

ASEAN-China Survey 2020

Assessing the Present
and Envisioning the Future
of ASEAN-China Relations



FOREIGN POLICY
COMMUNITY
OF INDONESIA

FOREWORD



I am pleased to present the ASEAN-China Survey 2020: “Assessing the Present and Envisioning the Future of ASEAN-China Relations.”

This survey is produced in anticipation of an important diplomatic milestone next year: the celebration of 30 years of ASEAN-China relations.

During those three decades, ASEAN and China have learned much more about one another and developed comprehensive relations. ASEAN - China cooperation has emerged as a pillar of regional order, and a building block for world peace.

This survey aims to capture and highlight the various shades and nuanced views from the ASEAN region towards China as well as ASEAN-China relations. The respondents cover officials, students, business community, the academia and, civil society from the general public. The questions that we asked the respondents were broad ranging, from geopolitics, economics, people-to-people, and political-security. What makes it even particularly interesting is that the survey was conducted during the time of COVID-19, in the months from July to September — an extremely difficult time where regionalism, cooperation and resilience was being tested.

There is no doubt that China looms large in ASEAN's future. We hope that the survey will provide helpful insights and fresh perspective to the efforts to chart ASEAN - China relations in the coming decades.

Salam,

Jakarta, 5 October 2020



Dr. Dipo Patti Djalal
Chairman & Founder of Foreign Policy Community of Indonesia

FOREWORD



One of the most significant change in East Asia in the last few decades is the evolving relationship between ASEAN and China. The relationship that was marked with suspicion and fear during the Cold War period has gradually transformed into warm and working partnership in various sectors. Of course, anxiety remains, especially amidst the expectation that China's rise will inevitably leads to a great power rivalry which will shake the region's stability. However, ASEAN and ASEAN Countries are not passive takers. They are creative actors with strong ambition and modalities to be global players too. In this context, it is important to understand how these two entities perceive each other.

This survey aims to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse. To do so, the research is conducted through an online survey which targeted specific stakeholders: **(1) Elites**, further divided into four sub-categories: (a) Government officials; (b) Academia; (c) Business community; and (d) Civil Society; and **(2) Students**. It must be noted that this survey is **not** a public opinion survey that required a strict number of respondents that reflects the exact demographic composition of the population and thus should not be compared or treated as such. Since the aim of this survey is to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse, it focuses more on how each category in each country are adequately represented rather than on how the samples are reflecting the demographic composition.

From July 28, 2020 until September 23, 2020, the team sent more than 2000 emails and successfully received responses from 1,000 respondents from all ASEAN member countries: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam. Based on the responses, the team tries to identify and explain the perceptions of various segments of people in ASEAN countries towards China and towards ASEAN-China relations. The analysis, conclusion, and policy recommendation then formulated based on the identification of the patterns of the result of the questionnaires and a focus group discussion which involve representatives from all categories of respondents were held.

After an adventurous process, the report is now completed and presented to you. Some of the findings confirms and proves the popular observation on ASEAN-China relationship, such as on the sensitivity of political and security issues and the eagerness to pursue economic cooperation or the importance of ASEAN Centrality in the opinions of ASEAN public. However, there are also relatively new findings such as on the attitude of students towards ASEAN-China relationship. In general, ASEAN people's perception towards ASEAN-China relationship can be characterized as "cautiously optimistic." They see that there are a lot of opportunities ahead, but some uncertainties are also visible. Navigating this will be the challenge.

We do hope that this survey will contribute positively to the creation of a better, mutually beneficial, and people-centred relationship between ASEAN-China. We also would like to thank our partners: ASEAN Foundation, ASEAN University Network (AUN), ASEAN Youth Organization, UGM ASEAN Society, Youth SEakers, Overseas Indonesian Student Association (PPI), Asia-Pacific Youth Service (APYouthS) and ASEAN-Australia Youth Dialogue. Their assistance helped us to get in touch with potential respondents that otherwise are beyond our reach. We also would like to express our gratitude for all respondents who took their precious time to fill in the questionnaire. With your kindness, this report is completed.

Enjoy reading!

Jakarta, 5 October 2020


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ABOUT FPCI

Foreign Policy Community of Indonesia (FPCI) is a non-partisan, non-politic and independent foreign policy organization established to discuss and introduce international relations issues to many relevant actors in Indonesia such as diplomats, ambassadors, government officials, academia, researchers, businesses, media, lecturers, think tanks, students and media. FPCI is also dedicated to study the most-pressing foreign policy issues in relates to ASEAN, middle powers, geopolitics and geo-economics and diaspora.

FPCI has an active lecturers' group, China Policy Group (CPG), think tanks group and more than 20 university chapters all around Indonesia. FPCI Chapter is our branch for international relations students who engaged in regular discussion aiming to keep track on foreign policy issue. The chapter also contribute to a better understanding and analysis of Indonesian foreign policies by writing essays and blogs, conducting forum and conferences, creating podcasts, and joining our annual conference, Conference on Indonesian Foreign Policy (CIFP). FPCI university chapters are also actively engaged with government and foreign embassies to get insights, views and understanding on foreign policy issues.

FPCI has established university chapters at both state or private universities in important big cities across Indonesia, including Jakarta, Bandung, Jogjakarta, Makassar, Malang, Bali and so on. Through these FPCI Chapters, FPCI is acknowledging the growing importance of youth participation in foreign policy, and helping to prepare the next generation of leaders in this country.

About FPCI Research and Analysis

FPCI Research and Analysis (FPCI R&A) is FPCI's research division focusing on six areas of interest – Geo-Politics, Indonesian Foreign Policy, ASEAN, Cities, Diaspora, and Globalization. Our work is to contribute to the foreign policy development and thinking process. We work in collaboration with policy makers, experts, lecturers, researchers, officials, as well as the public on specific issues and trends. Our product is characterized as a policy-oriented analysis. We also work to enhance public understanding and engagement on international issues through conferences, public discussions, reports and publications.

SPECIAL THANKS TO OUR INSTITUTIONAL PARTNERS:



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EXECUTIVE SUMMARY

Cautious Optimism Amidst a Sea of Opportunities and Uncertainties

This survey aims to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse. This survey targeted five categories of respondents: (1) Government officials; (2) Academia and Think Tanks; (3) Business Community; (4) Civil society; and (5) students. Categories (1), (2), (3) and (4) are also collectively classified into the "Elites" category.

The data is collected through online survey template which was fielded electronically from July 28 to September 23, 2020. The use of an online template allowed for completion in 10 minutes or less, increasing the chance for response. After the data returned, researchers analyze and compare the results to formulate the findings and policy recommendations. This survey successfully collected data from 1,000 respondents from all ASEAN member countries: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam.

Findings

- In general, the relationship is viewed as mutually beneficial and contributing positively towards the peace, stability and progress in the region. However, it must be acknowledged that some skepticism remains lingering in the minds of some segments of ASEAN people and this skepticism must be considered to foster a better and stronger relationship between ASEAN and China.
- ASEAN people tend to welcome stronger economic cooperation such as in the BRI initiative, but also view that the cooperation need to be continuously reassessed in order to optimally benefit both partners.
- On the other hand, the degree of skepticism is relatively higher in the political-security dimension of the relationship. There is a concern on the state of ASEAN Centrality and how interaction with China would affect ASEAN countries' sovereignty. Such concern is understandable and must be taken into account to ensure a more cordial relationship between the two partners.
- The people of ASEAN measure the benefit of the cooperation between ASEAN and China in the lens of their own countries' national interest.
- ASEAN public perceptions on China is largely dependent on specific issues being asked.
- The survey also shows that most respondents put more attention on political-security and economic dimension of the relationship compared to socio-cultural issues.
- There is a diversity of opinion among ASEAN people. Students are sometimes being slightly more cautious. However, Students overwhelmingly put positive assessments on programs that directly benefit them such as the ASEAN – China Young Leaders Scholarship (ACYLS).
- Among the Elites respondents, it is also important that stakeholders that are directly involved in the process (Government Officials and Business actors) are more optimistic, while Civil Society displays a higher degree of skepticism.
- Rather than divided by their allegiance to one great power, most respondents across all categories strongly think that ASEAN must not side with one side. They even view that ASEAN must 'step up' and proactively mediate the relationship between the two great powers, since uncontrolled great power rivalry would negatively affect the region.

Recommendations

1. Optimizing cooperation around sectors where positive and optimistic assessments are dominant such as in the economic and socio-cultural sectors, while continue to improve the trust-building process in the sensitive issues in political-security dimension.
2. The cooperation must continue to be developed under ASEAN mechanism and ASEAN centrality **must be preserved**. The relatively higher skepticism in the political-security sector is understandable, since it is normal for countries to be anxious about the rise of a powerful neighbor. To ease and manage such anxieties, it is important to ensure that all players, the powerful and the less powerful, respect the game in town and not trying to replace it with a power-based (dis)order.
3. **Developing more people-to-people connections in ASEAN-China cooperation.** The survey finds that the degree of optimism and positive views are more evident in the stakeholders directly involved in the process of cooperation such as government officials and business actors. This shows that the benefit of cooperation has not been felt equally across the segments of the society. **We recommend to seriously develop more cooperation that involves civil society and academics, such as through bottom-up collaboration projects or research collaborations.**
4. Developing more youth-specific programs for ASEAN-China Cooperation.

I. INTRODUCTION

A. BACKGROUND

In the 21st Century, both China and ASEAN are rising as important global players. In 1993, Nicholas Kristof wrote about the rise of China as “the most important trend of the next century” (Kristof, 1993). That century has arrived, and his prediction seems to be really hitting the mark. In 2017, in purchasing power parity (PPP) terms, China’s GDP (\$ 19.617 trillion) has already surpassed the GDP of the US (\$ 19.519 trillion). It is also becoming more active in international relations by showing more influence in international organizations and by introducing initiatives such as the Belt and Road Initiative. The rise of China is of course inevitably affecting the development in Southeast Asia. However, one must also remember that Southeast Asia itself is also a dynamic and rapidly growing region.

Since the founding of ASEAN in 1967, the regional body has seen tremendous growth and development. The ten ASEAN Member States (AMS) and its population of 650 million have been enjoying a fast-growing \$3 trillion economy since 2018 (ASEAN Secretariat, n.d.). Collectively, it is the third-largest economy in Asia and ranks seventh in the world (ASEAN Secretariat). The region is also becoming ever-more strategic than ever due to its formidable advantage of sitting on vital sea routes, rich with natural resources. Conclusively, ASEAN and the Southeast Asia region is an emerging player on the international stage.

China needs ASEAN, and ASEAN needs China. However, the relationship between the two emerging global players has not always been smooth. For this reason, it is important to explore relations between ASEAN and China as it enters the 30th anniversary in 2021. For one, the relationship between the two will enter a higher plane as the ten ASEAN member states decide whether or not it will grant China an upgrade of its status from ‘strategic partner’ to ‘comprehensive strategic partner’ (ASEAN-China Centre, 2020). Such consideration and its outcome denote the importance of ongoing relations and future cooperation between ASEAN and China.

Second, China is and has been ASEAN’s largest trading partner since 2009. For the first three months of 2020, ASEAN was also China’s biggest trading partner – trade with the ten AMS even surpassed the volumes of the United States and European Union (Medina, 2020). On another front, people-to-people relations are also robust, with Chinese tourists visiting the region at a record number of arrivals nearing 60 million in 2018 (ASEAN Secretariat, 2020). Together, ASEAN and China have also adopted the Master Plan on ASEAN Connectivity (MPAC) 2025 to deepen cooperation in promoting ASEAN integration thorough people-to-people connectivity, institutional, and physical connectivity.

Against this backdrop, the Research and Analysis department of the Foreign Policy Community of Indonesia conducted the “ASEAN-China Survey 2020: Assessing the Present and Envisioning the Future of ASEAN-China Relations” online survey beginning from July 28, 2020 until September 23, 2020 to seek the views of ASEAN Member States nationals on the region’s relations with China. This survey successfully collected data from 1,000 respondents from all ASEAN member countries: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam.

In emphasizing the importance of current relations and future directions for cooperation, this survey targets two different respondent groups, classified into Elites and Students. Perspectives from Elites contribute to the review of ongoing relations based on the discourse among those who are involved in the field of public policy, directly or indirectly, through their influence, advocacy, activity, or occupation, as current stakeholders – Academia, Business Community, Civil Society, and Officials. It is also important to include the view of Students in the survey, noting that aspirations of this group serve as one of the future determinants of how relations between ASEAN and China should and would be conducted.

B. AIM

This survey study aims to provide evidence-based policy recommendations on the relationship between ASEAN and China by exploring perceptions and attitudes of the people of ASEAN from all relevant sectors. Consequently, it hopes to capture nuances within the public discourse on a comprehensive set of issues spanning from economic, social-cultural, and political-security, to identify gaps needed to be addressed and opportunities to be taken. It also attempts to provide insights on public attitudes on the existing cooperation initiatives and mechanisms to review current relations between ASEAN and China. In short, this survey aims to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse.

C. SURVEY METHODOLOGY

To ensure a reliable measure of perceptions on ASEAN-China cooperation in ASEAN countries and to provide evidence-based policy recommendations, this research employs a sampling strategy, data collection methodology, and data analysis techniques that are designed to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse.

This survey targeted five categories of respondents that are identified as important in shaping the public discourse as well as policy-making in ASEAN countries. The five categories of respondents are (1) Government officials; (2) Academia and Think Tanks; (3) Business Community; (4) Civil society; and (5) students. Categories (1), (2), (3) and (4) are also collectively classified into the "Elites" category. To allow comparisons, the FPCI team set a minimum target of the number of respondents for each category.

It must be noted that this survey is not a public opinion survey that required a strict number of respondents that reflects the exact demographic composition of the population and thus should not be compared or treated as such. Since the aim of this survey is to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse, it focuses more on how each category in each country are adequately represented rather than on how the samples are reflecting the demographic composition.

Based on this methodological construction, the FPCI team decided to put 1000 respondents as the target. As a benchmark, a similar research on the future of the Indo Pacific conducted by the US' think tank, the Center for Strategic and International Studies (CSIS) used 201 respondents (CSIS, 2020). To begin the process, the research team allocates a specific number of respondents for each category. Based on these allocations, the FPCI team has identified candidates in Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam.

After the respondents are identified, the data is collected through online survey template which was fielded electronically from July 28 to September 23, 2020. The use of an online template allowed for completion in 10 minutes or less, increasing the chance for response. After the data returned, researchers analyze and compare the results to formulate the findings and policy recommendations.

After data collection completed, the team analyzed the data and formulate the findings by identifying and comparing the patterns that appear from the data. To get a more comprehensive understanding on the data, the team also organized a closed and intensive Focus Group Discussion (FGD) which involve representatives from all respondent categories from different ASEAN Countries on September 30, 2020. In the FGD, the team presented the findings and asked feedbacks from the stakeholders. The analysis was calibrated and enriched based on the feedbacks. To provoke candid and honest comments, the FGD is conducted under the Chatham House Rule and thus this report does not provide the list of the participants and does not refer to their comments directly, but it gains and uses the insights from the participants.

D. RESPONDENTS PROFILE

Based on the database as well as through institutional cooperation with ASEAN-related institutions such as ASEAN Foundation, the team sent the online questionnaires to more than 2000 potential respondents from different categories and ASEAN countries. As expected and common in this type of research, not all forms are returned by the potential respondents. On September 23, 2020, the total number of responses reached the target of 1000. The composition of categories is also quite balanced, with 42% coming from Students and 58% coming from Elites. The composition within the Elite category is also quite well distributed. Thus, based on this composition, the research team is quite confident that the perceptions captured by the first phase of this survey is quite representative and is able to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse.

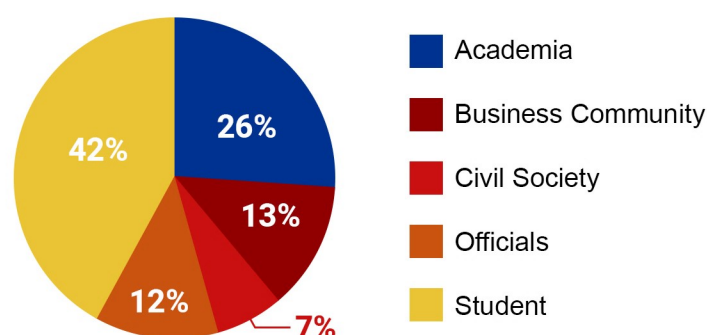


Chart 1: GENERAL - What is your affiliation?

The respondents are ASEAN nationals and coming from 10 ASEAN member countries. The distribution of the respondents is quite representative to adequately capture the diversity of perspectives on ASEAN-China cooperation.

Country	Respondent
 Brunei Darussalam	12
 Cambodia	42
 Indonesia	580
 Laos	18
 Malaysia	66
 Myanmar	65
 Philippine	77
 Singapore	51
 Thailand	43
 Vietnam	46
Total	1000

Table 1: Respondent's nationality

Categories	Respondent
Government Official	122
Academia	263
Business Community	125
Civil Society	68
Elite Group	578
Student Group	422

Table 2: Respondent's affiliation

Age Groups	Respondent
20 – 35	731
36 – 45	152
46 – 55	73
56 - above	44

Table 3: Respondent's age group

II. RESULTS AND ANALYSIS

A. INTRODUCTION

This chapter elaborates on the findings from the survey and what are the implications for ASEAN-China relations. To structure the analysis, the discussion will proceed into three parts. The first part looks at the **general perceptions** among ASEAN citizens towards ASEAN-China cooperation. The second part elaborates ASEAN public's perceptions and assessments towards the **existing** cooperation and relationship in various sectors, ranging from political-security, economy, to socio-cultural issues such as education and cooperation to combat COVID-19 impacts. The third part focuses on the perceptions, opinions, and hopes of the various segments of the ASEAN public on the **future relationship** between the two important partners.

B. GENERAL PERCEPTION: Strong Desire for Better Mutual Cooperation

In general, the survey finds that people in the region view their relationship with China as mutually beneficial. The majority of respondents agree with this statement and only 27% of them is in a disagreement spectrum (including 6% strongly disagree). Noting similarity in positive tones and attitudes, this view is shared both by Elites and Students.

However, it is interesting to note that among the Elite respondents, those in the Civil Society sector is quite an anomaly by showing a significant share of responses in the neutral option (38%). This is quite stark compared to Academia (25%), Officials (24%), and Business Community as the lowest (18%). The sentiment that the **benefits of ASEAN-China relationship** are not equally felt by all segments of society is testified by the significant share of those in the Students group and Civil Society group that are neutral or impartial when posed with the statement.

Such observation is confirmed during our roundtable discussion whereby representatives of the Officials group reasoned that due to the number of unpublicized meetings and dialogues on the state-level, information deficit in the mainstream media affects the knowledge on ASEAN-China endeavors for progress and cooperation. This may lead to respondents, especially Students and Civil Society, to have an unestablished stance on the issue or even tending to be more cautious overall in comparison to other groups.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
General	14%	32%	27%	21%	6%
Elites	15%	35%	25%	19%	6%
Officials	15%	34%	24%	21%	6%
Academia	14%	38%	25%	17%	6%
Business Community	22%	32%	18%	19%	9%
Civil Society	7%	28%	38%	25%	2%
Students	12%	29%	30%	23%	6%

Table 4: The current relationship between ASEAN and China benefit both ASEAN and China

On the opinion of **ASEAN-China Strategic Partnership contributing to regional peace, stability, development and prosperity**, the overall perspective of the region is positive. Nearly half of all the respondents *agree* or *strongly agree* with the partnership's contribution to regional peace, stability, development, and prosperity. While general opinion might be clouded with the fact that around a quarter of total respondents are neutral or have no opinion on the issue, only a minority of them (8%) *strongly disagree* with this statement.

There is a higher level of favorable attitude towards the partnership among Elites as compared to Students, half of all the former *agree* or *strongly agree* that the partnership results in positive contributions to the region.

Again, it is interesting to find that Civil Society tends to be neutral (33%) on this issue, significantly higher than the general respondents (26%). On the other hand, the Business Community has superb positive assessments towards the contributions that the ASEAN-China partnership provides at 23% choosing strongly agree as compared to the average share of 15%. Nevertheless, opinions that lean towards extreme pessimism are insignificant across all respondent groups, averaging slightly above 7%.

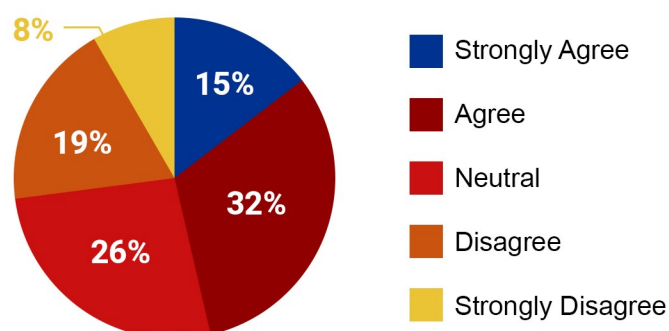


Chart 2: GENERAL - ASEAN-China Strategic Partnership contributes to regional peace, stability, development, and prosperity

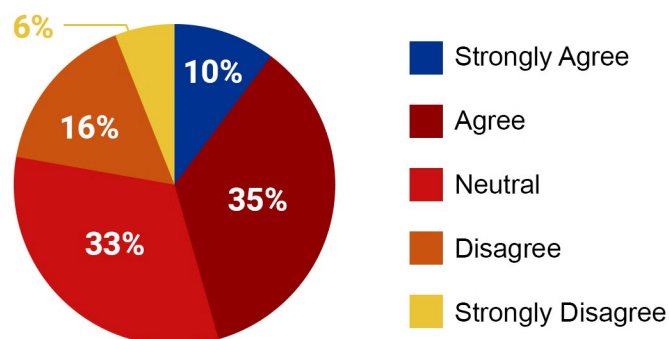


Chart 3: CIVIL SOCIETY - ASEAN-China Strategic Partnership contributes to regional peace, stability, development, and prosperity

On the statement of the **ASEAN-China relationship being on track**, a significant portion of respondents across all groups are impartial on the issue, averaging at 36% who are neutral. Again, Civil Society records the highest number of neutral respondents at 40%. Most prominent is the Business Community's large share in the agreement spectrum at 38% (strongly agree and agree). In comparison, Civil Society recorded a low of 22% along with Students at 25% within this spectrum. The rest of the respondents group averages at above 30%. Thus, the Business Community has the strongest level of respondents in the positive outlook while Civil Society has the least.

From the data, it can be concluded that Students find themselves to be more cautious on where the relationship between ASEAN and China is heading towards in comparison with Elites, despite a significant share of both Students (37%) and Elites (35%) neither agreeing nor disagreeing with this statement. The cautiousness might be due to the fact that mainstream media portrays and covers mainly controversies in

the agreement spectrum at 38% (strongly agree and agree). In comparison, Civil Society recorded a low of 22% along with Students at 25% within this spectrum. The rest of the respondents group averages at above 30%. Thus, the Business Community has the strongest level of respondents in the positive outlook while Civil Society has the least.

From the data, it can be concluded that Students find themselves to be more cautious on where the relationship between ASEAN and China is heading towards in comparison with Elites, despite a significant share of both Students (37%) and Elites (35%) neither agreeing nor disagreeing with this statement. The cautiousness might be due to the fact that mainstream media portrays and covers mainly controversies in regard to the ASEAN-China relationship, as affirmed by our Civil Society representatives during the survey's roundtable discussion. Further, benefits of the ASEAN-China relations for Students and Civil Society are fewer of any immediate nature due to the lack of direct interaction in comparison with the Business Community and Officials.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
General	7%	23%	36%	26%	8%
Elites	7%	26%	35%	24%	8%
Officials	7%	26%	35%	24%	8%
Academia	5%	27%	36%	24%	8%
Business Community	9%	29%	32%	21%	9%
Civil Society	4%	18%	40%	31%	7%
Students	6%	19%	37%	29%	9%

Table 5: The relationship between ASEAN and China is on the right track

When posed with a question of their enthusiasm **for deepening cooperation between ASEAN and China**, the majority of respondents recorded broadly positive attitudes. A vast majority of respondents (78%) are *not* within the unenthusiastic spectrum (*strongly disagree* and *disagree*). All sectors within the Elites group are keen to see deepening relations, with the highest degree of optimism recorded from Academia (60%), followed by Business Community (59%), Civil Society (57%), and Officials (55%). A majority share of Students respondents (51%) also echoes similar enthusiasm. This optimism must be seen as an important capital to move forward.

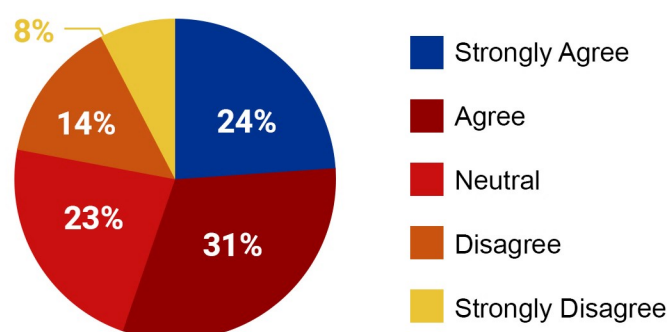


Chart 4: GENERAL – I am enthusiastic about deepening cooperation between ASEAN and China

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
General	24%	31%	23%	14%	8%
Elites	23%	35%	20%	15%	7%
Officials	16%	39%	22%	14%	9%
Academia	24%	36%	21%	14%	4%
Business Community	29%	30%	16%	16%	9%
Civil Society	22%	35%	22%	15%	6%
Students	24%	27%	26%	14%	9%

Table 6: I am enthusiastic about deepening cooperation between ASEAN and China

C. PRESENT SITUATION

Most Satisfactory Areas of ASEAN-China Cooperation and Mechanism

When asked to select five out of 28 areas of cooperation that are most satisfactory to them, all respondents seem to be most content with the economic sector and fields related to it. A whopping 57% of all respondents chose **Trade** as one area of cooperation that they are most satisfied with, this was followed by **Investment** (55%). The Business Community recorded the highest enthusiasm among all groups at 63% of respondents opting for the former and 66% for the latter (see annex).

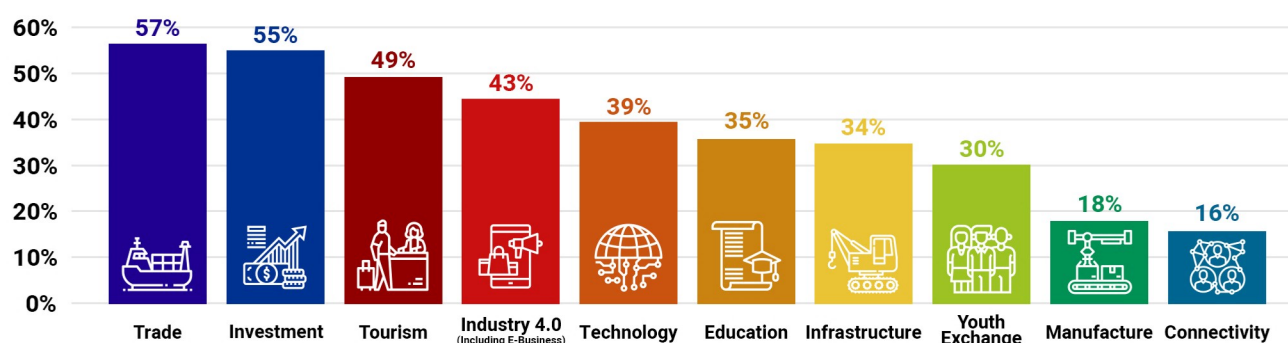


Chart 5: GENERAL – Top 10 areas of ASEAN-China cooperation that are MOST satisfactory

These choices have echoed supportive sentiments for economic-related cooperation expressed within the overall satisfaction rate on the **ASEAN-China Economic Minister Meeting**, which received a commendatory 82% satisfaction rate from all respondents. Indeed, this share of satisfied respondents is consistently found across all groups, hovering between 81% to 83%. The only notable exception is found with Civil Society, which records a slightly lower satisfied share of respondents at 77%. While this remains positive by a great margin, it again echoes findings that Civil Society has a cautious optimism in viewing the region's relationship with China. This interpretation can also be confirmed by the significant chunk of Civil Society respondents that sits within the *somewhat satisfied* option (43%).

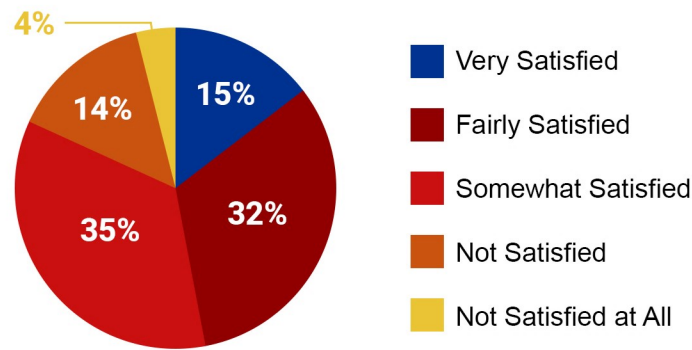


Chart 6: GENERAL – ASEAN-China Economy Minister Meeting

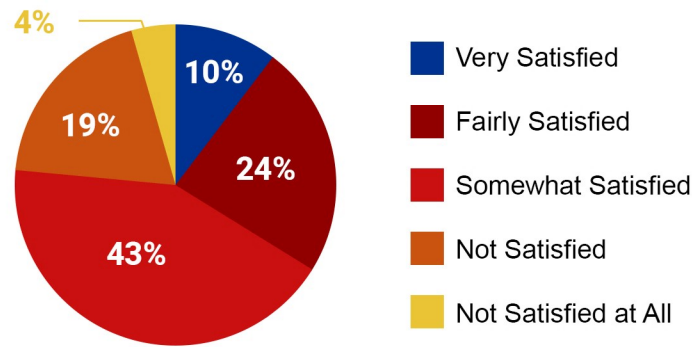


Chart 7: CIVIL SOCIETY – ASEAN-China Economy Minister Meeting

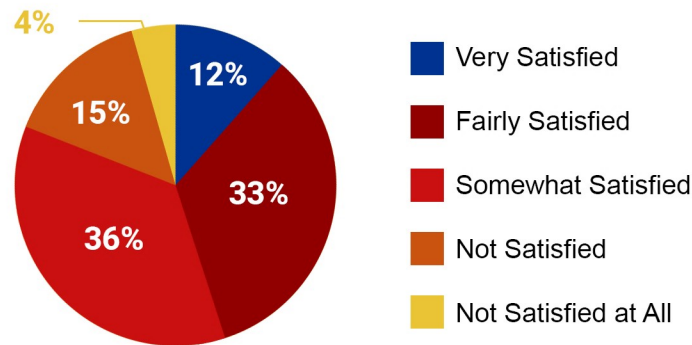


Chart 8: ELITES – ASEAN-China Economy Minister Meeting

Tourism ranks third as the most satisfactory out of the 28 provided areas of ASEAN-China cooperation at a response rate of 49%. This trend is consistent within the Elites group, although Students seem to rank it lower at number five. For Students, in Tourism's stead is **Industry 4.0 (including E-Business)** receiving a high 52% vote. In general, **Industry 4.0 (including E-Business)** and **Technology**, heavily linked with one another, sits at the fourth and fifth rank overall with records of 42% and 39% of all respondents choosing the two areas respectively.

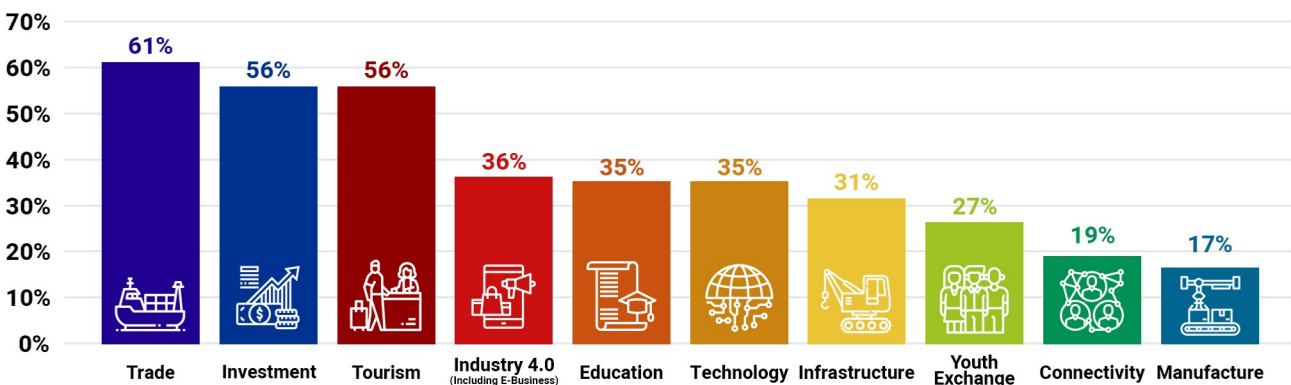


Chart 9: ELITES – Top 10 areas of ASEAN-China cooperation that are MOST satisfactory

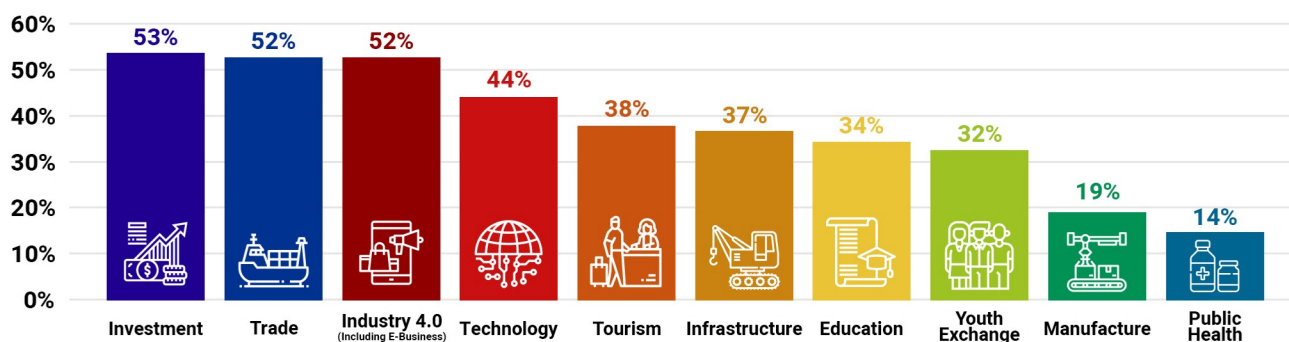


Chart 10: STUDENTS – Top 10 areas of ASEAN-China cooperation that are MOST satisfactory

The aforementioned five areas are the top choices of all respondents and this pattern of selection is consistently shared by students and all sectors of elites (Academia, Business Community, Civil Society, and Official). This further strengthens the observation that the positive economic contributions from the five areas are felt by all spheres in the general public.

A notable observation reveals that **Education** (35%) is also a strong contender for the top five areas most satisfactory to the region's nationals. It has a minute difference of only 4% in respondents' choice, trailing behind **Technology**. While economic cooperation is integral to the relationship between ASEAN and China, a people-to-people connection is also important. The finding that **Education** is among the top five ranks of most satisfactory areas, closely linked with **Youth Exchanges** (31%) that sits at the eighth, testifies that people-to-people exchange is viewed as an essential component by Southeast Asians.

Indeed, the observation is echoed by their perspective on the **ASEAN – China Young Leaders Scholarship (ACYLS)** program, which records exceptionally that 86% of all respondents are within the satisfaction spectrum. Students, who are one of the primary stakeholders and direct beneficiaries of this cooperation framework, recorded an overwhelming satisfaction rate of almost 90%, nearing 60% of whom are generally more than pleased (*very satisfied and fairly satisfied*).

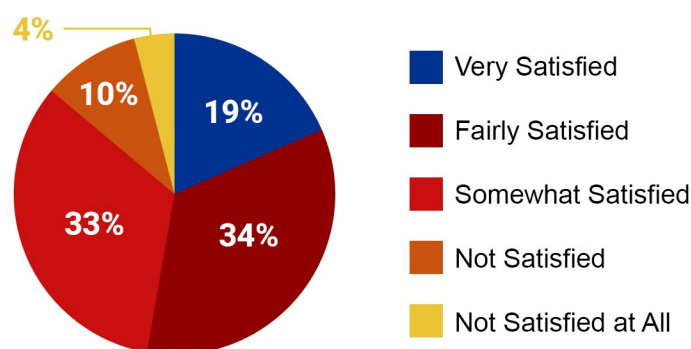


Chart 11: GENERAL – ASEAN-China Young Leaders Scholarship (ACYLS)

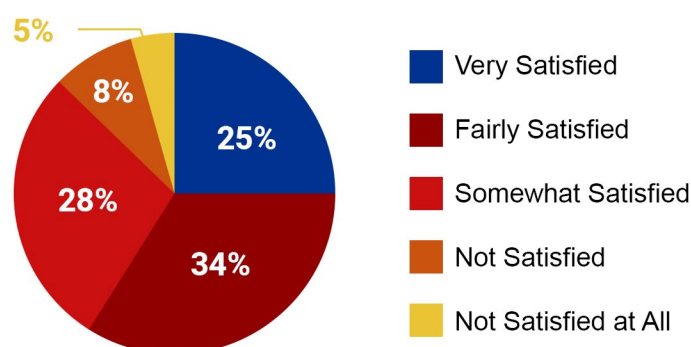


Chart 12: STUDENTS – ASEAN-China Young Leaders Scholarship (ACYLS)

The impact that these two areas of cooperation have on people-to-people connections is important. Indeed, such a statement is reaffirmed during the roundtable discussion by representatives across all respondent groups. Notably, there is a desire to foster stronger relations outside the bounds of the economy through enhanced partnership in the socio-cultural area, namely via people-to-people connections and its various frameworks of cooperation partnership.

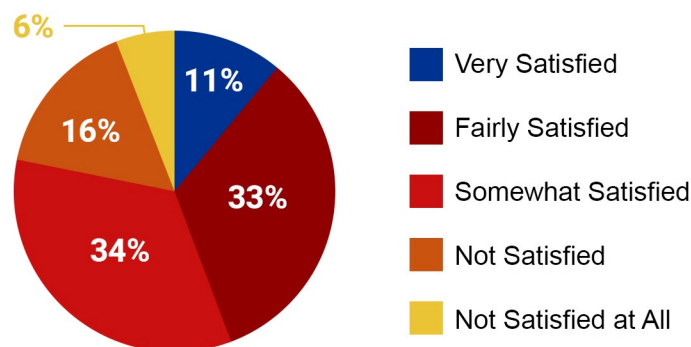


Chart 13: GENERAL – Overall ASEAN-China people to people exchanges and cooperation

Least Satisfactory Areas of ASEAN-China Cooperation and Mechanism

All respondents are also asked to identify areas that are least satisfactory to them. It is observed that there are more concerns overall on political-security matters than economic affairs. **Defense** is the most selected area of cooperation chosen by 44% of all respondents, followed by **Immigration and Borders** at 38%, **Policy Coordination** at 34%, **Cyber Security** at 33% and, **Environment** at 30%.

The five issues move up and down the ranks according to the Elites respondents. However, **Defense** consistently receives the highest share of votes among all groups of respondents as the least satisfactory area of cooperation.

These findings confirm that political-security matters are under higher scrutiny from Southeast Asian nationals. The issue of the South China Sea could not escape from the conversation, as it is very much entwined within the ASEAN public discourse – the majority of issues identified to be least satisfactory are very much interlinked with the territorial dispute. **Fisheries** – another issue implicit within the South China Sea dispute (e.g. illegal fishing) – also ranks within the top ten areas of cooperation that is least satisfactory based on votes from Officials (37%), Students (28%), Business Community (26%), Academia (21%) and Civil Society (21%) (see annex).

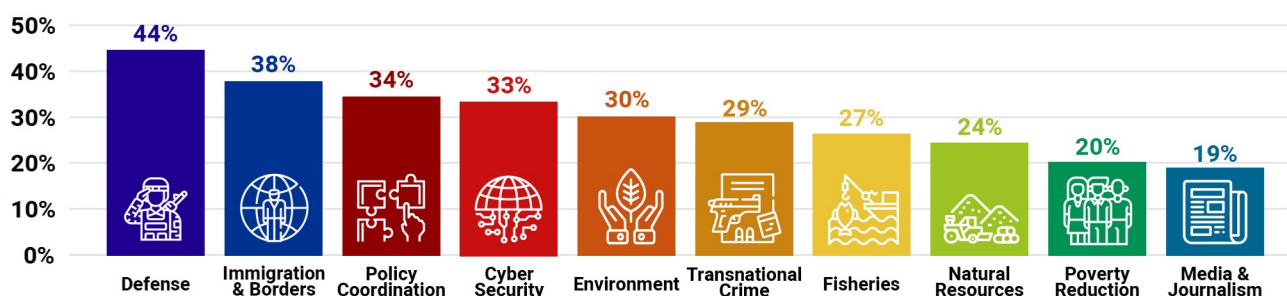


Chart 14: GENERAL – Top 10 areas of ASEAN-China cooperation that are LEAST satisfactory

Correlating with this issue, the survey also asked the ASEAN public satisfaction level on the **Consultations of Code of Conduct in the South China Sea (COC)**. The majority of respondents (55%) are within the satisfied range on the ongoing consultations of the Code of Conduct. At the same time, the share of those who are not satisfied is also nearing half of the total respondents.

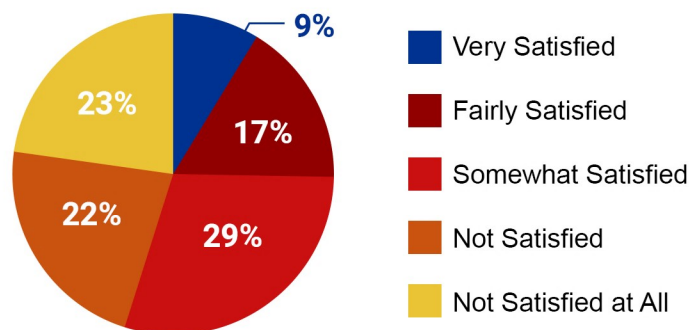


Chart 15: GENERAL – Consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC)

This observation should bear in mind, however, that there is an overall shared **confidence** within the public discourse that the **negotiations will eventually bring stability and cooperation in the disputed waters**. Results on public confidence reveal that 57% of total respondents are within the confident spectrum, consistent with the Elites group share of 57% and Students share of 56%. It should be noted that Civil Society is the least confident, notably only 1% of this group's respondent is *very confident* when posed with this question, in comparison to Academia (9%), Officials (8%), Students (8%), and Business Community (5%).

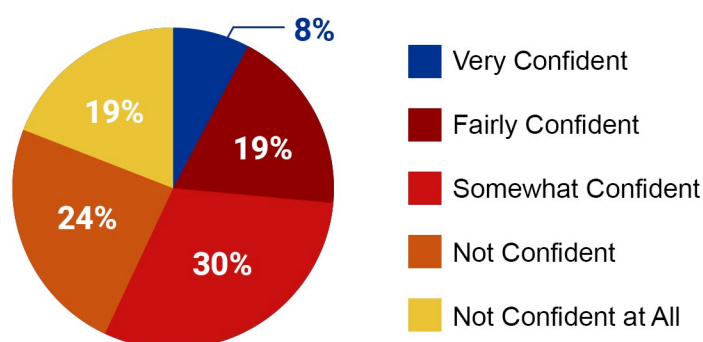


Chart 16: GENERAL – The presently negotiated Code of Conduct will bring stability and cooperation in the South China Sea

	Very Confident	Fairly Confident	Somewhat Confident	Not Confident	Not Confident at All
General	8%	19%	30%	24%	19%
Elites	7%	21%	29%	24%	19%
Officials	8%	16%	38%	18%	20%
Academia	9%	21%	25%	28%	17%
Business Community	5%	29%	25%	16%	25%
Civil Society	1%	13%	40%	31%	15%
Students	8%	16%	32%	25%	19%

Table 7: The presently negotiated Code of Conduct will bring stability and cooperation in the South China Sea

In rationalizing the Civil Society's low-level of confidence in political-security matters, it is noteworthy to find that the group places more importance on environmental issues. The group ranks **Natural Resources** (35%) at number three and **Environment** (34%) at number four as the least most satisfactory among other issues. To contextualize, no other respondent groups positions the two issues within the top five ranks of the least satisfactory areas of cooperation. This observation breaks the trend of political-security matters that exclusively dominate the charts evident from the responses of Academia, Business Community, Officials, and Students.

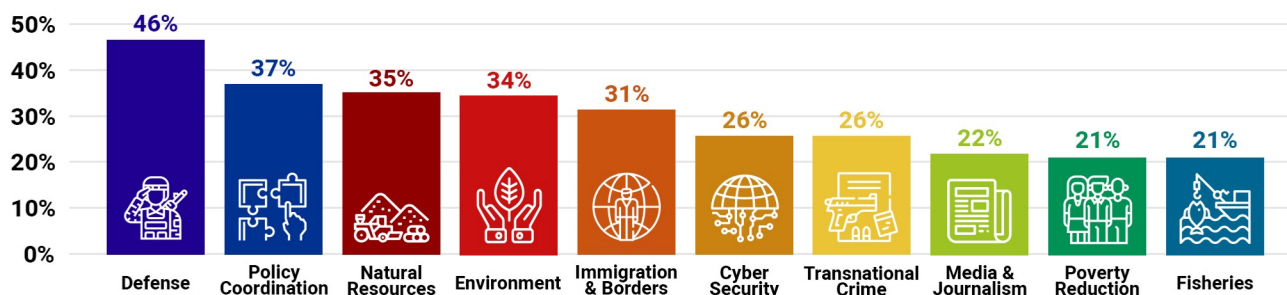


Chart 17: CIVIL SOCIETY – Top 10 areas of ASEAN-China cooperation that are LEAST satisfactory

Indeed, representatives of Civil Society, Officials, and Business Community in the roundtable discussion expressed a certain degree of concern pertaining to findings that the issues such as the environment, natural resources, human rights, and others across socio-cultural aisle received disproportionate attention from the Southeast Asian public. This pattern affirms the observation that ASEAN-China relationship is first and foremost associated with the optimism on economic aspect and concern on political-security matters. Socio-cultural issues have yet to deeply penetrate the public discourse.

Despite skepticism and cautiousness on political-security matters, the **ASEAN - China Foreign Ministers' Meeting**, which is responsible for political-security cooperation and external relations of ASEAN, scored one of the highest satisfaction rates among respondents. A vast majority of respondents' attitudes (83%) are within the satisfied spectrum (*very satisfied, fairly satisfied, somewhat satisfied*). This positive response attests that the ASEAN –China Ministerial Meeting has thus far carried out its duties accordingly in the eyes of Southeast Asian nationals. This observation also serves as an indication of the region's optimism and hopes that the ASEAN–China Ministerial Meeting can indeed be a platform to provide solutions, initiate collaboration, mitigate crises, and elevate cooperation on political-security issues, even those that still have room for improvements.

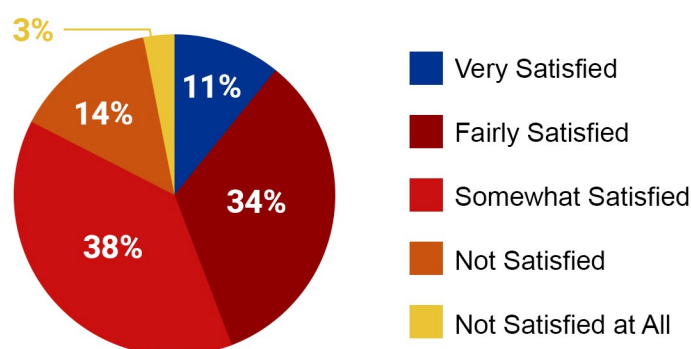


Chart 18: GENERAL – ASEAN-China Foreign Minister Meeting

Political Security Issue

In political security, ASEAN public is relatively confident in seeing **ASEAN-China political security cooperation** despite ASEAN public being cautious in political issues. The survey posts seven question related to the political – security issues.

The first question is about **China's respect on ASEAN centrality**, where 55% of total respondents are in confident spectrum (the confident spectrum ranges from *somewhat confident*, *fairly confident*, and *very confident*) with 26% of total respondents answered *very* and *fairly confident* and 29% answered *somewhat confident*. The Elites group (Academia, Officials, Business, and Civil Society) are relatively more confident, with 28% of them are answering very and fairly confident.

Among the five groups, Business Community comes as the most confident on China's respect on ASEAN centrality proven by 61% of Business Community stands in confident spectrum. This result shows Business Community trust positive China's political position towards ASEAN. However, despite the rest of the groups are answered in confident spectrum, most responses are in *somewhat confident*. This shows that the overall respondents are still cautious on that regard.

The survey also explores ASEAN public perspective **on how China respects national unity and territorial integrity of AMS (ASEAN Member States)** and about 47% answered in confident spectrum. The Elites group resonates the same answer with 48% in confident spectrum compared to the Students group with 45% in confident spectrum. Within the Elites group, only Official (52% in confident spectrum) and Business community (51% in confident spectrum) are relatively more confident with China on this matter. Yet, if we look further on both Official and Business' confident levels, the answer are still dominated in *somewhat confident*.

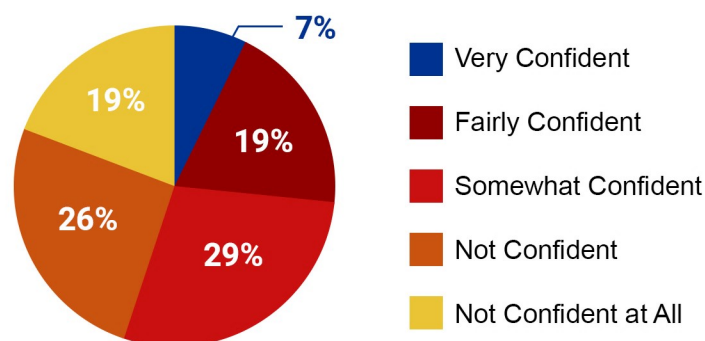


Chart 19: GENERAL – China's respect the centrality of ASEAN

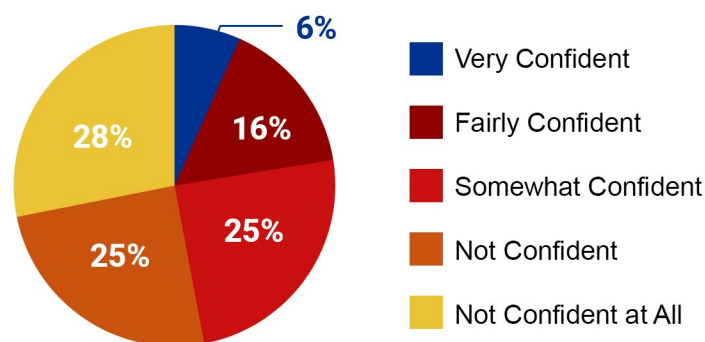


Chart 20: GENERAL – China respects the national unity and territorial integrity of ASEAN countries

Still in the political question, the survey explores ASEAN public confidence level **on China applying the principle of non-intervention to ASEAN countries**. The survey looked into the 5 groups of respondents (Officials, Academia, Business, Civil Society, and Students), their responses are in the confident spectrum with 61% having a positive outlook on China. Furthermore, the Students is proven to be more confident with 62% of them in confident spectrum. Civil Society comes last, recording 48% of respondents feeling confident on the issue.

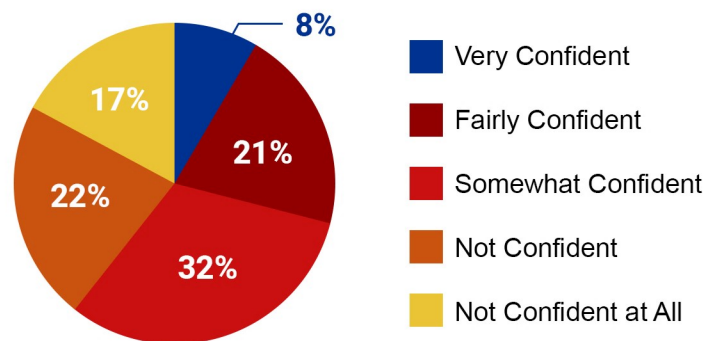


Chart 21: GENERAL – China applies the principle of non-intervention regarding the political development of ASEAN countries

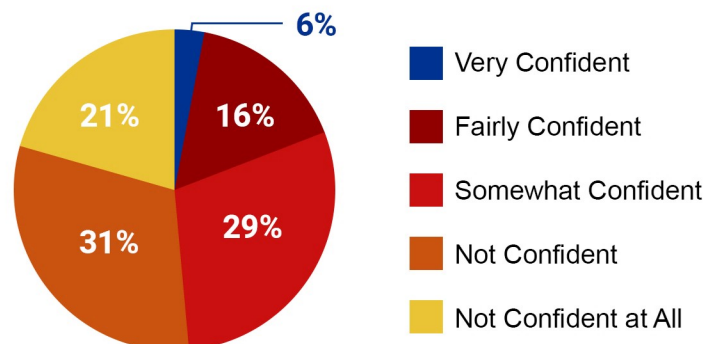


Chart 22: CIVIL SOCIETY – China applies the principle of non-intervention regarding the political development of ASEAN countries

On the geo-political question, the survey aims to disclose ASEAN public's confidence level on **the ASEAN and China cooperation in shaping regional architecture**. The survey conveyed that 75% of the total respondents are in the confident spectrum. Furthermore, looking into the five groups of respondents, Academia shares the highest proportion within that spectrum at 79% followed by Students at 78%, Official at 75%, Business community at 73%, and Civil Society at 64%. Interestingly, all groups share a commonality, whereby, the respondents in five groups have mostly stated their confident level in *somewhat confident* with around 32 – 36%. Looking into that commonalities, the ASEAN believes with our cooperation is productively shaping the regional architecture, however, there are still hesitation. Policy makers should prove the cooperation is continue to be a building block for a better regional architecture to the public.

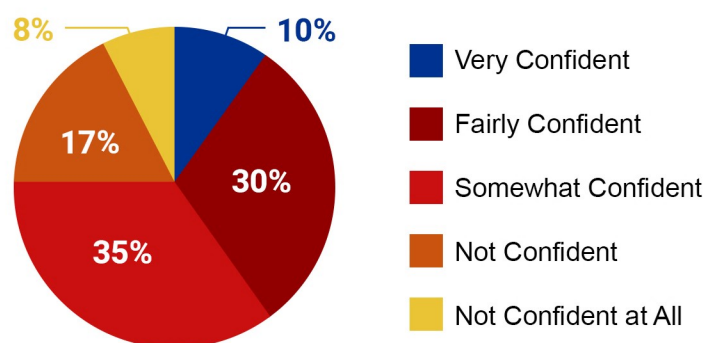


Chart 23: GENERAL – China and ASEAN are working closely together in shaping the region's architecture

As for today's US-China geopolitical rivalry and competition, the survey asked ASEAN public's confident level **on China's effort to defuse geopolitical rivalry**. The survey shows that the respondents have a relatively positive attitude with 53% of them being in confident spectrum. Even though, most of the public's confident level is in *somewhat confident* with 31%. Interestingly, Student shares the biggest proportion in the confident spectrum at 54% compared and Official only share 50% in the confident spectrum.

It means that ASEAN public has a faith on China's effort to defuse the geo-political rivalry, however, we cannot deny a fact that there are still hesitation showed by a relative high percentage in *somewhat confident*.

The last question on political matters is on how **China treats ASEAN as equal partners**. Respondents views positively that China has been treating ASEAN as an equal partner, 56% of them are in the confident spectrum. Students has higher level of confidence, with 59% of them in the spectrum compare while Elites respondents occupy 54%. Interestingly, Officials and Academia share relatively same level of confident with 54% and 53%.

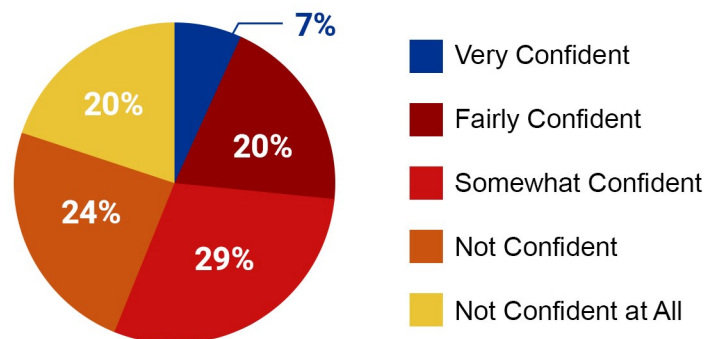


Chart 24: GENERAL – China treats ASEAN as equal partners

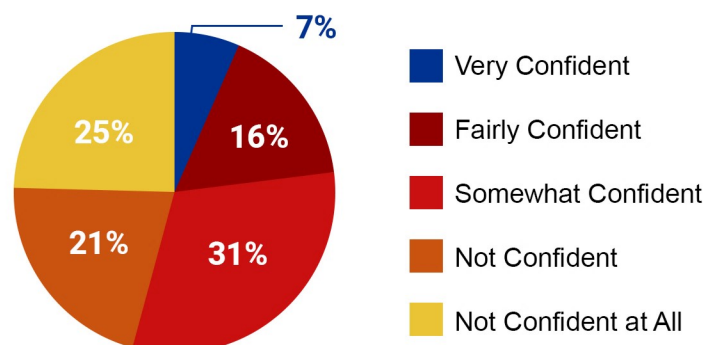


Chart 25: OFFICIALS – China treats ASEAN as equal partners

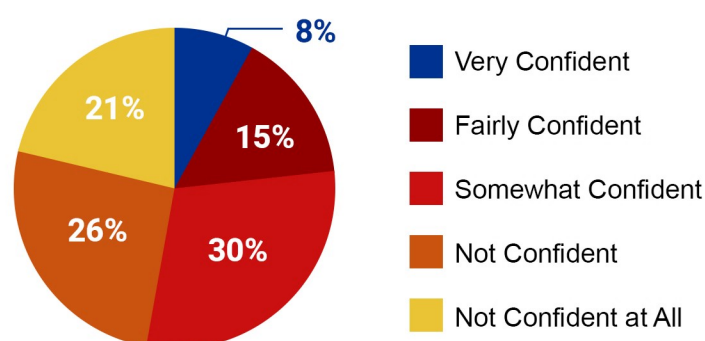


Chart 26: ACADEMIA – China treats ASEAN as equal partners

The aforementioned questions on political issue confirm and give us a candid picture of ASEAN people's feeling toward China's political commitment and position on ASEAN. They believe on China's good faith with ASEAN but with a relative feeling of wariness.

Economic Security and the Belt and Route Initiative

The survey also explores questions on ASEAN-China Economic-Security cooperation. The questions measure the level of confidence on the issue of economic projection and ongoing cooperation of the Belt and Road Initiative.

In the question of **ASEAN-China future economic relations**, 85% of respondents are in the confident spectrum, composing of 40% *fairly confident*, 24% *somewhat confident* and 21% *very confident*. Elites and Students also see it in a positive light, echoing the general share of confident spectrum. Subsequently, about 41% of Elites respondents answered *fairly confident*, 24% *somewhat confident*, and 21% *very confident*. Students show least confidence, with 37% of them responded *fairly confident* and 21% *very confident*.

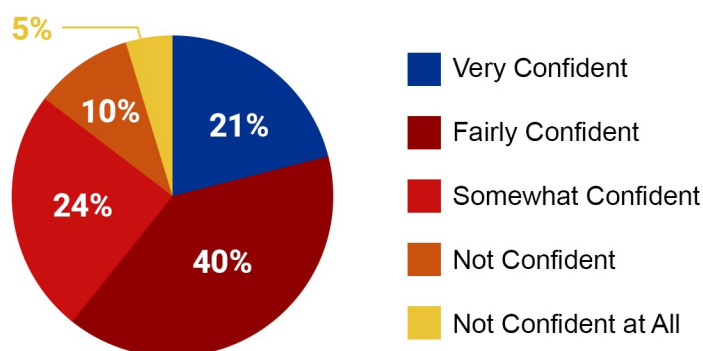


Chart 27: GENERAL – Future economic ties between China and ASEAN will steadily increase

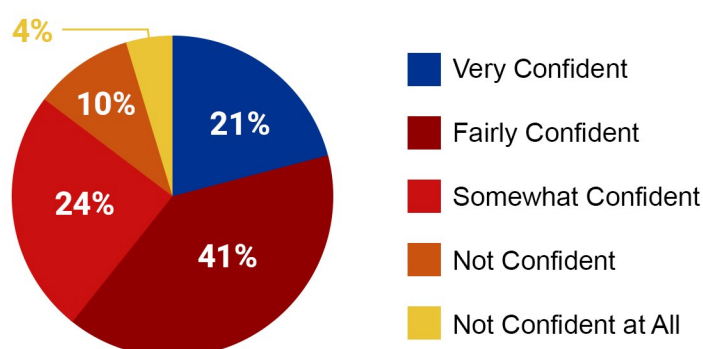


Chart 28: ELITES – Future economic ties between China and ASEAN will steadily increase

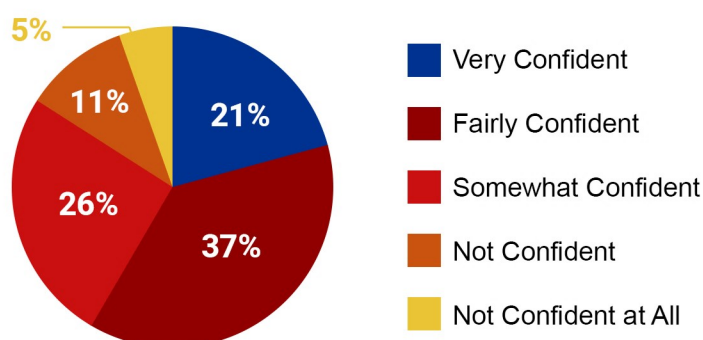


Chart 29: STUDENTS – Future economic ties between China and ASEAN will steadily increase

Civil society seems to be cautious with ASEAN –China future economic ties, even though the answer is relatively positive with 84% in the confident spectrum, the answers are dominated in *somewhat confident* level with 34%. Policymakers from ASEAN and China should work more to convince the ASEAN civil society community of the bright prospect of future economic cooperation.

Belt and Road initiative (BRI) has been a part of ASEAN-China cooperation for years. It can also be said as one of China's most major collaboration project with ASEAN countries. Looking into the significance and implication of the project to the region's political and social-economic of ASEAN countries, the survey posed a BRI question to the ASEAN public.

The survey starts the question with **BRI as a key feature of ASEAN-China cooperation**. In general, respondents see positively with 69% of them belonging in the confident spectrum. However, the responses are still dominated in the *somewhat confident* option (31%). The highest level of confidence is shared by Business Community (72%), Academia (70%), Students (70%), and Officials (66%). Once again, Civil Society shows the least confidence level, with only 67 % being in the confident spectrum and shares the largest portion for *somewhat confident* with 43%. This figure shows that Civil society is more cautious with BRI cooperation would bring win-win for ASEAN and China.

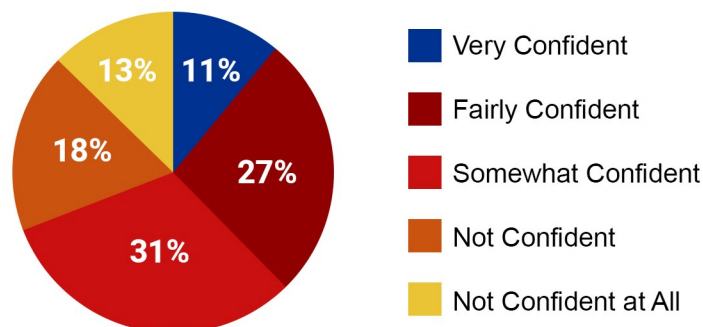


Chart 30: GENERAL – The Belt and Road Initiative by China has become a key feature of ASEAN-China win-win cooperation

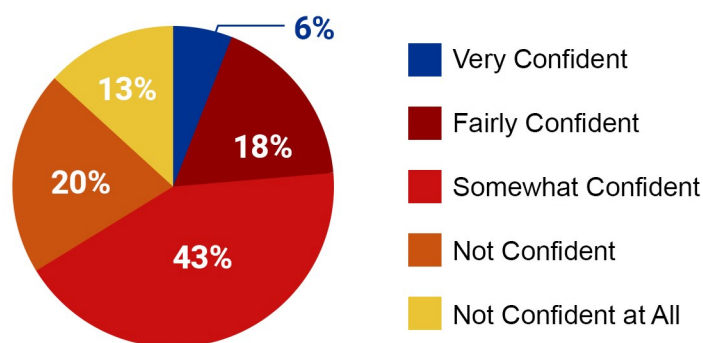


Chart 31: CIVIL SOCIETY – The Belt and Road Initiative by China has become a key feature of ASEAN-China win-win cooperation

Subsequently, the survey asked about **the continuation and enhancement of the BRI**. In general, respondents view this prospect positively in the important spectrum (80%) to continue and enhance the BRI. This positive result is also reflected in the share of respondents in the important spectrum, Elites at 82%, Academia at 86% and, Officials at 75%.

However, the ASEAN public seems to be cautious with BRI, proven by how each group shares a significant percentage for *somewhat important*, 34% of Elites, 36% of Academia, and 30% of Business Community.

	Very Important	Fairly Important	Somewhat Important	Not Important	Not at All Important
General	17%	28%	35%	13%	7%
Elites	19%	29%	34%	13%	5%
Officials	11%	32%	32%	19%	6%
Academia	22%	28%	36%	9%	5%
Business Community	23%	29%	30%	10%	8%
Civil Society	12%	28%	40%	19%	1%
Students	15%	28%	35%	14%	8%

Table 8: The continuation and enhancement of China's Belt and Road Initiative

The Belt and Road Initiative has ongoing projects in many ASEAN countries like the High-Speed Railway Jakarta-Bandung in Indonesia, East Coast Rail Link in Malaysia, and many more. However, many of it has to be temporarily halted due to the COVID-19 pandemic and also many we see the public has a relative high level of cautiousness on the BRI. For these reasons, the survey asked respondents on **what needs to be reviewed in the BRI project in Southeast Asia**, before the many of the projects resume.

In general, 48% of the respondents believe that there needs to be a review of the long-term economic benefits for the host country and the involvement of business and civil society organizations. Trailing behind, around 31% of them believe that project financing/sharing mechanism and debt sustainability should also be reviewed. Interestingly, Elites rank the issue of Chinese labor employment in BRI projects at number three, with only around 32% of respondents favoring its review.

	Project financing /sharing mechanism and debt sustainability	Numbers of prospective project	The employment of Chinese and local labor	Long term economic benefit for host country and business and civil society organization
General	31%	7%	14%	48%
Elites	14%	8%	32%	46%
Officials	35%	5%	16%	44%
Academia	33%	8%	13%	46%
Business Community	28%	9%	17%	46%
Civil Society	32%	9%	7%	52%
Students	29%	7%	14%	50%

Table 9: What aspects of the BRI need to be reviewed in the post COVID-19 world order to promote the recovery of ASEAN economies?

Education and Language

The relationship between countries can be profoundly built when people to people connection are robust and close, education and language are important factors of it. The survey asked respondents to share their perspective on **Chinese higher education and language**.

The result shows that China is not yet popular higher education destination among the ASEAN public. Only 18% of total respondents seeks to pursue higher education in China, while 42% are in consideration of it and 40% rejecting the prospect. Only 19% of Students respondents show their interest and Academia shows only 20% get interested for pursuing Chinese higher education.

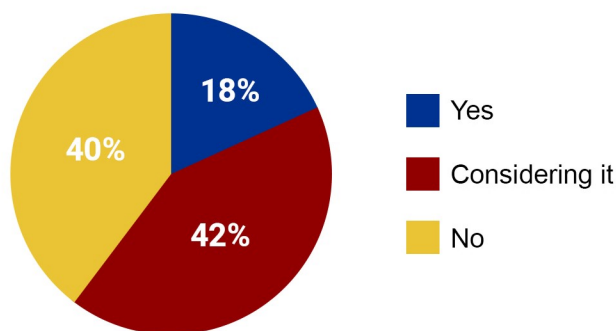


Chart 32: GENERAL – Is China your preference for higher education?

However, the ASEAN public believes that **Chinese language proficiency is important**. 70% of total respondents regarded the Chinese language as important, with a notable 78% of Academia affirming this view. More than half of Business Community (56%) said that Chinese language is *very* and *fairly important*.

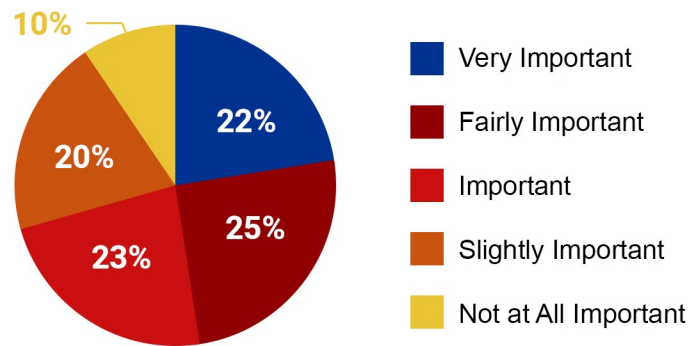


Chart 33: GENERAL – How do you see the importance of Chinese language proficiency for ASEAN people?

In 2018, Indonesia, Vietnam, Thailand, and Laos alone contribute more or less 79,000 international students' enrollment in Chinese universities (Statista, 2020). Thousands of ASEAN nationals who graduated from Chinese universities have gone back to their home country to pursue professional endeavors. Therefore, it is important to explore ASEAN public's perspective on **graduate contribution to their home country**.

In general, all respondents and groups responded quite equally among the four options given: *the graduates significantly contribute towards market and connectivity; the graduates contribute to product and technology innovation; the graduates helped ASEAN countries have a better understanding towards China; and the graduates gave no significant contribution*.

In the big picture, 30% of all respondents said that graduates from Chinese universities made their country to have a better understanding towards China. Elites collectively (32%) also shares this view. Students are generally divided by 26% said that *graduates contribute to the product and technology innovation in the origin country and better understanding towards China*.

	The graduates contribute significantly to market connectivity between my country and China	The graduates contribute to the product and technology innovation in my country	The graduates help my country have a better understanding towards China in overall	There is no significant contribution from the graduates
General	23%	20%	30%	27%
Elites	23%	17%	32%	28%
Officials	25%	15%	32%	28%
Academia	23%	13%	38%	26%
Business Community	22%	22%	26%	30%
Civil Society	21%	23%	22%	34%
Students	23%	26%	26%	25%

Table 10: How do you see Chinese higher education system contribute towards your country?

Slightly differing in Business Community is also divided by 22% of business respondents thinks that graduates contribute to market and connectivity and contribute for technology development. Most of the Business Community believes that the graduates have significant contribution to the home country with 30%.

All in all, Chinese higher education is somewhat remaining unpopular and the contribution of Chinese graduates is viewed relatively minimum. However, the Chinese language is viewed as profoundly important in the eyes of ASEAN nationals.

COVID-19

China and ASEAN have been working closely and proactively during the early stages of the outbreak to mitigate the pandemic crisis. A series of meetings, from the ministerial level to the technical level, had been conducted to bring concrete solutions towards the fight against COVID-19.

Looking into the close relationship and cooperation in the government level, the survey explores the question on **how the ASEAN public sees the COVID-19 support given by China**. In general, the responses are vastly positive, 79% of total respondents are in the confident spectrum. The Academia and Students are confirming the public's perspective with the same result of 81% of respondents answering in the confident spectrum and both share more than 50% answering very confident and fairly confident. In Elites, confidence level is all above 75%. An exception is Civil Society, who yet again occupies the group with least confidence level, 71% of whom is in the confidence spectrum.

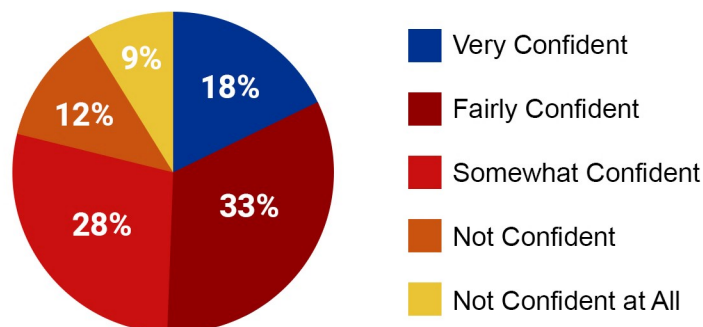


Chart 34: GENERAL – China supports ASEAN efforts regarding COVID-19

The results indicate that the cooperation is felt by the grassroots communities and is effectively supporting ASEAN's effort in addressing COVID-19 pandemic.

D. TOWARDS THE FUTURE

Geo-political shift: US and China Rivalry

Today's geopolitical rivalry and competition between the US and China are, in many and all areas (i.e. politics, economy, trade, military, technology, etc.) impacting ASEAN and the Southeast Asia region. The ASEAN-China survey sees this as an important question to be asked; candid perspectives of ASEAN grassroots communities are needed to navigate this issue.

The survey started with a question of **“How should ASEAN react to the downward spiraling relations between China and the US?”** the survey revealed that 58% of total respondents is in favor for *“ASEAN mediates US-China through ASEAN led regional mechanism.”* and trailing behind, 33% of responses are in favor to stay neutral. Elites (58%) and Students (58%) resonate the same view and surprisingly, Business Community and Officials share the highest favor (61%) for ASEAN to mediate the US and China.

The result explains that the ASEAN public sees the important role of ASEAN to play a more strategic role to mediate and ease tensions between the two big powers through ASEAN-led regional mechanism.

Notable to understand that the result also shows us the notion of ASEAN centrality has been grass rooted to the ASEAN public. This short conclusion is confirmed during the ASEAN-China Survey roundtable discussion which the discussion agreed that ASEAN should continue to hold and promote its centrality.

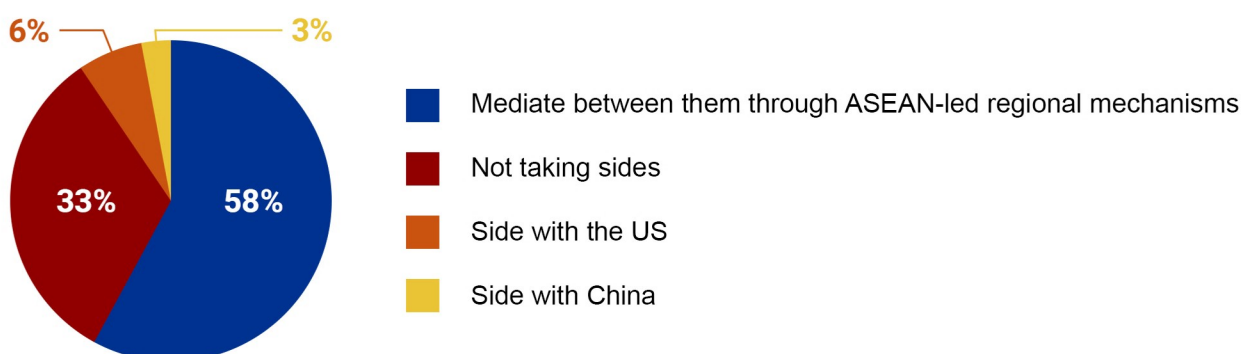


Chart 35: GENERAL – How should ASEAN react to the downward spiraling relations between China and the US?

Continuing on the topic of the US-China, the survey asked about **the impact of US-China competition towards ASEAN regionalism post COVID-19**. ASEAN public believes that *“the competition will benefit ASEAN countries in terms of economy and investment”* (37%) and *“the competition will be ASEAN’s bottle neck on its regional integration and development”* (33%). Only 16% of total respondents believe that *“the US-China competition will increasingly disunite ASEAN”* and a minor share of 14% of total respondents thinks that *“the US-China competition will spark faster ASEAN regional integration.”*

The Elites and Students resonate the same opinion that the US and China competition will benefit ASEAN countries with 34% and 41%. Within the Elites, Official, Students, and Business Community share the largest optimism that ASEAN will receive benefit over the competition by 40% and 45%. This unique perspective is confirmed during the ASEAN – China roundtable discussion, in which the forum discussed that the competition between the US and China is an opportunity.

However, Academia and Civil Society have a different opinion with the rest of the groups. They believe that the competition will be ASEAN’s bottle neck on its regional integration and development supported by 41% of Academia said so and 43% from Civil Society.

	The relationship will benefit ASEAN countries in terms of economy and investment	The relationship sparks faster ASEAN regional integration	The relationship will be ASEAN’s bottle neck on its regional integration and development	The relationship may increasingly disunite ASEAN
General	37%	14%	33%	16%
Elites	34%	14%	35%	17%
Officials	45%	11%	31%	12%
Academia	25%	14%	41%	20%
Business Community	40%	17%	23%	20%
Civil Society	38%	10%	43%	9%
Students	41%	14%	30%	15%

Table 11: How do you see the state of relationship between China and the US impacting ASEAN regionalism in the post COVID-19 world?

This question of the US-China relationship impact toward ASEAN shows a picture of opinion division among the Officials and Business community versus Academia and Civil Society groups. This interesting pattern is concluded by ASEAN-China roundtable discussion that ASEAN public has a feeling of cautiously optimism towards China as well as China rivalry with the US.

The survey also explores public perspectives on the **strategic step that ASEAN can consider in responding to the US-China competition**. The respondent is again divided in their views, with 35% of total respondents choosing *“further strengthen ASEAN’s regional integration”* and 36% for *“ASEAN should ensure a balanced approach of partnership to both US and China”*.

Interestingly, only 23% of all respondents see efforts to ease tensions with regional-led mechanisms as a strategic step for ASEAN. This is very much contradictory to the previous US-China question: *“How should ASEAN react to the downward spiraling relations between US and China,”* which recorded 58% of respondents choosing the option *“ASEAN mediates US and China with regional led mechanism.”* It shows that public discourse and opinion are often times inconsistent and vacillating when dealing with the issue of US and China.

The most strategic step to take is to strengthen ASEAN’s regional integration, according to 41% of Officials. They (34%) also think that *“ensuring balanced approach to both US and China”* is the next step forward. This view is echoed by Academia, with 35% favoring strengthening regional integration, 37% advocating for a balanced approach, and 24% regarding regional mechanism as the way to ease tensions.

	Further strengthen ASEAN's regional integration	Try to ease tension by promoting progressive dialogue between the US and China through ASEAN-led regional mechanisms	Ensure a balanced approach of partnership both with the US and China respectively in appropriate areas of cooperation	Side with country which best provides the interest for ASEAN
General	35%	23%	36%	6%
Elites	36%	22%	37%	5%
Officials	41%	18%	34%	7%
Academia	35%	24%	37%	4%
Business Community	37%	18%	38%	7%
Civil Society	31%	28%	38%	3%
Students	33%	25%	36%	6%

Table 12: What is the most important strategic step that ASEAN can do in facing strategic competition between the US and China?

Strategic issues

In the survey, questions about strategic issues were also raised to respondents. These questions aim to see how ASEAN public prioritizes strategic issues and what should be addressed by policymakers.

The first issue raised is on the **importance of equitable access to vaccines** for ASEAN people. Evidently, 81% of all respondents think this is *very* and *fairly important*. The same percentages resonate in the rest of the other respondent groups.

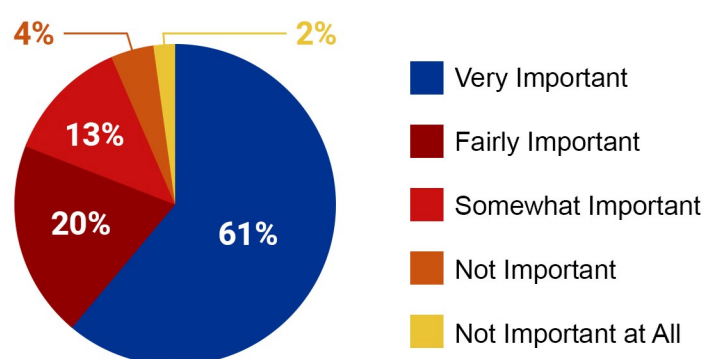


Chart 36: GENERAL – Equitable access to vaccines of COVID-19 for ASEAN people

The ASEAN public also regards the **importance in revitalizing the manufacturing sector in the ASEAN public** as *very* and *fairly important* (63%). This issue turns out to be in the important spectrum among Students (89%), Academia (91%), Business Community (90%), and Civil Society (90%).

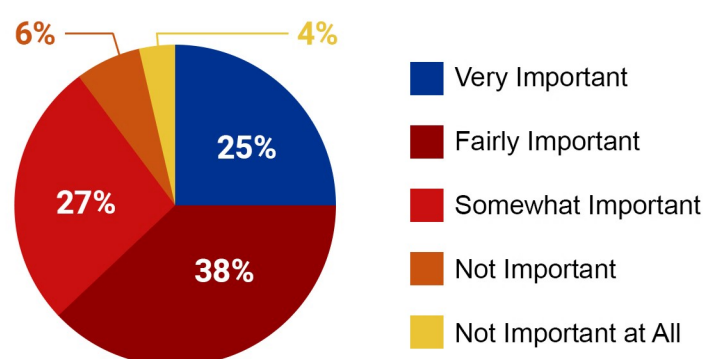


Chart 37: GENERAL – China's support to revitalize the manufacturing sector in ASEAN

Another issue addressed in the survey is multilateralism, which is explored by posing the question of **ASEAN-China cooperation to strengthen multilateralism**.

The result of the survey shows that the vast majority of all respondents (89%) stands within the important spectrum, with 64% of them saying *very* and *fairly important* and only 25% thinks that it is *somewhat important*.

Elites (91%) show slightly higher positive attitude on this cooperation than Students (88%). It reflects the region's hope and faith that cooperation between ASEAN-China can set an example of effective multilateralism to the rest of the world.

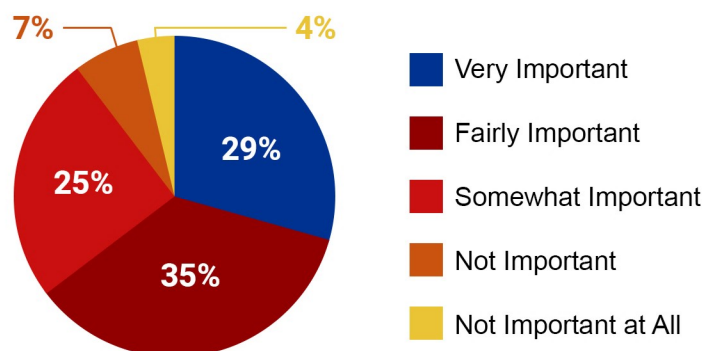


Chart 38: GENERAL – ASEAN-China cooperation to strengthen multilateralism

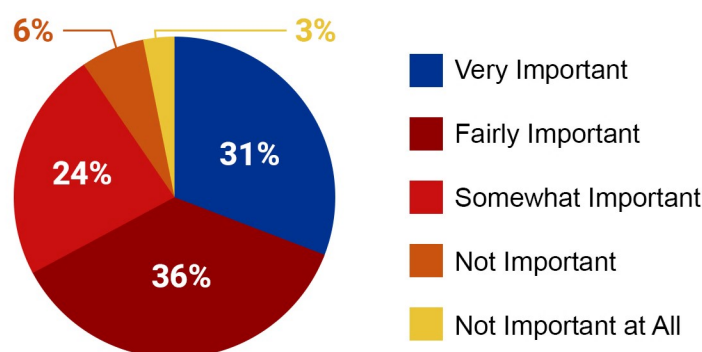


Chart 39: ELITES – ASEAN-China cooperation to strengthen multilateralism

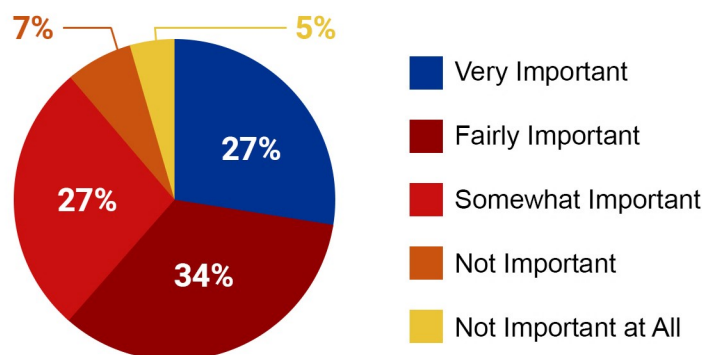


Chart 40: STUDENTS – ASEAN-China cooperation to strengthen multilateralism

On the question posing the importance of **China as the solution provider to ASEAN challenges**, the ASEAN public responded to this question positively with 77% of total respondents in the important spectrum. 44% of respondent from five groups are consider it *very* and *fairly important* to see China as a solution provider. Business Community stands the highest share with 82% answered in important spectrum.

However, zooming in into the important spectrum, all the five groups' answer is still dominantly in *somewhat important*. This shows that the ASEAN public is still relatively cautious with the idea, yet, it also shows that the ASEAN public does regard China as a solution provider.

	Very Important	Fairly Important	Somewhat Important	Not Important	Not at All Important
General	13%	31%	33%	16%	7%
Elites	12%	32%	36%	14%	6%
Officials	8%	31%	39%	15%	7%
Academia	15%	30%	35%	14%	6%
Business Community	18%	34%	30%	11%	7%
Civil Society	3%	34%	40%	17%	6%
Students	14%	30%	30%	18%	8%

Table 13: China is increasingly becoming one of the solution providers to the challenges faced by ASEAN

The survey also puts concerns on the future challenges in the post COVID-19 world through the question of **what would be the top challenge for ASEAN-China to overcome after the pandemic.**

The results show that 36% of overall groups respondents believe that *economic rebound and regional supply chain* is the number one challenge that needs to be addressed. It is followed by 23% voting for *unsettled territorial disputes* and 22% believing that *COVID-19 Vaccine distribution and access are the top challenges*. Appealingly, the US-China competition in the region stands as the last challenge that ASEAN-China should overcome with only 19% answered that.

Both Elites and Students agree that economic rebound is the most important. However, difference in perspective lies on the second top challenge, whereby the former chose *unsettled territorial disputes* and the latter opt for the *COVID-19 vaccine distribution and access*.

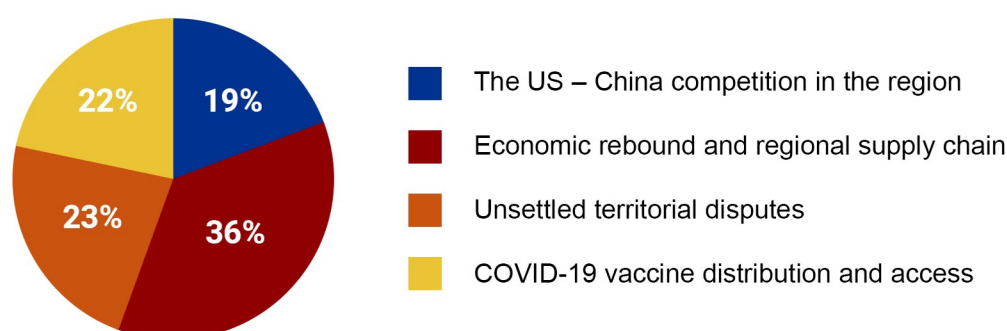


Chart 41: GENERAL – What would be the top challenge that must be overcome by ASEAN in ASEAN-China relationship post COVID-19?

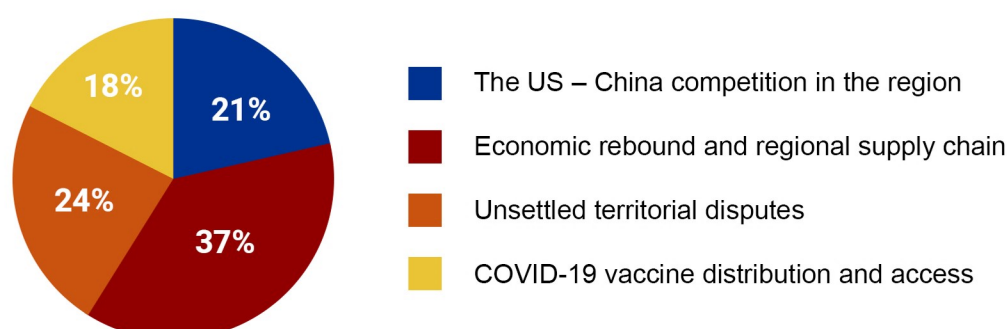


Chart 42: ELITES – What would be the top challenge that must be overcome by ASEAN in ASEAN-China relationship post COVID-19?

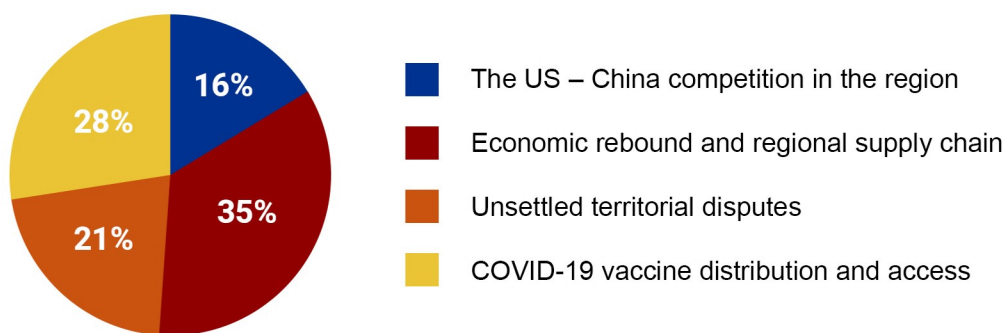


Chart 43: STUDENTS – What would be the top challenge that must be overcome by ASEAN in ASEAN-China relationship post COVID-19?

III. CONCLUSION AND POLICY RECOMMENDATION

A. CONCLUSION

In the 21st Century, the relationship between ASEAN and China is an important factor that will shape the situation in Southeast Asia and beyond, affecting the ability of ASEAN Countries to continue their promising growth. As two emerging global players and engines of global growth, the cooperation between the two entities is crucial for both parties.

The survey finds that most people in the region, represented by Elites and Students respondents, view its relationship with China in a positive manner. In general, the relationship is viewed as mutually beneficial and contributing positively towards the peace, stability and progress in the region. However, it must be acknowledged that some skepticism remains lingering in the minds of some segments of ASEAN people and this skepticism must be considered to foster a better and stronger relationship between ASEAN and China. Despite some skepticisms, the survey also finds that there is a strong desire to create a more effective cooperation between the two and many of the respondents are eager to contribute to such initiative.

If one looks deeper, there is a pattern that positive assessments are overwhelmingly visible in the issue of economic cooperation. ASEAN people tend to welcome stronger economic cooperation such as in the BRI initiative, but also view that the cooperation need to be continuously reassessed in order to optimally benefit both partners. On the other hand, as expected, the degree of skepticism is relatively higher in the political-security dimension of the relationship. There is a concern on the state of ASEAN Centrality and how interaction with China would affect ASEAN countries' sovereignty. Such concern is understandable and must be taken into account to ensure a more cordial relationship between the two partners.

The results of this survey also confirm that the people of ASEAN measure the benefit of the cooperation between ASEAN and China in the lens of their own countries' national interest. Furthermore, rather than seeing the relationship between ASEAN and China as a single phenomenon, the respondents tend to make compartmentalization between different issues. Thus, it could be safely argued that ASEAN public perceptions on China is largely depended on specific issues being asked. Rather than seeing China in a black-and-white manner, the people of ASEAN try to strategically identify the specific cost of benefit of cooperation in each sector.

The survey also shows that most respondents put more attention on political-security and economic dimension of the relationship compared to socio-cultural issues. While the questionnaire accommodates socio-cultural issues and cooperation programs in its alternative options, most respondents prefer to pick political-security issues (on the less optimistic part) and economic issues (on the more optimistic part). Improvements and innovations are needed in all dimensions of cooperation, but we must consider the different characteristics of each sectors.

It must also be noted that there is a diversity of opinion among ASEAN people. While both Elites and Students respondents display positive assessments and desire a stronger relationship between ASEAN and China, it is interesting to note that Students are sometimes being slightly more cautious. However, Students overwhelmingly put positive assessments on programs that directly benefit them such as the ASEAN – China Young Leaders Scholarship (ACYLS). Among the Elites respondents, it is also important that stakeholders that are directly involved in the process (Government Officials and Business actors) are more optimistic. While in general the number of positive assessments is still dominant, Civil Society displays a higher degree of skepticism towards the benefit of the ASEAN-China relations.

The cooperation between ASEAN and China is also influenced by the interaction between Great Powers: the US and China. In this regard, we can characterize the general opinion on this issue as “cautiously optimistic.” An interesting pattern was also observed: respondents from government official and business community backgrounds tend to be optimistic, while Academia and Civil Society tend to be more cautious.

One important insight is that this survey result should make us less worried about the arrival of Cold War 2.0 between the US and China. Rather than divided by their allegiance to one great power, most respondents across all categories strongly think that ASEAN must not side with one side. They even view that ASEAN must ‘step up’ and proactively mediate the relationship between the two great powers, since uncontrolled great power rivalry would negatively affect the region. In this context, ASEAN centrality is viewed as important. The result also shows that the people of ASEAN values their countries’ independent foreign policy, and even those who are often characterized by observers as close allies of one great power are continuously trying to maintain their independence in various issues.

B. RECOMMENDATION

Based on the conclusions, the research team formulated several policy recommendations to create a better and more mutually beneficial ASEAN-China relationship:

First, it is important to optimize cooperation around sectors where positive and optimistic assessments are popular such as in the economic and socio-cultural sectors, while continue to improve the trust-building process in the sensitive issues in political-security dimension. COVID-19 cooperation provides such an opportunity to prove that the relationship between ASEAN and China is crucial for both partners. For China, focusing on economic cooperation by seriously considering the concerns and priorities of ASEAN countries is crucial to increase the acceptance of ASEAN countries towards China’s increasing regional and global role. For ASEAN countries especially during the COVID-19 crisis, a focus on economic cooperation would bolster China’s contribution to the make-or-break situation presently faced by ASEAN’s economy. This is also consistent with the finding that the respondents see economic recovery/rebound as the priority for future cooperation. This must be coupled with efforts to develop stronger trust and mutual respect in sensitive and difficult issues in the political-security dimension, such as in the issue of South China Sea.

Second, the cooperation must continue to be developed under ASEAN mechanism and ASEAN centrality must be preserved. The relatively higher skepticism in the political-security sector is understandable, since it is normal for countries to be anxious about the rise of a powerful neighbor. To ease and manage such anxieties, it is important to ensure that all players, the powerful and the less powerful, respect the game in town and not trying to replace it with a power-based (dis)order. This should be a matter of mutual interest. On China’s side, many Chinese intellectuals also see that the unpredictability of Great Power relations provides an incentive for Beijing to put emphasis on ASEAN (Zhexin, 2016). On ASEAN’s side, ASEAN centrality is vital to maintain their ability to safely navigate and manage great power rivalry in the region.

Third, there is a need for more people-to-people connections in ASEAN-China cooperation. The survey finds that the degree of optimism and positive views are more evident in the stakeholders directly involved in the process of cooperation such as government officials and business actors. This shows that the benefit of cooperation has not been felt equally across the segments of the society. **We recommend to seriously develop more cooperation that involves civil society and academics, such as through bottom-up collaboration projects or research collaborations.** There is a need for a consistent and sustain messaging on the benefits of ASEAN-China relations –noting that inconsistent and one-off messaging usually produce little impact.

Fourth, we also recommend that ASEAN and China increase their attention towards the youth. The youth is the future of the region, and for both ASEAN and China the new generation always has new qualities compared to the previous one. While generally, they are assessing the relationship positively, Students show slightly less optimism compared to the Elites, especially government officials and business actors. This might be due to their lack of involvement in the cooperation programs. When they are the primary beneficiaries such as in the ASEAN – China Young Leaders Scholarship (ACYLS) program, their assessments are overwhelmingly positive. Thus, a strong push on the youth cooperation program is needed.

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