actual participation in BRI projects has been inconsistent and relatively limited.

7.1.2 Challenge of the Hong Kong surveyors in operating overseas business and the strategies formulated to overcome the challenge

According to our surveys, Hong Kong surveyors face challenges when operating business in Southeast Asian countries along the BRI routes, including unfamiliarity with local planning and development knowledge, language barriers, and unfamiliarity with local cultures and lifestyles. These challenges can result in errors or incorrect decisions, miscommunications, and difficulties in building relationships with local authorities and communities. The lack of local planning and development knowledge is the main challenge, and respondents do not believe they are competitive in the Southeast Asian market. Based on our results from questionnaire survey and interviews, we formulate three strategies to overcome these challenges.

Strategy 1: Collect local planning and development knowledge by self-learning

Hong Kong surveyors face challenges in providing surveying services in Southeast Asian countries due to their lack of local planning and development knowledge. Collaborating with local experts is an option to overcome this challenge, but having a basic understanding of local planning and development systems is crucial for their competitiveness in the industry. This requires them to understand procedures for obtaining planning permission and local laws and regulations regarding land use in the countries they work in. Familiarizing themselves with local planning and development knowledge increases their work efficiency and helps them make informed decisions, leading to better outcomes for their clients. It also improves communication with local authorities and other

stakeholders and sets them apart from competitors in the industry, enabling them to offer a wider range of services and expertise.

Strategy 2: Collaborating with local professionals

Hong Kong surveying firms operating in Southeast Asia should collaborate with local experts to adapt to the context of the host country, and the degree of adaptation depends on their expansion stage. In the 'client-following' stage, their duty is relatively simple, such as drafting contracts with contractors. Hong Kong surveyors mainly rely on local professionals to translate the contracts, negotiate with contractors and deal with issues related to local authorities. However, in the 'market-seeking' stage, where firms aim to expand their presence in Southeast Asia, they need to set up teams that can operate more efficiently than local competitors by engaging local partners in the firm's operation. Hong Kong surveying firms should also develop more sophisticated ways of assembling global teams of professionals to respond more effectively to multinational clients' demand for integrated cross-national services, giving local partners or employees more authority to better mobilize and coordinate firm-wide resources.

Strategy 3: The role of HKIS

According to our survey, Hong Kong surveying professionals see the Hong Kong Institute of Surveyors (HKIS) as key in helping them expand under the Belt and Road Initiative. They suggested that HKIS establish more partnerships with surveying institutions in countries along the BRI routes. One respondent noted that Hong Kong surveying firms were small in scale and lacked the resources

to develop business networks in Southeast Asia. Still, they had an advantage due to their international backgrounds, which were recognized by both RICS and HKIS. To further leverage this advantage, the respondent recommended that the HKIS align RICS professional standards and guidelines with those in Thailand, Malaysia, and other South Asian countries, which would help Hong Kong surveying firms find more opportunities in the region. By establishing such partnerships and aligning professional standards, Hong Kong surveying firms can overcome some of the challenges they face when expanding their businesses under the Belt and Road Initiative, and position themselves to take advantage of the many opportunities available.

7.1.3 Comparison of development control systems between the case countries and Hong Kong

Development control systems play a critical role in shaping the growth and expansion of cities. This study compares the development control systems in Hong Kong, Malaysia, Vietnam, and Thailand. Planning control is a fundamental aspect of the development control system, and it has two paradigms: the discretionary and regulatory control systems. Malaysia uses a discretionary system in which planning control primarily focuses on regulating and monitoring urban growth by approving or rejecting development applications. Vietnam uses a hybrid planning control system that heavily relies on state enforcement, while Thailand employs a regulatory control approach based on comprehensive and specific plans.

Land control measures vary across these countries. Hong Kong uses a leasehold system where the government grants leases of public property to the public for a predetermined period. Malaysia and Thailand operate a freehold system where private land can be bought and sold in the open market,

while public land can be sold through competitive methods such as auctions or bidding. In Vietnam, private individuals have exclusive land-use rights, and land is classified as public property that belongs to the entire population, managed and administered by the central government.

Building control regulations are mandatory in Hong Kong and Malaysia. Developers are required to obtain building plan approvals before construction can begin. Vietnam and Thailand use building permits as a significant tools by which the government controls land development. In Thailand, where developers do not need planning permission, local governments rely on the Building Control Acts as a framework for implementing planning when approving construction projects.

7.1.4 Challenge of the HKIS surveyors in getting involved in BRI projects and the strategies formulated to overcome the challenge

The lack of a clear understanding of the BRI implementation and its requirements presents challenges for surveyors in Hong Kong to participate in BRI projects. Our survey found that while many HKIS surveyors have a positive attitude toward the potential impact of the BRI on Hong Kong's future development, confusion about the execution, lack of standardization in guidelines and business models, and limited recruiting channels hinder their participation in BRI projects. Moreover, they face intense competition with mainland consulting firms and have insufficient experience in "packaging" a project to suit the goals of Chinese SOEs and local countries. As such, building relationships with Chinese state-owned enterprises, collaborating with mainland consulting firms, and collecting information through Hong Kong official platforms could be strategies for HKIS surveyors to expand their business network and working opportunities under the BRI.

Strategy 4: Connecting with mainland consulting firms and planning and surveying institution

Hong Kong surveyors could establish partnerships with mainland consulting or surveying firms, to leverage the mainland companies' networks and become sub-consultants for large-scale BRI projects. This collaboration provides a one-stop-shop for overseas surveying services for mainland companies within the "one country, two systems" framework, helping Hong Kong surveying practitioners penetrate the BRI and Greater Bay Area markets. In this way, Hong Kong surveyors can provide high-quality professional services to BRI-participating Chinese enterprises, supporting the development of the initiative.

Strategy 5: Two offices – expand the business network through the Singapore office

Singapore is a favourable location to explore new business opportunities due to its access to the Southeast Asian market, favourable tax policies, and straightforward company formation procedures. Meanwhile, HKIS has a reciprocity agreement with the Singapore Institute of Surveyors and Valuers (SISV) that can benefit surveyors. However, some interviewees expressed concerns about the risks of doing business abroad, such as language barriers, cultural differences, unfamiliar regulations and laws, and unpredictable and unstable business environments. One potential solution is to establish partnerships and collaborate with local professionals to mitigate risks, pool resources and knowledge, and increase visibility and reach in the market. Collaboration can also help to provide a comprehensive range of services to clients conducting business in BRI countries, from planning to operational phases. Therefore, it would be wise for Hong Kong surveying professionals to broaden their network of business partnerships rather than go it alone to create more business opportunities.

Strategy 6: Take advantage of the Hong Kong government's platforms

The Hong Kong government is actively promoting and supporting the Belt and Road Initiative (BRI) by establishing the Infrastructure Financing Facilitation Office (IFFO) and the Belt and Road Office and becoming a member of the Asia Infrastructure Investment Bank. The Hong Kong Trade and Development Council (HKTDC) also hosts an annual Belt and Road Summit, which helps connect businesses with opportunities in BRI countries. These platforms provide valuable opportunities for Hong Kong surveyors to expand their business network and access market information. They connect them with authorities, companies, and developers in the BRI host countries, mainland local governments, state-owned companies, and Hong Kong developers and companies. Therefore, the government's platform and the Belt and Road Summit are excellent resources for Hong Kong surveyors to explore new business prospects in the BRI countries.

7.1.5 New opportunities come with the Green BRI

Implementing the Belt and Road Initiative (BRI) in Southeast Asia can bring significant economic benefits, but it also carries the potential for negative environmental impacts. The demand for green projects in the region, which can reduce negative effects and support the long-term success of the BRI, presents a significant business opportunity for Hong Kong professional surveyors. They can provide their expertise and services in surveying, planning, and project management to help organizations in Southeast Asia design and develop green projects. Their knowledge of sustainable building practices and compliance with local regulations and standards can help ensure that green projects are carried out accurately, efficiently, and in a way that minimizes impacts on local

communities and ecosystems. Promoting their expertise can attract potential clients and partners in the region and help to ensure the implementation of green BRI projects in Southeast Asia.

7.2 Conclusion

This study examines the opportunities and challenges for Hong Kong professional P&D surveyors to expand their business under the BRI initiative. The Hong Kong professional service sector has been evolving to adapt to the development of BRI. Despite distinctive advantages, HKIS surveyors countered barriers to participation in the BRI projects. Through comprehensive discussions and engagement with HKIS surveyors, the research team has identified potential solutions to address some constraints and challenges.

The "one country, two systems" institutional arrangement has been instrumental in defining contemporary Hong Kong and its unique advantages in the context of the BRI. Despite institutional differences between Hong Kong and the mainland, these differences are regarded as a source of strength, not weakness. The distinctiveness of Hong Kong's professional surveying services plays a crucial role in addressing BRI challenges, and many of the strategies put forward in this study aim to further develop this potential. Many stakeholders in BRI destinations view Hong Kong professional service as an opportunity to bring about sustainable and quality practices that can contribute to their transformative developments. As a result, Hong Kong surveyors are uniquely positioned to offer their professional services to support BRI projects.

Meanwhile, the Belt and Road Initiative (BRI) can boost the business network's development for Hong Kong planning and development surveying professionals. To achieve this, practitioners in

the industry must address their shortcomings and prepare for new challenges and opportunities. The government, industry, and institution sectors must work together to adjust policies and business practices to promote this common goal.

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