The rise of Baidu, Alibaba and Tencent (BAT) and their role in China's Belt and Road Initiative (BRI)

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Abstract

The Chinese digital technology giants Baidu, Alibaba and Tencent (BAT) dominate their competitors in China across that include e-commerce, digital entertainment, e-finance and artificial intelligence (AI). To understand BAT's corporate power and their strategic role working with the government—in this case, their involvement in Belt and Road Initiative (BRI)—this paper unveils the capabilities of these three oligopolies and discuss their international expansion in relation to BRI. BRI is being constructed on two layers: the physical and digital infrastructure, and BAT is contributing to the latter. This paper examines the interrelations between BAT and the state through case studies, observing the tensions and potential contradictions arising from the reliance of the Chinese state on BAT to build digital infrastructure, while BAT seek to minimise direct state regulation for their data-driven business models.

Keywords

The rising power of BAT in a global context

To a large extent, Baidu, Alibaba and Tencent (hereafter referred to as BAT) represent China's digital economy. As world-renowned internet companies, the BAT constitute the major international competitors to the US-based digital technology giants such as Apple, Google, Amazon, Facebook and Microsoft, and their rise presents a challenge to both the global economic order and the power of nation-states. The BAT business strategies possess both similarities and differences, as they compete for domestic and international market share, user base, possession of underlying data, profitability, and technological innovation. It is common for BAT companies to conduct large-scale acquisitions and merges that empower their services and platforms in various ways. As pioneers in the Chinese internet industry, they were given the greatest opportunity for global expansion with the announcement by the Chinese government under Xi Jinping of the Belt and Road Initiative in 2013 (initially termed the One Belt One Road Strategy). The BRI is being constructed on two layers: the first is the government-level infrastructure that forms the physical Silk Road, such as the cross-regional project of transportation and information technology; the second is the corporate-level digital infrastructure that forms the Digital Silk Road, such as the development of e-commerce along the tangible ancient route. Even though BAT is contributing to the Digital Silk Road, the government still has mixed feelings about the rise of these private companies. The synergy and tension between capital and state power is more intricate than ever.

Such tensions between digital technology giants and national governments are not unique to China.

As digital companies operate on a transnational scale, the tensions between capital and state power is a dynamic interaction that occurs globally. In the wake of the Edward Snowden revelations about the National Security Agency (NSA) accessing data from U.S.-based digital platforms operating around the world, and sharing resulting information with U.S. government agencies, concerns about data sovereignty in an age of cloud computing have accelerated. The conduct of digital platforms, most notably Facebook, in handling user data, and the perceived role played by the sharing of third-party data in events such as the 2016 U.K. Brexit Referendum and the election of U.S. President Donald Trump, have led to major public enquiries in the U.S. and elsewhere, and the Federal Trade Commission ordering a $US5 billion fine against Facebook over the Cambridge Analytica data sharing scandal (Flew, 2018a, 2019). When digital media becomes a significant part of people's lives and a large number of 'netizens[1]' have chosen to share intimate details of their personal lives across multiple digital platforms, user control over access to data was frequently relinquished, and became the basis for the business models of what has been termed 'platform society' (van Dijck, Poell & de Waal, 2018) and 'surveillance capitalism' (Zuboff, 2019). In a sense, the confrontation between capital and state power is inevitable: sooner or later, they are destined to clash, particularly as both as seeking to access and analyse data that has both economic and national security uses.

In this paper, we investigate how these tensions between digital capital and state power are playing out in China, with particular reference to the role being played by the BAT in the Belt and Road Initiative. The paper draws upon interviews with internet practitioners in the field, in order to draw

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[1] The term netizen is a portmanteau of the words Internet and citizen as in "citizen of the net". It describes a person actively involved in online communities or the Internet in general.

attention to the contested and strategic stance of online oligopolies, and to generate awareness and further discussion of use and regulation of their online services. To investigate the country's online markets more thoroughly, fieldwork was conducted in China from September to December 2017. Interviewees were selected from a subset of a larger group, which constitute the complete dataset of the PhD project (Su, 2019). Interviews adopted in this paper features internet practitioners only, in order to present industry perspectives. Internet practitioners who are currently or used to be BAT employees were interviewed to generate industry perspectives that vary from those found in scholarly works. In addition to theoretical frameworks, these interviews present an up-to-date perspective of what is occurring in this field today. While the distinctiveness of the Chinese Internet is acknowledged, which in turn generates particularities to the Chinese case, the case study has wider implications for considering the relationship between global digital platforms and national governments, particularly in a 'post-global' age (Flew, 2018b) where tensions between leading nation-states and competing regional blocs are being accentuated.

Soft power

In 1990, the Harvard University political scientist Joseph S. Nye Jr. first proposed the concept of 'soft power', in the widely read U.S. journal *Foreign Policy* (Nye, 1990). Nye asserted that 'soft power' is the power of 'attraction', as opposed to the power of 'coercion' (military or 'hard' power) or 'inducement' (economic power). Soft power is not exclusively cultural power, yet exporting cultural goods that hold attraction for other countries could potentially communicate values and influence societies as a by-product. In Nye's words, '"soft power" is the ability to get what you want through attraction rather than coercion or payments' (Nye, 2004, p. x). This definition is

simple to understand, but in order to gain further understanding of China's soft power, one needs to look at its 'four make-ups' (Chitty, 2015). The first make up is identification, where cultures consist of deep traditional values that constitute the identity of a nation or a race. The second is reconciliation: when positioned in post-conflict situations, reconciliation is a kind of making-up. The third is 'cosmetification', which is an accentuation of positive images. The fourth is falsification, which is also seen as propaganda. These four make-ups represent the quality of soft power in a receding order – the last one in fact having the least influence and the possible effect of reducing soft power (Chitty, 2015). When discussing China's soft power policy, or soft power scheme, it is often related to ideology propaganda or political agenda in Western discourses. In this sense, China's endeavour to increase its cultural soft power – building Confucius Institutes, setting up a CCTV satellite channel, exporting martial arts movies and TV serials – is an effort to improve the attraction of Chinese culture and even of the nation (Barr, Feklyunina, & Theys, 2015; Berry & Farquhar, 2006; Callahan, 2015; Ding, 2015; Edney, 2015; Zhao & Keane, 2013). Critics have seen it as 'wearing too much makeup', or trying too hard to sell to the world an overly idealized image of China (Sun, 2015; Shambaugh, 2015).

The 'main-melody' strategy is one of the factors that may be attributable to this stereotyped impression. With the goal of building national identity and strengthening the governance of the Chinese Communist Party (CCP), the main-melody strategy was first put forward for cinema in 1987, and has been implemented across all media since then. As one of the most important cultural strategies in China, main-melody cultural productions are still being produced, emphasizing CCP history and major battles, but drawing upon Hollywood-style special effects. In spite of heavy investment in such media products, this government-level intervention has failed to fulfil its purpose during China's encounter with 'Global Hollywood' (Berry and Farquhar, 2006; Su, 2016;

Miller & Kraidy, 2018). The 'visible hand' is all over China's cultural sectors, as 'the government [has] attempted to tighten its ideological control on the cultural front' (Su, 2016), and has now expanded to the online front. Most literature has concentrated on the general concept of soft power, and on how to enhance China's soft power across traditional media platforms (Flew, 2016). It is only recently that a body of literature has emerged which discusses the formation of the BAT as a new digital power, and their collective contribution in improving soft power.

The scholarship on relationships between culture and soft power has focused upon the rise of Chinese economic power, and how the global dissemination of Chinese culture may contribute to China's attempts to becoming a global leader in politics and diplomacy, and to have greater influence over global public opinion, commensurate with its rising economic status (Chan, 2009; Keane, 2016a, 2016b; Keane & Zhao, 2015). This literature indicates that, as the second largest economy in the world, China has long been trying to enhance its global visibility through the cultural and creative industries. When facing the threat posed by foreign counterparts, China tends to resist this force by blocking market entry either directly or indirectly – putting up various obstacles, constantly employing different regulations, and banning foreign content (Donald, Hong and Keane, 2002; Fuchs, 2016).

Platform convergence and the development of the Chinese online market

Under state facilitation such as blocking foreign competitors to develop the domestic market, BAT are aggregating enormous economic, and potentially political, power. They are expanding by

offering multiple services that cover almost all Chinese users' online activities. This phenomenon of providing multiple services within one platform—or, as some scholars refer to it, 'lock in strategies' or 'forming [an] enclosed business loop' (Srnicek, 2016:111)—has been adopted by the Chinese internet companies, based on the business models of global platform businesses such as Google, Facebook and Amazon (Parker, van Alstyne & Choudary, 2016; Srnicek, 2016). This business strategy aims to maintain and increase numbers of users by providing multiple services in an attempt to meet everyone's needs, which will 'lock in' users and improve the stickiness of the platform. Regardless of whether the approach used is mergers and acquisitions or platform convergence, the ultimate goal is to create an enclosed business loop that centralises the platform and radiates various possible fields to accumulate incremental capital.

As an emerging conceptual framework, platform capitalism is not yet widely adopted in China, possibly because of its association with capitalism. Nonetheless, Chinese scholars often describe the 'cross-subsidisation' or affordance of multiple services within one digital platform as a 'platform convergence' strategy. The formation of this strategy is the result of 'following market rules', which was not invented in China in any means, but emerged from Western literature dating back to the 1980s. For Jenkins and Deuze (2008) media convergence is a 'process' instead of an 'end state', taking place in multiple forms and across multiple levels. Information society theorists such as De Sola Pool (1983) proposed that the changing relationships within communication industries were driven by a force named 'convergence', the notion that 'a service provided in the past by any one medium—be it broadcasting, the press, or telephony—can now be provided in several different physical ways' (de Sola Pool, 1983).

In the context of Chinese communications since the 1950s, when information was sent along wired speakers in villages, the switch from 'physical ways' to 'virtual ways' represents a massive transformation. Private companies now offer services that were previously the province of governments. Chinese online platforms are now trying to achieve one-stop online portals, where all kinds of information and frequently used services are available, preferably through a single platform; convergence is thus a reality in China. Green and Jenkins (2009:213-225) argue that 'this convergence is being shaped both by media conglomerates' desires to exploit "synergies" between different divisions and consumer demands for media content where, when and in what form they want it'. The outcome of convergence in relation to China's online sector is unclear in terms of how functionalities take root—but this disrupting force is blurring the boundaries between platforms, causing significant changes in Chinese online enterprises.

Chinese scholar Yu Guoming (2015b) also addresses platform convergence, and believes that the evolution of platforms should be considered from a 'higher dimension'. His claim aligns with the concept of 'internet thinking[2]', reportedly devised by the Chief Executive Officer (CEO) of Tencent. Yu is striving to restructure the 'dimension' of the existing economic sector and considers platform convergence strategy a critical instrument in this economic restructuring, arguing that traditional business logics often fail to apprehend hidden patterns behind these economic changes (Yu, 2015b). Intimidated by failure caused by unawareness of the tides or defeated by nascent start-ups overnight (as is frequently the case with China's internet businesses and globally, when businesses or new ventures/ideas can quickly become obsolete), internet enterprises in China are

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[2] Internet thinking is a way of thinking about re-examining the market, users, products, enterprise value chains and even the entire business ecosystem in the context of the continuous development of (mobile) Internet +, big data, cloud computing and other technologies.

undertaking platform convergence with great passion. Many online companies in China have gone on an integration spree, attempting to build a digitised service hub that also supports third-party applications (Yu, 2015a). Although platform convergence is now a trendy concept in China, it is akin to the 'network effects' or 'lock in' strategy described in Western literature, where the aim is to create an 'enclosed business environment' and increase user stickiness. In this sense, internet players in China and the West are headed in similar directions, exploiting lookalike business models—although to a large extent, China has begun to customise business models for its markets much faster than anywhere else.

The competitive domestic digital environment

It is a commonplace to observe that governmental facilitation is crucial in the development of online behemoths such as BAT. However, from an industry perspective, a pertinent policy (such as the 'Great Firewall of China', where legislative and technology hindrance are enforced by Chinese government to regulate the domestic internet) may shield Chinese companies from their Western competitors (Foster and Azmeh, 2016), although this does not exempt domestic players from free market competition (Elkins, 2016). The fieldwork findings emphasise the heated competition in this field: it is not easy to maintain a position as one of China's top three internet oligopolies. In the eyes of Alibaba staff member Haoyang Gao[3], Baidu could no longer compete with Alibaba and Tencent, and had "lost its position in the first tier, as China's number one searching services" (Guo, interview, 2017).

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[3] Two of the interviewees are named, however, the rest are referred to as A, B, C etc., this is conducted according to research ethics guidelines, where the rest of the interviewees have chosen anonymity under any circumstances, any disclosure on the interviewee's identity would be regarded as misconduct.

It is well known that the three BAT companies excel in different areas: Baidu in online searching and AI technology, Alibaba in e-commerce and cloud computing and Tencent in social media and gaming. Even though BAT are expanding their businesses into other areas, the real competition existed between Alibaba and Tencent, especially in terms of mobile payment and cloud services:

> Narrowing down to the actual products, the largest competition in my view is between Alipay and WeChat, smaller ones are between Ali Cloud and Tencent cloud. Ali's advantage is that the payment system combined with the e-commerce ecosystem and credit mechanism was established at an earlier stage, the combination of online and offline shopping is being tested constantly. Ali Cloud is also the earliest cloud computing manufacturers in China, the domestic market share is very high (Anonymous Internet Practitioner A, interview, 2017).

The core businesses of BAT are strengthening and expanding. Like any oligopolies, the ranks of BAT are earned, not bestowed. For BAT, acute market instinct often means keeping up with the tides—even though sometimes, those dictating the tides are not online giants, but the market itself. One interviewee, Fei Yan, believed that the competition in the internet industry has gradually transformed from the original major areas of search, social, and e-commerce into consumer (kill time) competition (To C) and enterprise affordance competition (To B). 'To B' and 'To C' are figures of speech in the internet industry: To B refers to products directly involved with companies, such as the advertisers of e-commerce platform T-mall or clients of BAT cloud computing services. The enterprise competition between the three BAT entities lies in their ability to empower other companies—for example, how effective will the advertisement be, what data will be generated and

available from the advertisement, how powerful is the cloud computing service, how secure will the service be? To C refers to direct interactions with consumers—that is, consumer competition—which always involves user experience and platform stickiness. Macroscopically, enterprise and consumer competition not only face BAT companies, but goes beyond the realms of enterprise and onto the industry level:

> TO C and TO B model will bring more and more borderless competition. Take Baidu for example, the advantage of Baidu reflected in the retained data collected from search service and the consistent investment into the technology innovation. For example, for high technology-oriented products, Baidu use[d] only six months to develop and deliver a news recommendation application—FEED, which instantly became the biggest competitor against *Today's Headlines*, the number one news app in China (Yan, interview, 2017).

For tech companies, the competition between enterprise and consumer or the arms race of the top three (BAT) are both fundamentally based on technology. AI, virtual reality (VR) and alternative reality technology were mentioned several times during all the interviews. For example, Alibaba has adopted numerous technologies to enable an online 'smart dressing mirror'. With consumer provided figures of the body mass index and AI-supported facial recognition technology, the smart dressing mirror creates a virtual image of the customer, with a potential accuracy of nearly 85% (Chiu&Lee, 2018). This technology enables customers to 'try on' over 1,000 garments within three minutes, the undiscovered styles and countless possibilities no doubt unleashing the desire to purchase. Other technology innovations include AI searching, AI recommendation and AI customer service. Baidu uses AI for voice recognition, natural language processing, image

recognition, Knowledge Map and other services. Internet practitioners who have worked in the field for some time confirmed the enthusiastic response among industry practitioners to technology innovation:

> Alibaba has made lots of investments in AI technology, and they are not merely fancy high-tech for showing off, these are the technologies that could touch down base with the products of Alibaba, they could help improve the user experience and simplify the using process. (Anonymous Internet Practitioner A, interview, 2017)

Another internet practitioner, Fei Yan, believed that:

> For Baidu, AI technology will be widely adopted in the use of Knowledge Map, Knowledge Map is a newly established AI searching technology that will definitely improve the user experience of online searching in the future (Yan, interview, 2017).

For these internet giants, technologies are the foundations of products and services and the links to business ecology, which ultimately constitutes the characteristics of each company and contributes to profitability. Meanwhile, oligopolistic market structures and the implementation of new technology have, to a degree, stimulated technology innovation on a national scale. In this sense, BAT are not only aggregating economic capital, but also social influence, brand recognition and political power. The most prominent example of this is the expansion of online payment systems to social infrastructure and governmental levels. In some cities, such as the headquarters of Alibaba, Hangzhou, Alipay (Alibaba's online payment system) can be used on public transport, for governmental logistic services and more. Internet practitioners believe that these collaborations

are, according to one interviewee, 'mutually beneficial for government and corporate alike and will tighten the relationship while stimulating economic growth' (Anonymous Internet Practitioner B, interview, 2017).

However, one practitioner contended that 'although I am not familiar with the relations between Alibaba and the state, Alibaba emphasises its social values, and not so much in governmental relations' (Anonymous Internet Practitioner C, interview, 2017). Other interviewees expressed similar conservative attitudes, with indicating that 'I am not sure of the relationship between my company and the government, but I do know that we are pouring lots of money and resources to develop the AI technology, and this no doubt echoes governmental policies' (Anonymous Internet Practitioner D, interview, 2017). While the ambiguous relationship between BAT and the state remains unclear, most industry practitioners stressed their willingness to comply with the government, such as by complying with governmental policies or cooperating with governmental projects.

Chinese internet practitioners interviewed all expressed uncertainty about the ties between their companies and state policy. This phenomenon is indicative to a deeper understanding of dynamics at play. State possesses supreme power over BAT even though its power can be threatened by capital power at times. This means that the power of BAT can be facilitated or restrained by state policies. Compliance to governmental policies can be strategic and superficial, in exchange for less regulation or in attempts for further business expansion. BAT and the state are interdependent, the state relies on BAT to build the digital infrastructure of BRI and even of the country, while

BAT relied on the state to allow it to operate as lightly regulated national oligopolies.

National policies and political implications

In 2017, the Communist Party of China (CPC) released the 13th Five Year Plan, in which the government repositioned the Digital Creative Industries as one of five emerging pillar industries in China. Twenty-one major projects were promulgated, including the 'Internet +' project, Big data project, AI project, Digital, cultural, creative technology and equipment innovation project, and Digital content innovation project (Ding, 2017), all of which suggest that developing BAT and the digital-related industry is part of the national policy. In an age when the 'Chinese dream' (Ferdinand, 2016:941-957) represents nationhood and prosperity, and when the BRI is regarded as a diplomatic endeavour to improve cultural renaissance (*wen hua fu xin*g), to regain the glory of the great China (Wang, 2017)—where soft cultural power is gradually being transformed into cultural confidence (*wen hua zi xin*) (Du, 2017)—what the government is trying to achieve is the nationwide awakening of traditional culture and cultural innovation.

Building Chinese cultural power (*wen hua qiang guo*) and soft cultural power (*wen hua ruan shi li*) has been part of the Chinese Government's policy going back to the 1990s (Flew, 2016). In 2011, at the Sixth Plenary Session of the Seventeenth Central Committee, soft cultural power was proposed in the government document of *Decision of the Central Committee of the Communist Party of China on Deepening the Reform of Cultural System and Promoting the Great Development and Prosperity of Socialist Culture*; in 2012, President Xi Jinping put forward the

'Chinese dream', stating that 'realizing the great rejuvenation of the Chinese nation is the greatest dream of the Chinese people since modern times' (Ferdinand, 2016:941-957); and in 2014, President Xi stressed the significance of constructing cultural power (*wen hua qiang guo zhan lue*). Coincidently, during the same period, Premier Li Keqiang proposed the 'Entrepreneurial and Innovation' policy (*shuang chuang zheng ce*), whereby public entrepreneurship and innovation (*da zhong chuang ye, wan zhong chuang xin*) is highly recommended (Wei et al., 2017). The sequence of these political events underscores the growing importance of developing Chinese culture, creativity and sense of identity, which have become the means of developing the courage and motives to realise the Chinese dream—that is, Chinese people should be reminded of who they are before they start dreaming who they might become (Wang, 2014). Instead of expressing anxiety about cultural trade deficits and how to mitigate Western cultural influence, the Chinese Government has made cultural heritage take centre stage to revitalise traditional Chinese culture. This phenomenon is partially attributable to the development of the BRI, but is also intended to elevate cultural and economic power on a global scale.

Capital and state power

At the Davos World Economic Forum in 2015, the Chinese Premier Li Keqiang emphasised the pivoting role of communications (from telecommunications to digital media) in relation to the national economic restructuring plan. This announcement confirmed the significance of the digital economy at a national level. In her book *Networking China*, Yu Hong (2017:1) argued that 'internet related business is seen as a boon to the nation, and networking and computing technologies are expected to retool traditional industry and commerce'. The emergence of tech

giants such as BAT highlights these overwhelming social, economic and cultural changes. This disrupting force has fundamentally transformed traditional industry and commerce and successfully garnered international attention. When digital media enterprises such as Facebook, Google, Amazon and Netflix became internationally mainstream, the power of digital economy became a global social instrument. Digital capitalism, as one way to discern such phenomenon, varies between realms. Hong refers to China as the state-led model of digital capitalism to differentiate it from the US:

> At the intersection of China's rise as a global power and its internal quest for transformation, digital economic development in China is one of the most significant stories of the twenty-first century. Ultimately, this book is about China's state-led model of digital capitalism, which contends, collaborates, and overlaps with the US-dominated system of global digital capitalism (Hong, 2017, p. 145).

One of BAT's most notable contributions is the platform accessibility initiated by these enterprises, which increases the penetration of internet services among Chinese people and reaches even the most remote and underdeveloped regions (Institute, 2016). Expressed another way, advanced telecommunication technology infrastructure such as 3G and 4G, or the accessibility of broadband, make it possible for less educated populations to access internet services at a lower cost. In a developing country such as China, the rise of BAT, along with advanced technology infrastructure, accelerates social equality, narrows the digital information gap (Institute, 2016) and improves local economies (e.g., Alibaba's endeavour to build a countryside e-commerce business has resolved

information gap and transportation issues which improved employability and 'hard to buy, hard to sell' situations in rural areas). In this sense, BAT are powerful allies of the state.

China's social infrastructure and economic system is more developed because of BAT, which also fill the gaps in Chinese society that have radically challenged and transformed sociological patterns. The high penetration of online platforms and smart technology has disrupted the original hierarchy between cities and classes: coastal cities were more economically and socially advantaged than northern or western ones, and those in the elite, white-collar classes were much more informed than their lower-class counterparts. However, BAT are causing problems for the Chinese government: while they contribute to the evolution of the online environment, they also cause various regulatory issues.

As a result, BAT's 'in-between' stance is one of the manifestations of contested state capitalism (Hong, 2017). BAT oscillates between business strategies and state regulations and is contingent on government policies, just as the government struggles to regulate and support the domestic development and global expansion of these online behemoths. The BRI has further clouded the ambiguous relationship between BAT and the state, and the synergies and tensions between BAT and the BRI underline the interplay of capital and state power that exists in China and beyond.

BAT and the BRI

The Belt and Road Initiative (BRI), once known as One Belt One Road, is a national policy aimed

at international engagement for regional development. It was proposed by Chinese President Xi Jinping in 2013 (Li, 2017c). For Chinese scholars, the BRI is viewed as a great opportunity for the nation, a grand scheme to reinvent China's glory (Office, 2017, Han and Zou, 2014). Much Chinese literature sees BRI as a national strategy to stimulate the Chinese economy, and a catalyst for the internationalisation of Chinese enterprises (Feng, 2015). However, the international reception to the BRI has not been as positive (Swaine, 2015). For scholars outside China, the BRI is sometime seen as economic infrastructure for political gain (Menon, 2017), and critics argue that 'it is a concept rather than any detailed plan' (Gilbert, 2017). Considering the myriad complexities of conducting infrastructure operations across various regions, cultures and languages, the BRI is evidently a most challenging task for any nation (Pu, 2016). The Western perception of the agenda as politically motivated, or the sceptical attitude towards mutual benefit, seem like minor concerns in comparison. The BRI is based on the original Silk Road and consists of tangible land and sea routes. However, a virtual line, an intangible Silk Road was born in our age: what is today proposed is a digital Silk Road formulated by BAT and facilitated by information and communication technology (ICT) infrastructure (Djankov and Miner, 2016; Rolland, 2017).

There is extensive literature exploring the numerous aspects of the BRI, economically, politically and strategically (Cheng, 2016). However, the development of the digital Silk Road has received less discussion. Undoubtedly, the scale of the BRI is initiating tremendous changes in China— while the infrastructure and political benefits take time to accomplish, the changes the digital Silk Road is causing are occurring much more rapidly. The digital Silk Road incorporates ICT infrastructure, smart city and e-commerce networks (Brown, 2017). BAT, as a high-tech enterprise

in the internet industry, is contributing to the BRI in more ways than one. Will the combination of BAT and BRI propel the rejuvenation of the nation, or merely maintain economic growth? It is imperative to examine BAT's involvement to reveal their hidden powers.

BAT and their involvement in the BRI

Baidu

The Chinese version of Google, Baidu falls short in many areas. Having endured a public crisis for its notorious 'ranking by bidding mechanism' (Cheng, 2013), Baidu is now investing most of its energy in AI (Han, 2015) and digital content, through its very own streaming service, iQIYI. Unlike Google, which has diverse interests in multiple areas and makes substantial profits, Baidu has been undergoing a financial crisis for some time, especially since the *Death of Wei Zexi*[4], who lost his life because of Baidu's false medical advertising and ranking by bidding mechanism (Yang, 2016). This incident spread all over the Chinese internet. Subsequently, Baidu faced intense criticism for its entire online search services. After a social protest against this mechanism, Baidu had to adjust its business model and rebuild its brand image. This incident successfully caught the government's attention. The Cyberspace Administration of China conducted an investigation, and called on strict regulations to be imposed on Baidu advertisements. While Baidu was being condemned on national media outlets, the tension between Baidu and the state was evident in

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[4] Death of Wei Zexi: Wei Zexi (Chinese: 魏则西; pinyin: Wèi Zéxī;[1] 1994 – April 12, 2016) was a 21-year old Chinese college student from Shaanxi who died after receiving experimental treatment for synovial sarcoma at the Second Hospital of the Beijing Armed Police Corps, which he learned of from a promoted result on the Chinese search engine Baidu. Wei's death lead to an investigation by the Cyberspace Administration of China, prompting Chinese regulators to impose new restrictions on Baidu advertisements.

national media coverage. Nevertheless, Baidu still provides the best Chinese searching services, and AI technology is one of its competitive advantages. As is the case for other Chinese enterprises and companies, the BRI is a virtual connector that allows BAT to dive into new territories. This is not simply business expansion, but capital cooperation based on political protections, with various possibilities.

In terms of the BRI, Baidu services such as AI translation, BRI Baidu Smart Map, Baidu Cloud and Cultural Heritage Protection Program are designed especially for the BRI. AI translation intends to dissolve language barriers in the implementation of BRI. By adopting AI technology, Baidu translation is more smooth and powerful than existing translation applications (Liu, 2016). Although designed for BRI, the well-performing application has attracted more users internationally, far beyond the BRI's scope. Baidu Map covers 209 countries, but the newly released BRI Baidu Smart Map, according to its manager Dongyu Li, is an 'AI based Map' (iNEWS, 2017). By integrating VR, Union pay and vendors, the updated service provides a comprehensive tour guide for users near the Silk Road region. By applying innovation to its original services, Baidu was able to strengthen its core businesses while supporting the BRI. By comparison, Baidu Cloud is expanding advanced services internationally under the protection of the BRI.

Preliminary cooperation between Baidu and the BRI in the economic sector has led to collaborations in the cultural area. One example of Baidu's dedicated BRI endeavours is its enthusiastic participation in the Cultural Heritage Protection Program. The BRI is a complicated

and ambitious scheme, and revitalising traditional Chinese culture is embedded in the initiative, which evolved into an independent national policy in early 2017 (Agency, 2017). In January 2018, Baidu launched the Cultural Heritage Protection Program with the Imperial Palace, adopting AI technology to reinvent 'Internet +' and 'Knowledge +' (Liu, 2018b). By creating digital versions of cultural heritage, AI technology helps transform museum knowledge into vivid digital interactions, as a way to make history come alive.

To a certain extent, Baidu is pursuing overseas expansion under BRI. Even though AI translation, BRI Baidu Smart Map and Baidu Cloud are designed for BRI, these are updated version of existed services, aiming at aggregation of competitive advantages and expansion of overseas market. Cultural Heritage Protection Program conforms with the state's main-melody strategy, as one of the means to cater state policy for the benefit of its own development. Evidently, Baidu and the government has a strategic stance against each other, despite recent controversies such as the *Death of Wei Zexi*. The relationship between Baidu and the government is ambivalent, at least while business is booming and society is improving. However, one example of the relationship between tech giants and government is not persuasive enough—the other tech players must be examined as well.

Alibaba

Alibaba is known for its many achievements. In spite of its ambition to become the internet infrastructure provider, its primary service is e-commerce, alongside auxiliary operations

including logistics, mobile payment, Alicloud and more. Unlike Baidu, which suffered financial deficit and brand damage, Alibaba has successfully avoided such problems. Its biggest public relations crisis so far has been the counterfeit problem of Taobao. However, the eruption of a public relations crisis of Alibaba around the sale of counterfeit goods was raised by the US Government instead of Chinese regulatory authorities (Li, 2016), as it was an oversight of the Chinese government. This situation corroborates a protective stance of the officials. Interestingly, Alibaba used the Chinese media as a defensive front against the Western media (Lu, 2018), a gesture indicating the longstanding amicable relationship between Alibaba and the Chinese Government. This was further proven by Alibaba's involvement in the BRI.

Alibaba expanded its e-commerce and logistics services (Ali Express), payment system (Ali Pay), translation and cloud services (Ali Cloud) under the facilitation from BRI. According to the E-commerce Connectivity Index provided by the Alibaba research centre, the users of Alibaba's services along the BRI accounts for more than 45% of international users (Li, 2017a). The international expansion of Alibaba's e-commerce service is, to a large extent, along the trajectory of BRI and the growing coverage of logistic services (Ali express). For the international expansion of Alibaba, it is imperative to construct global logistics services: Yong Zhang, the Alibaba CEO, claims that Alibaba will be able to deliver the most efficient Chinese and even global logistics networks within the next five years (Jin, 2017). Alipay, the third-party payment system, began to prosper based on these services. In addition, to optimise user experience and expand businesses, Alibaba initiated the language translation service aiming at eliminating language barriers (Liu, 2016). Alicloud is extending cloud services to underdeveloped countries. Alibaba and its well-equipped international e-commerce infrastructure have strongly contributed to regional economic

development. Moreover, it was crowned the 'online BRI' by the Chinese media, and the 'online pioneer' (Sun, 2017). According to the 2017 Big Data Report of the BRI released by National Information Center, Alibaba was ranked the fifth most influential Chinese enterprise, and the most influential private company in China (Qin, 2017).

In the case of Alibaba and the BRI, it is clear that the synergy between capital and state power is steady and, more importantly, that the cooperation between Alibaba and the government is more extensive than ever (Yichen Zhang and Dang, 2018). Meanwhile, the Chinese Government is vigilant of Alibaba's growing power, fearing that the capital-led enterprise may have enough power to one day wield against the state. Alibaba is the biggest contributor to BRI, but it is also the largest beneficiary of this initiative. E-commerce, logistics, cloud, translation and pay services constitute the core businesses of this tech giant, and global expansion has always been part of the plan. BRI brings more legitimacy to global expansion of domestic online giants, with a strong political support. This initiative has been more than convenient for both BAT and the state alike.

Tencent

As the largest social media and entertainment provider in China, Tencent's services sometimes interact with one another. In the 2017 Tencent Financial Report, Tencent revealed its five main services: social media and messaging services (e.g., QQ and WeChat); internet games (e.g., King of Glory); digital content (Tencent video, QQ music, Tencent Yuewen Group); internet advertising (on Tencent video, Tencent News and WeChat); and other miscellaneous businesses (WeChat Pay and Tencent Cloud) (Tencent, 2017). Tencent makes a profit by advertising on its social and entertainment platforms, offering subscription or VIP services and selling virtual tools in internet

games. Tencent products are so popular that WeChat is the most indispensable application in a mobile phone—Tencent CEO Pony Ma is actually concerned about overuse of it (Yuanzhijun, 2017; Montag et al., 2018). Another application is enduring a similar fate: King of Glory was described by Xinhua News Agency as 'King of Poison' (Yan, 2017) when it caused severe game addiction problems among Chinese juveniles across the nation. Following this incident, Tencent is enforcing 'game time restriction rules' on children under 12 to offset the negative social influence prompted by this crisis. This unexpected criticism from the most respected news outlets in China indicate the tightened relationship between the tech giants and the state. Like Baidu, Tencent was on the government's radar because of these incidents. However, unlike Baidu or Alibaba, who have their own competitors, Tencent is and has always been on the top of the pyramid in its particular area of social media and entertainment (Wu, 2017). There is simply no substitute for QQ or WeChat; Tencent runs the most frequently used online services in China (Fei, 2017).

It is tricky to make any assumptions about the relationship between Tencent and the state. Tencent is aggregating enormous tangible and intangible power, and government is at a loss in terms of how to restrain this and alleviate Tencent's market monopolisation, despite government's intended acquisition of a small stake in these private businesses (Li, 2017b). Luckily, Tencent is smart enough to not make itself an enemy of the state and has devoted its resources to the digitisation of cultural heritage. For example, Tencent's coalition with the Imperial Palace and the Mo Kao Grotto at Dunhuang have created digital archives of cultural heritages and have increased the accessibility of cultural heritage knowledge (Liu, 2018a). These endeavours are seen as efforts to increase social influence on the cultural sector and are mutually beneficial for the corporate and state alike, where corporate power is being constructed in the process, and state power are further enhanced through

these joint adventures (Pu, 2017).). Apart from its contribution to the cultural aspects of the BRI, Tencent also started offering them translation and cloud services (Mu, 2017). Tencent Video has also produced its own documentary series on the BRI as a supportive gesture for the government.

Tencent is forging a cultural empire. Digitizing cultural heritage and producing BRI documentary series are means to accommodate the main-melody strategy. Unlike Baidu or Alibaba, where their global expansion is dependent on BRI (or at least under the cloaking of state policies), and their domestic development is contingent on regulation policies, Tencent is complying with main-melody strategy to seek for close ties with the government in hopes of less regulation. In this sense, Tencent's decision of contributing to BRI could be seen as purely strategic and superficial, in that they are more concerned about the elevation of their social recognition rather than substantial development of this initiative.

Conclusion

The online giants of BAT have collectively contributed to BRI in translation, cloud and payment services as part of the internet infrastructure of the digital Silk Road. While they hope to improve the development of the BRI with BAT, the latter's increasingly aggregated power remains a source of concern. Regardless, BAT's facilitation of the BRI has accelerated China's rejuvenation. Economically, E-commerce and mobile payment services are the BRI's pillar technologies, and strongly add to regional economic growth. Culturally, the frontrunners in the digitisation of traditional culture, Baidu and Tencent, contribute to the BRI's cultural sector, echoing the national scheme to revitalise Chinese culture. The combination of BAT and the BRI has also expedited development in regional areas. By following the sequence of economy, cultural and, finally,

political improvement, China is dedicated to recreating its glory days of the Tang Dynasty and pursuing the 'China Dream'.

This paper has investigated the rise of capital power and the synergies and tensions between capital and state power using the example of the BRI. BAT's contribution the BRI is indispensable, considering its advanced technology and the power of platform capitalism. Meanwhile, BAT's decision of collaborating with BRI can be interpreted as essentially strategic in nature, where such compliance has the appearance of national patriotism, but is primarily about public relations, brand building, and expanding domestic and international business opportunities. On the other hand, the government is well aware of the potential power of these tech giants, and their ability to hold supreme power over the digital economy in China. In that respect, the Chinese government's concerns echo the growing debate in the US, Europe, Australia and elsewhere about how to address the power of giant digital platforms, their control over data, and their dominance of advertising markets (e.g. Australian Competition and Consumer Commission, 2019).

However, as manifestations of capital and state power, BAT and BRI are interdependent, as the state relies on BAT to build the digital infrastructure while BAT relied on the state to allow it to operate as lightly regulated national oligopolies. From this perspective, BRI represents the opportunity for BAT to grow its influence overseas in tandem with state policy.The BRI provides an opportunity for government–corporate cooperation, but also the potential for circumvention of government demands for closer supervision. BAT will continue their close relationship with the government as they remain involved in the BRI—will BAT be less state-regulated in the future, or will government concerns to check their growing power in the digital economy lead to tighter

controls? In this respect, current debates in China about the BAT and the BRI echo similar policy

debates now occurring on a global scale.

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