Nation Brand Research

The Anchor Brand

Why does Singapore win the reputational contest in the SIJORI Growth Triangle, and what can Malaysia and Indonesia learn from it?

RESEARCH BRIEF
SEPTEMBER 2026

KEY INSIGHT | AN ANCHOR BRAND

Singapore has positioned itself as the Anchor Brand in the SIJORI

SIJORI refers to the Singapore–Johor–Riau Islands Growth Triangle, linking Singapore with Johor in Malaysia and the Riau Islands in Indonesia.

An anchor brand is the node (any country, city, or institution in a regional system) that captures the region's investment and its credit.

Attribution is the recognition and credit a place receives for its contribution to a shared economic system, including which place becomes associated with its investment, capabilities, projects, and success.

Attribution does not necessarily follow output volume. The SIJORI case suggests that recognition can gravitate toward the coordinating node, particularly where it also controls credibility and shapes the narrative. Over time, international measurement systems that gauge value solidify the node’s regional stature; investors start preferring to contract through it, and the region’s story is told in the anchor’s language and perspective.

Broadly, the positioning follows **coordination, credibility,** and **visibility.**

Coordination

Organizing the regional system, hosting headquarters, determining capital allocation, contracting, and setting standards.

Credibility

Supplying the governance promise to make production elsewhere investable and reliable.

Visibility

Describing the model and handling strategic delegations, binding the system’s value with the anchor.

Therefore, any project’s attribution depends on the contracting entity's location and the dominant narrative. Singapore, Malaysia, and Indonesia have operated under the same trade winds for thirty-five years; however, **Singapore has converted the system into brand equity, while the other two nations have not.**

MEASUREMENT FRAMEWORK

The Nation Brand Radar

The Nation Brand Research Performance Radar evaluates countries on **twelve dimensions using data from over 100 public sources,** including Transparency International, WIPO, the World Justice Project, and Brand Finance. Each country receives a score from **1 (very strong)** to **10 (developing),** with lower scores indicating stronger performance.

The Radar assesses how investors, media, and institutions perceive countries rather than focusing solely on economic output, providing a basis for interpretation that supports more nuanced strategic analysis.

DIMENSION	SINGAPORE	MALAYSIA	INDONESIA
Global Curiosity	**5**	6	6
Distinctiveness	**4**	4	5
Symbols & Icons	**5**	7	5
Leading Edge	**3**	6	6
Emotional Connection	**6**	5	5
Integrity	**2**	5	7
Cultural Prevalence	**6**	6	7
Aspirational	**4**	4	7
Influence	**6**	5	4
Centrality	**4**	4	6
Magnetism	**4**	6	5
Leadership	**3**	3	4

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SIJORI — SINGAPORE · JOHOR · RIAU

Overview

The SIJORI Growth Triangle, established in 1989,[1] links Singapore, Johor (Malaysia), and the Riau Islands (Indonesia) in a system of cross-border collaboration.[2] The economic value is distributed across the triangle; however, reputational value is not uniformly shared. Singapore is the highest-ranked ASEAN nation brand, attracts most of Southeast Asia's foreign direct investment (FDI), and hosts the regional headquarters of multinationals.[3]

The Nation Brand Research Performance Radar shows that Singapore does not dominate every dimension (see page 3). Singapore trails its neighbors on Emotional Connection (warmth and affinity toward the country) and does not hold a decisive advantage on Cultural Prevalence (the global presence of its culture), while Indonesia outranks Singapore on influence (weight in shaping decisions and agendas abroad). Singapore's advantage is concentrated in three dimensions: **Integrity** (trusted governance and institutions), **Leading Edge** (frontier innovation and technology), and **Magnetism** (the pull of talent, capital, and firms), which investors value when deciding where to anchor capital and contracts.[4]

The city-state treats its credibility and reliability as a national product, builds systems that solidify its global position as a financial hub and an anchor for SEA investments, and brands itself across innovative, high-tech frontiers. In examining what makes Singapore different as the anchor brand of the Growth Triangle (and the region), we conclude that recognition does not follow economic activity alone; it follows **coordination, credibility,** and **visibility,** and whichever node holds all three captures most of the system's value. Proactive branding further captures reputation flows in the global narratives; for instance, Singapore's **"SG+"** obscures Johor and Batam's contributions.

The three SIJORI nodes do not operate from equal political positions. Singapore is a sovereign city-state, while Johor and the Riau Islands are states within Malaysia and Indonesia. Their ability to control cross-border policy, international representation, investment rules, immigration, and project positioning is therefore more constrained. Johor and Riau cannot replicate Singapore's sovereign toolkit; their opportunity is to strengthen attribution within their own powers and secure greater recognition through coordination with federal and central institutions.

Malaysia's primary goal is to **attract higher-value functions** and **co-brand new projects,** while Indonesia must convert its state-level **influence into attribution.** Both nations need to capitalize on their state-level performance (Johor and Riau) and design state-level recognition through reporting and targeted institutional reforms.

Finally, the SIJORI lessons can be applied across underrepresented nodes in any region with a focus on institutional reforms and planned attribution strategies to capture reputational gains.

1. National Library Board Singapore. (2013). "Formation of SIJORI Growth Triangle is announced." https://www.nlb.gov.sg/main/article-detail?cmsuuid=bd4d0374-63ae-49fe-95c8-2210b3b0ac59

2. Chen, H.-I. A. (2009). "A Case Study on Singapore-Johor-Riau Growth Triangle (SIJORI)." In Transnational Sub-regional Cooperation in Practice: Dynamics of Micro-regionalism and Micro-regionalisation in the East Asia Pacific. PhD thesis, University of York. https://etheses.whiterose.ac.uk/1251/6/mc_ch4-done.pdf

3. UN Trade and Development. (2025). World Investment Report 2025: International Investment in the Digital Economy, Annex Tables. https://unctad.org/system/files/official-document/wir2025_annex-tables_en.pdf; Brand Finance. (2026). Global Soft Power Index 2026. https://static.brandirectory.com/reports/brand-finance-soft-power-index-2026-digital.pdf; Brand Finance. (2026, January 27). "Singapore reaffirms ASEAN Soft Power leadership." https://brandfinance.com/press-releases/brand-finance-global-soft-power-index-2026-singapore-reaffirms-asean-soft-power-leadership

4. Nation Brand Research. (n.d.). "Performance Radar." Nation Brand Research. Accessed July 2026. https://www.nationbrandresearch.com/performance

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01

PART I

Economic complementarity and how it shapes collaboration.

THE HUB

Singapore retains R&D, coordination and the regional headquarters.

THE SPOKES

Johor and Riau supply land, labor and industrial capacity.

THE ASYMMETRY

Strong links run upward; the spoke-to-spoke link stays weak.

How Complementarity Built a Hub-and-Spoke System

In the SIJORI Growth Triangle, Singapore provides a conducive environment for establishing regional headquarters, conducting R&D, and coordinating regional activities. The city-state's proactive anchor strategy leverages abundant land and affordable manufacturing labor in neighboring Johor and Riau.[5] Such a value chain, organized under a **"twinning"** model in a hub-and-spoke structure, has been in place since the 1990s (Philips was an early player, while Sunningdale Tech operates similarly today).[6] And the structure has largely been investment-oriented, with the private sector as the impetus and the three nations working in concert.[7]

Organized in a hub-and-spoke style, Singapore has two spokes, Johor and Riau, sharing resources (land, labor, and industrial capacity), resulting in weaker links between them but stronger ties to Singapore.[8] Singapore's anchor advantage is partly structural: as a sovereign city-state, it can align national investment policy, diplomacy, immigration, regulation, and international positioning efficiently. Johor and the Riau Islands, on the other hand, operate within federal or central-state systems.

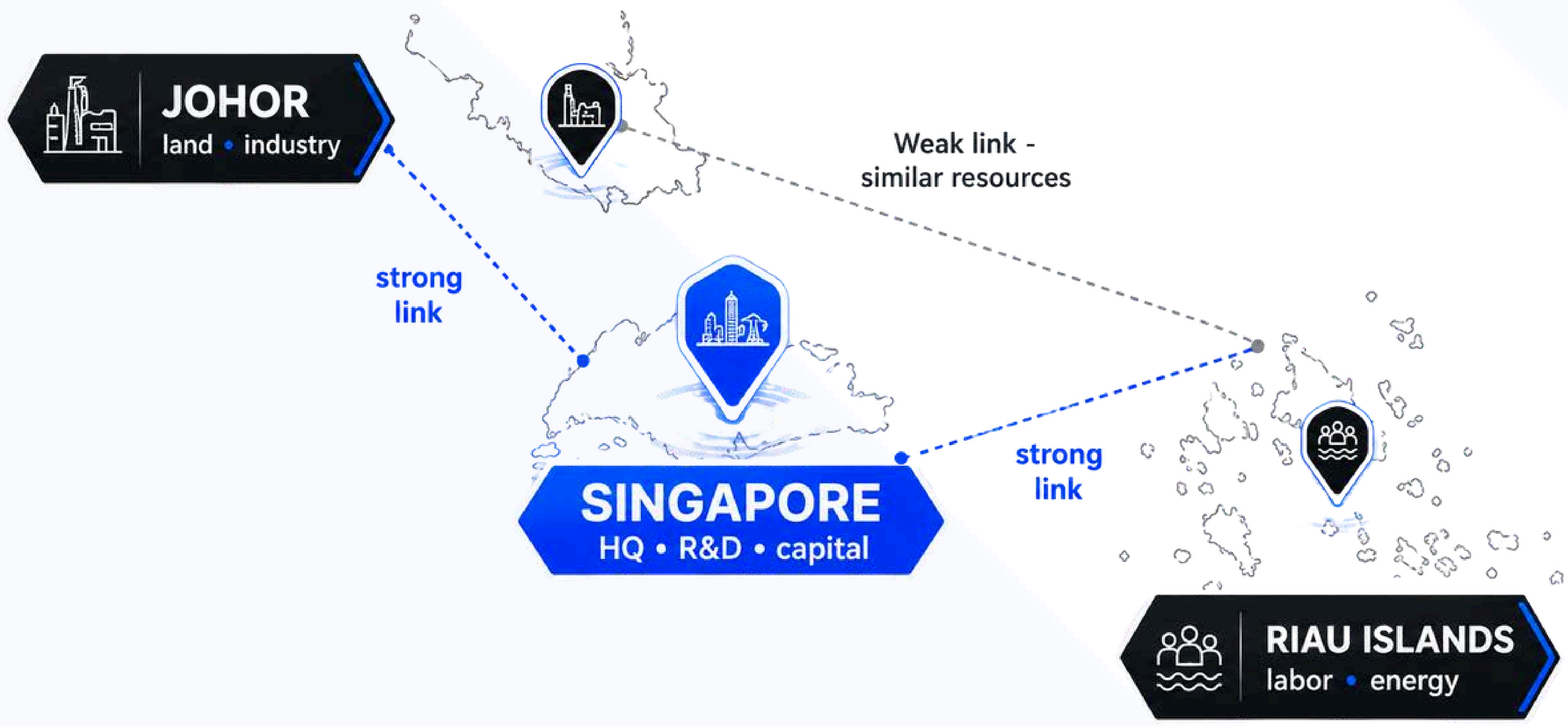

Figure 1. Economic complementarity in SIJORI.
Source: Chen, H.-I. A. (2009), University of York, via White Rose eTheses.

SINGAPORE - MALAYSIA (JOHOR)

Singapore's economic integration with Johor begins with water.[9] An industrial and resource partnership formalized in **1988** accelerated investment flows.[10] Today, land-intensive industries that Singapore cannot host, such as aerospace, electronics, and precision engineering, cluster in Johor's Nusajaya Tech Park.[11] Recently, the key development has been the growth of data centers in Johor after Singapore's moratorium on new builds (2019–2022).

5. National Library Board Singapore. (n.d.). "Formation of SIJORI Growth Triangle is announced." https://www.nlb.gov.sg/main/article-detail?cmsuuid=bd4d0374-63ae-49fe-95c8-2210b3b0ac59

6. Singapore Economic Development Board. (2023, September 27). "How Indonesia and Malaysia's industrial parks help manufacturers reduce dependence on a single production base." https://www.edb.gov.sg/en/business-insights/insights/how-indonesia-and-malaysias-industrial-parks-help-manufacturers-reduce-dependence-on-a-single-production-base.html

7. Chen, H.-I. A. (2009). "A Case Study on Singapore-Johor-Riau Growth Triangle (SIJORI)." In Transnational Sub-regional Cooperation in Practice: Dynamics of Micro-regionalism and Micro-regionalisation in the East Asia Pacific. PhD thesis, University of York. https://etheses.whiterose.ac.uk/id/eprint/1251/

8. Chen, H.-I. A. (2009). "A Case Study on Singapore-Johor-Riau Growth Triangle (SIJORI)." In Transnational Sub-regional Cooperation in Practice: Dynamics of Micro-regionalism and Micro-regionalisation in the East Asia Pacific. PhD thesis, University of York. https://etheses.whiterose.ac.uk/id/eprint/1251/

9. Jumrah, W. (2021, September 30). "The 1962 Johor-Singapore Water Agreement: Lessons Learned." The Diplomat. https://thediplomat.com/2021/09/the-1962-johor-singapore-water-agreement-lessons-learned/; Ministry of Foreign Affairs Singapore. "Water Agreements." https://www.mfa.gov.sg/about-mfa/key-issues/water-agreements/

10. Chen, H.-I. A. (2009). "A Case Study on Singapore-Johor-Riau Growth Triangle (SIJORI)." In Transnational Sub-regional Cooperation in Practice: Dynamics of Micro-regionalism and Micro-regionalisation in the East Asia Pacific. PhD thesis, University of York. https://etheses.whiterose.ac.uk/id/eprint/1251/

11. Singapore Economic Development Board. (2023, September 27). "How Indonesia and Malaysia's industrial parks help manufacturers reduce dependence on a single production base." https://www.edb.gov.sg/en/business-insights/insights/how-indonesia-and-malaysias-industrial-parks-help-manufacturers-reduce-dependence-on-a-single-production-base.html

Redirected data center flows have surged, and Johor is projected to hold 60% of Malaysia's total data center capacity by **2030.**[12] Given the nature of transnational projects, under Malaysia's Constitution, an alignment between the federal and state governments is required to execute them successfully.

SINGAPORE - INDONESIA (RIAU ISLANDS)

Batam also became Singapore's manufacturing partner, providing lower-cost land and labor. **Batamindo Industrial Park,** developed to meet Singapore's needs and owned by a Singaporean firm, is a free-trade zone attracting multinationals.[13] Companies like Infineon and Schneider Electric have anchored their operations in the region,[14] with Schneider's Batam factory recognized as a regional leader in advanced manufacturing.[15] The Riau Islands have also supplied **land-reclamation sand** to Singapore until an export ban in 2007.[16] The current pivot to energy supply, and subsequent investments, are being made in new solar projects near Batam to deliver low-carbon electricity to Singapore starting in 2027.[17] Politically, Riau's authority remains fragmented between a central-government free-zone agency and the city government, despite a 2019 reform making the mayor of Batam ex officio head of the agency.[18]

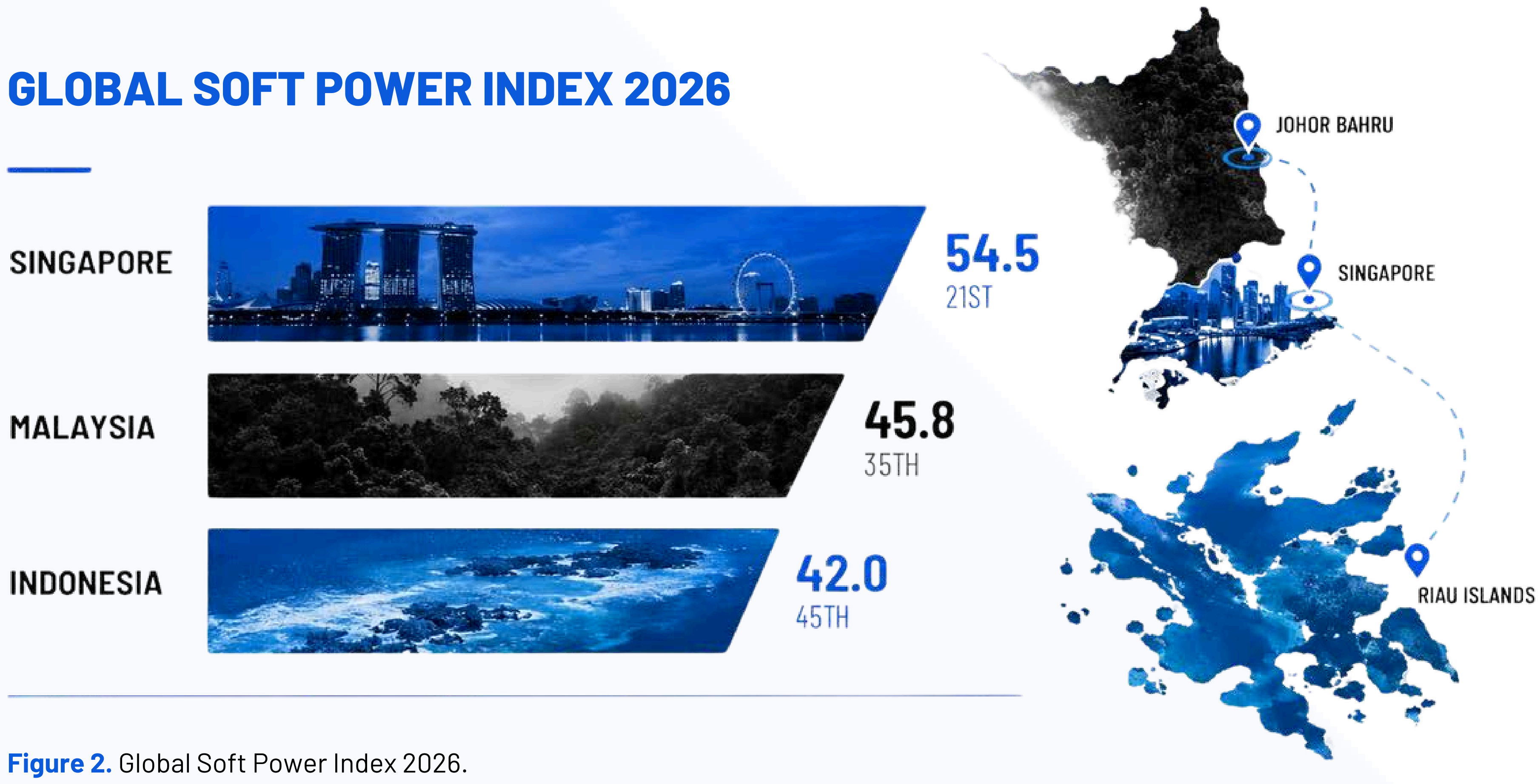

Figure 2. Global Soft Power Index 2026.
Source: Brand Finance Global Soft Power Index 2026.

12. South China Morning Post. (2024). "Singapore spillover of data centres benefits Malaysia's Johor." https://www.scmp.com/week-asia/economics/article/3288291/singapore-spillover-data-centres-benefits-malaysias-johor

13. Business Indonesia. (n.d.). Batamindo Industrial Park. https://business-indonesia.org/files/estates/s62XeY7Nhabq0VqTKBTKdZdd0uD2RnGcGFIPdmKI.pdf

14. Infineon Technologies. (2022, April 12). "Infineon to expand existing backend operations in Indonesia." https://www.infineon.com/press-release/2022/infxx202204-068

15. Schneider Electric. (2019, July 9). "Schneider Electric's Batam Smart Factory recognized by the World Economic Forum as a Fourth Industrial Revolution Lighthouse." PR Newswire. https://www.prnewswire.com/news-releases/schneider-electrics-batam-smart-factory-recognized-by-the-world-economic-forum-as-a-fourth-industrial-revolution-lighthouse-300881677.html

16. National Library Board Singapore. (2007). "Indonesia bans land sand exports to Singapore." Singapore History. https://eresources.nlb.gov.sg/history/events/5c6485bb-c357-48be-9d12-bf7c1d422d0e

17. Energy Market Authority. (2024, September 5). "Singapore and Indonesia Make Substantive Progress on Electricity Imports." https://www.ema.gov.sg/news-events/news/media-releases/2024/singapore-indonesia-make-substantive-progress-on-electricity-imports

18. Nasution, E. S. A., Istislam, Puspitawati, D., & Susmayanti, R. (2025). "Legal reconstruction of dual authority: The mayor's ex-officio role in Batam City governance." International Review of Social Sciences Research, 5(3), 270–288. https://doi.org/10.53378/irssr.353265

The functions sit in Singapore. So does the name.

In three of four cases, the brand name attaches to the anchor or the firm, and the spoke node is defined by its function, with Schneider's Batam plant as an exception.

COMPANY / SECTOR	SINGAPORE (ANCHOR)	JOHOR	BATAM / RIAU
STMICROELECTRONICS / SEMICONDUCTORS	Major front-end wafer fabrication and electrical wafer-sort operations; packaging R&D[19]	Advanced assembly and test facility, Muar; ~4,300 employees[20]	
	Muar operates as an STMicroelectronics site; it does not function as an independent regional identity for Johor.		
INFINEON / SEMICONDUCTORS	Asia-Pacific regional headquarters; R&D, test, sales, distribution and logistics hub[21]		Back-end semiconductor manufacturing, assembly and test site, Batam; established 1996[22]
	Singapore retains the regional headquarters designation. Batam is classified under Singapore as a site, reflected in the "Infineon Asia-Pacific" label.		
SCHNEIDER ELECTRIC / ENERGY MANAGEMENT AND INDUSTRIAL AUTOMATION	East Asia headquarters and Asia Innovation Hub[23]		Batam Smart Factory; WEF 4IR Lighthouse and Indonesia National Lighthouse[24]
	Batam is an exception, with independent recognition from the World Economic Forum and Indonesian authorities.		
PRINCETON DIGITAL GROUP / DATA CENTRES AND DIGITAL INFRASTRUCTURE	SG1 and SG3 data centres; anchor of the SG+® Singapore-Johor-Batam strategy[25]	JH1 150MW AI-ready data-centre campus, Sedenak Tech Park[26]	BT1 96MW data-centre campus, Nongsa Digital Park, Batam[27]
	The industrial estate is branded as "SG+®," positioning Singapore as the anchor. Johor and Batam are included under the "+," rather than being named as separate or equal entities.		

Table 1. Firm-level practice across the three nodes. Functions are concentrated in Singapore; spoke sites are identified by function rather than by place.

19. STMicroelectronics. (n.d.). Ang Mo Kio, Singapore site: Careers & facilities. www.st.com/content/st_com/en/about/manufacturing-at-st/our-facilities/singapore-st-site.html

20. STMicroelectronics. (n.d.). Muar, Malaysia site: Careers & facilities. www.st.com/content/st_com/en/about/manufacturing-at-st/our-facilities/muar-st-site.html

21. Infineon Technologies. (n.d.). Infineon Singapore. www.infineon.com/regional/singapore

22. Infineon Technologies. (n.d.). Your career in Batam. www.infineon.com/careers/our-locations/batam

23. Singapore Economic Development Board. (2018, March 29). Schneider Electric opens East Asia and Japan Headquarter in Singapore. www.edb.gov.sg/en/about-edb/media-releases-publications/schneider-electric-opens-east-asia-and-japan-headquarter-in-singapore.html

24. Schneider Electric Indonesia. (n.d.). Smart Factory & Smart Manufacturing Center. www.se.com/id/en/work/campaign/smart-factory/

25. Princeton Digital Group. (n.d.). "Data Center Singapore: PDG's Hyperscale & AI-Ready Solutions." https://princetondg.com/locations/singapore-plus/

26. Ibid.

27. Ibid.

Participation in a shared economic system, therefore, does not necessarily produce similar brand equity. Recognition was concentrated where **coordination, credibility,** and **visibility** were aligned. In this case, these attributes were most clearly established in Singapore.[28] For Johor and Riau, this implies that moving up in recognition requires capturing **higher-value functions** and **designing attribution** (by converting influence into attribution), rather than focusing on deeper economic integration.

28. Nation Brand Research. Performance Radar, indicator-based nation brand performance assessment (accessed July 2026). UN Trade and Development (UNCTAD). World Investment Report 2025, Annex table 1.

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PART II

What makes a node a regional anchor, and how did Singapore become one?

THE INSTRUMENT

We used the Performance Radar from Nation Brand Radar to assess the countries.

THE SCALE

Scores range from 1 (very strong) to 10 (developing); lower is stronger.

THE LEAD

Singapore leads in Integrity, Leading Edge, and Magnetism.

The Core Dimensions That Make an Anchor

An anchor does not lead everywhere. It leads where it counts.

Singapore's decisive advantage is in **(i) an Integrity score of 2,** against Malaysia's score of 5 and Indonesia's score of 7; **(ii) a Leading Edge score of 3** against 6 and 6; and **(iii) a Magnetism score of 4** against 6 and 5 (respectively).

Integrity reflects confidence in governance; Leading Edge shows frontier innovation capability; Magnetism is the ability to attract and retain talent and capital.[29]

External measures, such as the Corruption Perceptions Index 2025, show **Singapore scores 84 (3rd of 180),** Malaysia 52 (54th), Indonesia 34 (109th).[30] The Corruption Perceptions Index 2025 independently reinforces Singapore's Integrity advantage. Collectively, these indicators signal reliability and trust when deciding on anchoring investments, contracts, or headquarters.

On Emotional Connection, both Malaysia and Indonesia *(scores of 5)* outperform Singapore (score of 6). On Cultural Prevalence, Singapore *(score of 6)* is level with Malaysia and one point ahead of Indonesia (7). On Influence, Indonesia *(score of 4)* is the strongest of the three; its demographic and diplomatic weight is stronger than Singapore's. Malaysia matches Singapore on Distinctiveness (4), Aspirational (4), Centrality (4), Cultural Prevalence (6), and Leadership (3).

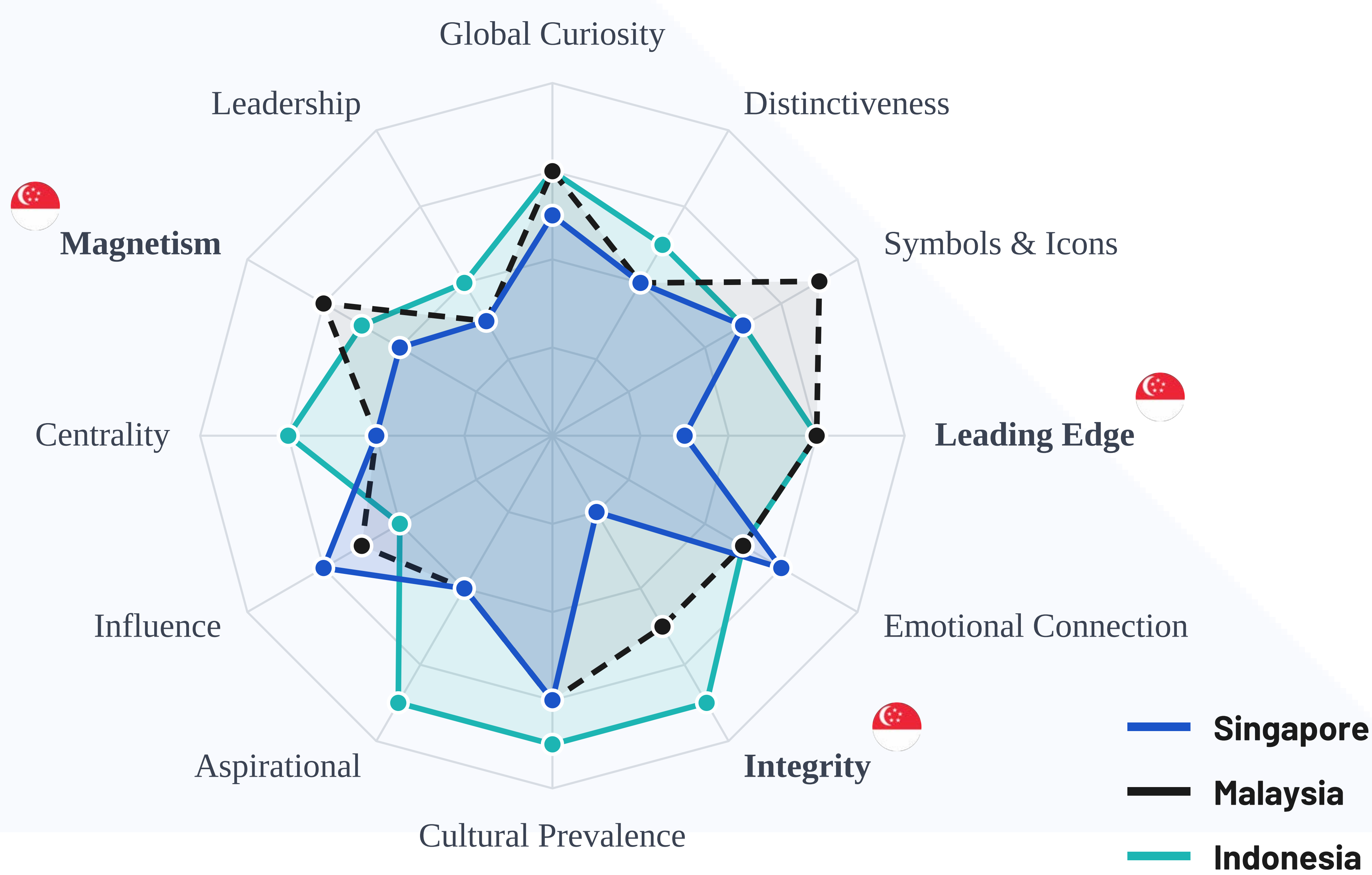

Figure 3. Performance Radar profiles: three nodes across twelve dimensions. **Note:** Lower scores indicate stronger performance.
Source: Nation Brand Research (accessed July 2026).

29. Nation Brand Research. Performance Radar, indicator-based nation brand performance assessment (accessed July 2026). https://www.nationbrandresearch.com/performance

30. Transparency International. (2026, February 10). "Corruption Perceptions Index 2025." https://www.transparency.org/en/cpi/2025

“An anchor brand within a regional system outperforms other regional players in **specific, decisive dimensions** rather than across all areas.”

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03

PART III

How has Singapore sustained itself as the anchor over time?

CREDIBILITY

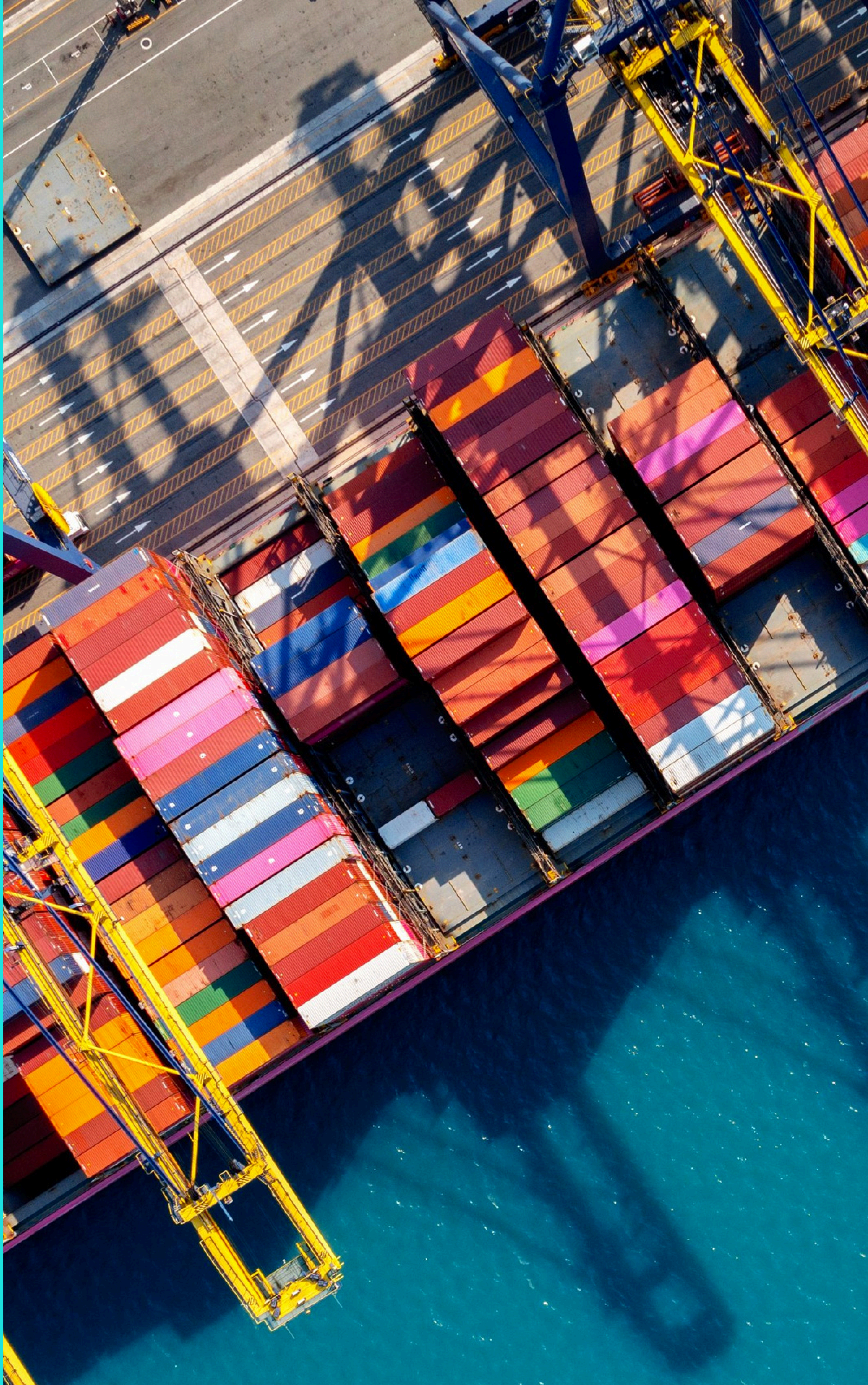
Singapore converts its institutional integrity into brand equity.

NARRATIVE

Singapore-led branding dominates investors' narratives.

FRONTIERS

Singapore positions itself at the forefront of emerging technologies.



Replicable Practices from Singapore

1 Treat Credibility As The Product, Not A By-Product

Singapore has converted its institutional integrity into its brand equity. A strong Performance Radar score on Integrity,[31] is consistent with external benchmarks, such as **(i) Transparency International's 2025 Corruption Perceptions Index** (Singapore ranked **3rd** globally),[32] **(ii) World Justice Project's 2025 Rule of Law Index** (Singapore ranked **16th** of 143 countries),[33] (iii) ranking of **21st** out of 193 countries in the **Brand Finance Global Soft Power Index 2026,**[34] and (iv) **1st** for institutions in **WIPO's 2025 Global Innovation Index.**[35] For business, the reliability in IP protection, transparent regulation, commercial dispute resolution, tax certainty, and fiscal advantages are attractive.[36] Firms that anchor capital and contracts in Singapore while assigning production in Johor or Batam[37] benefit from Singapore's governance and credibility, helping to de-risk cross-border coordination. McKinsey found that Southeast Asian manufacturing FDI rose about **20%** from 2019 to 2023, while Chinese manufacturing investment in ASEAN reached **US$24 billion** in 2023,[38] creating additional opportunities for Singapore.

INVESTMENT "FROM" SINGAPORE TO MALAYSIA, 2024

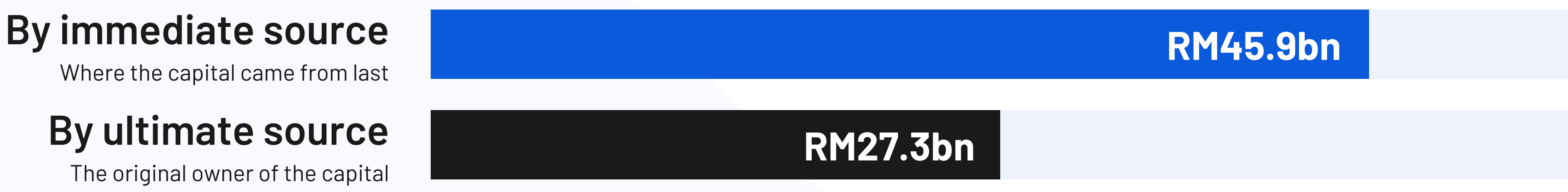


Figure 4. RM18.6 billion of Malaysia's "Singaporean" investment in 2024 was routed through Singapore rather than originating there.
Source: Malaysian Investment Development Authority. (2025, February). "Approved Investments by Immediate and Ultimate Source." Malaysia Investment Performance Report 2024. https://www.mida.gov.my/report/malaysia-investment-performance-report-2024/

2 Build the Narrative

Singapore creates a narrative that makes SIJORI legible to investors. Since 2022, Singapore's Economic Development Board (EDB) has promoted the cross-border model under the **"SG+"** or **"Singapore+"** branding, positioning Singapore as Southeast Asia's **"gateway"** and the **"control tower"** for regional operations.[39] The brand architecture keeps Singapore as the named anchor, while Johor, Batam, and other production locations are incorporated into the expandable "+"; high-value functions are retained in Singapore, while production is distributed elsewhere.[40] EDB's coined terminology has

31. Nation Brand Research. (n.d.). "Performance Radar." Nation Brand Research. Accessed 5 July 2026. https://www.nationbrandresearch.com/performance

32. Transparency International. (2026). "Singapore." Corruption Perceptions Index 2025. https://www.transparency.org/en/countries/singapore

33. World Justice Project. (2025, October 28). "Singapore Ranks 16 out of 143 in the WJP Rule of Law Index." WJP Rule of Law Index 2025. https://worldjusticeproject.org/sites/default/files/documents/Singapore_3.pdf

34. Brand Finance. (2026). Global Soft Power Index 2026. https://static.brandirectory.com/reports/brand-finance-soft-power-index-2026-digital.pdf

35. World Intellectual Property Organization. (2025). "Singapore Ranking in the Global Innovation Index 2025." Global Innovation Index 2025. https://www.wipo.int/gii-ranking/en/singapore

36. Singapore Economic Development Board. (2026, June 23). "What Makes Singapore's Environment Business Friendly." https://www.edb.gov.sg/en/why-singapore/business-friendly-environment.html; Singapore Judiciary. (n.d.). "Singapore International Commercial Court." https://www.judiciary.gov.sg/singapore-international-commercial-court

37. Singapore Economic Development Board. (2026, June 3). "Johor-Singapore Special Economic Zone." https://www.edb.gov.sg/en/johor-singapore-special-economic-zone.html; Singapore Ministry of Trade and Industry. (2025, September 18). "Speech by MOS Alvin Tan at the British Chamber of Commerce Singapore 'Economic Co-Operation in Southeast Asia: The Johor-Singapore Special Economic Zone' Event." https://www.mti.gov.sg/newsroom/speech-by-mos-alvin-tan-at-britcham-economic-co-operation-in-southeast-asia-jsez-event/; BP Batam. (2023). Industrial Estates in Batam. https://bpbatam.go.id/ebook/industrial-estates-in-batam/

38. McKinsey & Company. (2024, September 5). "Diversifying Global Supply Chains: Opportunities in Southeast Asia." https://www.mckinsey.com/industries/logistics/our-insights/diversifying-global-supply-chains-opportunities-in-southeast-asia

39. Singapore Economic Development Board. (2022, September 23). "SG+: Twin to Win the Supply Chain Long Game with Singapore as the Gateway to Southeast Asia." https://www.edb.gov.sg/en/business-insights/insights/sg-twin-to-win-the-supply-chain-long-game-with-singapore-as-the-gateway-to-southeast-asia.html; Singapore Economic Development Board. (2023, March 20). "Singapore: An Ideal Launchpad for Businesses in Southeast Asia." https://www.edb.gov.sg/en/business-insights/insights/singapore-an-ideal-launchpad-for-businesses-in-southeast-asia.html

40. Singapore Economic Development Board. (2026, May 18). "Expanding Your Business into Southeast Asia: A Practical Guide to Using Singapore as a Launchpad." https://www.edb.gov.sg/en/business-insights/insights/expanding-your-business-into-southeast-asia-a-practical-guide-to-using-singapore-as-a-launchpad.html been adopted by **Princeton Digital Group,** which defines its Singapore, Johor, and Batam facilities on a "Singapore Plus" location page and emphasizes Singapore-led expansion.[41] Singapore's narrative power creates the asymmetry in reputational flows.

3 Secure Functions With Strategic Visibility

In investment narratives, attribution tends to center on the legal entity's location, the government announcing the project, and the project's name/brand. Singapore has approximately **4,200** multinational regional headquarters whose high-level functions are anchored in Singapore-resident entities.[42] The **US$4.3 billion** YTL–NVIDIA AI campus in Kulai, while NVIDIA also deepens its presence in Singapore.[43] Dyson's headquarters relocation to St James Power Station was staged as a national milestone.[44] UNCTAD recorded **US$143.35 billion** in FDI inflows into Singapore in 2024,[45] including pass-through capital alongside investment directly absorbed by Singapore's economy.

4 Leading In Emerging Frontiers

Singapore's **Leading Edge score of 3** is sustained by repeatedly positioning itself at the highest-value point of each emerging frontier in the region. Between **2019–2022,** the data-center moratorium shifted physical capacity to Johor, yet Singapore preserved the strategic functions, capital allocation, cloud architecture, connectivity, regulation, and regional management, and framed it internationally as a **"Singapore spillover."**[46] A similar pattern could emerge as solar infrastructure near Batam begins supplying several gigawatts of electricity to Singapore from 2027.[47]

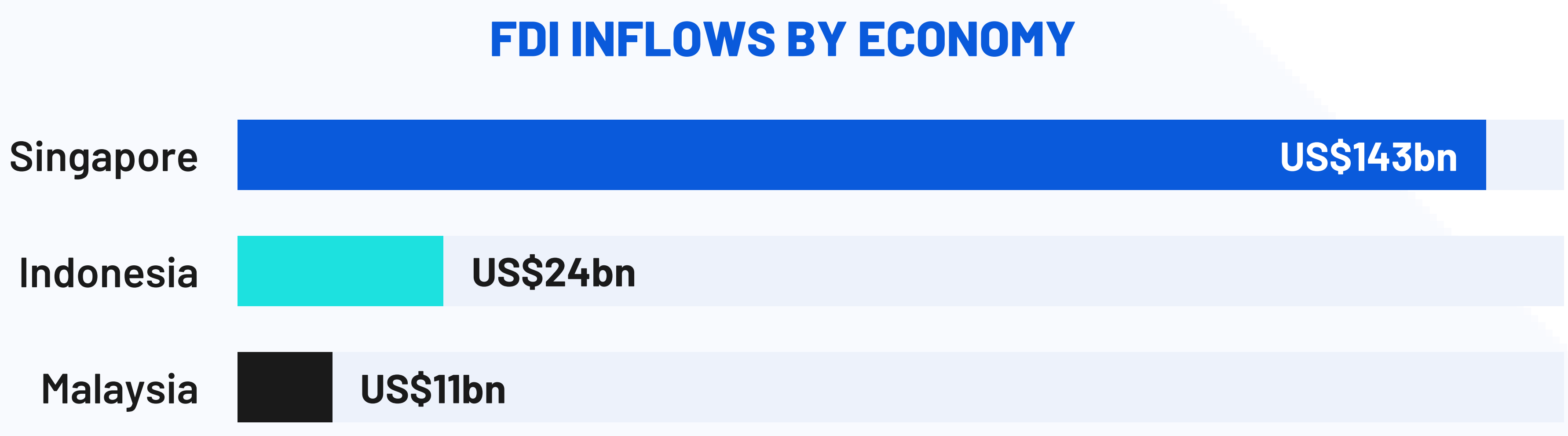


Figure 5. FDI inflows by economy, 2024 (US$ billion). Singapore accounts for the most inflows among the three SIJORI economies.
Source: UN Trade and Development. (2025, June). "Annex Table 1: FDI Inflows, by Region and Economy." World Investment Report 2025: International Investment in the Digital Economy. https://unctad.org/system/files/official-document/wir2025_annex-tables_en.pdf

41. Princeton Digital Group. (n.d.). "Singapore Plus." https://princetondg.com/locations/singapore-plus/

42. Singapore Economic Development Board. (n.d.). "Headquarters." https://www.edb.gov.sg/en/our-industries/headquarters.html

43. Butler, G. (2023, December 11). "Nvidia & YTL Power partner for $4.3bn AI data centers in Malaysia." Data Center Dynamics. https://www.datacenterdynamics.com/en/news/nvidia-ytl-power-partner-for-43bn-ai-data-centers-in-malaysia/; Babalola, O. (2026, May 20). "Nvidia's Singapore Hub Reveals Its Southeast Asia GPU Strategy." Investing.com. https://www.investing.com/analysis/nvidias-singapore-hub-reveals-its-southeast-asia-gpu-strategy-200680630

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46. Sipalan, J. (2024, November 27). "Singapore spillover of data centres benefits Malaysia's Johor." South China Morning Post. https://www.scmp.com/week-asia/economics/article/3288291/singapore-spillover-data-centres-benefits-malaysias-johor

47. Singapore Economic Development Board. (2023, November 10). "Tuas Power to buy green energy from $12.3b solar plants near Batam from 2027." https://www.edb.gov.sg/en/business-insights/insights/tuas-power-to-buy-green-energy-from-12-3b-solar-plants-near-batam-from-2027.html

Nation
Brand
Research

04

PART IV

Malaysia needs a strategy to convert operational contribution into reputational gains.

THE PROFILE

Malaysia matches Singapore across multiple dimensions.

THE GAP

Johor bets on capacity rather than high-value functions and control.

THE CONSTRAINT

Malaysia must build institutional reliability to attract regional anchoring.

Lessons for Malaysia

Malaysia's radar profile matches Singapore's on five of twelve dimensions: Distinctiveness, Aspirational, Centrality, Cultural Prevalence, and Leadership.[48] Yet it has been unsuccessful in converting that position into higher-value functions and corresponding reputational gains. Three dimensions weaken Malaysia's ability, including a weaker (i) Integrity score (5), which affects confidence in institutional reliability; (ii) Leading Edge (6), which limits association with innovation and advanced capability; and (iii) Magnetism (6), which reduces its pull for capital, talent, and high-value activity. Further constraining reputation flow is that an activity occurring in Johor is not always symbolically associated with Malaysia's national brand.

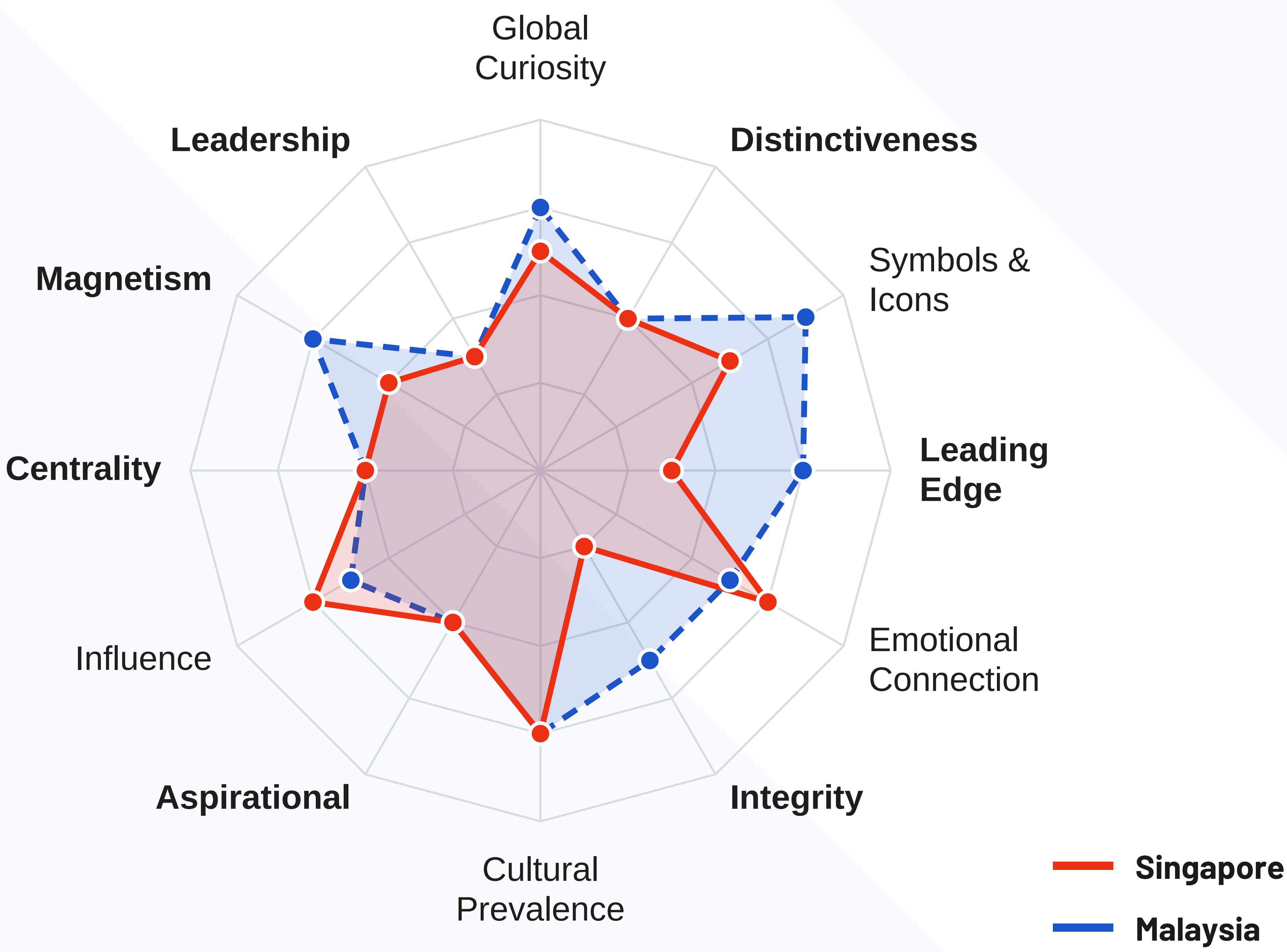

Figure 6. Malaysia–Singapore nation-brand performance profiles across twelve dimensions. **Note:** Lower scores indicate stronger performance. **Source:** Nation Brand Research (accessed July 2026).

1 Reclaim Credit In Public Narratives

Malaysia's national credibility gap, reflected in a **32-point CPI deficit,** may take time to close. However, credibility can be built faster at the zone level. The **JS-SEZ** can function as a credibility enclave by using single-window approvals, clear service standards, and public scorecards to track project delivery. After the KL-Singapore high-speed rail corridor cancellation,[49] future cross-border commitments may face greater scrutiny, making demonstrated, dated delivery a strong branding tool for Johor.

48. Nation Brand Research. (n.d.). "Performance Radar." Nation Brand Research. Accessed July 2026. https://www.nationbrandresearch.com/performance

49. Lee, J. (2021, January 1). "No more KL-SG high speed rail, M'sia to compensate S'pore S$100 million." Mothership. https://mothership.sg/2021/01/sg-kl-high-speed-rail-cancelled/

2 Attract High-Value Functions, Not Just Capacity

Thirty-eight data-center projects have signed supply agreements with TNB for **5.9 GW** of maximum demand, against **405 MW** actually drawn as of December 2024.[50] Utilization is phased, and the gap is likely to narrow. Malaysian leaders have highlighted that the data center surge must deliver jobs and knowledge transfer.[51] Global rankings and industry analysts will also gauge demonstrated capabilities, and to Malaysia's reputational benefit, deals should include functional commitments and high-level mandates.

Similarly, while Iskandar Malaysia saw **RM41.4 billion** in new commitments in 2024, national-level investment reporting can make Johor's specific contribution less salient within Malaysia's **RM378.5 billion** headline figure.[52] To stand out, Johor needs a transparent, real-time investment and performance dashboard. Within its state-level remit, Johor can strengthen investment delivery and place promotion, while using the JS-SEZ and federal coordination to negotiate higher-value functions and knowledge transfer, co-branded assets that name Johor directly **(e.g., Nvidia-YTL Johor, Microsoft Johor cloud region),**[53] and joint marketing that positions Johor as a strategic partner rather than only a supporting player in a Singapore-led story.[54]

3 Use Border for Brand Distribution

Malaysia can leverage the brand contact point at the Johor–Singapore Causeway, used by roughly **300,000** people daily,[55] to build a favorable image among Singaporeans, who already form Johor's dominant foreign visitor base,[56] and non-Singaporean residents, professionals, students, and tourists already in Singapore.[57] The **1.86 million** non-resident population (2024) can experience Malaysia without a high travel cost.[58] Once the RTS Link is established, crossing friction will reduce further, and Johor will have the opportunity to achieve stronger Magnetism, Symbols & Icons, and Emotional Connection (Nation Brand Radar, see Measurement Framework on Page 3) by strengthening its institutions for delivering a seamless experience across all touchpoints.[59]

50. Loo, S. (2025, June 12). "Data Centres, Energy Demand and Sustainability: Can Malaysia Strike the Right Balance?" ISEAS Perspective, 2025/43. ISEAS – Yusof Ishak Institute. https://www.iseas.edu.sg/articles-commentaries/iseas-perspective/2025-43-data-centres-energy-demand-and-sustainability-can-malaysia-strike-the-right-balance-by-sara-loo/

51. Ma, J. (2025, October 29). "Johor's past, present, and future." Data Center Dynamics. https://www.datacenterdynamics.com/en/analysis/the-past-present-and-future-of-johor/

52. Malaysian Investment Development Authority. (2025, February 25). "Malaysia Records Historic High RM378.5 Billion in Investments, with 14.9% Y-O-Y Growth, Generating More Than 207,000 Jobs in 2024." https://www.mida.gov.my/media-release/malaysia-records-historic-high-rm378-5-billion-in-investments-with-14-9-y-o-y-growth-generating-more-than-207000-jobs-in-2024/; Malay Mail. (2025, April 25). "Iskandar Malaysia hits record RM41.4b in investments for 2024, says PM Anwar." https://www.malaymail.com/news/malaysia/2025/04/25/iskandar-malaysia-hits-record-rm414b-in-investments-for-2024-says-pm-anwar/174416; The Sun. (2025, April 24). "Iskandar Malaysia records committed investments of RM41.4b in 2024." https://thesun.my/business/iskandar-malaysia-records-committed-investments-of-rm414b-in-2024-jc13998155/

53. Butler, G. (2023, December 11). "Nvidia & YTL Power partner for $4.3bn AI data centers in Malaysia." Data Center Dynamics. https://www.datacenterdynamics.com/en/news/nvidia-ytl-power-partner-for-43bn-ai-data-centers-in-malaysia/; Butler, G. (2025, November 5). "Microsoft details plans for cloud region in Johor, Malaysia." Data Center Dynamics. https://www.datacenterdynamics.com/en/news/microsoft-details-plans-for-cloud-region-in-johor-malaysia/

54. Singapore Economic Development Board. (n.d.). "Johor-Singapore Special Economic Zone (JS-SEZ)." https://www.edb.gov.sg/en/johor-singapore-special-economic-zone.html

55. Hutchinson, F. E., Lin, S., & Bunnell, T. (2023, August 24). "The Johor–Singapore Causeway: Celebrating and conceptualising its centenary." Journal of Southeast Asian Studies, 54(3), 355–366. https://www.cambridge.org/core/journals/journal-of-southeast-asian-studies/article/johorsingapore-causeway-celebrating-and-conceptualising-its-centenary/480AAE4AB85A73AC85D37B18AA5DA3C9

56. Shadiqe, J. (2026, May 4). "Singaporeans top Johor arrivals as Visit Johor 2026 gathers pace." New Straits Times. https://www.nst.com.my/amp/news/regional/2026/05/1432018/singaporeans-top-johor-arrivals-visit-johor-2026-gathers-pace

57. Singapore Tourism Board. (2026, February 3). "Record Singapore tourism receipts from January to September 2025." https://www.stb.gov.sg/about-stb/media-publications/media-centre/record-singapore-tourism-receipts-from-january-to-september-2025/

58. National Population and Talent Division, Strategy Group, Prime Minister's Office. (2024, September 24). Population in Brief 2024. https://www.population.gov.sg/media-centre/publications/population-in-brief/

59. Land Transport Authority, Singapore. (n.d.). "Johor Bahru–Singapore Rapid Transit System Link." Accessed July 2026. https://www.lta.gov.sg/content/ltagov/en/upcoming_projects/rail_expansion/JB-Singapore_RTS_link.html

05

PART V

Indonesia can convert its diplomatic influence into attribution.

THE PROFILE

Indonesia's relative strength is its Influence score of 4, stronger than Singapore's 6.

THE RECORD

Batam has performed an industrial function since 1990 without accruing reputational gains.

THE CEILING

A low Integrity score and a CPI rank of 109th place a ceiling on available gains.

Lessons for Indonesia

Indonesia's relative strength lies in its score of 4 in the Influence dimension on the Performance Radar, which is stronger than Singapore's 6, reflecting its diplomatic weight. On the other hand, it lags in Integrity (7) and Aspirational (7). As a node in SIJORI, Batam has a robust industrial function: **Batamindo opened in 1990,**[60] it has hosted Infineon's back-end operations since 1996,[61] and it has a Schneider Electric plant recognized by the World Economic Forum as a Fourth Industrial Revolution Lighthouse.[62] However, Indonesia lags in global investment narratives, suggesting that attribution flows need to be planned to improve visibility.

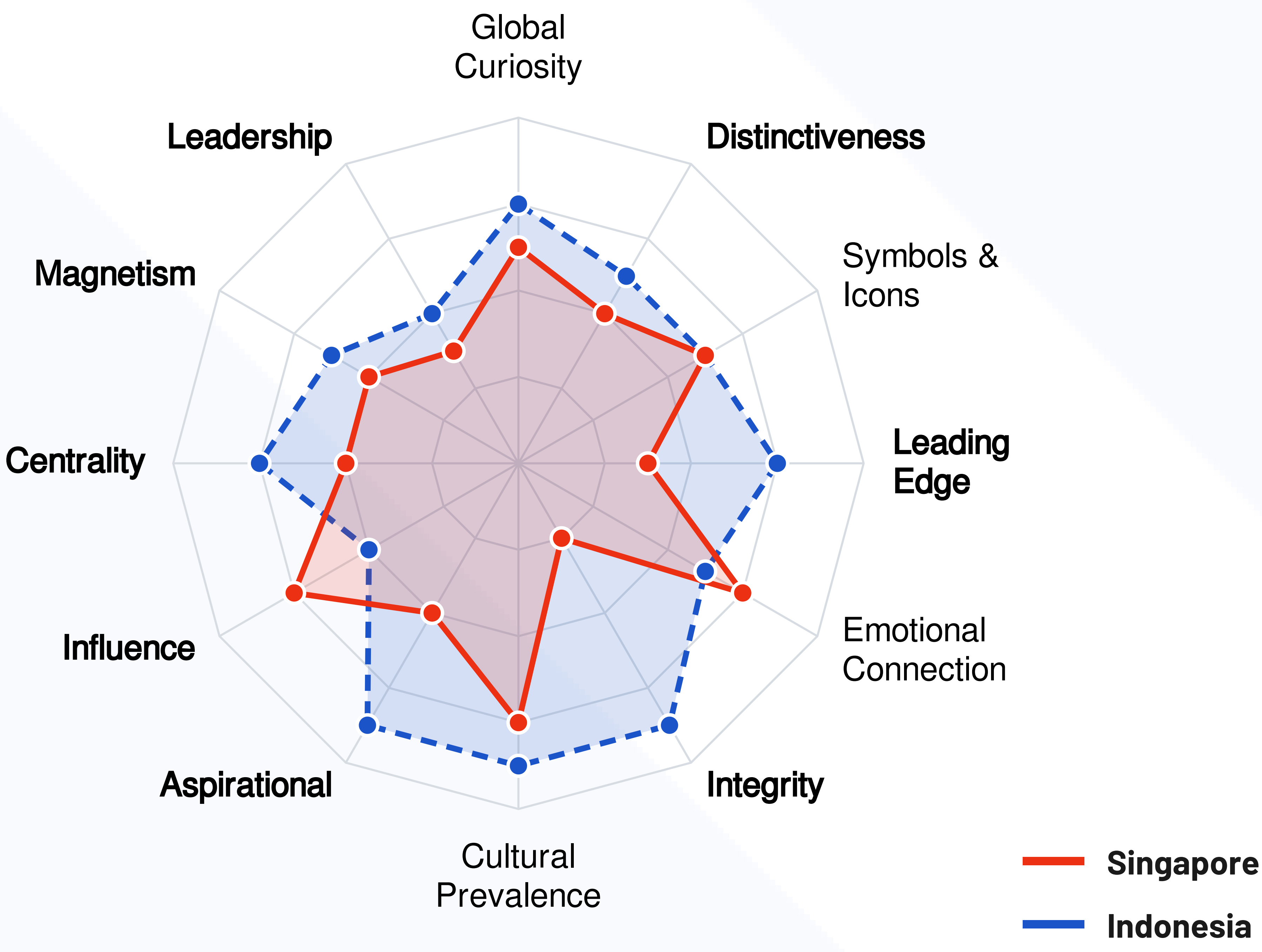

Figure 7. Indonesia–Singapore nation-brand performance profiles across twelve dimensions. **Note:** Lower scores indicate stronger performance. **Source:** Nation Brand Research (accessed July 2026).

1 Fix the Credibility Floor

Indonesia's low Integrity score of 7 and **CPI rank of 109th** place a ceiling on its reputational gains.[63] Corruption perception is not the only concern; land rights, environmental approval, and community disputes can also create investor and reputational risk; Rempang Eco-City provides a recent example.[64] In the long run, Indonesia cannot depend on Singapore's borrowed credibility while sending weak

60. Business Indonesia. (n.d.). Batamindo Industrial Park [Industrial estate profile]. https://business-indonesia.org/files/estates/s62XeY7Nhabq0VqTKBTKdZddOuD2RnGcGFIPdmKI.pdf

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62. Schneider Electric. (2019, July 9). "Schneider Electric's Batam Smart Factory recognized by the World Economic Forum as a Fourth Industrial Revolution Lighthouse." PR Newswire. https://www.prnewswire.com/news-releases/schneider-electrics-batam-smart-factory-recognized-by-the-world-economic-forum-as-a-fourth-industrial-revolution-lighthouse-300881677.html

63. Transparency International. (2026). Corruption Perceptions Index 2025. https://www.transparency.org/en/cpi/2025

64. Business & Human Rights Resource Centre. (2023, September 13). "Indonesia: Chinese-invested Rempang Eco City Project and relocation controversies." https://www.business-humanrights.org/en/latest-news/indonesia-chinese-invested-rempang-eco-city-project-and-relocation-controversies/; Llewellyn, A. (2023, September 15). "Protests in Indonesia as thousands face eviction for Rempang 'Eco-City'." Al Jazeera. https://www.aljazeera.com/news/2023/9/15/protests-in-indonesia-as-thousands-face-eviction-for-rempang-eco governance signals of its own. Transparent governance mechanisms and public reporting are indispensable brand infrastructure for improving Indonesia's Integrity.

2 Convert Influence into Attribution

Indonesia can leverage its state influence to secure investment recognition in cross-border projects. Currently, Riau risks remaining an invisible supplier, as shown by the land-reclamation sand trade with Singapore, where Indonesia received limited attribution.[66] Indonesia's national diplomatic weight gives Riau a platform that the provincial government can leverage to press for co-branding, project naming, and official communications that explicitly credit Riau. Currently, clean energy offers a reputational opportunity; the **S$12.3 billion** solar export deal near Batam, supplying to Singapore from 2027,[65] can link Riau to decarbonization and grid resilience.[67]

3 Turn Batam into a Proof-of-Performance Node

At the national level, Batam has developed significant digital and industrial assets, but these do not automatically translate into a distinct international place narrative.[68] The provincial and national governments can instead promote Batam as an established proof point of Indonesia's SIJORI role, positioning it as a gateway for digital, energy, and advanced manufacturing in the region.[69] Such a positioning, coupled with talent-facing visas built around Batam with work-study pathways, digital-nomad access, engineering-talent incentives, and Batam-specific career routes, could make the node stand out in investor and talent circles. Executing the strategy would require transparent indicators on investment, jobs, power capacity, data center growth, talent pipelines, ESG compliance, and dispute resolution, showing Batam as a governed, measurable, and improving platform.

65. Singapore Economic Development Board. (2023, November 10). "Tuas Power to buy green energy from S$12.3 billion solar plants near Batam from 2027." https://www.edb.gov.sg/en/business-insights/insights/tuas-power-to-buy-green-energy-from-12-3b-solar-plants-near-batam-from-2027.html; Energy Market Authority. (2024, September 5). "Singapore and Indonesia Make Substantive Progress on Electricity Imports." https://www.ema.gov.sg/news-events/news/media-releases/2024/singapore-indonesia-make-substantive-progress-on-electricity-imports

66. Kog, Y.-C. (2006). "Land Reclamation and Its Political Impact." S. Rajaratnam School of International Studies. https://www.rsis.edu.sg/wp-content/uploads/rsis-pubs/WP101.pdf

67. Energy Market Authority. (2024, September 5). "Singapore and Indonesia Make Substantive Progress on Electricity Imports." https://www.ema.gov.sg/news-events/news/media-releases/2024/singapore-indonesia-make-substantive-progress-on-electricity-imports; Reuters. (2024, September 5). "Singapore to import more low-carbon power from Indonesia, minister says." https://www.reuters.com/business/energy/singapore-import-more-low-carbon-power-indonesia-minister-says-2024-09-05/

68. Nongsa Digital Park. (n.d.). "Our Company." https://nongsadigital.com/our-company/; DayOne. (n.d.). "Batam, Indonesia Data Center." https://dayonedc.com/market/batam

69. Nongsa Digital Park. (n.d.). "Our Company." https://nongsadigital.com/our-company/; Singapore Economic Development Board. (2023, November 10). "Tuas Power to buy green energy from S$12.3 billion solar plants near Batam from 2027." https://www.edb.gov.sg/en/business-insights/insights/tuas-power-to-buy-green-energy-from-12-3b-solar-plants-near-batam-from-2027.html; Schneider Electric Indonesia. (n.d.). "Smart Factory & Smart Manufacturing Center." https://www.se.com/id/en/work/campaign/smart-factory/

Looking Forward

SIJORI demonstrates that production nodes within an anchored regional system do not automatically receive recognition. Capacity alone is not enough for reputational gains; building a reputation requires strengthening a country's position across specific dimensions (see page 3). Dedicated efforts to build institutional credibility and reliability, brand projects, third-party validation, and a robust narrative infrastructure yield a strong position.

Continued performance in these areas can create space for higher-order functions, such as attracting headquarters, R&D, and contracting authority. Neglecting the underlying architecture would let reputation gains flow elsewhere; moreover, promotional activities without credibility produce weak claims and drive visibility without substance.

Singapore demonstrates its value by holding the highest position in the system, within the international measurement records, making itself legible as the coordinator and narrator of the regional story. Johor and Batam can adapt elements of Singapore's playbook within their more limited institutional mandates, moving from operational extensions toward named, measurable, and validated nodes.

A PROPOSED PATHWAY TO REPUTATIONAL RETURN

Neglecting the underlying architecture prevents reputation gains from flowing.

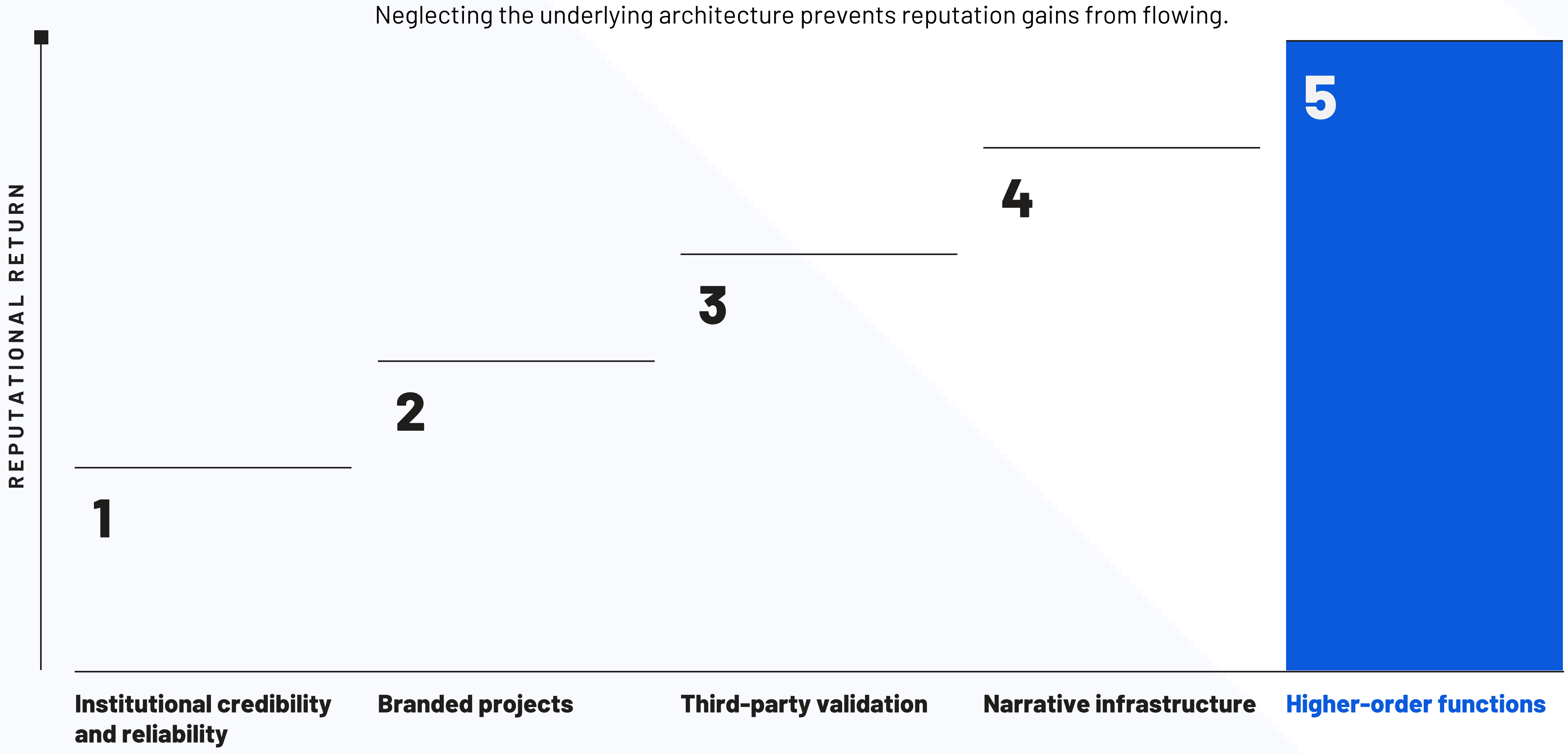

Figure 8. Source: Nation Brand Research conceptual framework.

The next 12–18 months will be decisive

Key projects include the RTS Link opening in December 2026,[70] the Batam solar corridor supplying Singapore from 2027,[71] the YTL-NVIDIA campus coming online in the same window,[72] and the JS-SEZ transitioning from announcement to delivery.[73] Each milestone tests Johor and Batam's ability to secure visibility, lasting attribution, and redefine the broader regional story.

70. Tan, C., & Supharta, K. (2025, June 30). "JB-S'pore RTS train to start in Dec. 2026, 5 mins travelling time to go overseas." Mothership. https://mothership.sg/2025/06/jb-spore-rts-train-to-start-in-dec-2026-5-mins-travelling-time-to-go-overseas/; Land Transport Authority. (n.d.). "Johor Bahru-Singapore Rapid Transit System Link." https://www.lta.gov.sg/content/ltagov/en/upcoming_projects/rail_expansion/JB-Singapore_RTS_link.html

71. Singapore Economic Development Board. (2023, November 10). "Tuas Power to buy green energy from S$12.3b solar plants near Batam from 2027." https://www.edb.gov.sg/en/business-insights/insights/tuas-power-to-buy-green-energy-from-12-3b-solar-plants-near-batam-from-2027.html; Energy Market Authority. (2024, September 5). "Singapore and Indonesia Make Substantive Progress on Electricity Imports." https://www.ema.gov.sg/news-events/news/media-releases/2024/singapore-indonesia-make-substantive-progress-on-electricity-imports

72. Butler, G. (2023, December 11). "Nvidia & YTL Power partner for $4.3bn AI data centers in Malaysia." Data Center Dynamics. https://www.datacenterdynamics.com/en/news/nvidia-ytl-power-partner-for-43bn-ai-data-centers-in-malaysia/

73. Singapore Economic Development Board. (n.d.). "Johor-Singapore Special Economic Zone (JS-SEZ)." https://www.edb.gov.sg/en/johor-singapore-special-economic-zone.html; Enterprise Singapore. (n.d.). "About the Johor-Singapore Special Economic Zone." https://www.enterprisesg.gov.sg/JS-SEZ/about

DEC 2026	The RTS Link opens.
FROM 2027	The Batam solar corridor supplies to Singapore.
SAME WINDOW	The YTL-NVIDIA campus comes online.
ONGOING	The JS-SEZ transitions from announcement to delivery.

The RTS Link; A Chance To Rebrand

For Johor, the RTS Link is an opportunity to turn daily crossings into repeated brand exposure and co-branding.[74] If the projects are framed as another Singapore spillover,[75] the opportunity to claim attribution will wither away.

Riau Energy Exports; Test Of Governance

For Riau, state-level assertions can demand credit in official communications. However, poor governance signals can cap returns,[76] increasing perceived country risk despite its contribution to green energy.[77] Indonesia can transparently highlight node-level indicators, including investments, jobs, power capacity, talent pipelines, ESG compliance, and dispute resolution, for exports to carry the brand name.

Singapore: The Anchor Gains When The "+" Is Named

One-sided reputational flows risk negative perceptions of Singapore. An alternative partner-recognition apparatus becomes scalable, trusted, and future-facing. For instance, the SG+ architecture can be rebranded from "+"[78] to credit partners with success. Singapore can also continue to lend credibility to the spokes while Johor and Batam build their own recognized equity, increasing the system's value. Strategic relationship management could also improve Singapore's standing on Emotional Connection, the one dimension where it trails its neighbors.[79] While it may not move capital, it can shape partners' perception of the anchor, and goodwill can make the anchor status durable rather than merely dominant.

> A stronger version of the SIJORI Growth Model is the one Singapore positions globally under an aligned system with named beneficiaries.

74. Tan, C., & Supharta, K. (2025, June 30). "JB-S'pore RTS train to start in Dec. 2026, 5 mins travelling time to go overseas." Mothership. https://mothership.sg/2025/06/jb-spore-rts-train-to-start-in-dec-2026-5-mins-travelling-time-to-go-overseas/; Land Transport Authority, Singapore. (n.d.). "Johor Bahru-Singapore Rapid Transit System Link." https://www.lta.gov.sg/content/ltagov/en/upcoming_projects/rail_expansion/JB-Singapore_RTS_link.html

75. Sipalan, J. (2024, November 27). "Singapore spillover of data centres benefits Malaysia's Johor." South China Morning Post. https://www.scmp.com/week-asia/economics/article/3288291/singapore-spillover-data-centres-benefits-malaysias-johor

76. Business & Human Rights Resource Centre. (2023, September 13). "Indonesia: Chinese-invested Rempang Eco City Project and relocation controversies." https://www.business-humanrights.org/en/latest-news/indonesia-chinese-invested-rempang-eco-city-project-and-relocation-controversies/; Llewellyn, A. (2023, September 15). "Protests in Indonesia as thousands face eviction for Rempang 'Eco-City'." Al Jazeera. https://www.aljazeera.com/news/2023/9/15/protests-in-indonesia-as-thousands-face-eviction-for-rempang-eco

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78. Singapore Economic Development Board. (2022, September 23). "SG+: Twin to Win the Supply Chain Long Game with Singapore as the Gateway to Southeast Asia." https://www.edb.gov.sg/en/business-insights/insights/sg-twin-to-win-the-supply-chain-long-game-with-singapore-as-the-gateway-to-southeast-asia.html

79. Nation Brand Research. (n.d.). "Performance Radar." Nation Brand Research. Accessed July 2026. https://www.nationbrandresearch.com/performance

Beyond SIJORI

The Anchor Brand framework could also be tested against Hong Kong's shadow nodes, ASEAN production corridors, and nearshoring regions in Europe and the Americas.

In a cross-border system with a strong anchor, under-recognized nodes can experience similar asymmetries. Global measurement systems may disproportionately credit anchors, while investor and nation-branding narratives may foreground them.

Functional nodes need planned attribution to earn reputational returns and must pursue institutional reform to secure it.

WHO WE ARE

NationBrandResearch is a global research initiative dedicated to understanding and advancing how countries build, maintain, and enhance their competitive positioning and soft power influence in an increasingly interconnected world.

WHAT WE DO

We provide evidence-based research, data-driven insights, and strategic recommendations to governments, institutions, and organizations seeking to understand and shape global perceptions of their nations.

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