FPCI | FOREIGN POLICY COMMUNITY OF INDONESIA

ASEAN-China Survey 2022

SURVEY REPORT

Managing Cooperation Amidst Geopolitical Tensions

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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, lecturers, think tanks, students, and media. FPCI is also dedicated to study the most-pressing issues related 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 are engaged in regular discussion aiming to keep track of foreign policy issues. The chapters also contribute to a better understanding and analysis of Indonesian foreign policies by writing essays and blogs, conducting forums and conferences, creating podcasts, and joining our annual conference, Conference on Indonesian Foreign Policy (CIFP) and Global Town Hall (GTH). 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, Medan, 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 interests--Geopolitics, 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 INTITUTIONAL PARTNERS

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INTRODUCTION

A. BACKGROUND

Asked to characterise the year 2022, many would say that this is "a year of living dangerously" -to borrow Soekarno's famous phrase. It is a year marked by increasing "geopolitical tension," both at global and regional levels. The war in Ukraine shows no sign of ending soon, and many involved actors seem willing to further escalate. It has sparked systemic effects on the world, including Southeast Asia, through various debacles such as the food and energy crisis and economic recession. The global geopolitical tension also affects the geopolitical dynamics in East and Southeast Asia, as it influences the calculations of leaders and officials in different countries in shaping their foreign policy. It is of course another factor in the "game of expectations" played by the leaders of ASEAN countries as well as other powers involved in the international relations of the region, including China.

Against this backdrop, we believe that understanding the perceptions by the people of ASEAN of such dynamics is crucial. This survey is an attempt to understand and mainstream the relationship of the peoples of ASEAN with China. To do so, this survey asked respondents in 10 ASEAN member countries for their views on various aspects of relationship between ASEAN and China.

To get at the trends, most of the questions in this survey are consistent with those of previous ASEAN-China Surveys that the FPCI has conducted. As a special focus in this 2022 survey edition, we added some questions that are specifically relevant to the topic of geopolitical tensions in the region.

This survey collected data from **1,658 respondents** from all ASEAN member countries: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam. Considering the importance of current relations and future directions for cooperation, this survey targets two different respondent groups, classified into Elites and Students. The perspectives of Elites contribute to the review of ongoing ASEAN-China 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 – the Academia, the Business Community, Civil Society, and Officials. It is also important to include the view of Students in the survey, noting that the 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 aims to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse. It tries to capture nuances within the public discourse on a comprehensive set of issues in the economic, social-cultural, and political-security fields, to identify gaps that need to be addressed and opportunities to be taken. It also attempts to provide insights on public attitudes on the existing initiatives and mechanisms of cooperation between ASEAN and China.

Amidst the increasing geopolitical tensions both at global and regional levels, this survey also aims to provide a deeper assessment by looking at how the current perceptions illustrate changes and continuities. There are also some questions related to some specific issues such as geopolitics, COVID 19, and the crisis in Myanmar.

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 policymaking 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. It is important to note that compared to other surveys which also look at ASEAN respondents such as the State of South East Asia survey which tend to focus on elites, we also included "students" as one of the categories since we do believe that the future is in the hands of the youth. 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 requires a strict number of respondents that reflects the exact demographic composition of the population and thus should not be assessed 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 to what extent each category in each country is represented rather than on how the samples are reflecting the demographic composition.

Based on this methodological construction, the FPCI team decided to put 1,600 respondents as the target.

To begin the process, the research team has allocated a specific number of respondents for each category. Based on these allocations, the FPCI team has identified respondents in Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam.

After the respondents were identified, the data were collected through an online survey template which was fielded electronically from 7th of July. The use of an online template allowed for completion in 15 minutes or less, increasing the chance for response. After the data was returned, researchers analyzed and evaluated the results to formulate the findings.

After data collection was completed, the team analysed the data and formulated the findings by identifying and comparing the patterns that appear from the data. To get a more comprehensive understanding of the data, the team also organized a closed and intensive Focus Group Discussion (FGD) which involved representatives from all respondent categories from different ASEAN Countries on 11th of October.

D. RESPONDENTS PROFILE

Based on the database and in cooperation with 21 Southeast Asian Thinktanks and NGOs, the team sent the online questionnaire to more than 14,000 potential respondents from different categories and ASEAN countries. At the end of the survey period (7th of July to 27th of September), a total of 1,658 respondents had fully answered all the questions in the questionnaire.

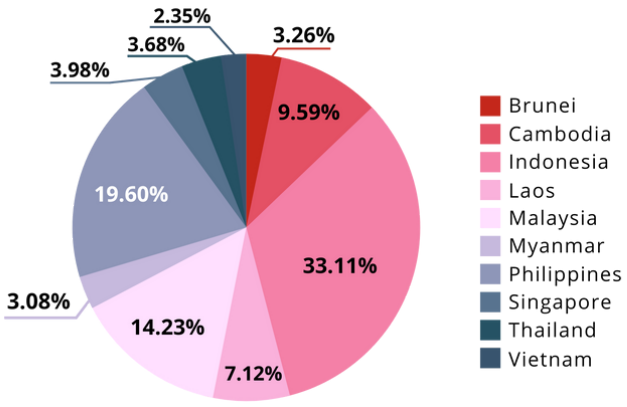


Chart 01. *Respondents Composition Based on Nationality*

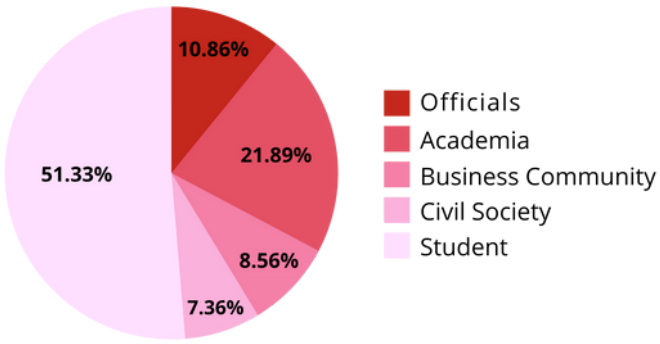


Chart 02. *Respondent's Distribution Based on Affiliations*

PERCEPTIONS ON ASEAN-CHINA RELATIONSHIP



In this part, the report looks at the perceptions of the people of ASEAN on various aspects of ASEAN-China relationship. To make it easier to follow, we have structured them into sub-sections based on the topics.

A. What Aspects of ASEAN-China Cooperation Were Assessed Most Positively? What Were Assessed Least Positively?

In the top 5 areas of ASEAN-China cooperation in the 2022 edition trade (68,64%) was the aspect of cooperation that yielded the most satisfaction. It is followed by investment at 62%, tourism at 41,31%, technology and industry 4.0 at 37,7%, and industry and supply chains at 35,16%. Surprisingly, the connectivity project did not make it to the top five collaborations, receiving only 26.3%.

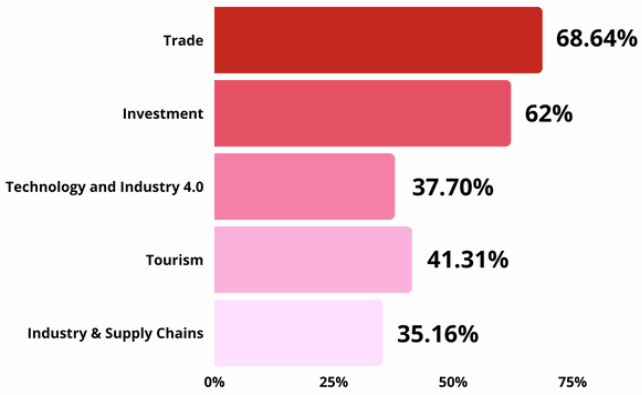


Chart 03. *Top five areas of ASEAN-China cooperation that are most satisfactory (General)*

Both Elite and Students selected similar options when asked about what are the **top five areas of ASEAN-China cooperation that are most satisfactory** to them. More than 60% of both Elite and Student respondents chose 'Trade' as the first area and put 'Investment' in the second place. 'Tourism' is ranked third by the Elite (48,20%) and fifth by the Students (34,78). The fourth most satisfactory area was 'Industry and Supply Chain' shared by both the Elite (33,71%) and the Students (36,55%). However, there is a difference between the two groups where Elite ranked Education (32,34%) at fifth place while Students ranked 'Tourism' (34,78%) as fifth.

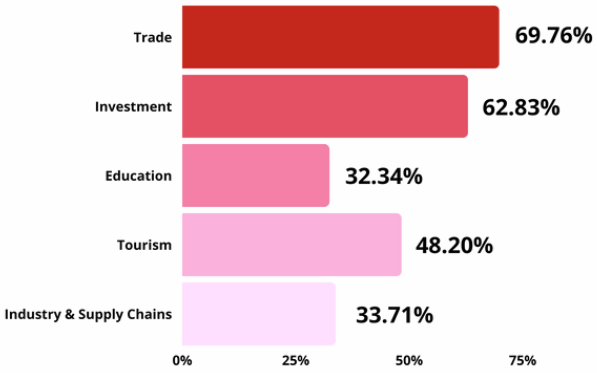


Chart 04. *Top five areas of ASEAN-China cooperation that are most satisfactory (Elite)*

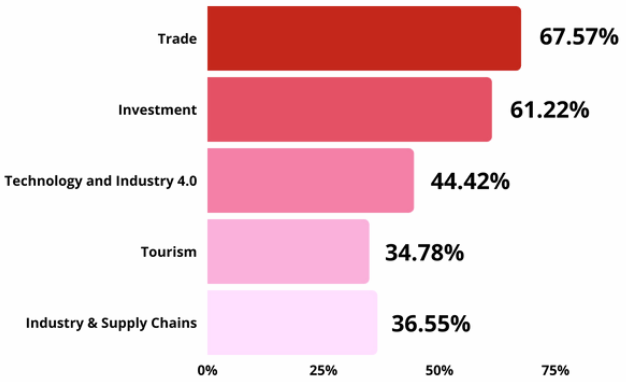


Chart 05. *Top five areas of ASEAN-China cooperation that are most satisfactory (Students)*



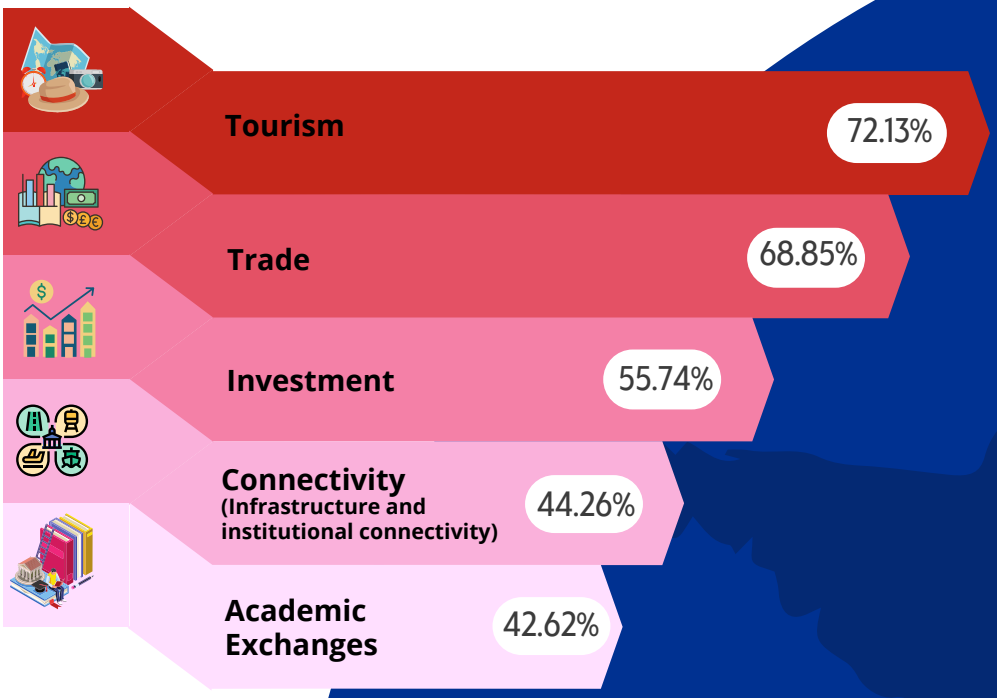


Chart 06. *Most Satisfactory Aspects of ASEAN-China Cooperation (Thailand)*

Most satisfactory cooperation from each countries' perspective followed the general pattern, with trade receiving the highest votes, ranging from 66,48% to 81,82%. Notable exceptions were found with respondents from Thailand, where 72,13% ranked tourism their number one choice, and respondents from Cambodia deeming cooperation in investment to be most satisfactory.

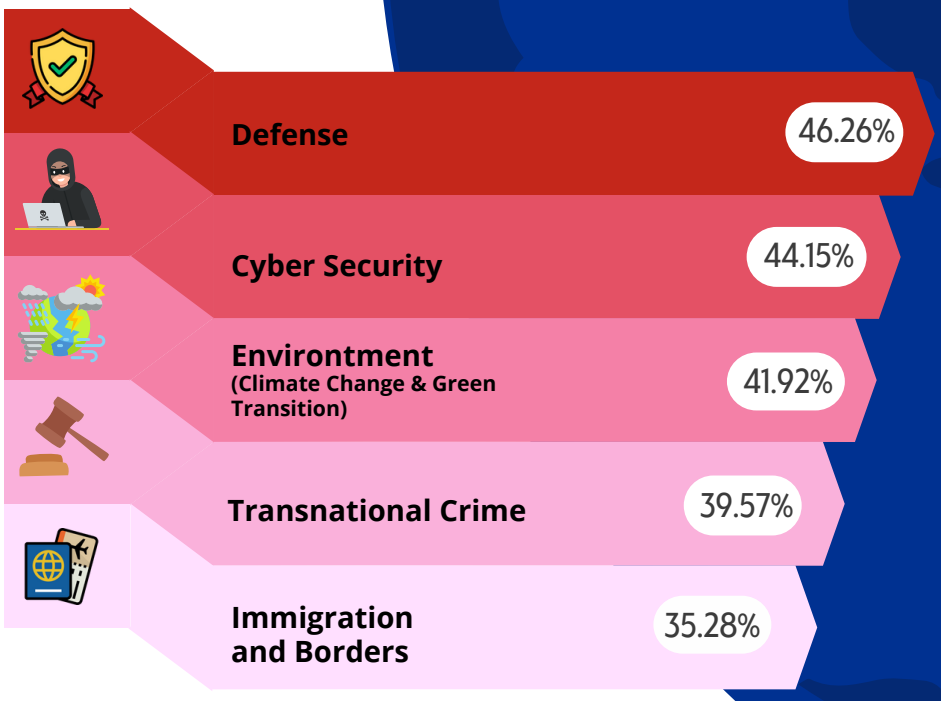


Chart 07. *Top five areas of ASEAN-China Cooperation that are least satisfactory (General)*

As with previous surveys, respondents put defence and cyber security as the **two least satisfactory aspects of ASEAN-China cooperation** at 46,26% and 44,15%. Third place was occupied by environment-related cooperation at 41,92%, and this shows Southeast Asian respondents' wish to boost the ASEAN-China environmental partnership. Following in fourth place was transnational crime at 39,57%, and in fifth place was immigration and borders at 35,28%.

The Elite and the Students both deemed the following as the least satisfactory areas of cooperation between ASEAN and China: 'Defense', 'Cyber Security', 'Environment (climate change & green transition)', and 'Transnational Crime'. The difference being that Students ranked 'Immigration and Borders' in fifth place while the Elite relegated 'Natural resources (fisheries, agriculture, etc.)' to fifth place.

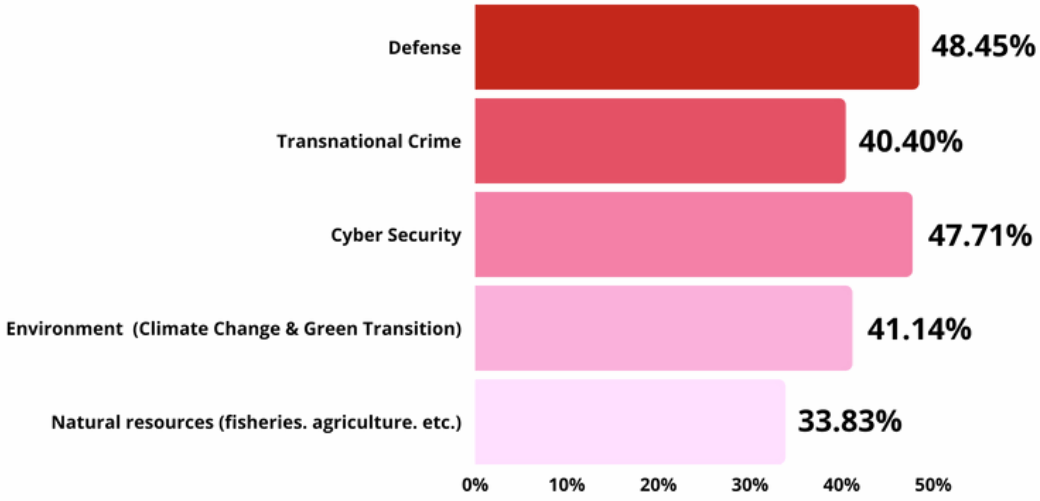


Chart 08. *Top five areas of ASEAN-China cooperation that are least satisfactory (Elite)*

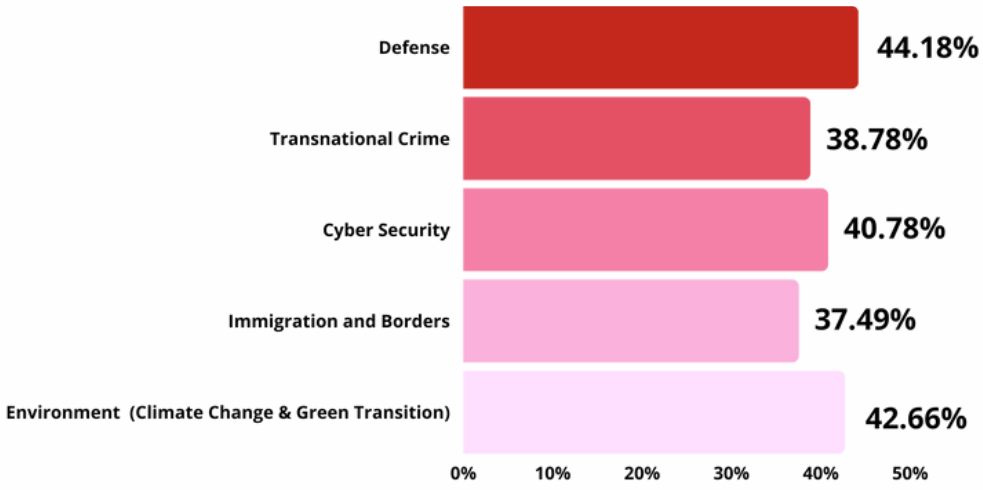


Chart 09. *Top five areas of ASEAN-China cooperation that are least satisfactory (Students)*



The most popular answer of respondents in many ASEAN countries (Indonesia, Philippines, Malaysia, Singapore, and Vietnam) is that defense is considered as the area of cooperation that is least satisfactory to them. Transnational crime follows as second least satisfactory, most frequently chosen among respondents from Cambodia. Respondents from Singapore are split in their choice, ranking both defense and cyber security as both equally least satisfactory at 62,12%.

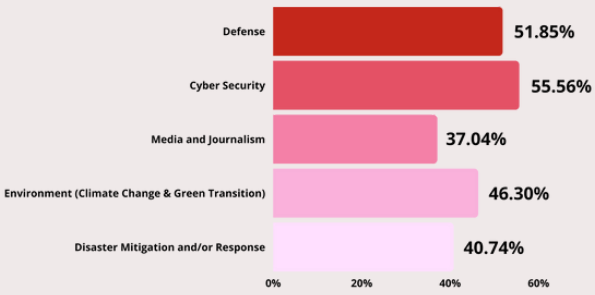


Chart 10. *Top five areas of ASEAN-China cooperation that are least satisfactory (Brunei)*

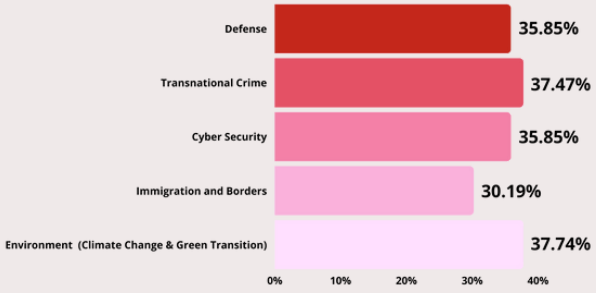


Chart 11. *Top five areas of ASEAN-China cooperation that are least satisfactory (Cambodia)*

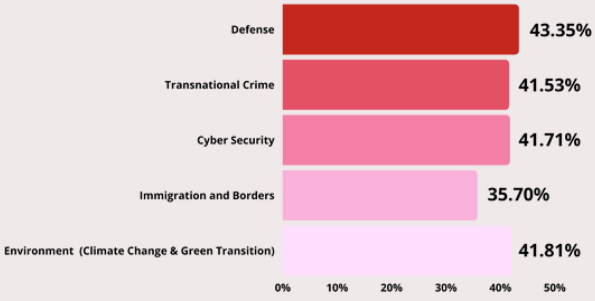


Chart 12. *Top five areas of ASEAN-China cooperation that are least satisfactory (Indonesia)*

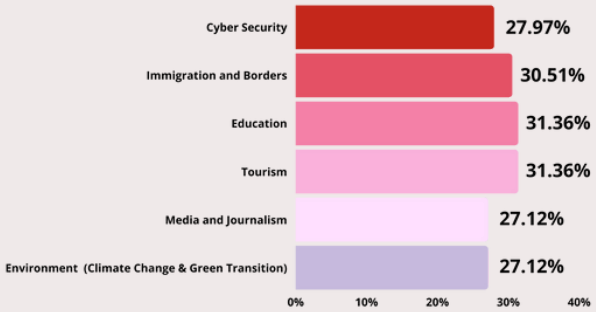


Chart 13. *Top five areas of ASEAN-China cooperation that are least satisfactory (Laos)*

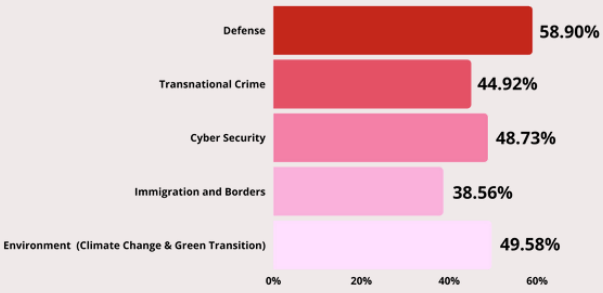


Chart 14. *Top five areas of ASEAN-China cooperation that are least satisfactory (Malaysia)*

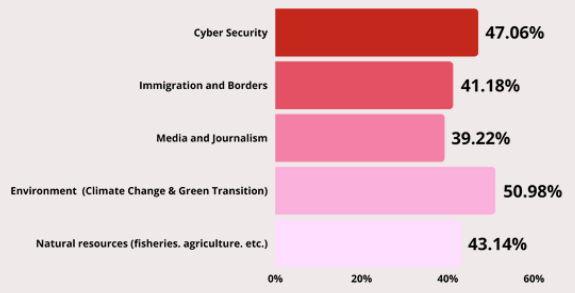


Chart 15. *Top five areas of ASEAN-China cooperation that are least satisfactory (Myanmar)*

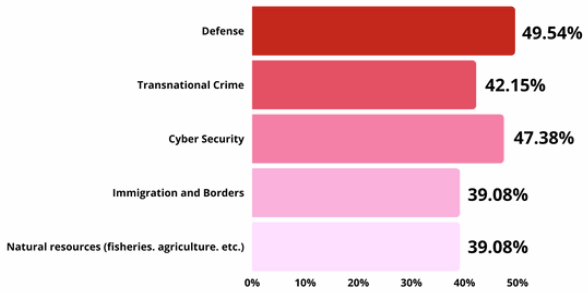


Chart 16. *Top five areas of ASEAN-China cooperation that are least satisfactory (Philippines)*

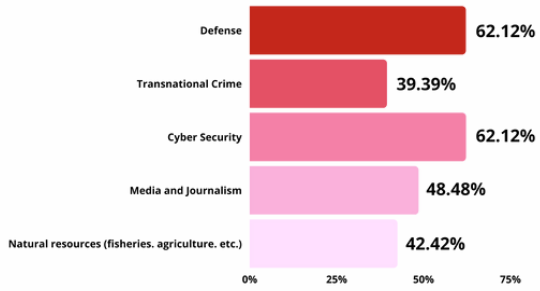


Chart 17. *Top five areas of ASEAN-China cooperation that are least satisfactory (Singapore)*

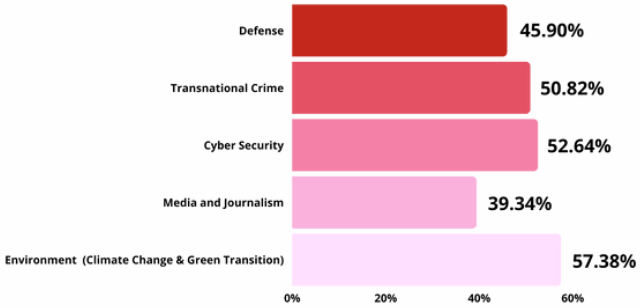


Chart 18. *Top five areas of ASEAN-China cooperation that are least satisfactory (Thailand)*

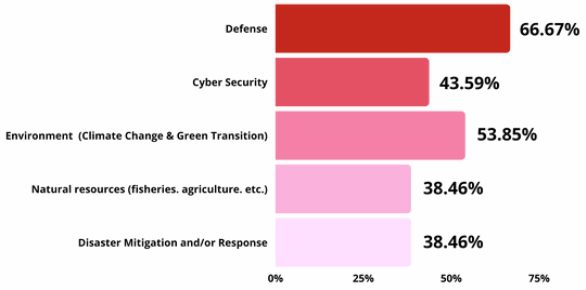


Chart 19. *Top five areas of ASEAN-China cooperation that are least satisfactory (Vietnam)*

B. Southeast Asian Satisfaction on the ASEAN-China Relationship

Asked about the newly announced ASEAN-China Comprehensive **Strategic Partnership (CSP)**, the most popular answer of the respondents, 38,42%, took a neutral view, while 33,84% of respondents answered that they were satisfied with the CSP.

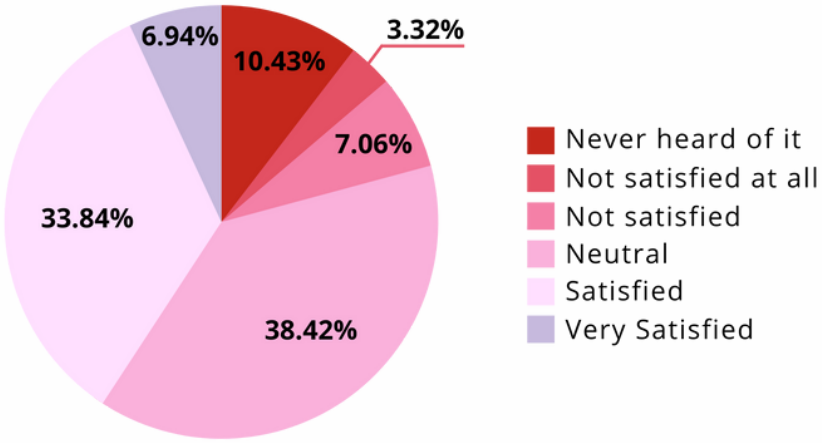


Chart 20. *Satisfaction level on the ASEAN-China Comprehensive Strategic Partnership (General)*

The most frequent answer of both Elite (37,30%) and Students (39,48%) is “neutral” in their level of satisfaction for the ASEAN-China Comprehensive Strategic Partnership. Yet there was also considerable satisfaction among both Elite and Students, where 32,59% of the Elite and 35,02% of the Students said that they were satisfied.

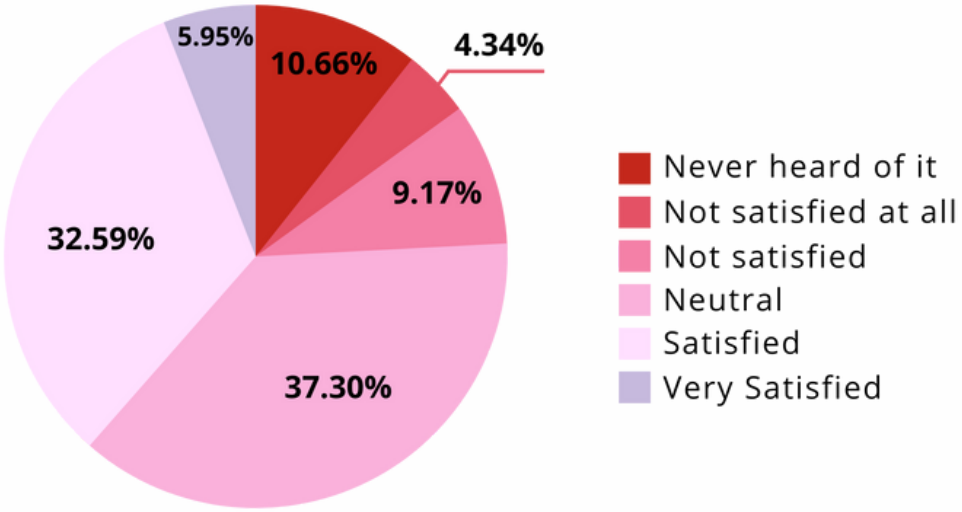


Chart 21. *Satisfaction level on the ASEAN-China Comprehensive Strategic Partnership (Elite)*

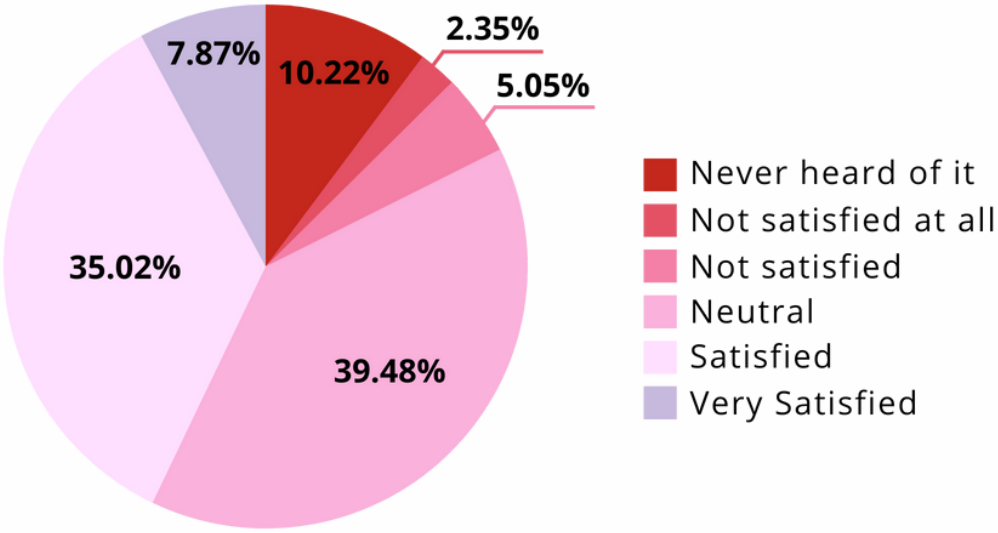


Chart 22. *Satisfaction level on the ASEAN-China Comprehensive Strategic Partnership (Elite)*

Broken down to each country's respondents, the pattern remained the same with the majority of countries feeling neutral about the CSP. However, the most popular answer from the Philippines at 37.85% and Cambodia at 48.43% stated that they were satisfied with the ASEAN CSP.

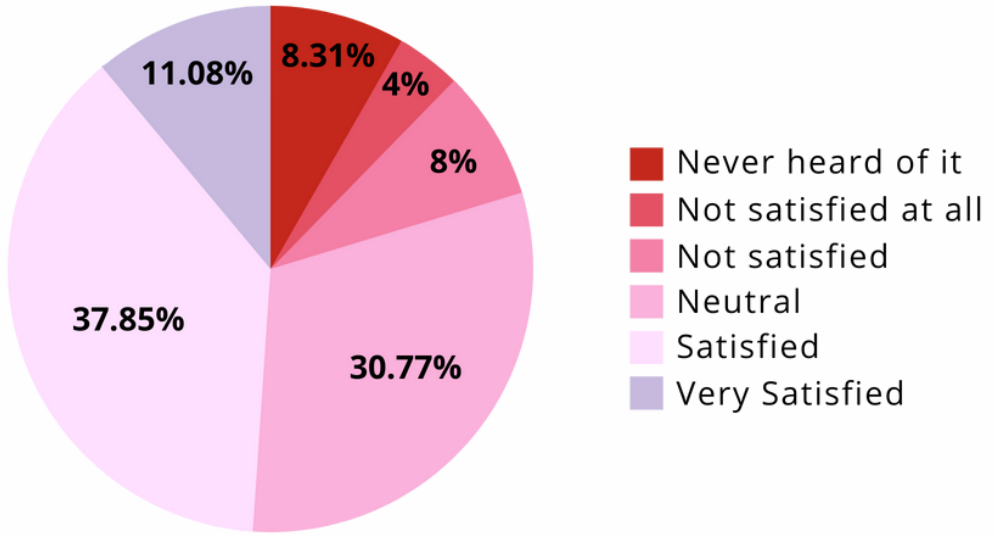


Chart 23. *Satisfaction level on the ASEAN-China Comprehensive Strategic Partnership (Philippines)*

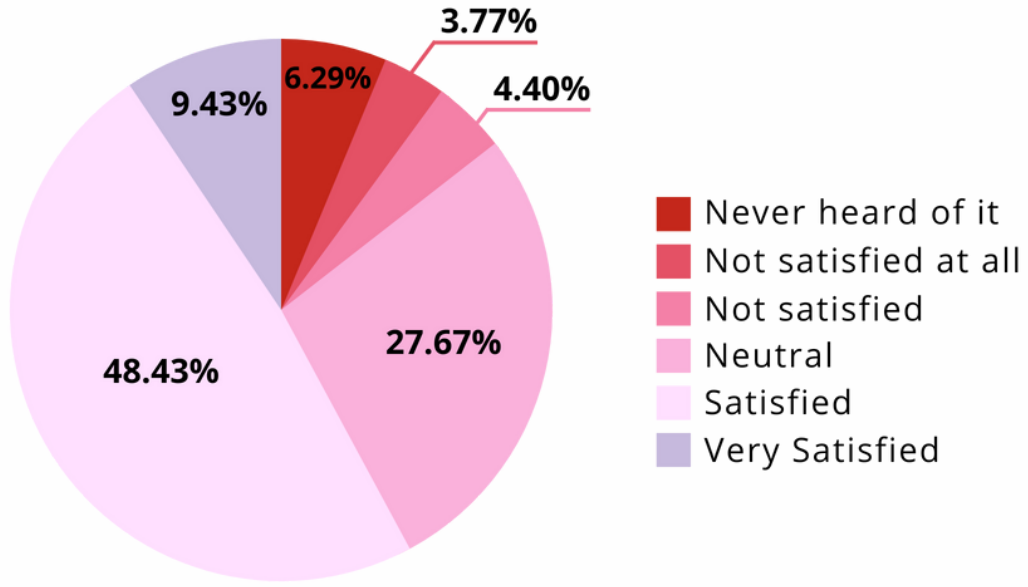


Chart 24. *Satisfaction level on the ASEAN-China Comprehensive Strategic Partnership (Cambodia)*

Economic Cooperation: Tilting Towards Positive

On the economy-related existing cooperation, the respondents leaned more towards a positive assessment, although the number of "neutral" answers was also quite sizable. For instance, respondents showed their satisfaction with the ASEAN-China Free Trade Area at 42,10% and the second largest population in the question was found to be neutral at 29,25%. Subsequently, on the Regional Comprehensive Economic Partnership (RCEP), 39,32% of respondents are satisfied and 32,87% are neutral.

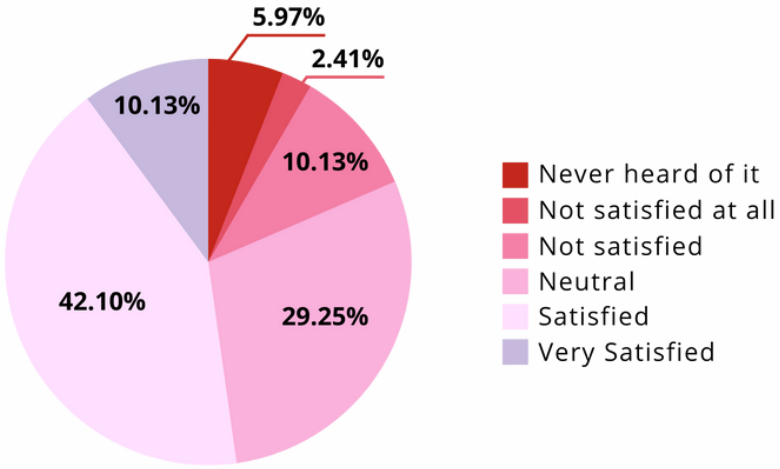


Chart 25. *Satisfaction level on ASEAN-China Free Trade Area (General)*

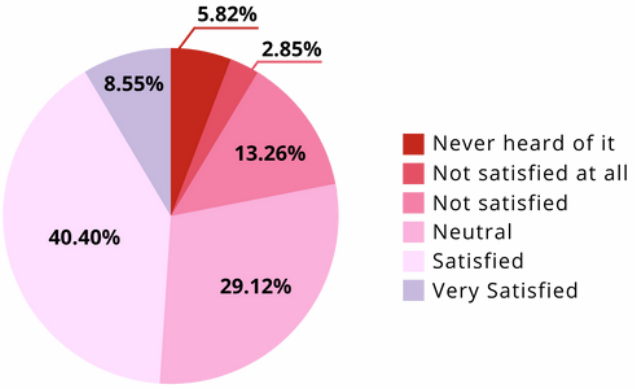


Chart 26. *Satisfaction level on ASEAN-China Free Trade Area (Elite)*

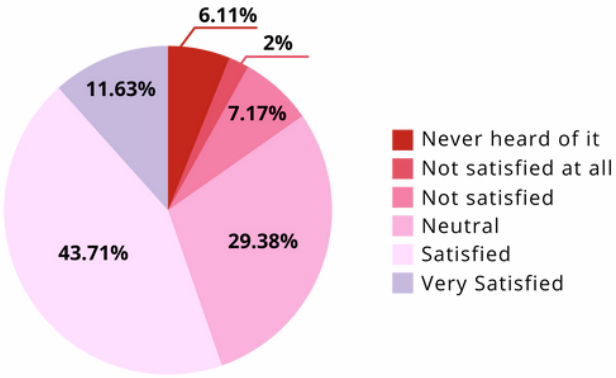


Chart 27. *Satisfaction level on ASEAN-China Free Trade Area (Students)*

On a different note, when asked about economic cooperation between ASEAN and China, the most popular answer of the Elite (40,40%) and the Students (43,71%) said they were satisfied with the ASEAN-China Free Trade Area. Both Elite (37,67%) and Students (40,89%) were equally satisfied with the Regional Comprehensive Economic Partnership (RCEP).

This pattern was repeated in the country's breakdown. However, while the majority of respondents from ASEAN countries were satisfied with the ASEAN-China Free Trade Area and the RCEP, most respondents from Vietnam, Myanmar, and Laos chose to stay neutral on the subject.

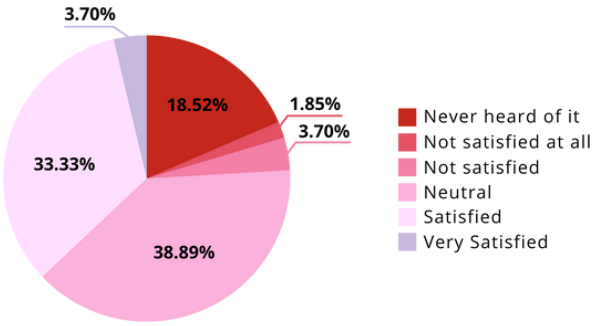


Chart 28. *Satisfaction level on ASEAN-China Free Trade Area (Brunei)*

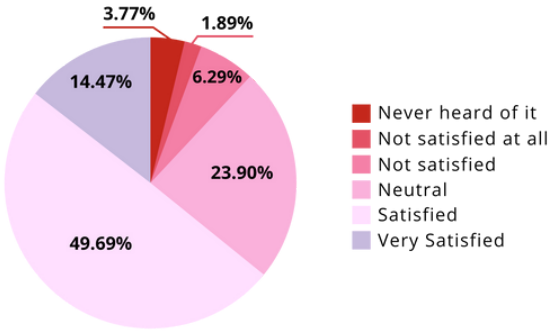


Chart 29. *Satisfaction level on ASEAN-China Free Trade Area (Cambodia)*

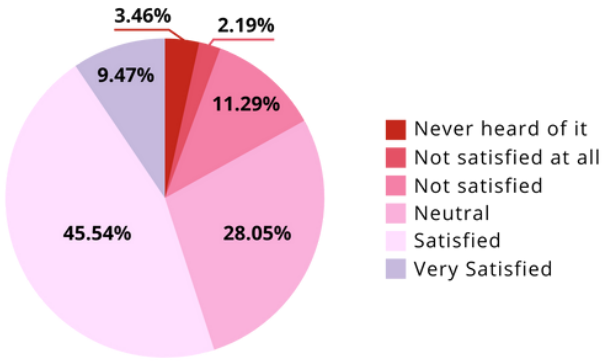


Chart 30. *Satisfaction level on ASEAN-China Free Trade Area (Indonesia)*

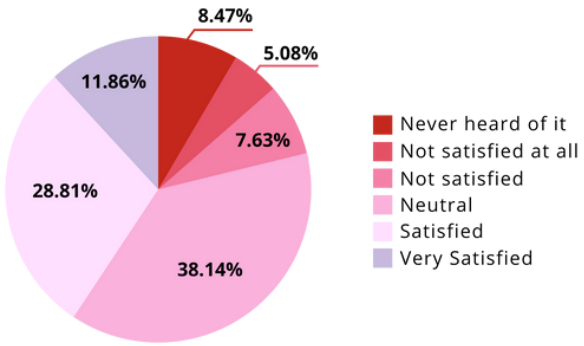


Chart 31. *Satisfaction level on ASEAN-China Free Trade Area (Laos)*

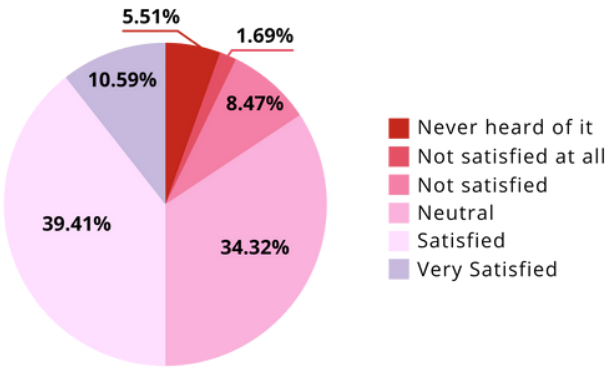


Chart 32. *Satisfaction level on ASEAN-China Free Trade Area (Malaysia)*

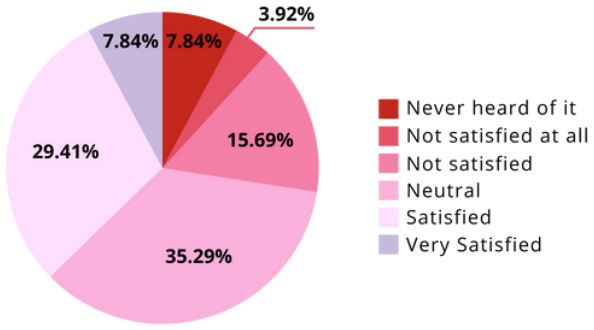


Chart 33. *Satisfaction level on ASEAN-China Free Trade Area (Myanmar)*

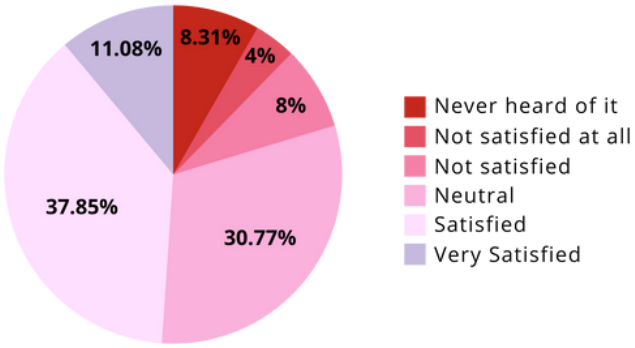


Chart 34. *Satisfaction level on ASEAN-China Free Trade Area (Philippines)*

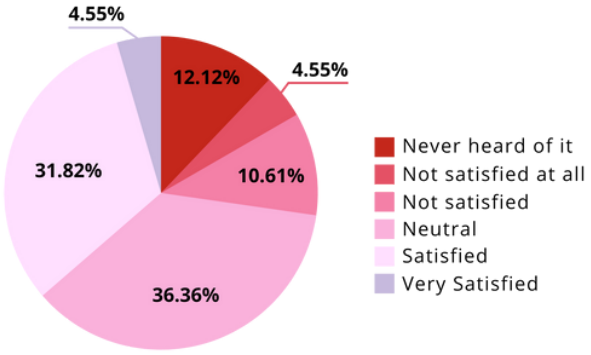


Chart 35. *Satisfaction level on ASEAN-China Free Trade Area (Singapore)*

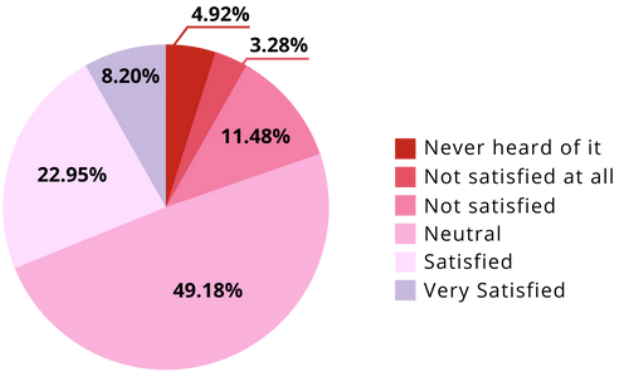


Chart 36. *Satisfaction level on ASEAN-China Free Trade Area (Thailand)*

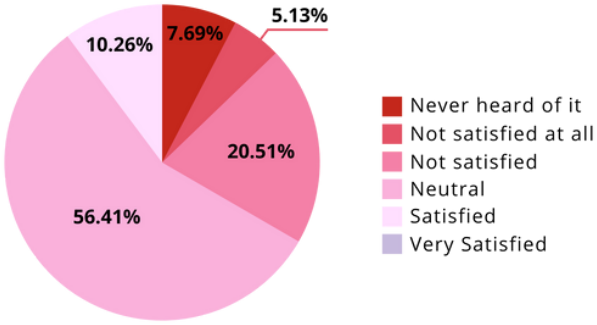


Chart 37. *Satisfaction level on ASEAN-China Free Trade Area (Vietnam)*

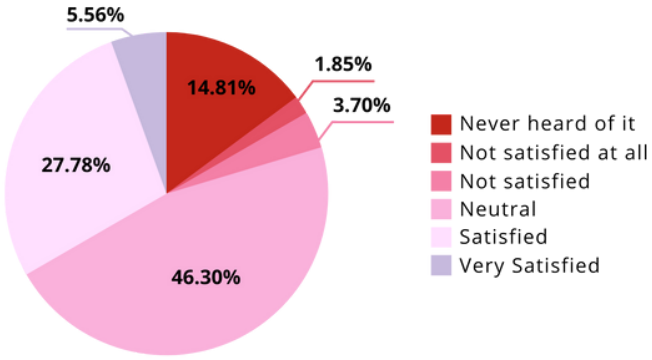


Chart 38. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Brunei)*

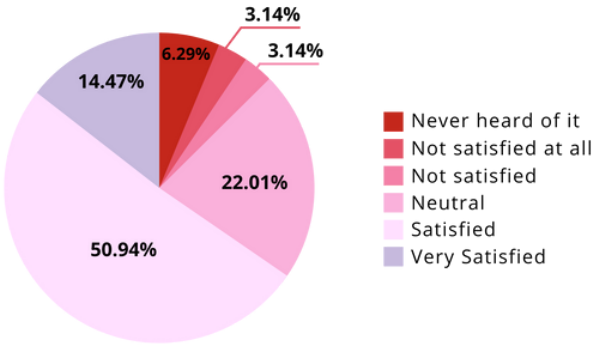


Chart 39. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Cambodia)*

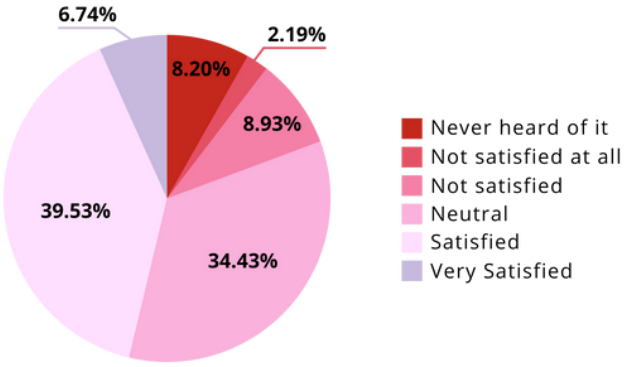


Chart 40. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Indonesia)*

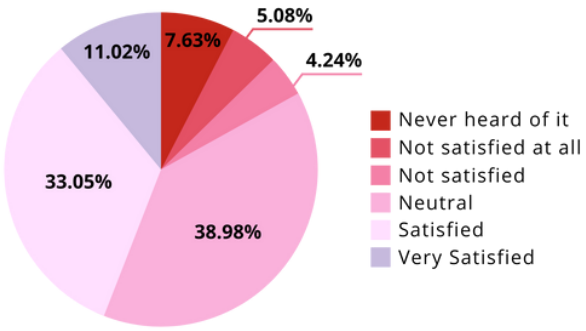


Chart 41. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Laos)*

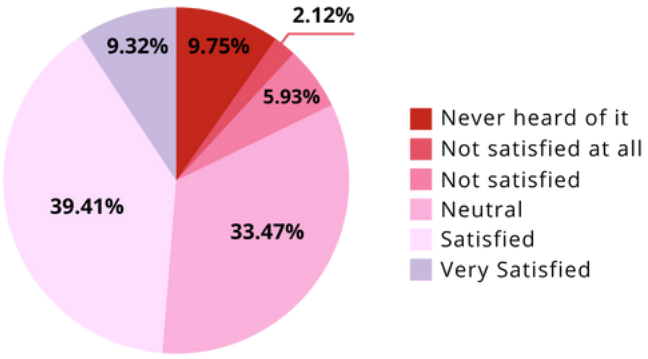


Chart 42. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Malaysia)*

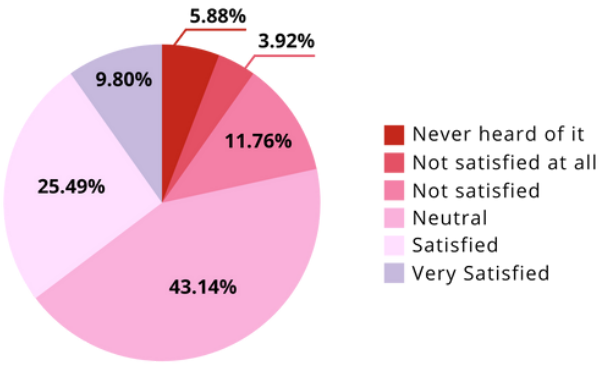


Chart 43. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Myanmar)*

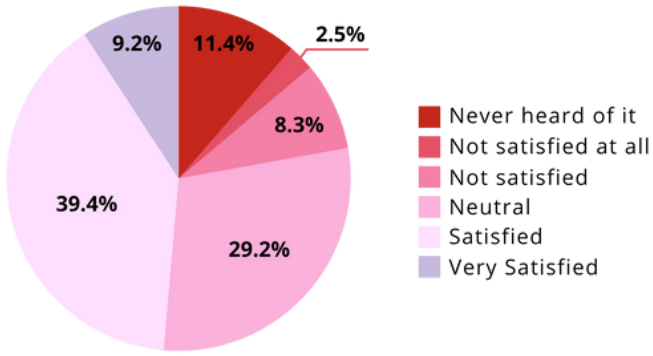


Chart 44. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Philippines)*

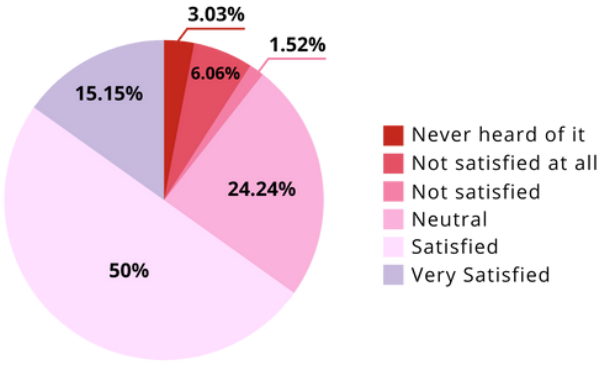


Chart 45. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Singapore)*

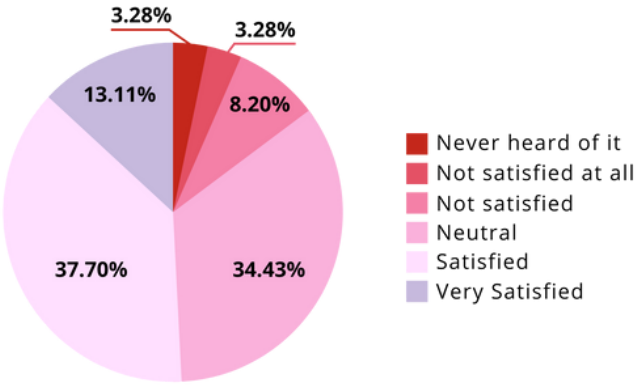


Chart 46. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Thailand)*

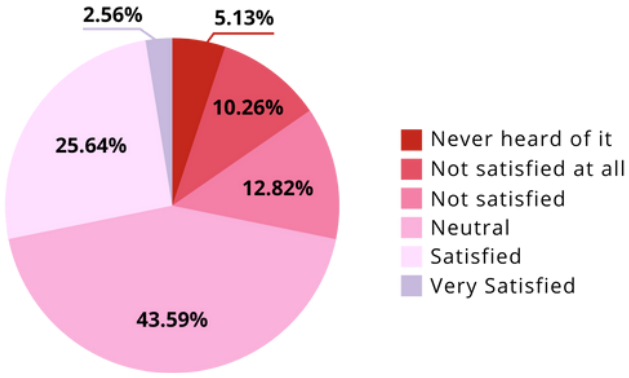
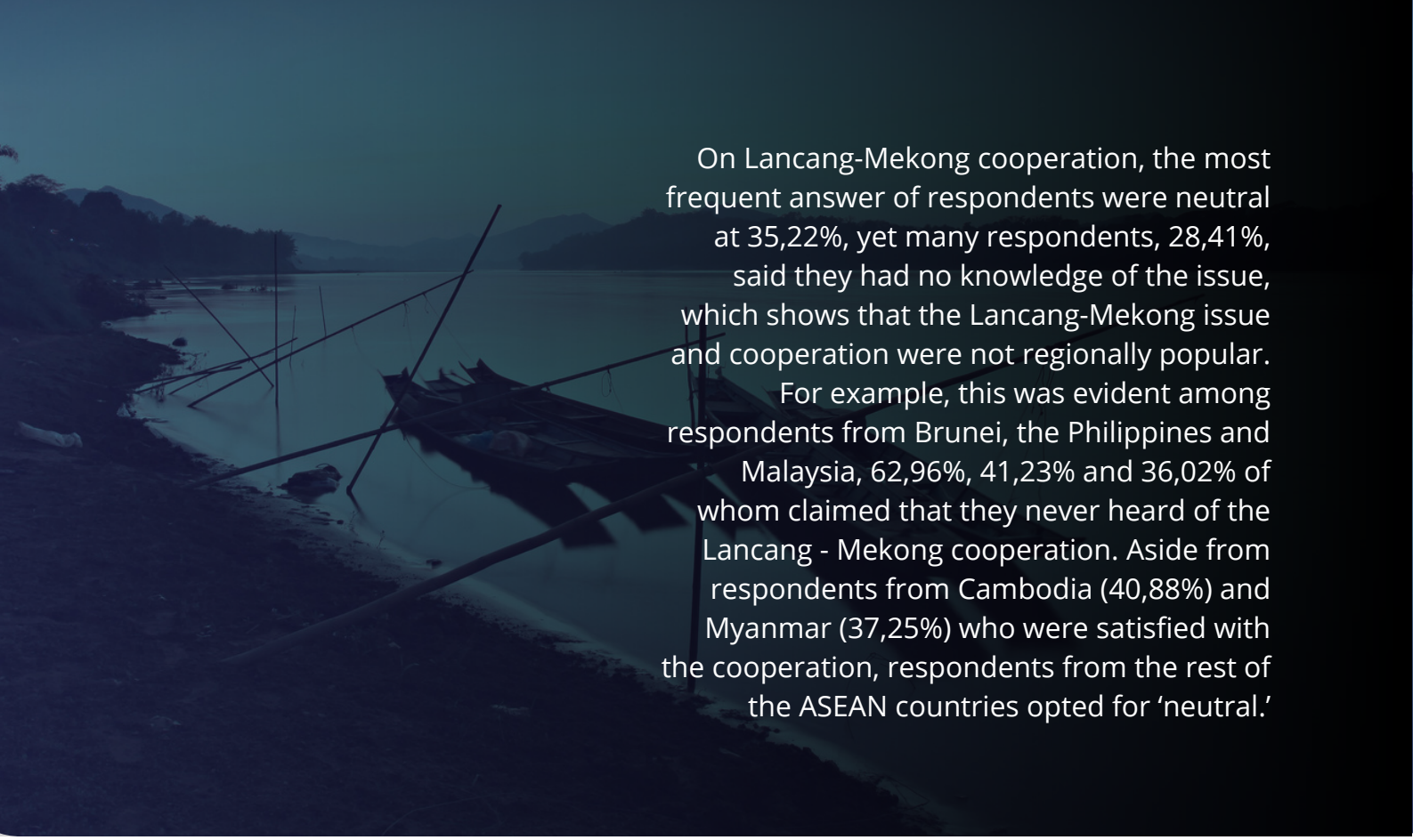


Chart 47. *Satisfaction level on Regional Comprehensive Economic Partnership (RCEP) (Vietnam)*



On Lancang-Mekong cooperation, the most frequent answer of respondents were neutral at 35,22%, yet many respondents, 28,41%, said they had no knowledge of the issue, which shows that the Lancang-Mekong issue and cooperation were not regionally popular. For example, this was evident among respondents from Brunei, the Philippines and Malaysia, 62,96%, 41,23% and 36,02% of whom claimed that they never heard of the Lancang - Mekong cooperation. Aside from respondents from Cambodia (40,88%) and Myanmar (37,25%) who were satisfied with the cooperation, respondents from the rest of the ASEAN countries opted for 'neutral.'

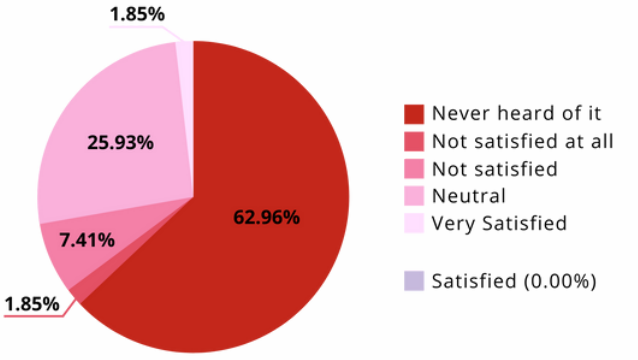


Chart 48. *Satisfaction level on Lancang-Mekong Cooperation (Brunei)*

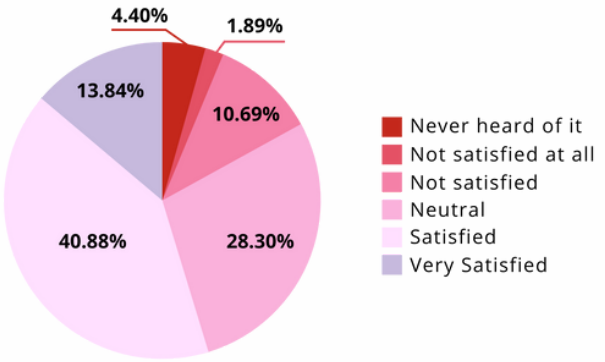


Chart 49. *Satisfaction level on Lancang-Mekong Cooperation (Cambodia)*

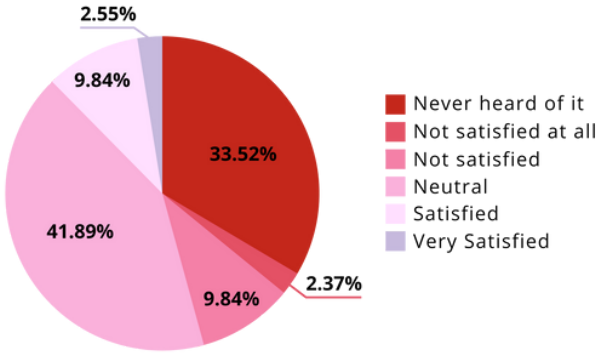


Chart 50. *Satisfaction level on Lancang-Mekong Cooperation (Indonesia)*

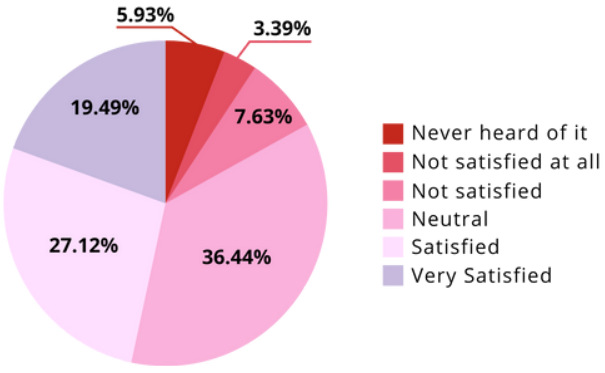


Chart 51. *Satisfaction level on Lancang-Mekong Cooperation (Laos)*

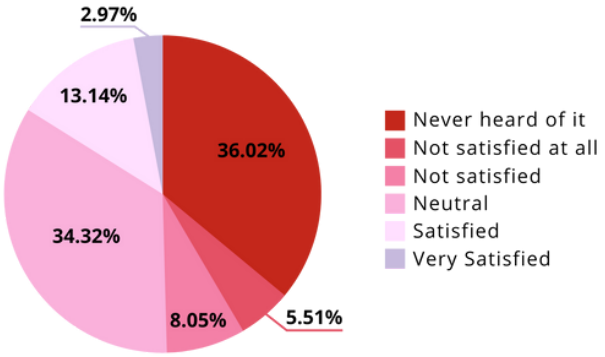


Chart 52. *Satisfaction level on Lancang-Mekong Cooperation (Malaysia)*

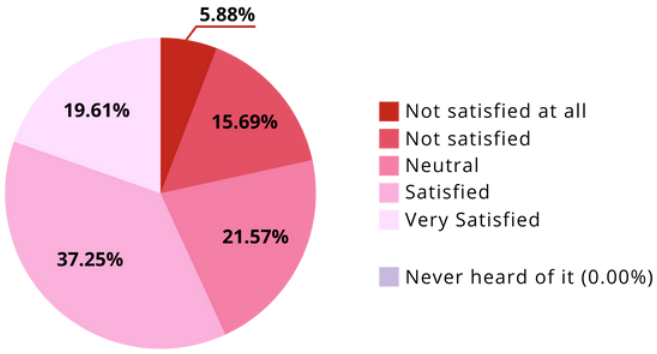


Chart 53. *Satisfaction level on Lancang-Mekong Cooperation (Myanmar)*

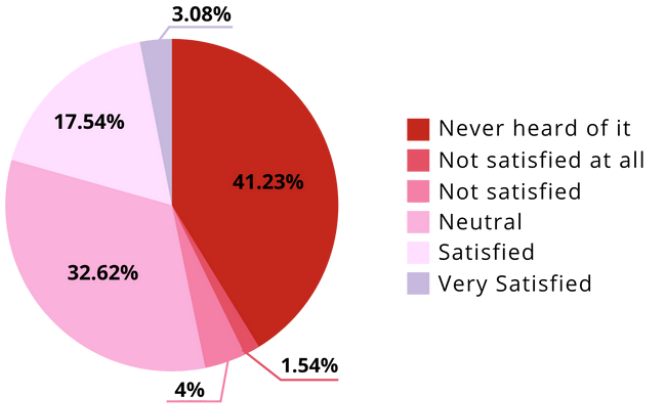


Chart 54. *Satisfaction level on Lancang-Mekong Cooperation (Philippines)*

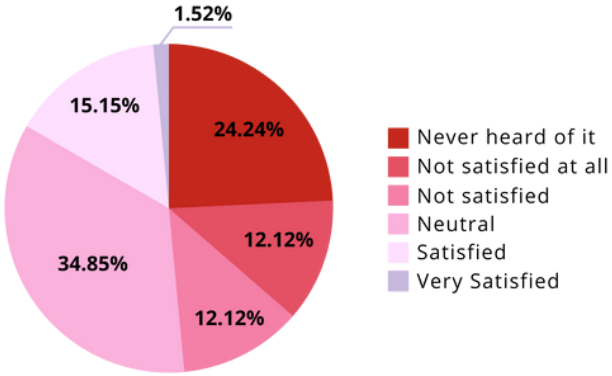


Chart 55. *Satisfaction level on Lancang-Mekong Cooperation (Singapore)*

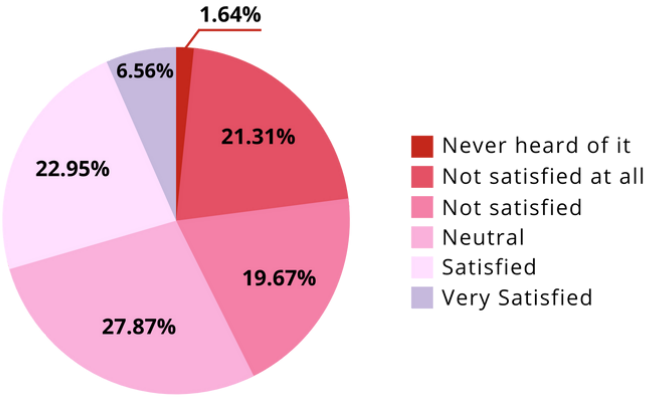


Chart 56. *Satisfaction level on Lancang-Mekong Cooperation (Thailand)*

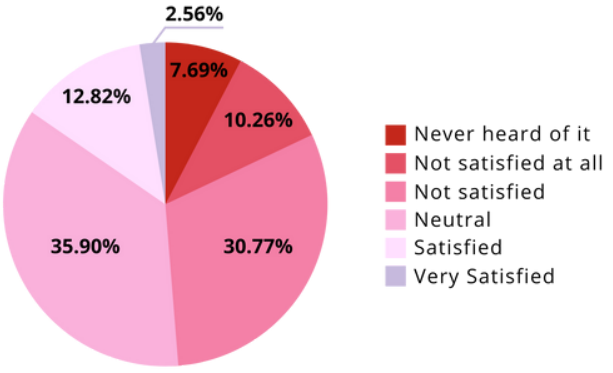


Chart 57. *Satisfaction level on Lancang-Mekong Cooperation (Vietnam)*

Most Elite (34,94%) and Students (35,49%) were neither satisfied nor dissatisfied with ASEAN-China cooperation on Lancang-Mekong. But it is worth noting that a sizable portion of the Elite (24,41%) and Students (32,20%) never heard of it.

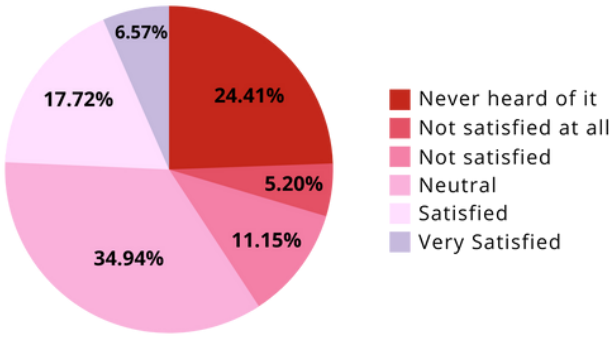


Chart 58. *Satisfaction level on Lancang-Mekong Cooperation (Elite)*

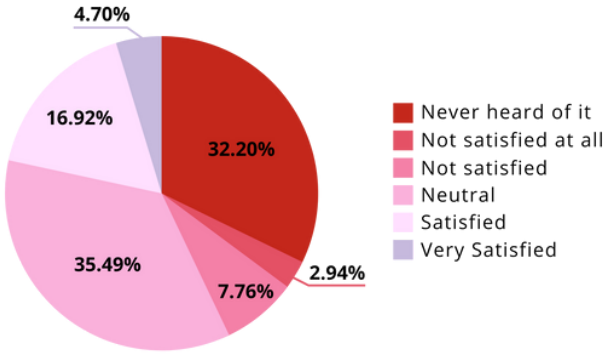


Chart 59. *Satisfaction level on Lancang-Mekong Cooperation (COC) (Students)*

Political Security Issues: Tilting Towards Negative Spectrum

Consistent with the 2020 and 2021 results, Southeast Asian respondents are not yet satisfied with political and security-related cooperation. For example, the 2022 survey results showed that 41,85% of respondents were not happy (no satisfied spectrum) with the Code of Conduct and 28,71% of respondents chose to be neutral.

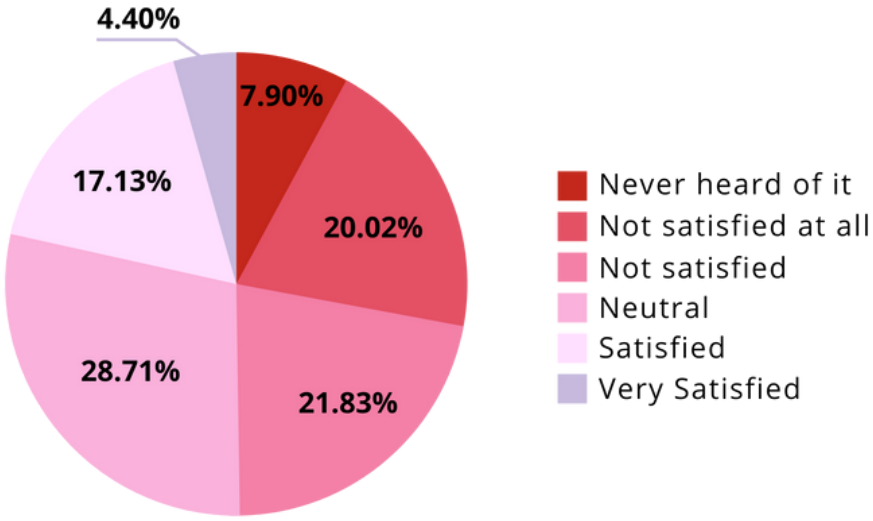


Chart 60. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Students)*

Consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) remained unsatisfying for both Elite and Students. About half of the Elite were not satisfied (24,16%) and not satisfied at all (23,79%) with the COC. Nonetheless, the most frequent answer of Student (33,37%) are neutral and 43,83% are in the not satisfied spectrum.

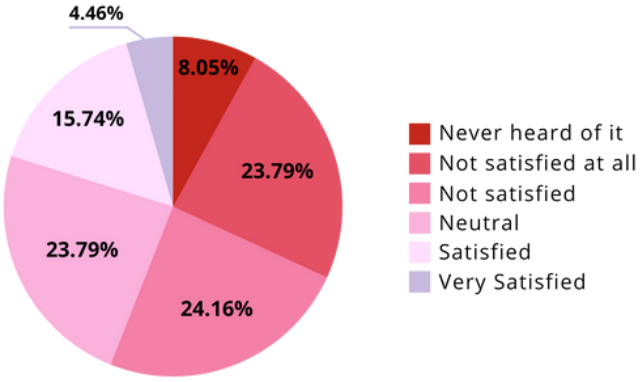


Chart 61. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Elite)*

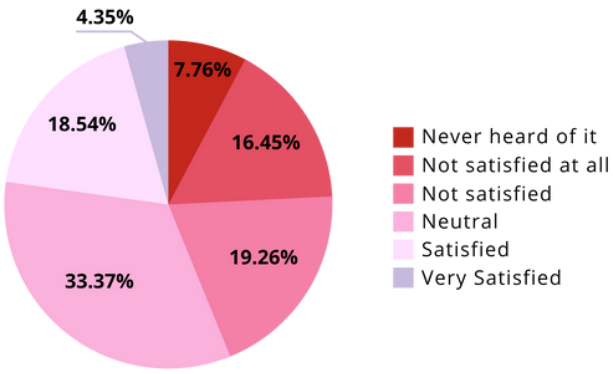


Chart 62. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Students)*

Broken down on a country-per-country basis, however, it appeared that respondents from most countries (Indonesia, Philippines, Cambodia, Myanmar, and Laos) remained neutral. On the other hand, nearly 29% of respondents from Malaysia expressed dissatisfaction with the consultation on the CoC. Even higher percentages of respondents from Singapore (27.27%), Vietnam(38,46%), Brunei (31,48%) and Thailand (29,51%), chose 'not satisfied at all.'



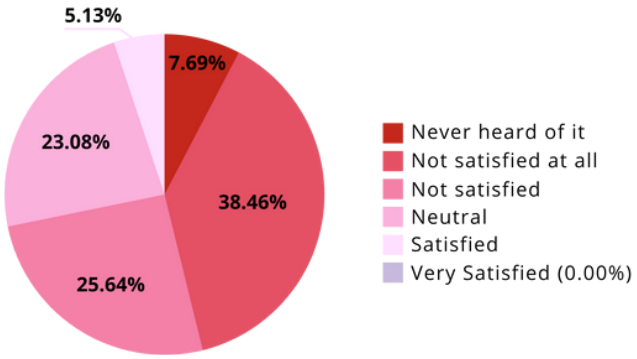


Chart 63. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Vietnam)*

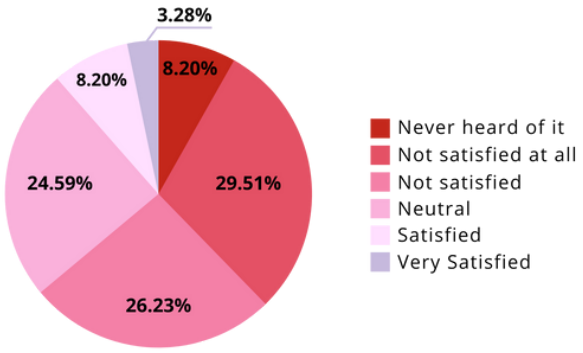


Chart 64. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Thailand)*

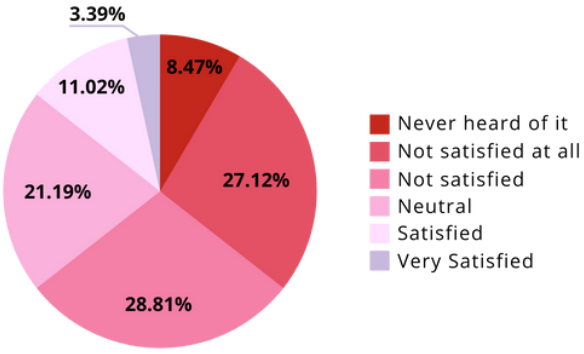


Chart 65. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Malaysia)*

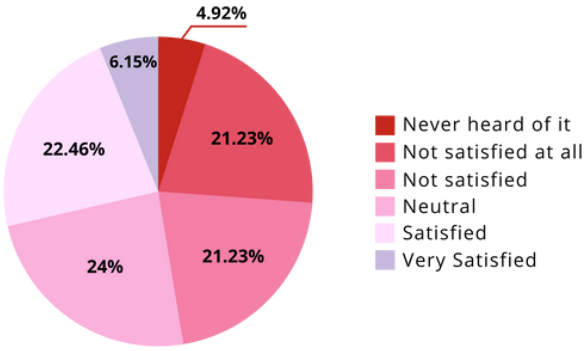


Chart 66. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Philippines)*

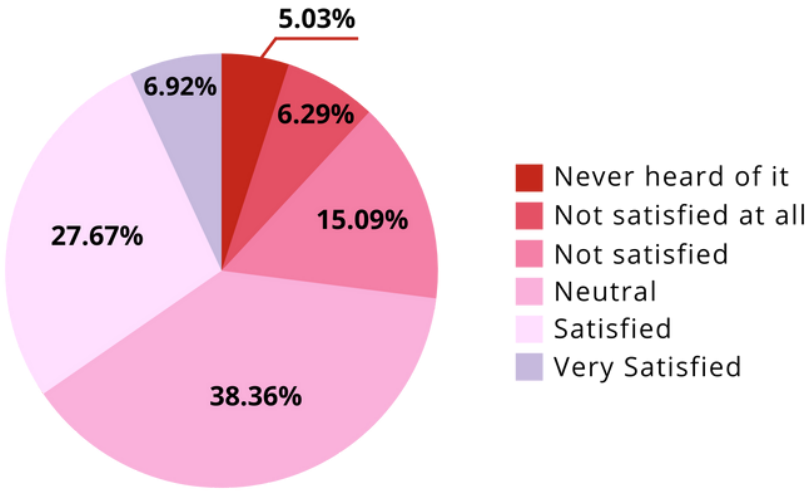


Chart 67. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Cambodia)*

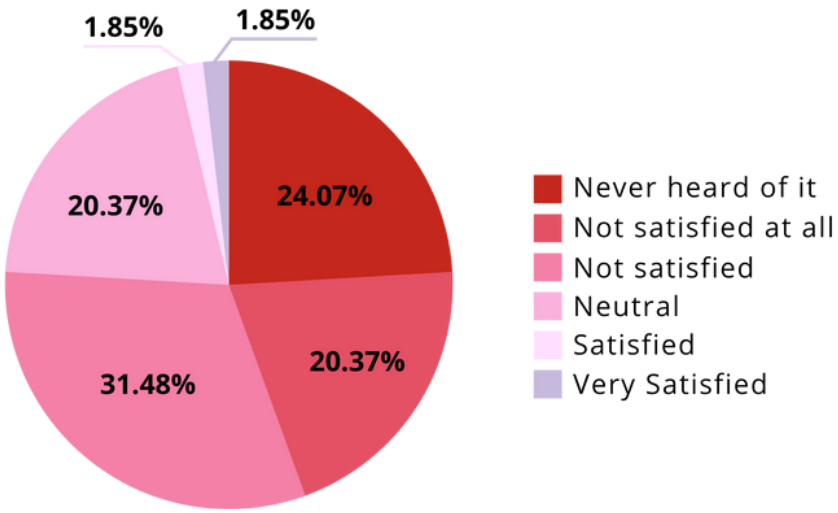


Chart 68. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Brunei)*

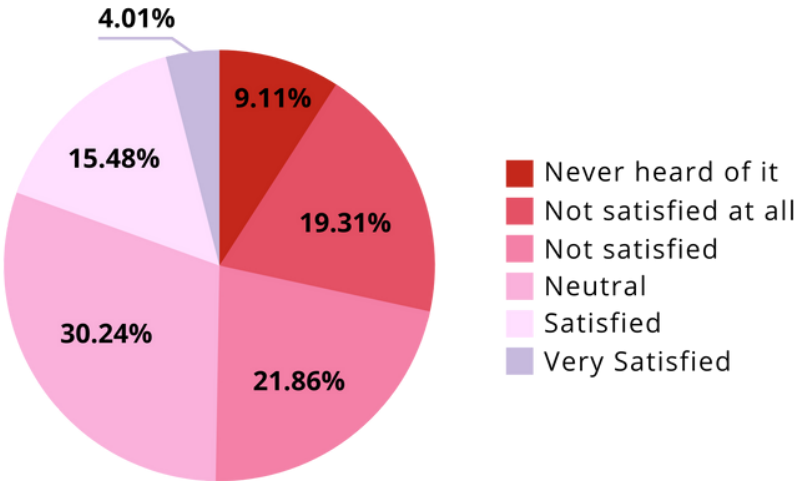


Chart 69. *Satisfaction level on the consultations between ASEAN member states and China on the Code of Conduct in the South China Sea (COC) (Indonesia)*

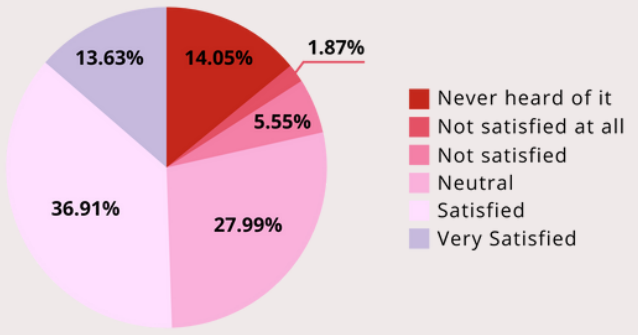


Chart 70. *Satisfaction level on the ASEAN-China Young Leaders Scholarship (General)*

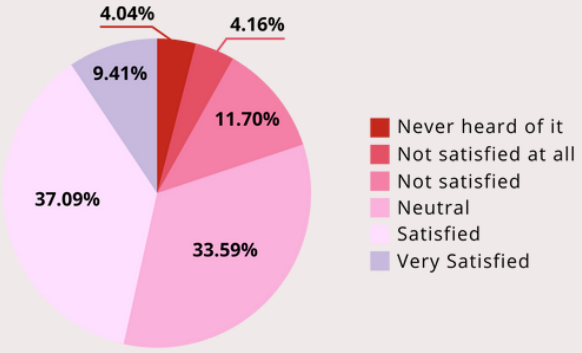


Chart 71. *Satisfaction level on the overall people-to-people connection between ASEAN and China (General)*

Respondents were tilting towards a positive spectrum in their answers on **socio-cultural cooperation**. The most frequent answer of respondents were satisfied with ASEAN-China Young leaders Scholarship at 36,91% and with overall people to people connection at 37,09% yet we also cannot ignore the fact that the second biggest group was at the neutrality spectrum.

When asked about the ASEAN-China Young Leaders Scholarship, more than half of Student respondents said they were satisfied (39,60%) and very satisfied (17,86%), while 43,25% of the Elite were also within the satisfied spectrum.

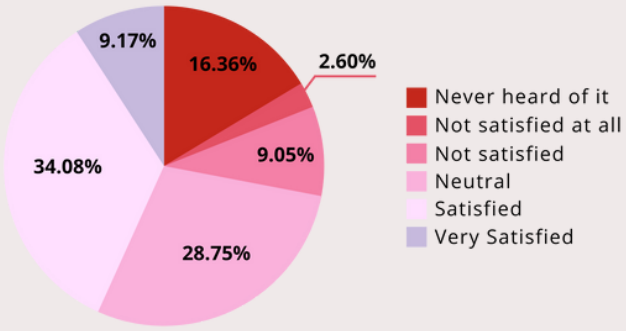


Chart 72. *Satisfaction level on the ASEAN-China Young Leaders Scholarship (Elite)*

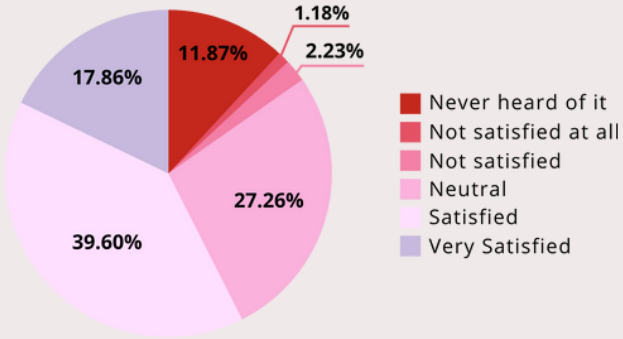


Chart 73. *Satisfaction level on the ASEAN-China Young Leaders Scholarship (Student)*

The level of satisfaction among the Elite and Students with the **people-to-people connection** between ASEAN and China also showed a similar pattern where 37,67% of Elite and 36,55% of Students said they were satisfied. However, there was only a thin difference with Elite (32,59%) and Student (34,55%) respondents that chose to be neutral.

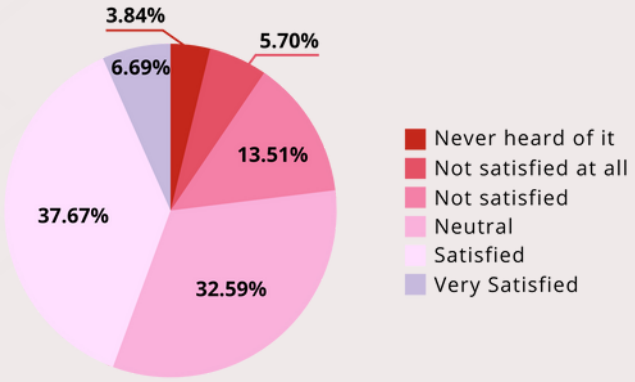


Chart 74. *Satisfaction level on the overall people-to-people connection between ASEAN and China (Elite)*

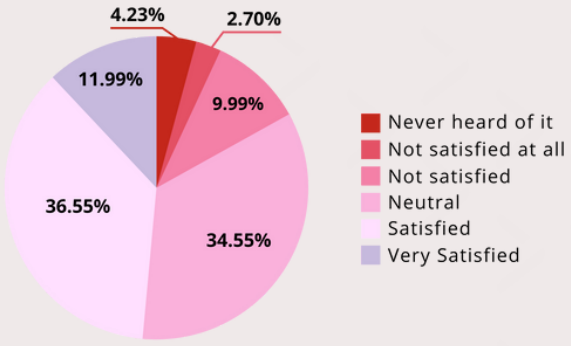


Chart 75. *Satisfaction level on the overall people-to-people connection between ASEAN and China (Students)*

C. Southeast Asian Perception on China's Global Development Initiative and Global Security Initiative

China's latest initiatives are the Global Development Initiative (GDI) and the Global Security Initiative (GSI). The survey asked the respondents about it. The result showed that respondents were more aware of GDI with 51,15% and GSI was less known by the respondents at 43,79%.

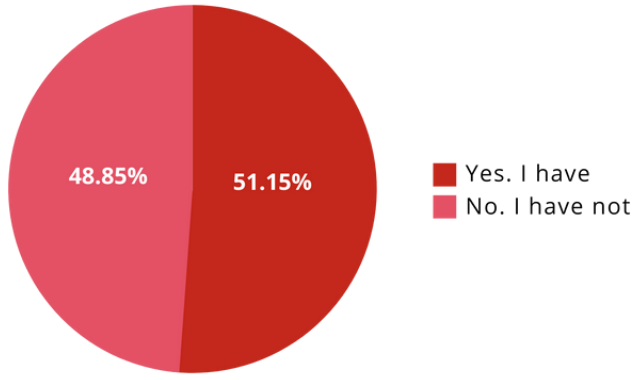


Chart 76. *Have you ever heard of the Global Development Initiative (GDI)? (General)*

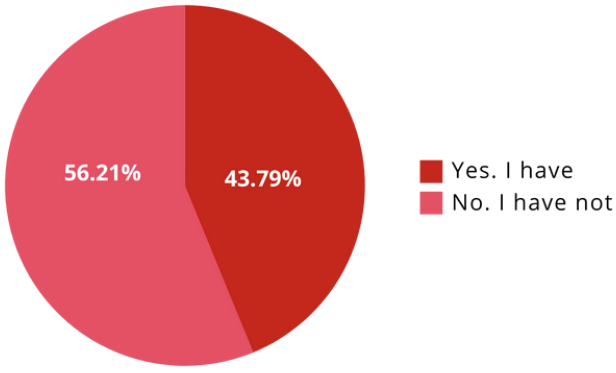


Chart 77. *Have you ever heard of the Global Security Initiative (GSI)? (General)*

Within the Elite group, the GDI was not yet popular among the 4 sub-groups of respondents. This initiative was popular among the Academia sub-group at 53,99% and Officials' group at 52,22%. However, GDI was not popular among the Business Community and Civil Society respondents, as the majority of them said that they had not heard about it.

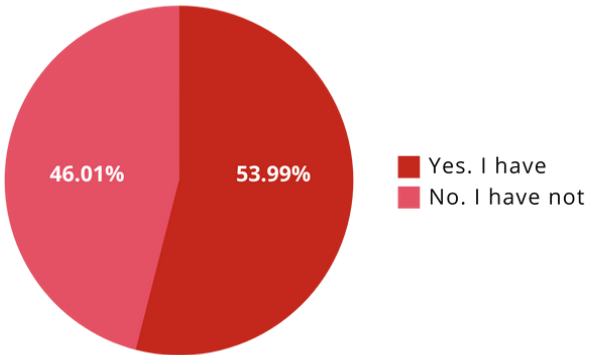


Chart 78. *Have you ever heard of the Global Development Initiative (GDI)? (Academia)*

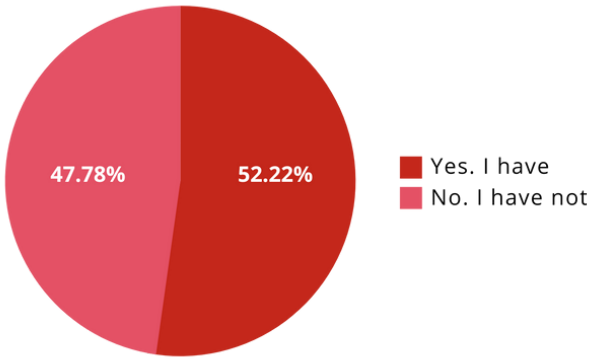


Chart 79. *Have you ever heard of the Global Development Initiative (GDI)? (Officials)*

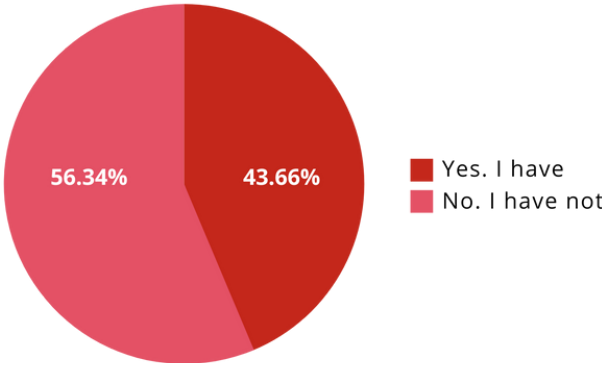


Chart 80. *Have you ever heard of the Global Development Initiative (GDI)? (Business Academy)*

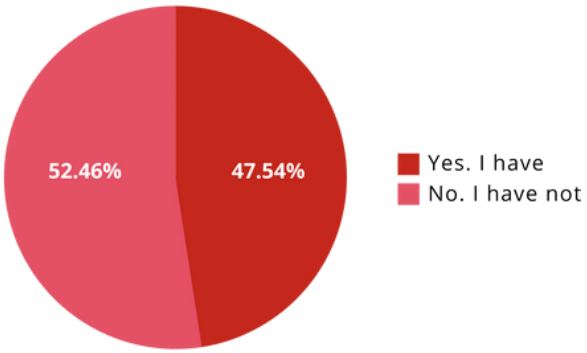


Chart 81. *Have you ever heard of the Global Development Initiative (GDI)? (Civil Society)*

Unlike in the case of the GDI, most of the Elite sub-groups were not aware of the GSI. Academia was the most knowledgeable on the initiative with 45,18% and Officials with 41,67%.

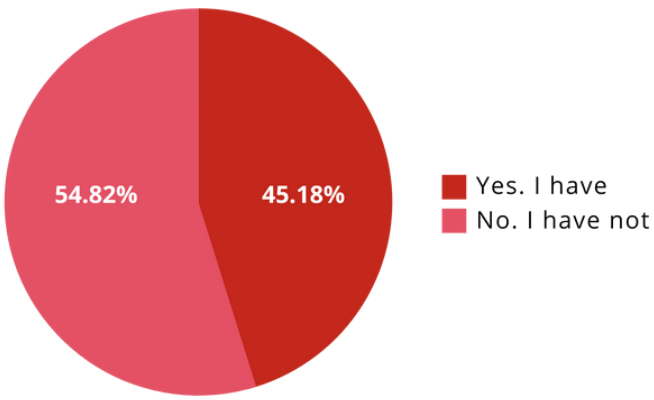


Chart 82. *Have you ever heard of the Global Security Initiative (GSI)? (Academia)*

Among respondents who were aware of the GDI and the GSI, 66,59% believed ASEAN should embrace GDI, while 64,05% believed the same for GSI. The result for GSI is worth noting as defense and security have been the least satisfactory aspects of ASEAN-China cooperation.

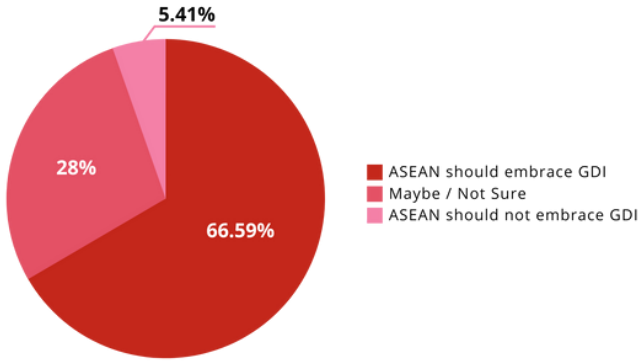


Chart 83. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (General)*

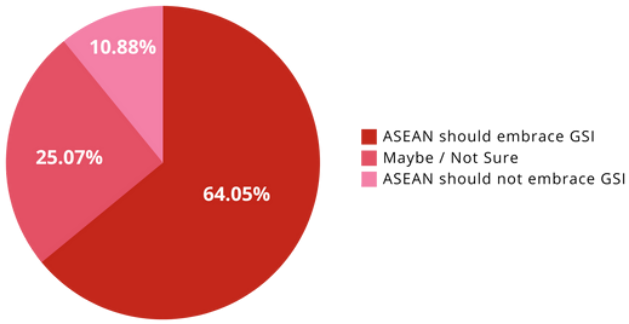


Chart 84. *If yes: Should ASEAN embrace the Global Security Initiative (GSI)? (General)*



There was an Interesting finding in the Elite sub-groups who were aware of the GDI. Business Community, which was the sub-group that were least aware of the GDI was the most supportive of the initiative, as 67,74% suggested that ASEAN embrace it. Academia (65,82%), Officials (63,16%), and the Civil Societies (56,90%) sub-groups largely agreed with the Business communities.

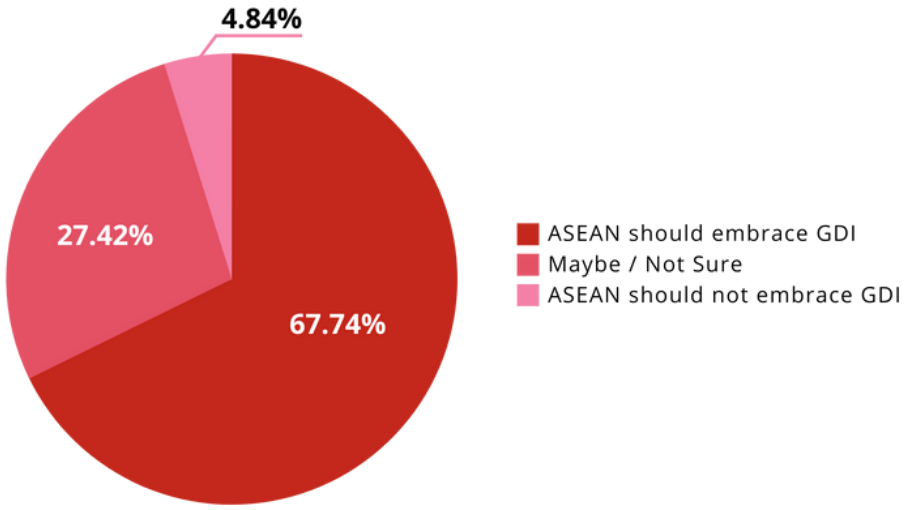


Chart 85. *If yes: Should ASEAN embrace the Global Security Initiative (GSI)? (Business Community)*

Although security was perceived as the least favored aspect of ASEAN-China cooperation, there was a different view among the Elite who were aware of the GSI. The survey results showed that 67,35% of the Civil Society sub-group was the most supportive, as they suggested that ASEAN embrace it. Officials, Academia, and Business Community generally agreed with Civil Society.

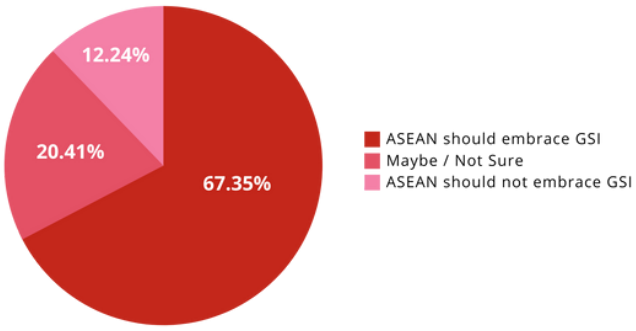


Chart 86. *If yes: Should ASEAN embrace the Global Security Initiative (GSI)? (Civil Society)*

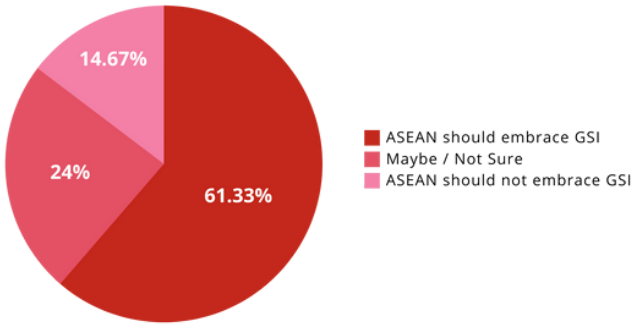


Chart 87. *If yes: Should ASEAN embrace the Global Security Initiative (GSI)? (Officials)*

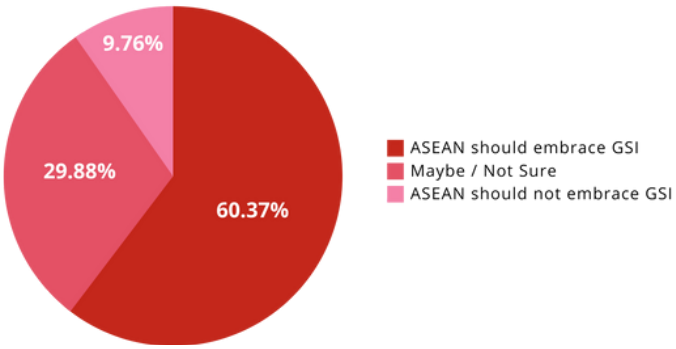


Chart 88. *If yes: Should ASEAN embrace the Global Security Initiative (GSI)? (Academia)*

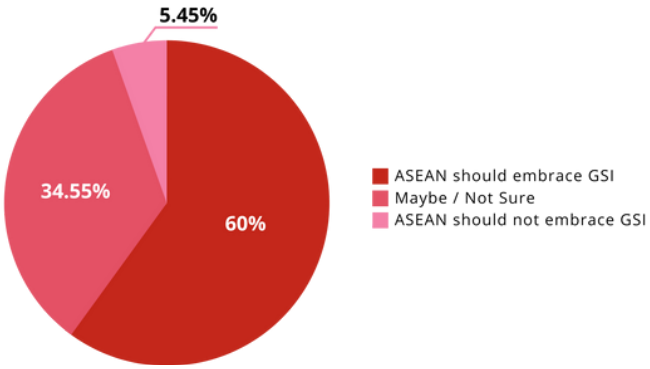


Chart 89. *If yes: Should ASEAN embrace the Global Security Initiative (GSI)? (Business Community)*

In country-per-country analysis, respondents from Vietnam (64,10%) and Myanmar (60,78%) were more aware of the GDI in comparison to respondents from other countries. Although, overall – at least 40% of respondents from all the ASEAN countries have heard of the GDI, a notable exception is Thailand, where 68% of respondents claimed that they had never heard of the GDI. Of those who were aware of the GDI, respondents from the Philippines (78,61%), Cambodia (72,29%), Indonesia (65,60%), Malaysia (65,18%) were most open to having ASEAN embrace the initiative.

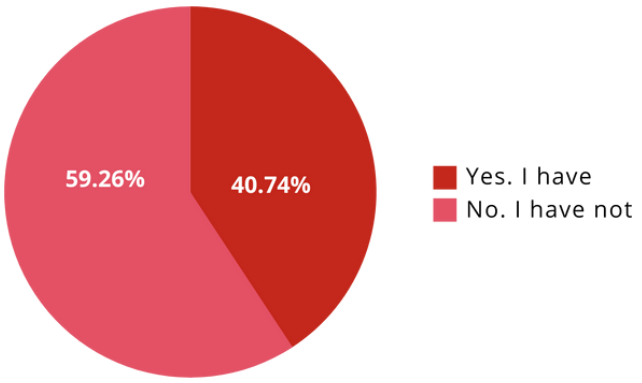


Chart 90. *Have you ever heard of the Global Development Initiative (GDI)? (Brunei)*

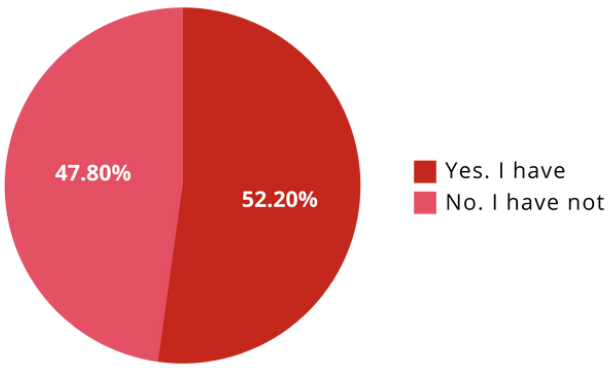


Chart 91. *Have you ever heard of the Global Development Initiative (GDI)? (Cambodia)*

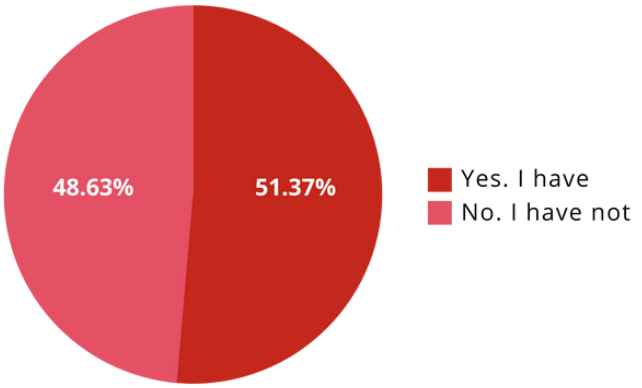


Chart 92. *Have you ever heard of the Global Development Initiative (GDI)? (Indonesia)*

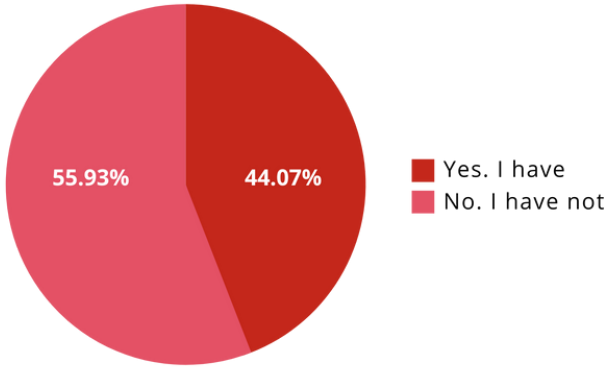


Chart 93. *Have you ever heard of the Global Development Initiative (GDI)? (Laos)*

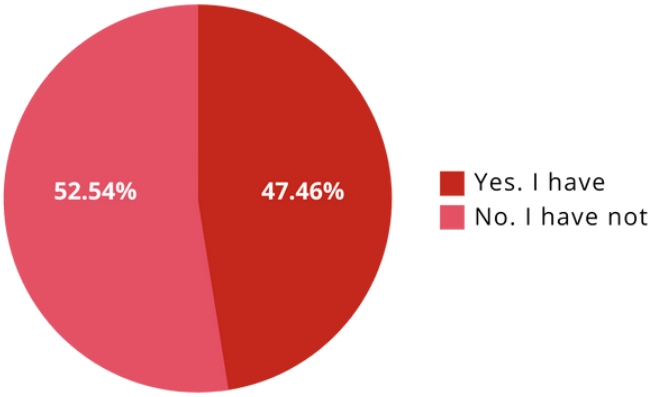


Chart 94. *Have you ever heard of the Global Development Initiative (GDI)? (Malaysia)*

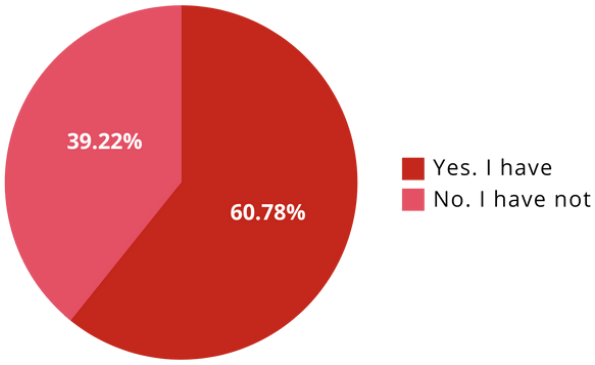


Chart 95. *Have you ever heard of the Global Development Initiative (GDI)? (Myanmar)*

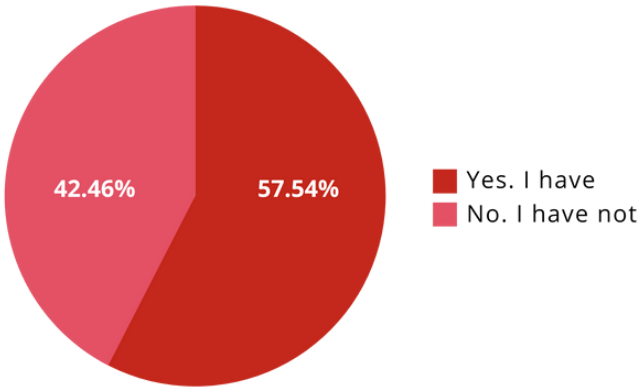


Chart 96. *Have you ever heard of the Global Development Initiative (GDI)? (Philippines)*

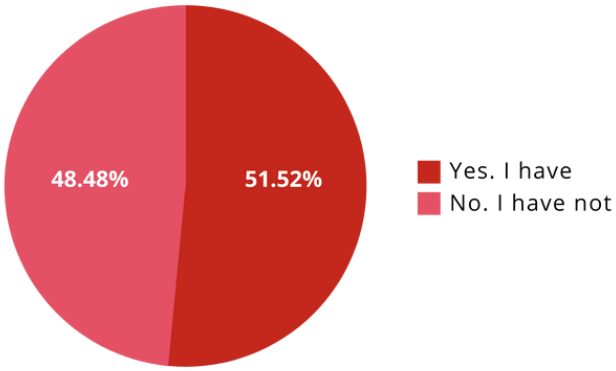


Chart 97. *Have you ever heard of the Global Development Initiative (GDI)? (Singapore)*

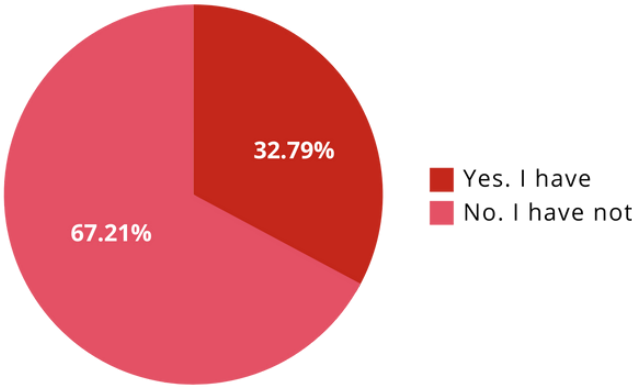


Chart 98. *Have you ever heard of the Global Development Initiative (GDI)? (Thailand)*

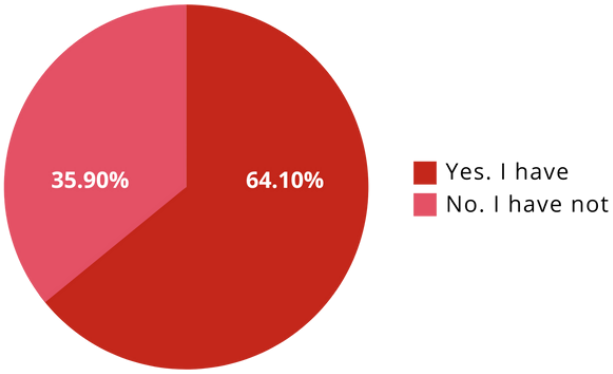


Chart 99. *Have you ever heard of the Global Development Initiative (GDI)? (Vietnam)*

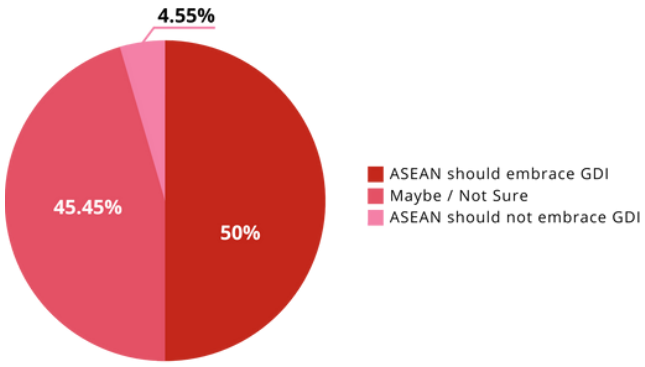


Chart 100. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Brunei)*

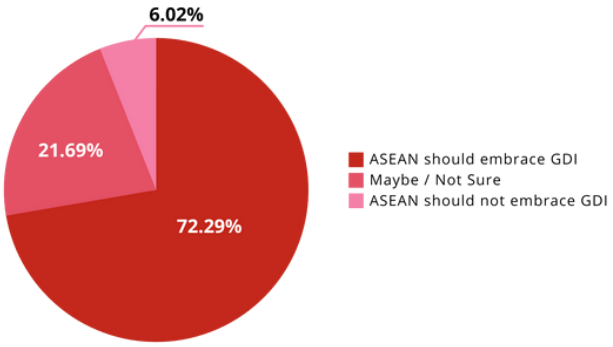


Chart 101. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Cambodia)*

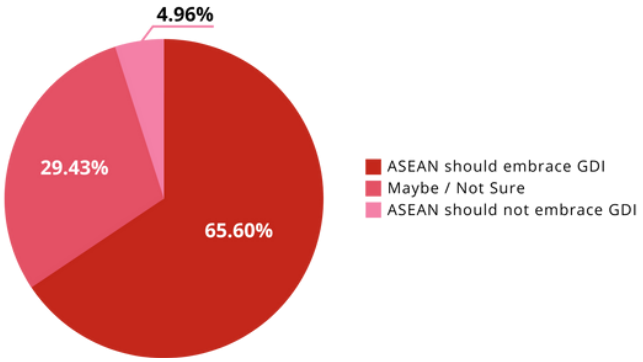


Chart 102. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Indonesia)*

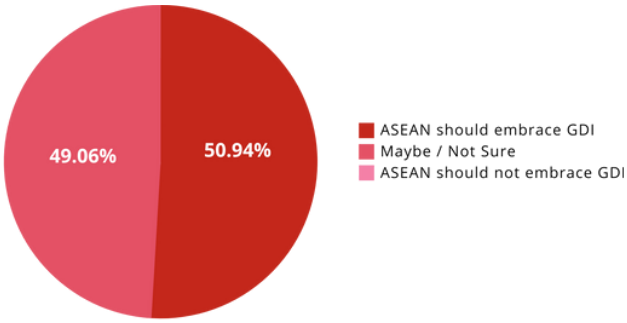


Chart 103. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Laos)*

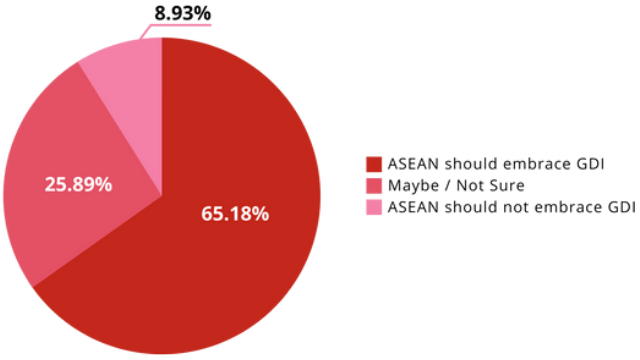


Chart 104. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Malaysia)*

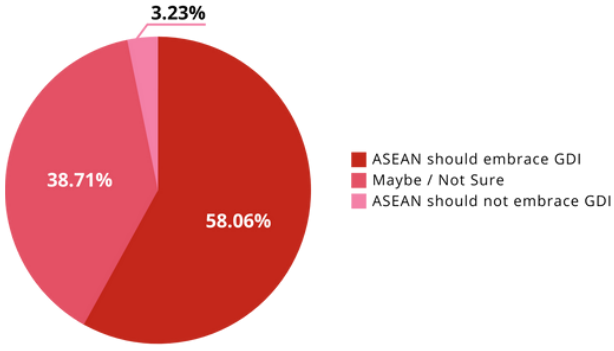


Chart 105. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Myanmar)*

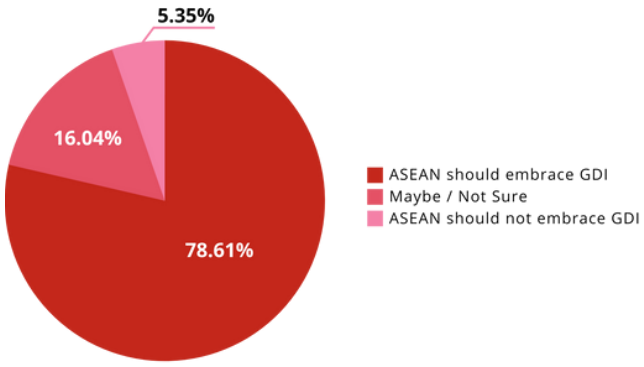


Chart 106. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Philippines)*

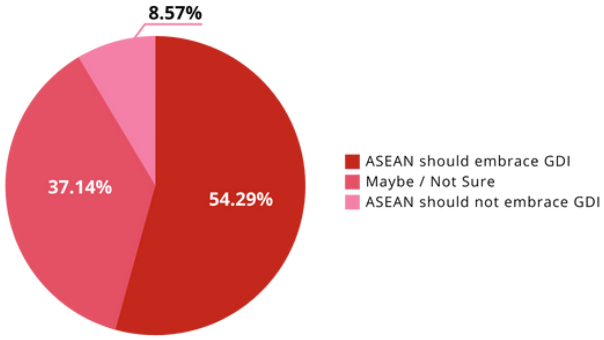


Chart 107. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Singapore)*

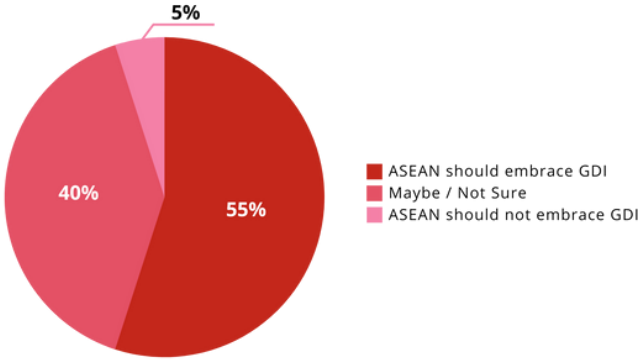


Chart 108. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Thailand)*

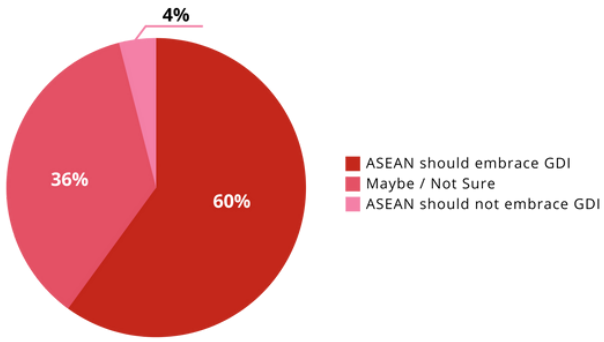


Chart 109. *If yes: Should ASEAN embrace the Global Development Initiative (GDI)? (Vietnam)*

On the other hand, the Global Security Initiative was slightly less known to the survey respondents as compared to the Global Development Initiative. Only respondents from Myanmar (56,86%) and Vietnam (58,97%) were mostly aware of the GSI. Echoing the pattern of support for embrace of the GDI, respondents from the Philippines (70,99%), Cambodia (69,84%) Indonesia (67,19%) were most supportive of the GSI.

D. Perceptions on China and ASEAN-China Cooperation

As in previous years, the survey asked respondents about their perceptions of China. The most frequent answer of respondents at 44,27% regarded the ASEAN-China relationship as **beneficial** to both, and 42,28% of respondents were enthusiastic about deepening the cooperation.

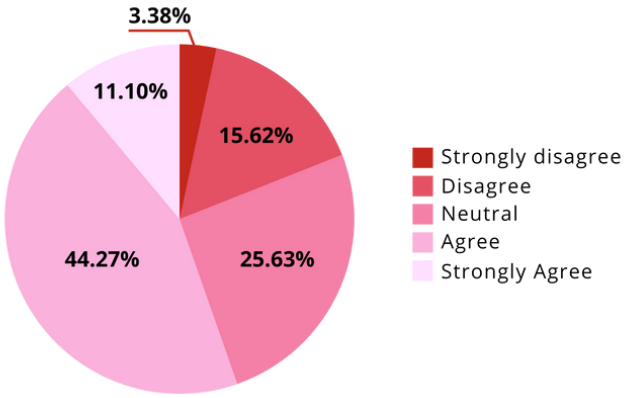


Chart 110. *Agreement on the statement: "The current relationship between ASEAN and China benefits both ASEAN and China" (General)*

Almost half of Elite (42,87%) and Student respondents (45,59%) agreed that the current ASEAN-China relationship benefited both sides. Majority of both the Elite (58,61%) and Students (63,34%) were also within the spectrum that agreed to deepen cooperation between ASEAN and China.

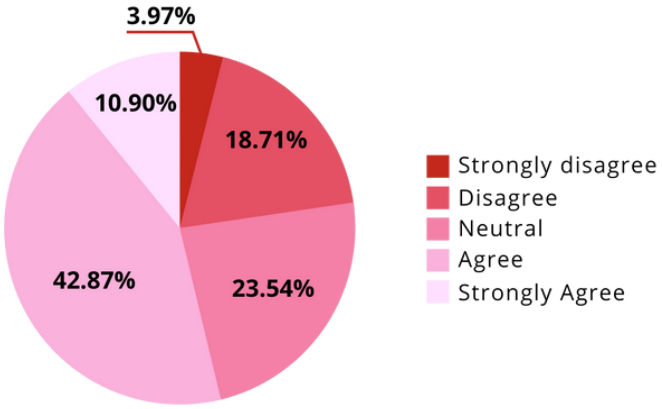


Chart 111. *Agreement on the statement: "The current relationship between ASEAN and China benefits both ASEAN and China" (Elite)*

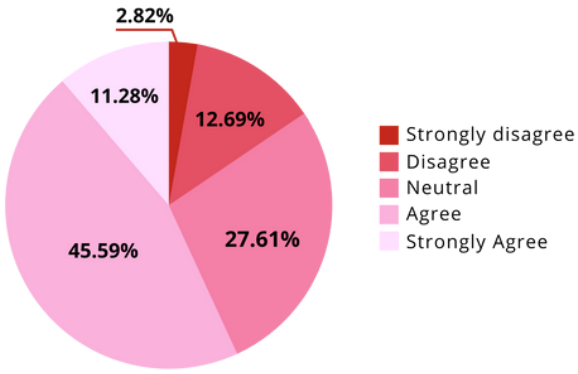


Chart 112. *Agreement on the statement: "The current relationship between ASEAN and China benefits both ASEAN and China" (Students)*



The Belt and Road Initiative (BRI) has also become a key feature of ASEAN-China relations, with 45.3% agreeing and 13.15% strongly agreeing that it was beneficial. However, it is worth noting that there was quite a large number of neutral respondents at 31,24%.

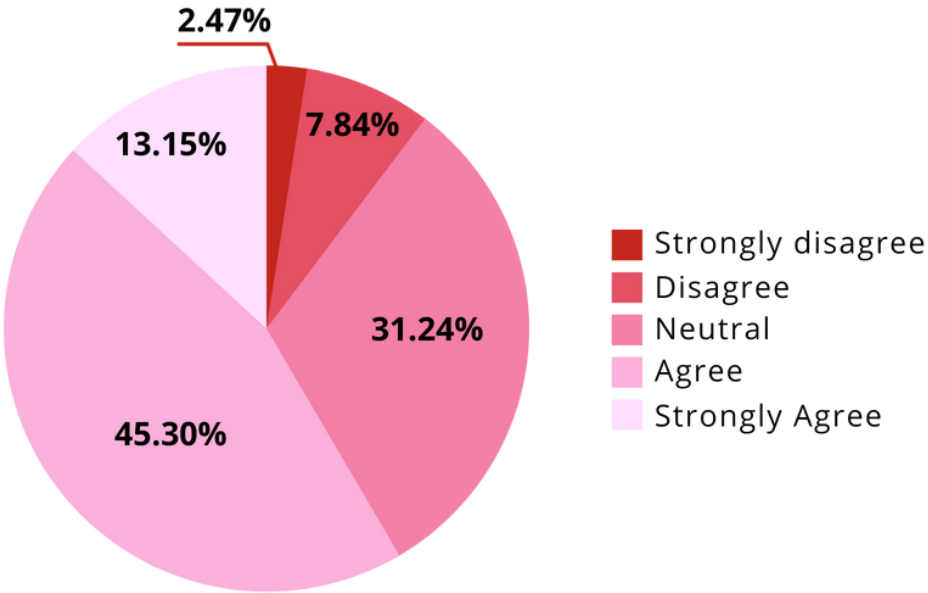


Chart 113. *Agreement on the statement: "The Belt and Road Initiative (BRI) has become a key feature of ASEAN-China relations" (General)*

A whopping number of Elite (57,62%) and Students (59,22%) agreed and strongly agreed that the **Belt and Road Initiative has become a key feature of ASEAN-China relations**. 28,75% of Elite and 33,61% of Students were neutral.

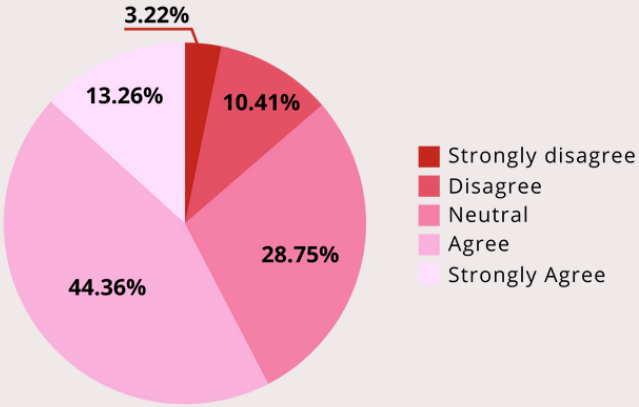


Chart 114. *Agreement on the statement: "The Belt and Road Initiative (BRI) has become a key feature of ASEAN-China relations" (Elite)*

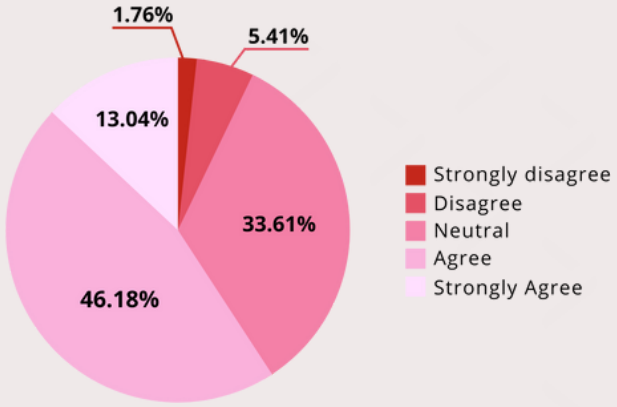


Chart 115. *Agreement on the statement: "The Belt and Road Initiative (BRI) has become a key feature of ASEAN-China relations" (Students)*

The survey asked about respondents' **perception of China's goodwill** towards ASEAN countries and the result was that the most frequent answer of respondents were neutral on it at 38,42% and the respondents who agreed were the second largest group at 30,94%. A similar pattern could be observed on the **perception of China's equal treatment** to ASEAN countries; the most frequent answer of respondents stood neutral on it at 34,74% while the proportion of respondents who agreed on it was 28,71%.

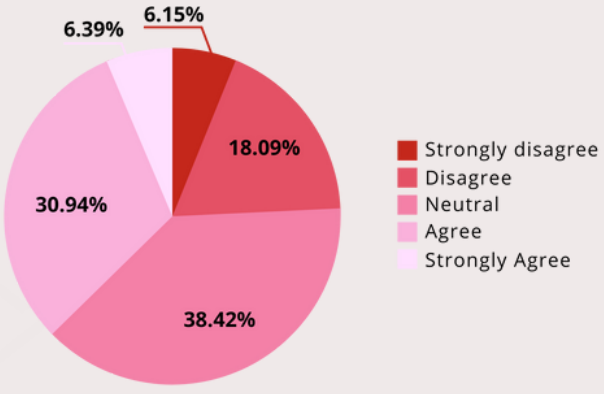


Chart 116. *Agreement on the statement: "China has a goodwill towards ASEAN countries" (General)*

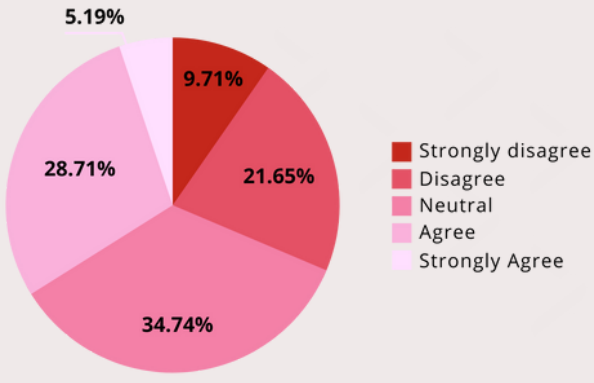


Chart 117. *Agreement on the statement: "China treats ASEAN as equal partners" (General)*

When asked whether **China had goodwill towards ASEAN** countries, the most frequent answer of the Elite (33,58%) and Students (43,01%) said they were neutral. 32,22% of Elites and 29,73% of Students agree.

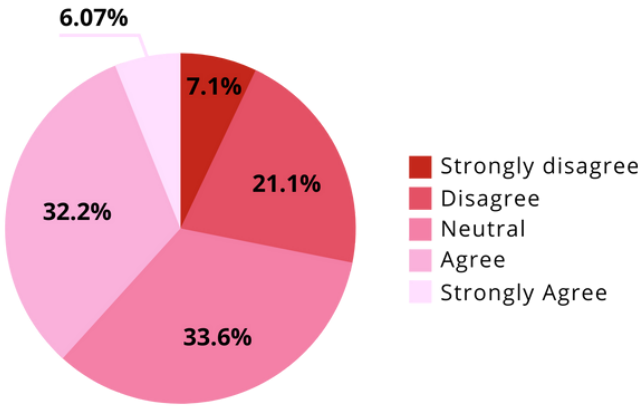


Chart 118. *Agreement on the statement: "China has a goodwill towards ASEAN countries" (Elite)*

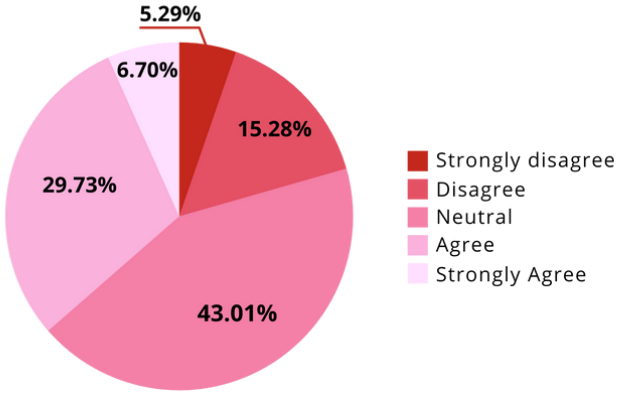


Chart 119. *Agreement on the statement: "China has a goodwill towards ASEAN countries" (Students)*

The Elites were almost equally split in their response on whether **China treated ASEAN as equal partners**. 37,30% were in the disagree spectrum (strongly disagree and disagree), 31,85% were neutral, 30,85% were in the agree spectrum (strongly agree and agree). On the other hand, Students showed a slight difference with that of the Elite. The most popular answer from Student (37,49%) were neutral; 36,78% were in the agreement spectrum; and 25,73% were in the disagreement spectrum.

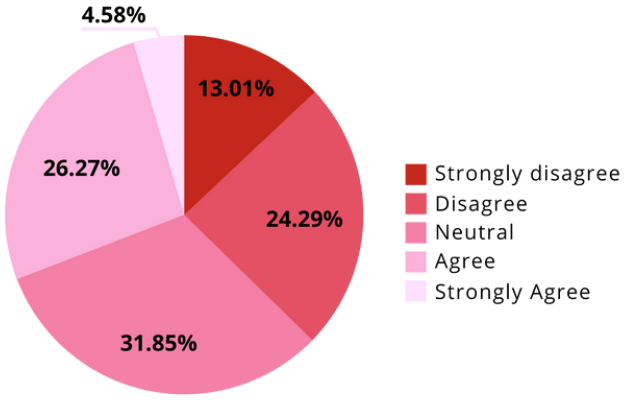


Chart 120. *Agreement on the statement: "China treats ASEAN as equal partners" (Elite)*

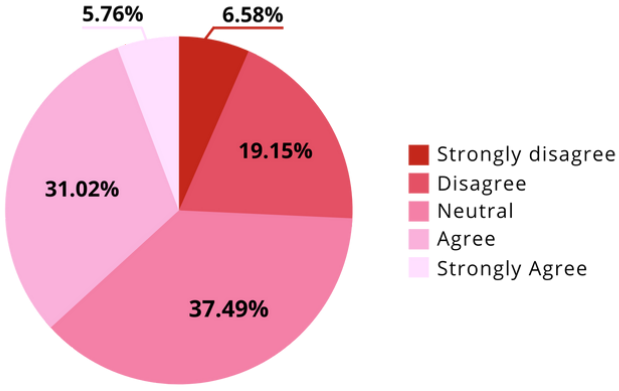


Chart 121. *Agreement on the statement: "China treats ASEAN as equal partners" (Students)*

Still the same question between Elite and Students, the most popular answer of the Elite (31,85%) agreed while 30,24% were neutral and the most frequent answer of Students (37,49%) chose to be neutral.



According to the survey, the respondents tended to agree with the statement **"China respects ASEAN Centrality"** at 38,36% (agree spectrum), with the remainder being neutral at 33,96%. An opposite trend was found in the statement, **"China respects ASEAN countries' national unity, sovereignty, and territorial integrity"**: most popular answer of the respondents disagreed, with 39,45% of respondents in the disagree spectrum while 29,19% were neutral.

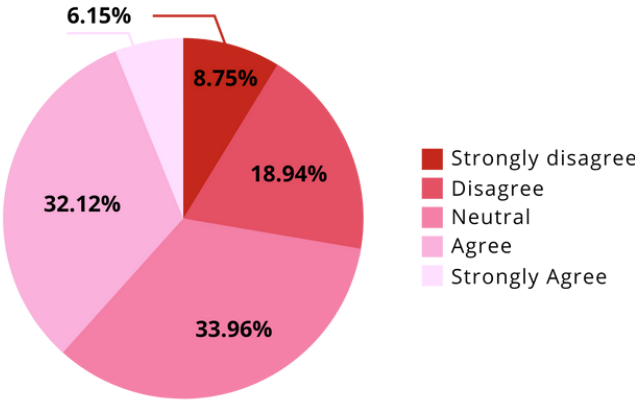


Chart 122. *Agreement on the statement: "China respects ASEAN centrality" (General)*

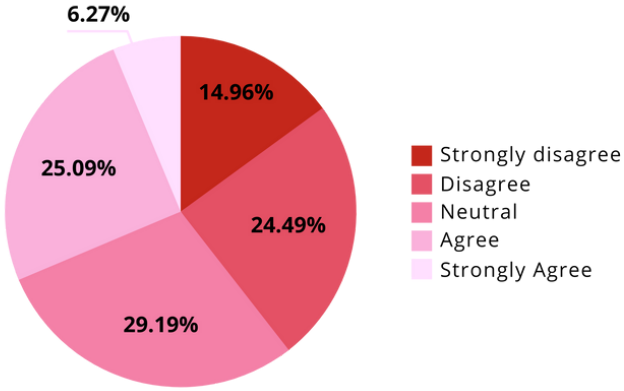


Chart 123. *Agreement on the statement: "China respects the national unity, sovereignty, and territorial integrity of ASEAN countries" (General)*



On the strategic issue about the ongoing negotiation toward a Code of Conduct, the survey asked for responses to the statement that **China has good intentions in the negotiation process**. The most popular answer of the respondents at 41,07% were neutral about it while 23,04% agreed and 20,14% disagreed. Yet, most respondents at 38,18% chose to be neutral on the statement, **"China proactively tries to defuse geopolitical rivalry and tension in the region,"** while 32,09% were in the disagree spectrum.

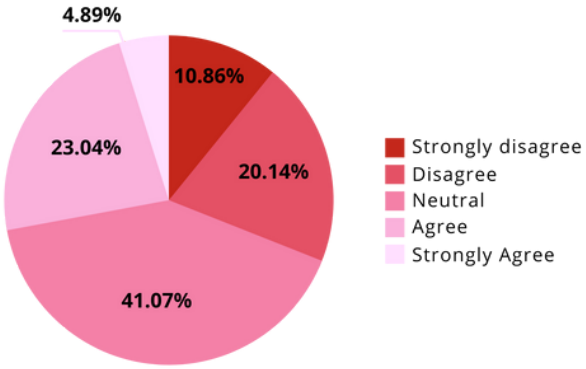


Chart 124. *Agreement on the statement: "China has good intentions in the negotiation of the Code of Conduct" (General)*

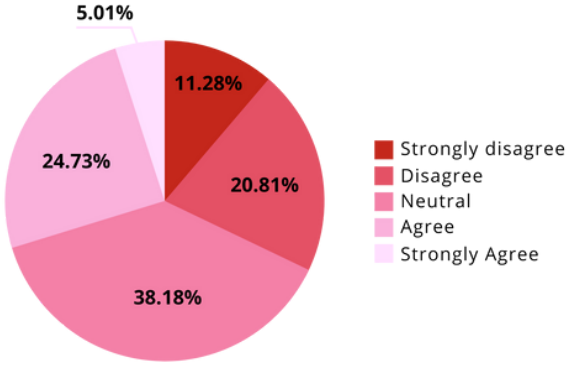


Chart 125. *Agreement on the statement: "China proactively tries to defuse geopolitical rivalry and tension in the region" (General)*

The most frequent of both Elites (37,67%) and Students (44,30%) were neutral on whether China has good intentions in the COC negotiation. 37,42% of Elites and 24,92% of Students disagreed and strongly disagreed. Furthermore, 25,50% of Students agreed that China has good intentions in the negotiation.

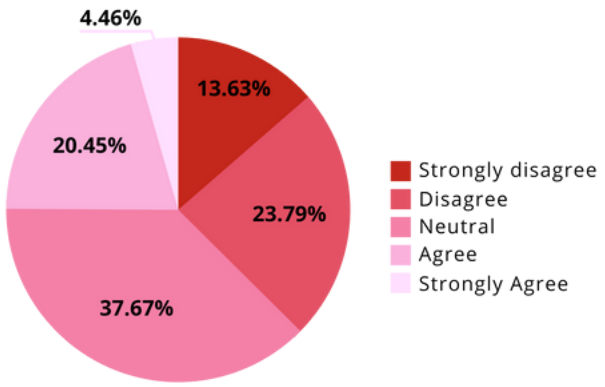


Chart 126. *Agreement on the statement: "China has good intentions in the negotiation of the Code of Conduct" (Elite)*

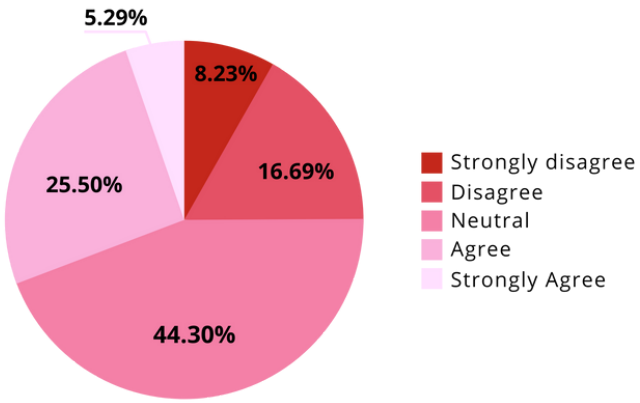


Chart 127. *Agreement on the statement: "China has good intentions in the negotiation of the Code of Conduct" (Students)*

37,3% of Elites disagreed and strongly disagreed that China proactively tries to defuse geopolitical rivalry and tension in the region. 33,33% of Elites and 42,77% of Students were neutral.

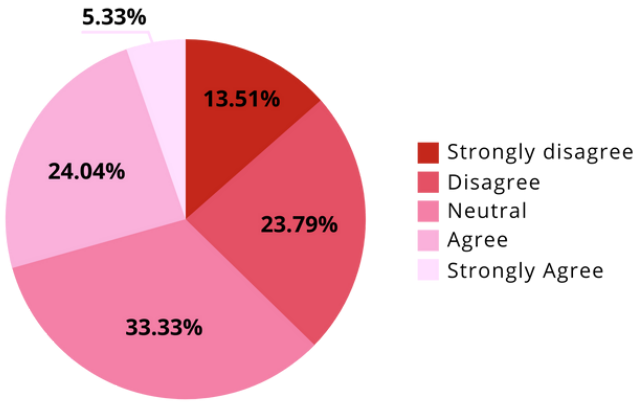


Chart 128. *Agreement on the statement: "China proactively tries to defuse geopolitical rivalry and tension in the region" (Elite)*

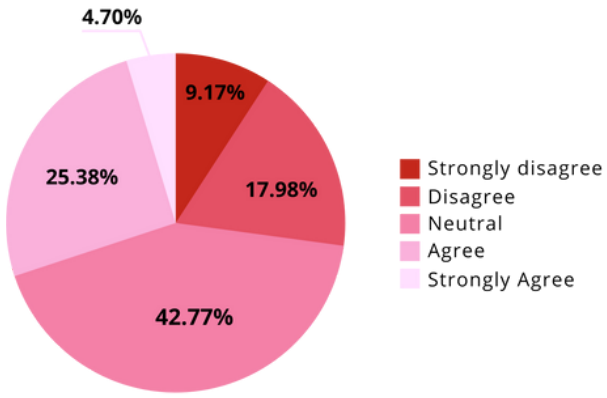


Chart 129. *Agreement on the statement: "China proactively tries to defuse geopolitical rivalry and tension in the region" (Students)*

E. Southeast Asian Country relationship with China

The survey asked about the relations of the respondent's country with China. The most frequent answer of respondents, or 37,33%, see their respective governments as having a close relationship with China while 24,31% said this relationship was very close.

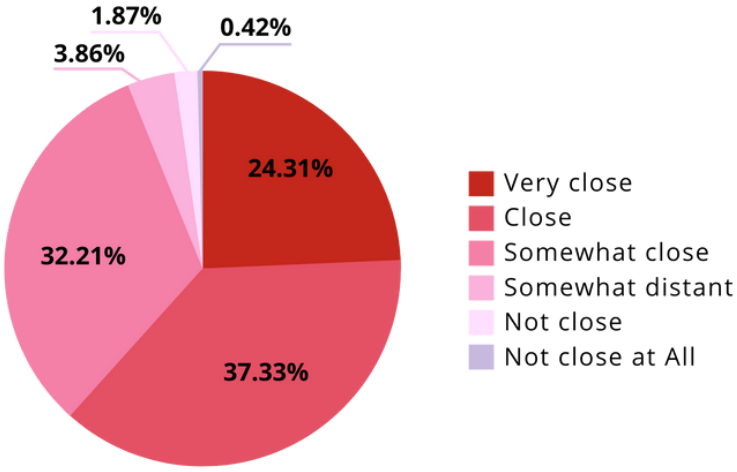


Chart 130. *How close do you think your government is with China? (General)*

Most respondents from Cambodia (57,86%) and Laos (44,07%) viewed their governments as very close to China. Respondents from Thailand (49,18%), Malaysia (42,37%), and Indonesia (40,07%) were of the same view.

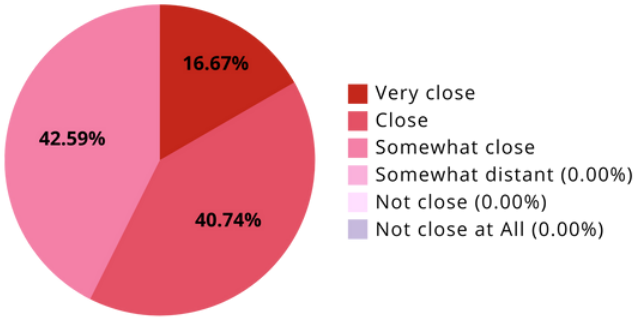


Chart 131. *How close do you think your government is with China? (Brunei)*

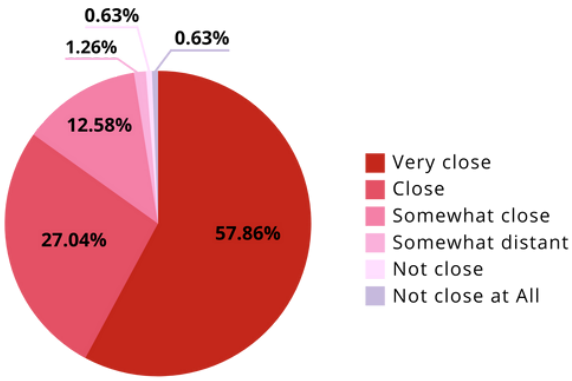


Chart 132. *How close do you think your government is with China? (Cambodia)*

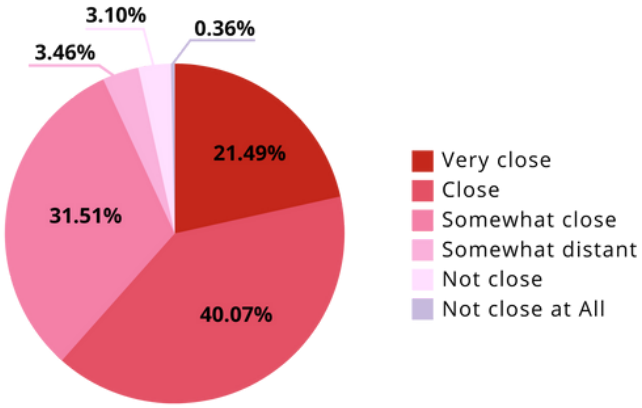


Chart 133. *How close do you think your government is with China? (Indonesia)*

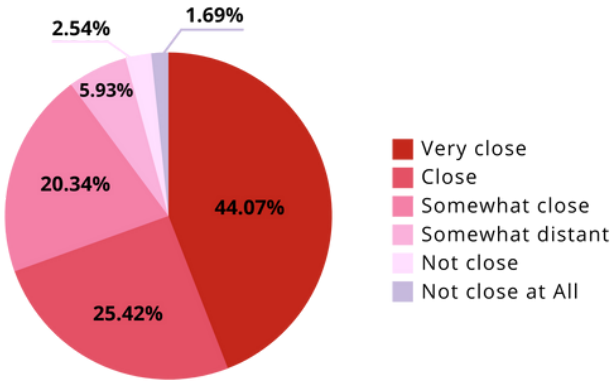


Chart 134. *How close do you think your government is with China? (Laos)*

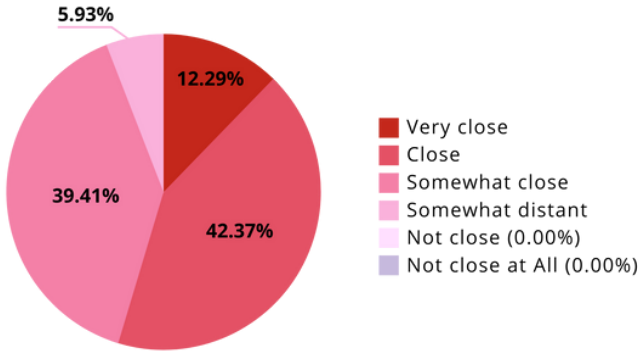


Chart 135. *How close do you think your government is with China? (Malaysia)*

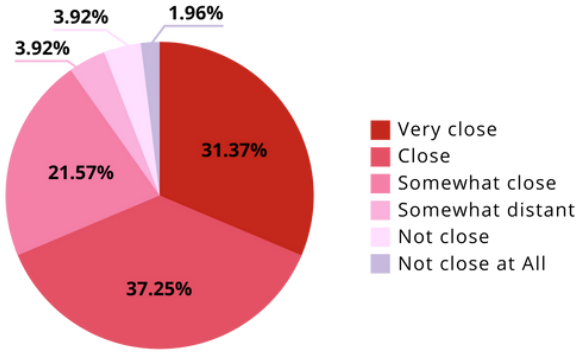


Chart 136. *How close do you think your government is with China? (Myanmar)*

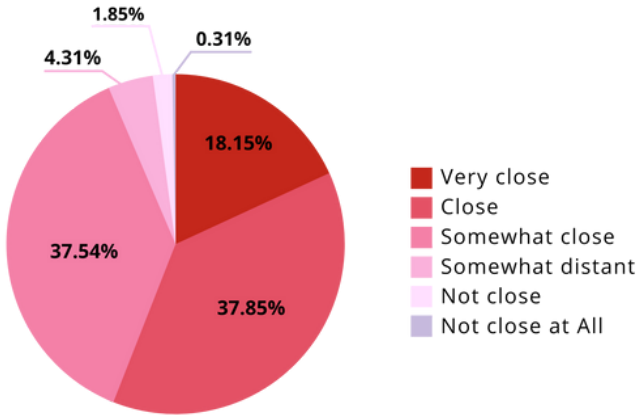


Chart 137. *How close do you think your government is with China? (Philippines)*

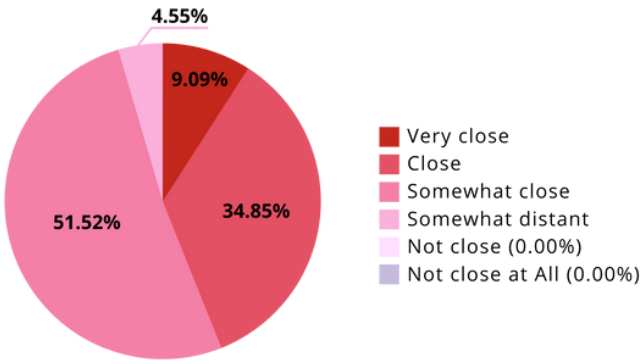


Chart 138. *How close do you think your government is with China? (Singapore)*

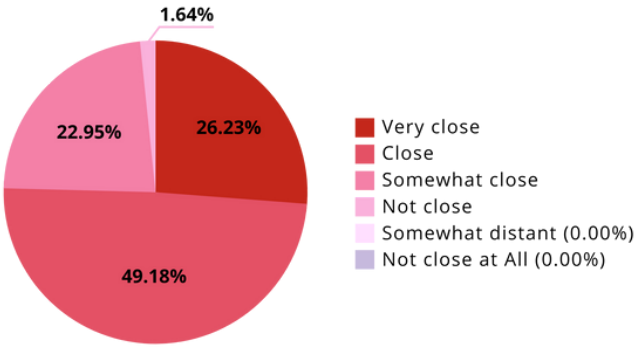


Chart 139. *How close do you think your government is with China? (Thailand)*

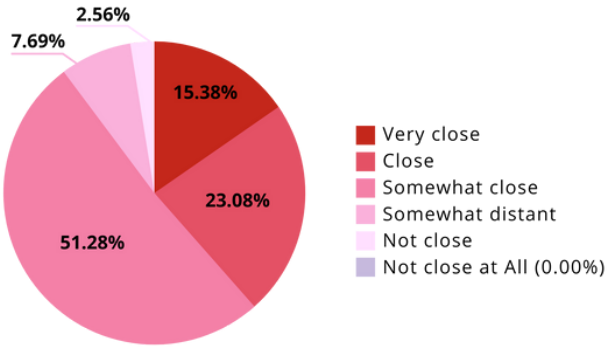


Chart 140. *How close do you think your government is with China? (Vietnam)*

Diving into the relations of the respondent's country with China, the survey did ask, **"What kind of influence China has in the relations of the respondent's country with China."** 50,12% of respondents were concerned about the economy, and 42,46% had concerns on both the political and economic fronts.



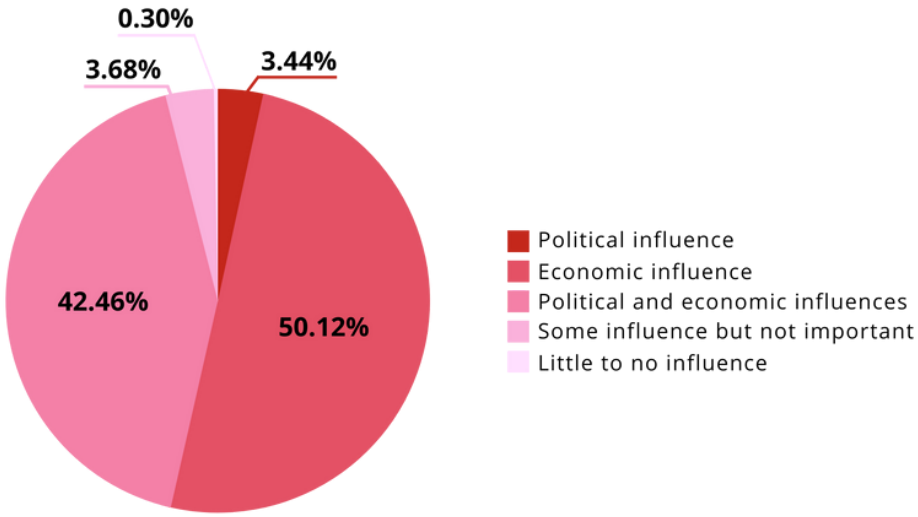


Chart 141. *What type/kind of influence does China have in your country? (General)*

While respondents from all countries generally recognized China's economic influence in their respective countries, those from Myanmar (72,55%), Vietnam (66,67%), and Cambodia (54,09%) noted that China's influence in each of their respective countries is also political, instead of just economic in nature.

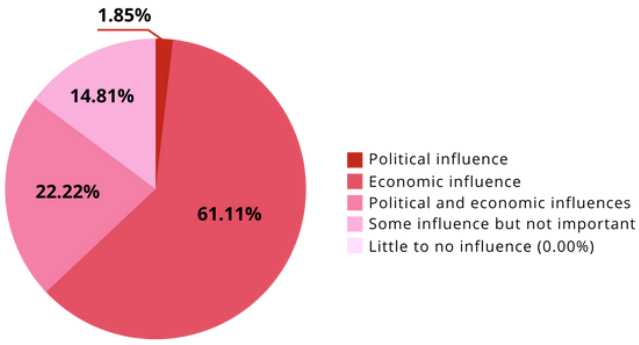


Chart 142. *What type/kind of influence does China have in your country? (Brunei)*

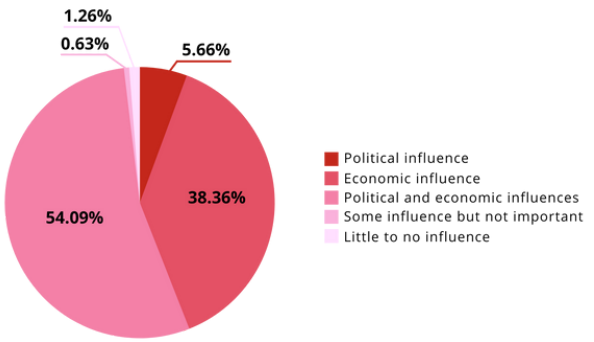


Chart 143. *What type/kind of influence does China have in your country? (Cambodia)*

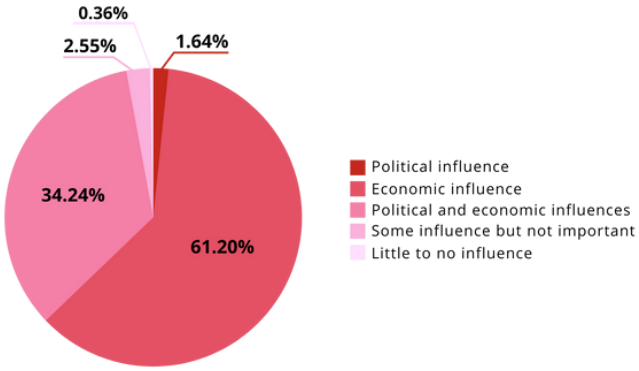


Chart 144. *What type/kind of influence does China have in your country? (Indonesia)*

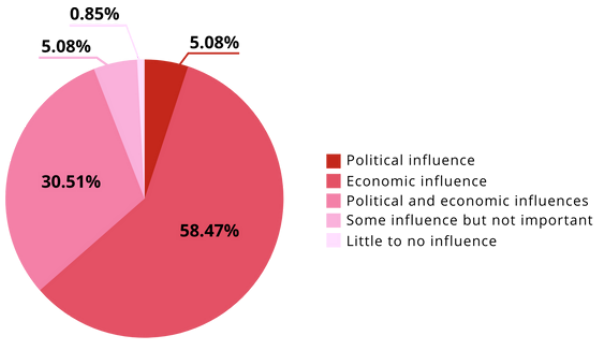


Chart 145. *What type/kind of influence does China have in your country? (Laos)*

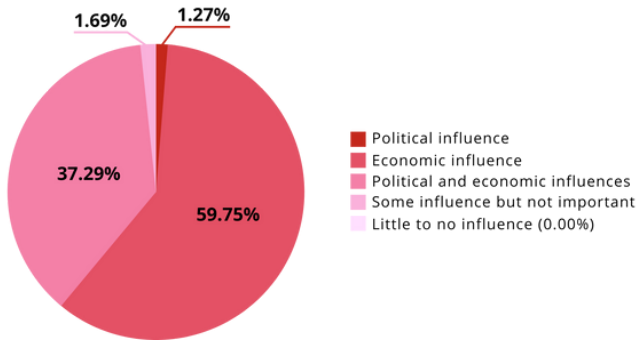


Chart 146. *What type/kind of influence does China have in your country? (Malaysia)*

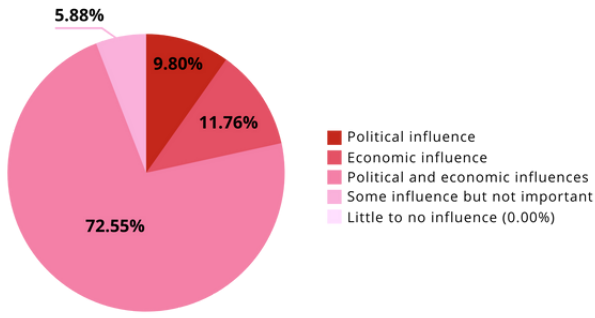


Chart 147. *What type/kind of influence does China have in your country? (Myanmar)*

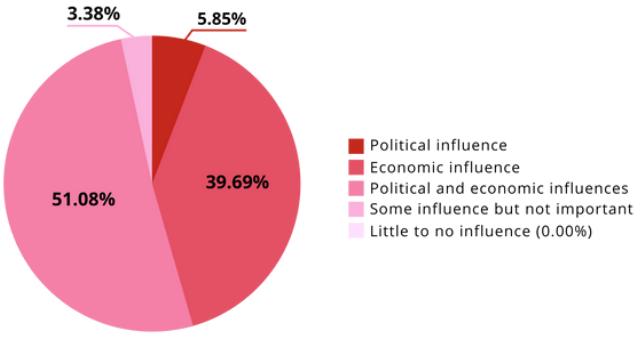


Chart 148. *What type/kind of influence does China have in your country? (Philippines)*

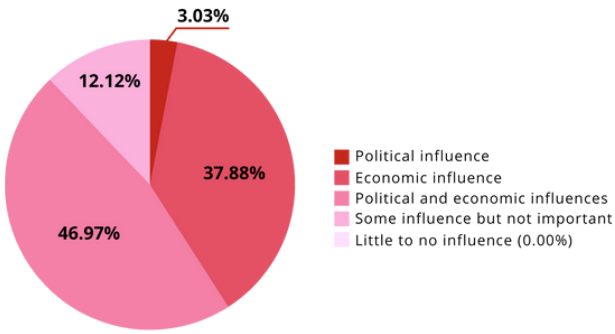


Chart 149. *What type/kind of influence does China have in your country? (Singapore)*

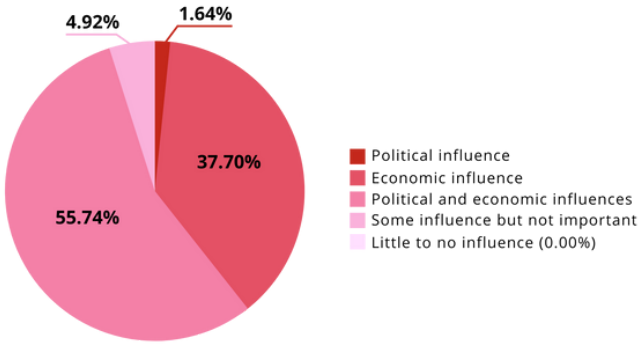


Chart 150. *What type/kind of influence does China have in your country? (Thailand)*

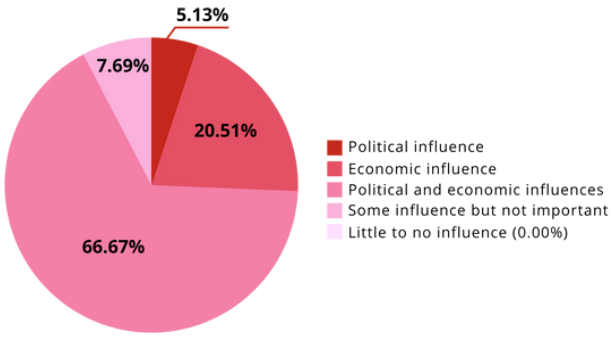


Chart 151. *What type/kind of influence does China have in your country? (Vietnam)*

Still, on China's influence on the respondent's country, the survey further asked about the respondent's view on Chinese influence in three categories: **welcomed, neutral, and concerned**. The result was an almost even split between neutral at 35,83% and concerned at 34,20%. The remaining respondents (29,98%) were enthusiastic about it.

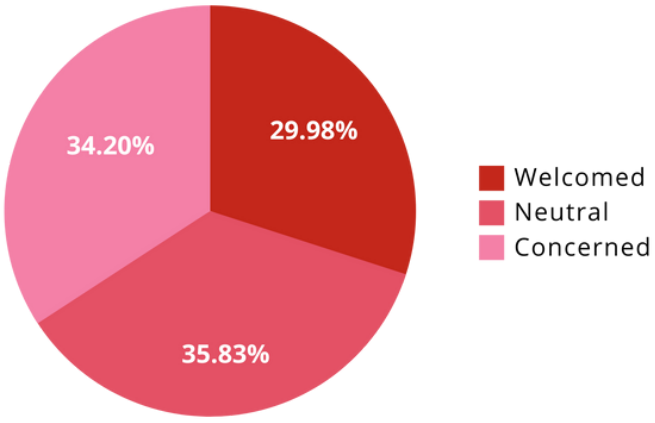


Chart 152. *What is your view of China's influence in your country? (General)*

Broken down per county, respondents from Vietnam (66,67%), Myanmar (54,90%), Thailand (54,10%), were the most concerned about China's influence in their respective countries.

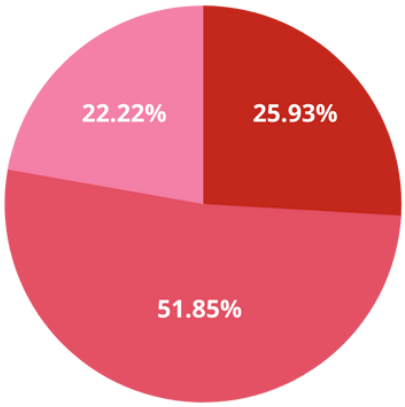


Chart 153. *What is your view of China's influence in your country? (Brunei)*

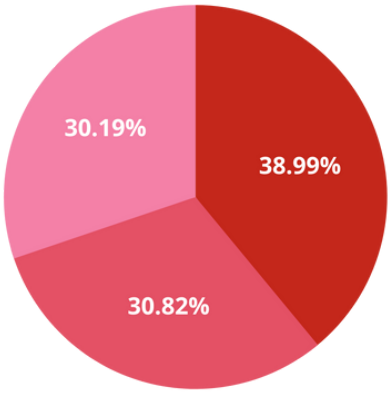


Chart 154. *What is your view of China's influence in your country? (Cambodia)*

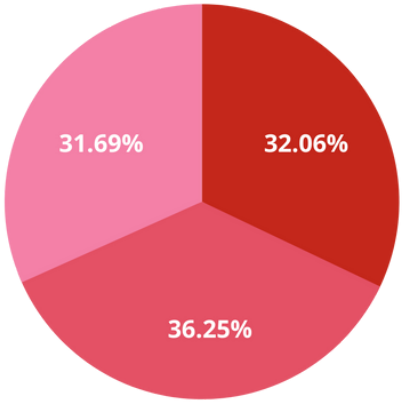


Chart 155. *What is your view of China's influence in your country? (Indonesia)*

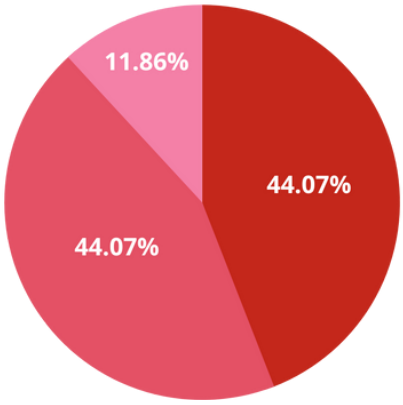


Chart 156. *What is your view of China's influence in your country? (Laos)*

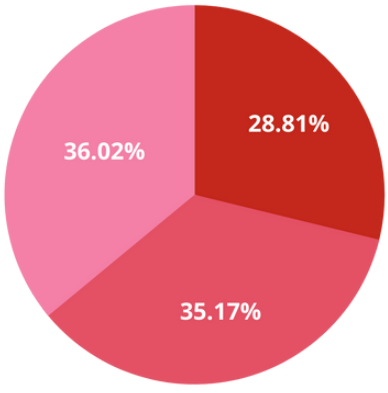


Chart 157. *What is your view of China's influence in your country? (Malaysia)*

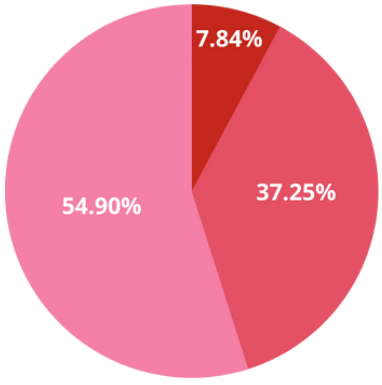


Chart 158. *What is your view of China's influence in your country? (Myanmar)*

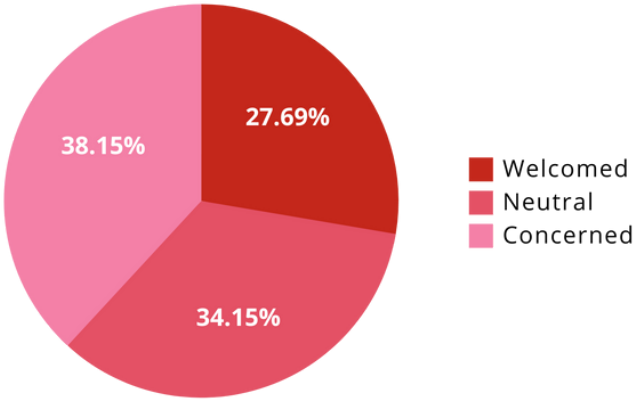


Chart 159. *What is your view of China's influence in your country? (Philippines)*

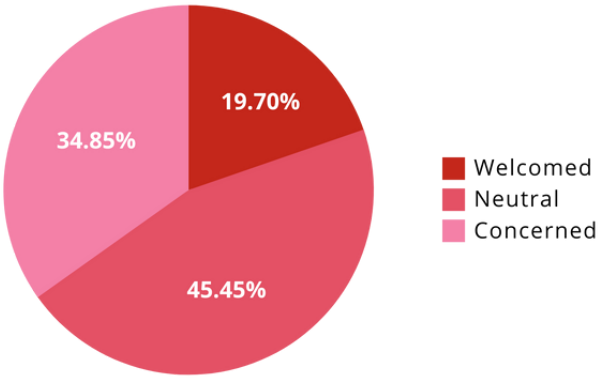


Chart 160. *What is your view of China's influence in your country? (Singapore)*

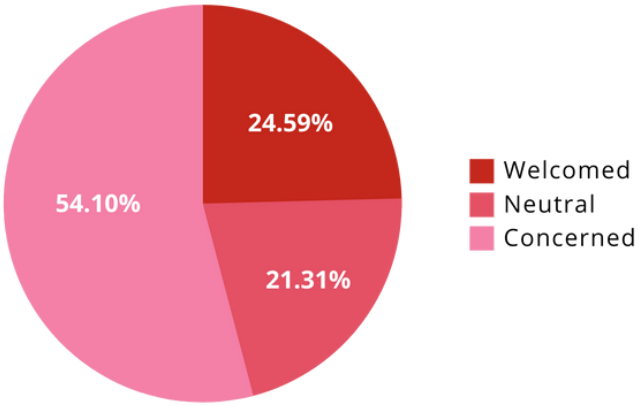


Chart 161. *What is your view of China's influence in your country? (Thailand)*

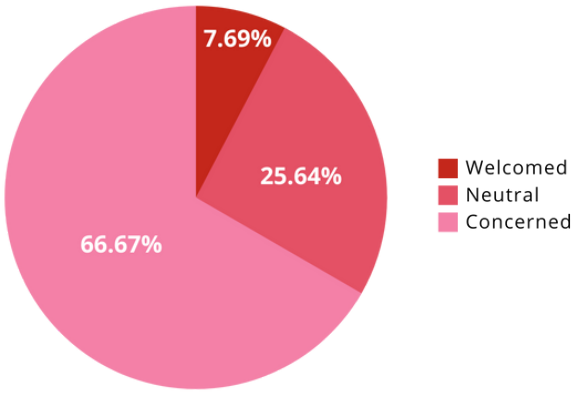


Chart 162. *What is your view of China's influence in your country? (Vietnam)*

F. Trust On China

The survey asked a direct question about the respondents' trust in China. The most popular answer of respondents or 42,76% chose not to answer the question. However, those who answered the question were more inclined not to trust China at 29,86% compared to those who trusted China at 27,38%.

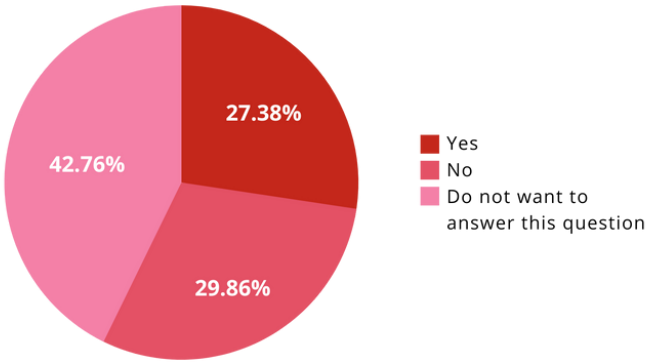


Chart 163. *Do you trust China ? (General)*

Respondents from Cambodia (38,98%), Singapore (37,88%), and Laos (38,98%) were the most trusting in China. On the other hand, those from Thailand (54,10%), Singapore (45,45%), and Vietnam (43,59%) were the least. Singapore is an interesting case since a huge percentage of its respondents either said that they trusted or they did not trust China. Other countries showed huge numbers who chose to be neutral.



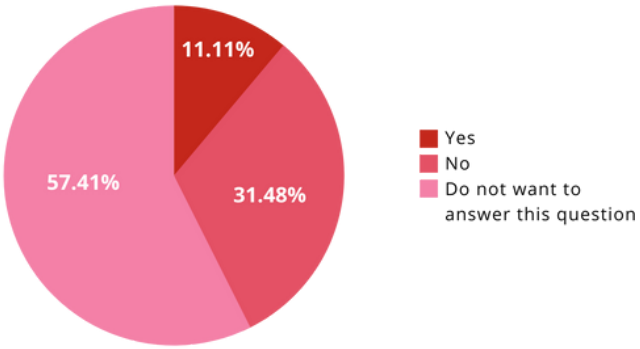


Chart 164. *Do you trust China ? (Brunei)*

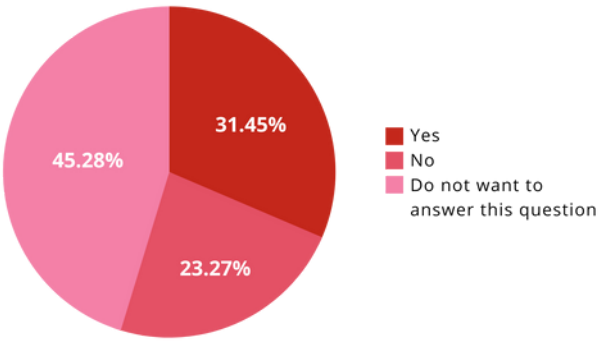


Chart 165. *Do you trust China ? (Cambodia)*

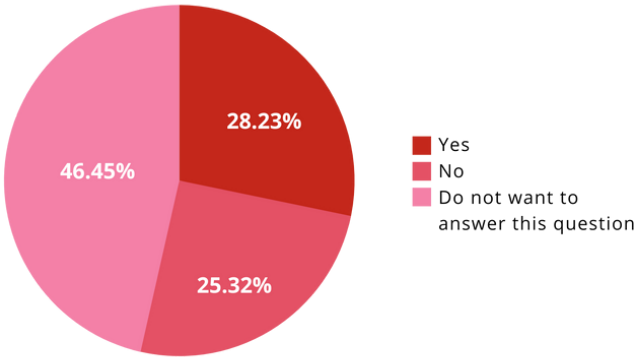


Chart 166. *Do you trust China ? (Indonesia)*

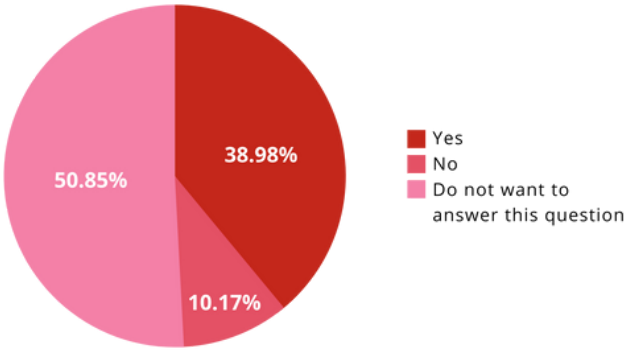


Chart 167. *Do you trust China ? (Laos)*

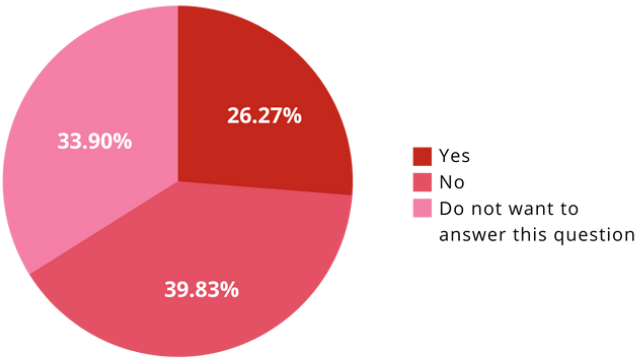


Chart 168. *Do you trust China ? (Malaysia)*

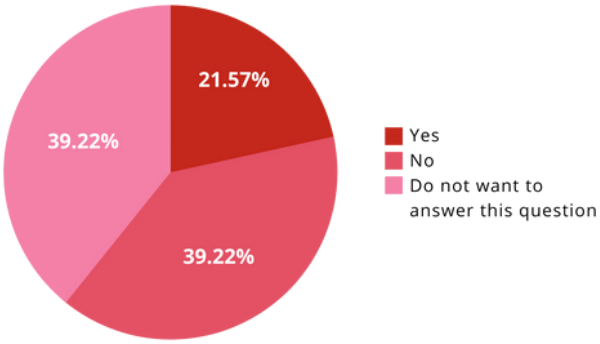


Chart 169. *Do you trust China ? (Myanmar)*

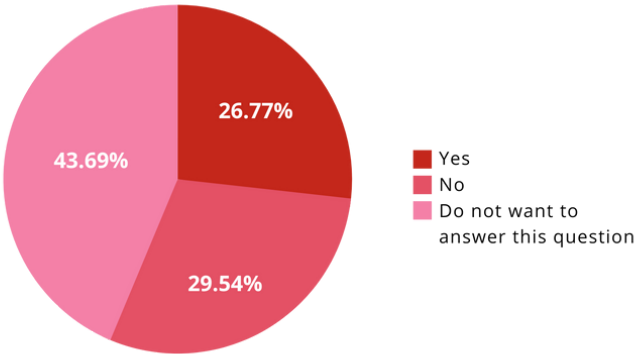


Chart 170. *Do you trust China ? (Philippines)*

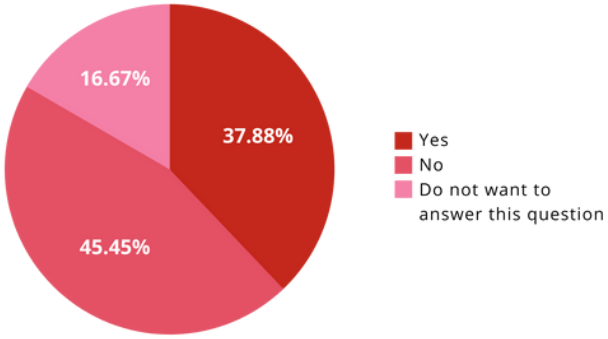


Chart 171. *Do you trust China ? (Singapore)*

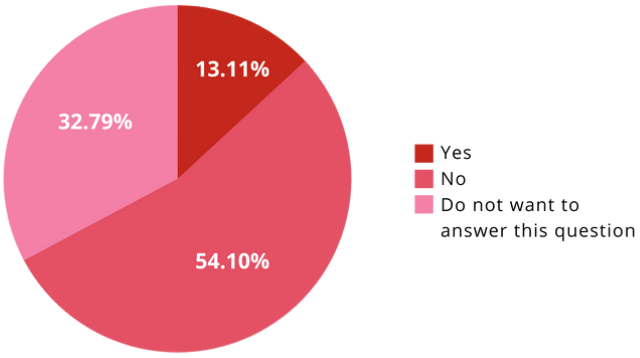


Chart 172. *Do you trust China ? (Thailand)*

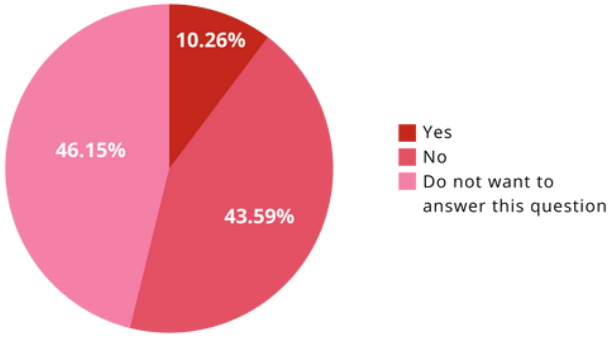


Chart 173. *Do you trust China ? (Vietnam)*

Almost half of Students (49,71%) did not want to answer the question of whether they trusted China or not while the most frequent answer of Elites (37,17%) said they did not trust China.

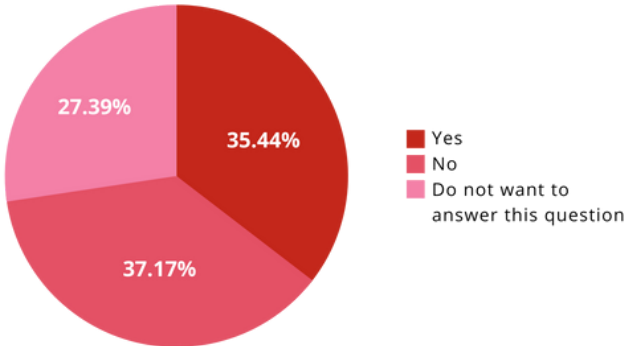


Chart 174. *Do you trust China ? (Elite)*

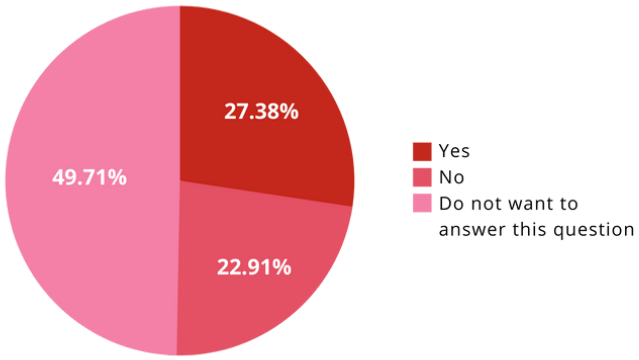


Chart 175. *Do you trust China ? (Students)*

The survey further asked the 27,38% of respondents **who trusted China** on what aspects did they trust China. The majority of the answers was on the economic aspect at 58,59% while technology came second at 16,30%.

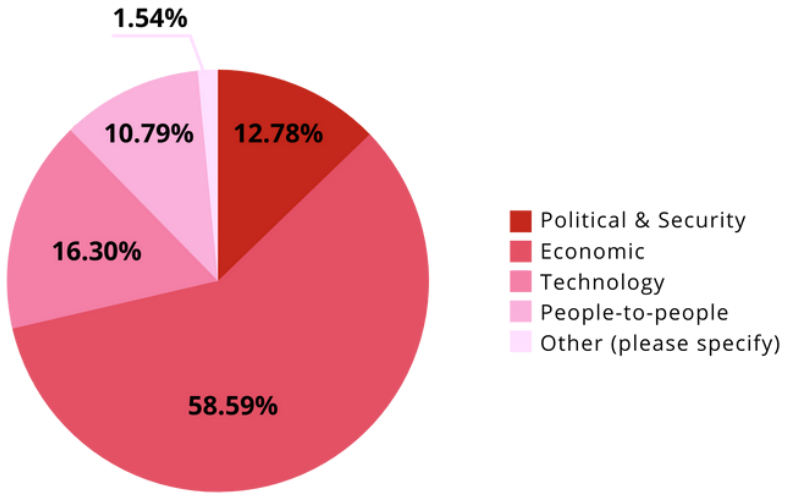


Chart 176. *If yes: What aspects do you most trust China with? (General)*

A similar pattern of trust in economic cooperation is also found in the country-per-country breakdown. However, a significant percentage of respondents from Myanmar (36,36%) noted that they also trusted China on the aspect of people-to-people cooperation.

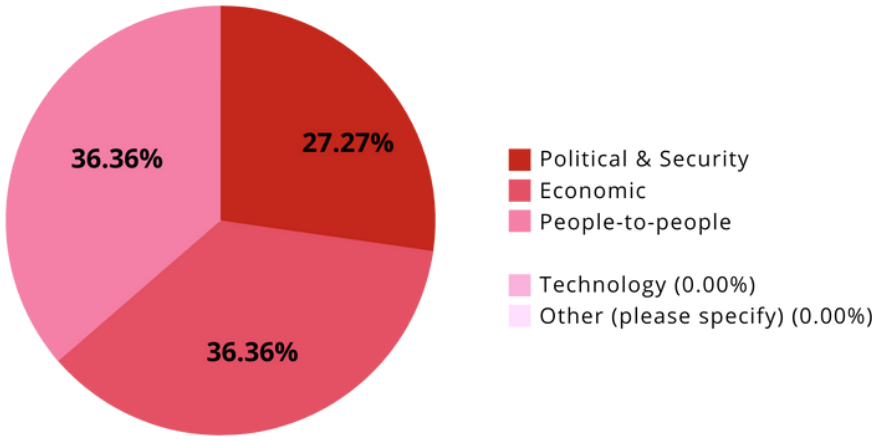


Chart 177. *If yes: What aspects do you most trust China with? (Myanmar)*

Similarly, the survey asked those who said they did not trust China on what aspect of cooperation was their distrust. The majority of respondents (71,92%) said they distrusted China on the political and security aspects.

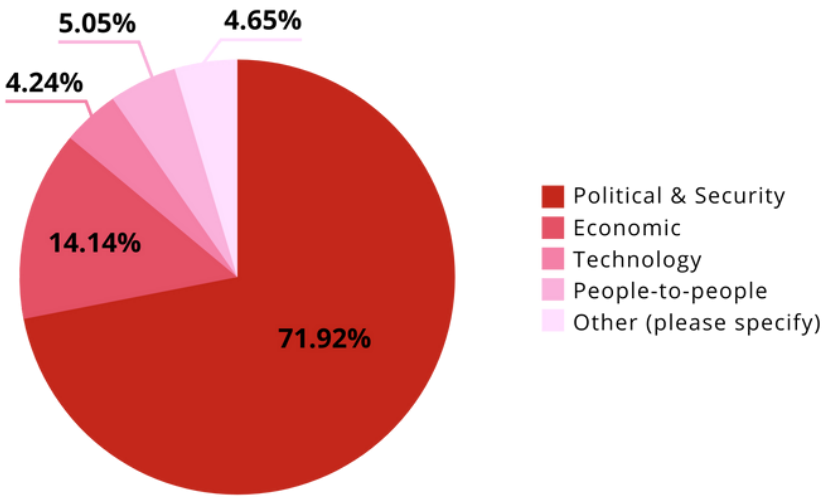


Chart 178. *If no: What aspects do you least trust China with? (General)*

More than half of both Elites (58,37%) and Students (58,80%) said that they trusted China on the economic aspect. The political and security aspect was regarded by the majority of both the Elite (73,33%) and Students (69,74%) as the least trustworthy aspect of cooperation.

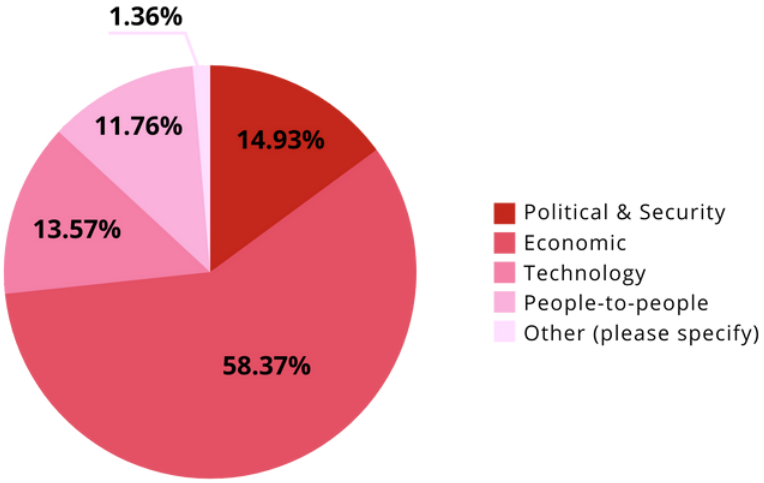


Chart 179. *If yes: What aspects do you most trust China with? (Elite)*

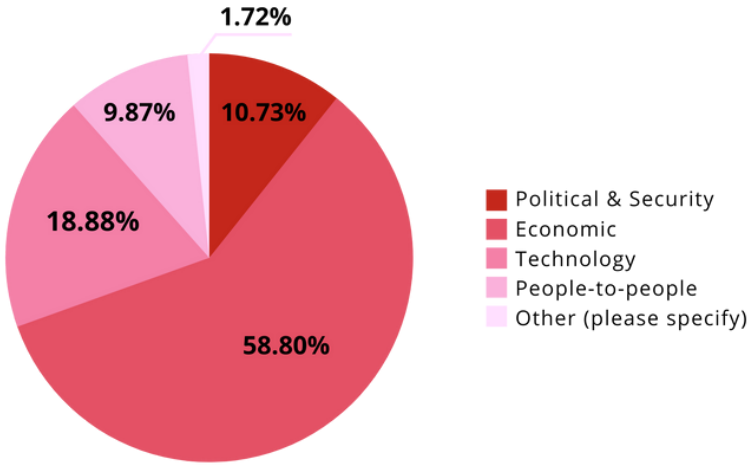


Chart 180. *If yes: What aspects do you most trust China with? (Students)*

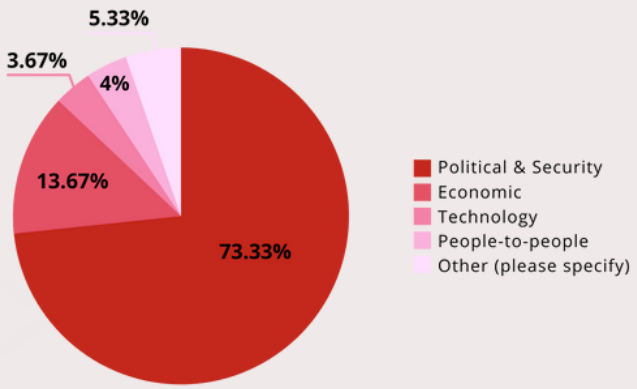


Chart 181. *If no: What aspects do you least trust China with? (Elite)*

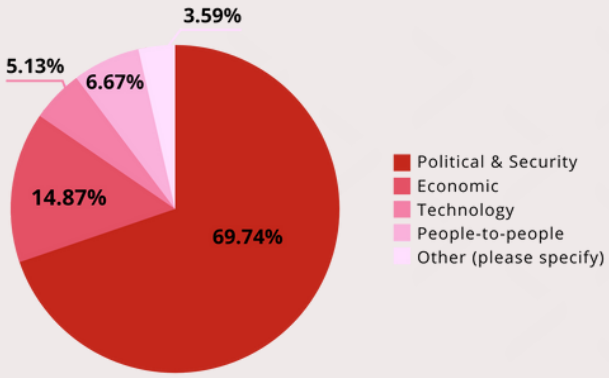


Chart 182. *If no: What aspects do you least trust China with? (Students)*

An anomaly in this trend was shown by respondents from Laos, 41,67% of whom said they did not trust China on economic cooperation.

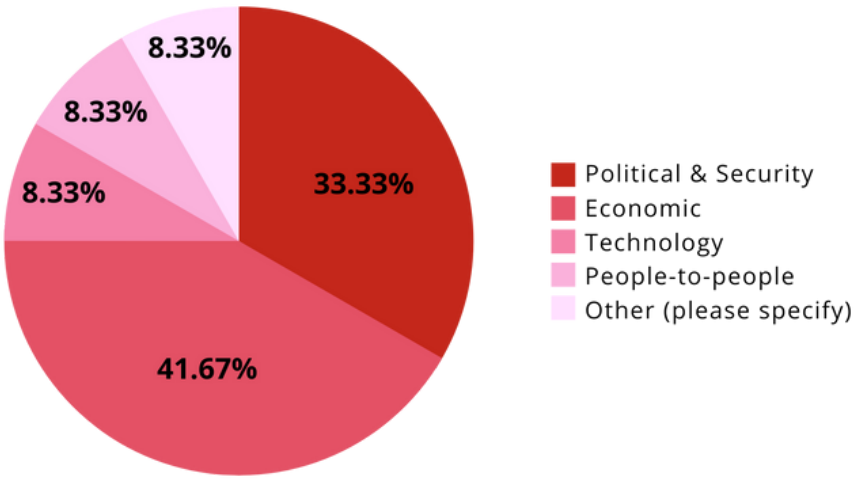


Chart 183. *If no: What aspects do you least trust China with? (Laos)*

SPECIAL FOCUS: PERCEPTIONS ON STRATEGIC ISSUES AND GEOPOLITICAL TENSIONS





In this part, the report focuses on the perceptions by the peoples of ASEAN of important issues that affect the strategic calculation and geopolitical dynamics in Southeast Asia and beyond. It looks into how respondents viewed ASEAN and China's role in Myanmar, the impact of the war in Ukraine, Great Power rivalry, as well as the emergence of different minilateral arrangements such as Quad and AUKUS.

A. The Russia-Ukraine War

The survey asked respondents on their perceptions of the Russia-Ukraine war and how it affects regional stability. An overwhelming number of respondents, 71,41%, said that the war affected regional stability.

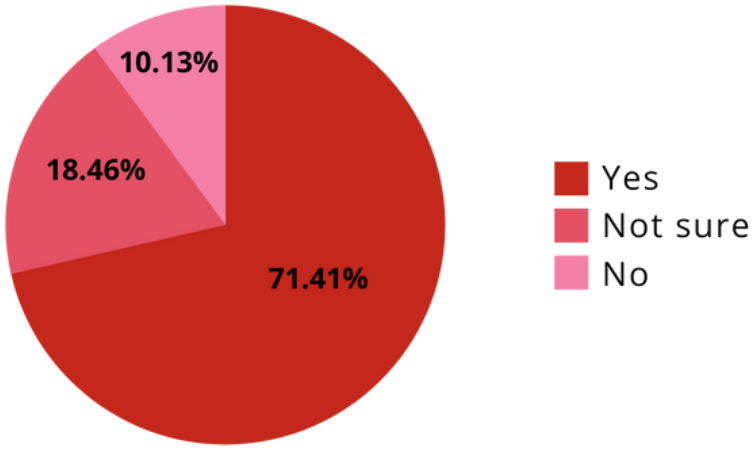


Chart 184. *Do you think the war in Ukraine will affect the stability in the region? (General)*

Most Elites (71,62%) and Students (71,21%) shared the view that the war in Ukraine would affect the region's stability.

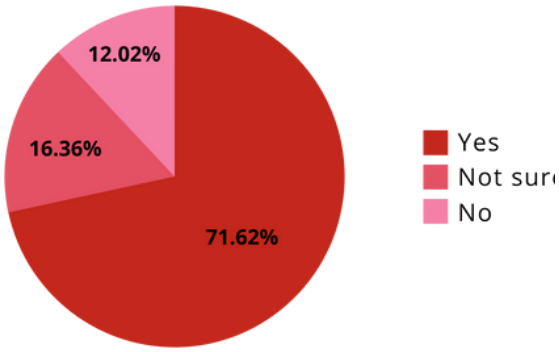


Chart 185. *Do you think the war in Ukraine will affect the stability in the region? (Elites)*

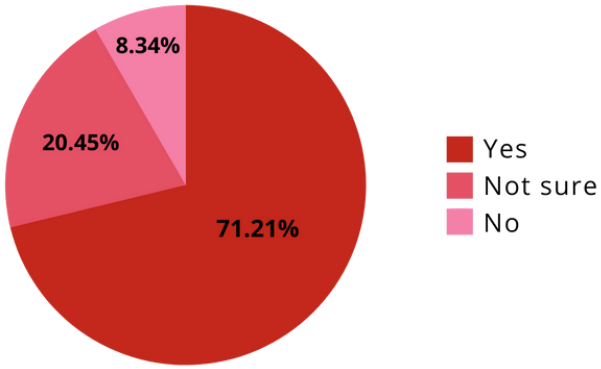


Chart 186. *Do you think the war in Ukraine will affect the stability in the region? (Students)*



While the general majority of respondents in each country reckoned that the Ukraine war would indeed affect stability in the region, 37,92% of respondents from Laos and 47,06% of respondents from Myanmar remained unsure.

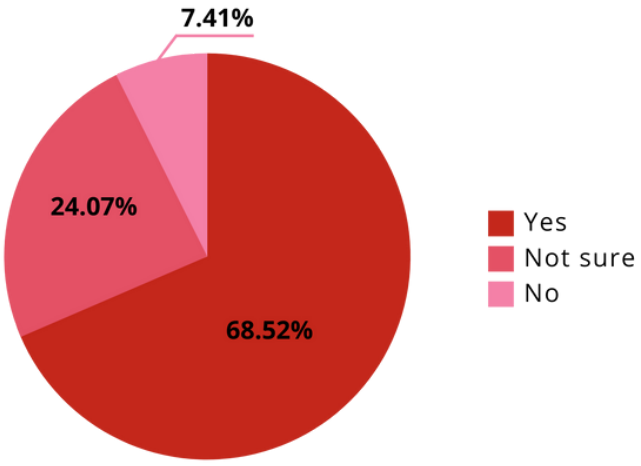


Chart 187. *Do you think the war in Ukraine will affect the stability in the region? (Brunei)*

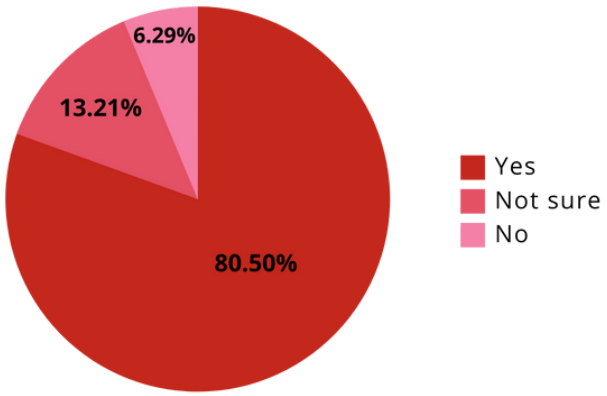


Chart 188. *Do you think the war in Ukraine will affect the stability in the region? (Cambodia)*

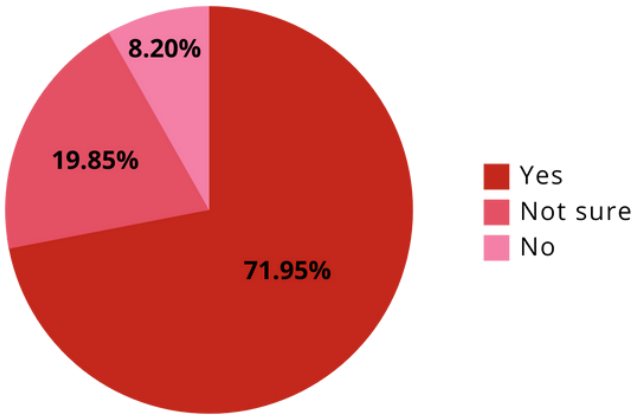


Chart 189. *Do you think the war in Ukraine will affect the stability in the region? (Indonesia)*

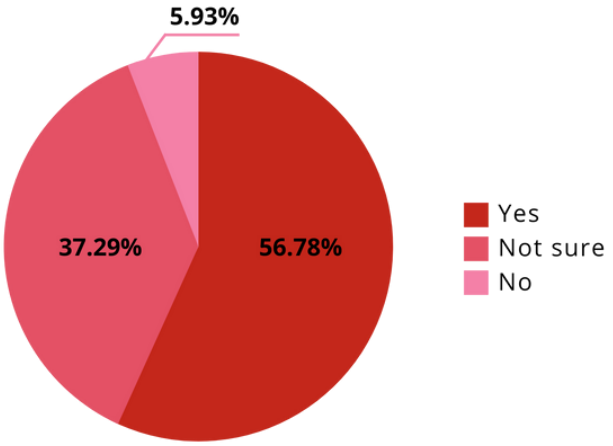


Chart 190. *Do you think the war in Ukraine will affect the stability in the region? (Laos)*

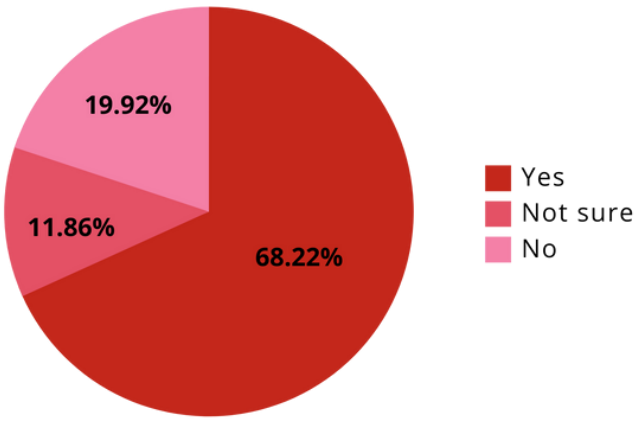


Chart 191. *Do you think the war in Ukraine will affect the stability in the region? (Malaysia)*

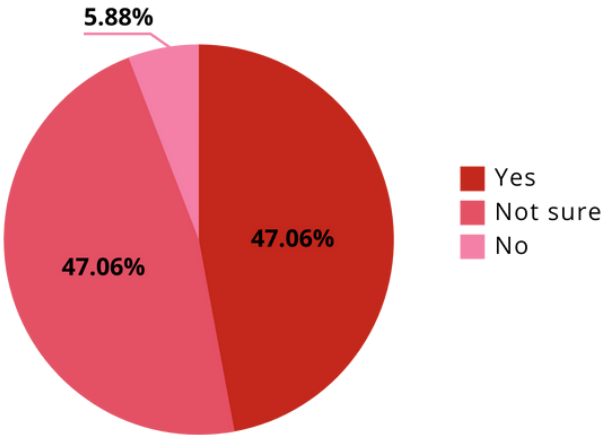


Chart 192. *Do you think the war in Ukraine will affect the stability in the region? (Myanmar)*

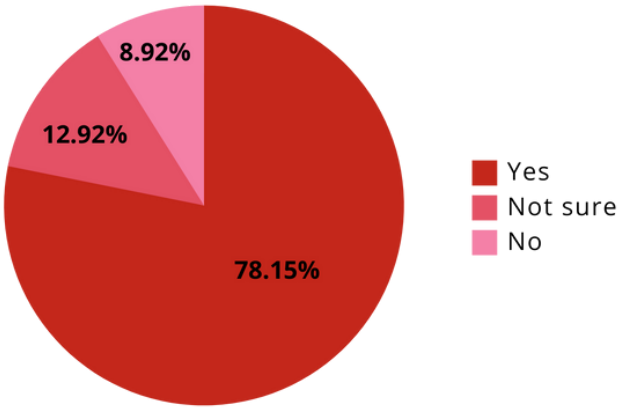


Chart 193. *Do you think the war in Ukraine will affect the stability in the region? (Philippines)*

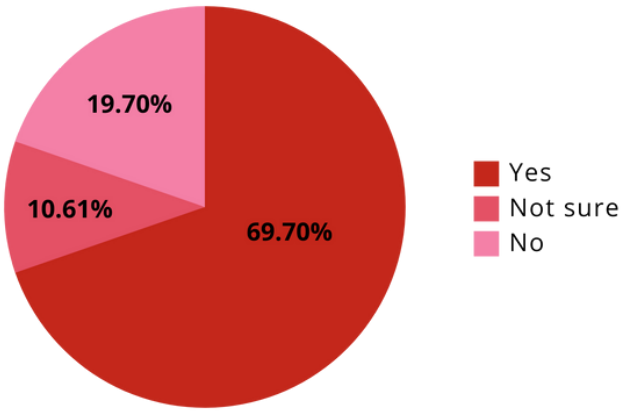


Chart 194. *Do you think the war in Ukraine will affect the stability in the region? (Singapore)*

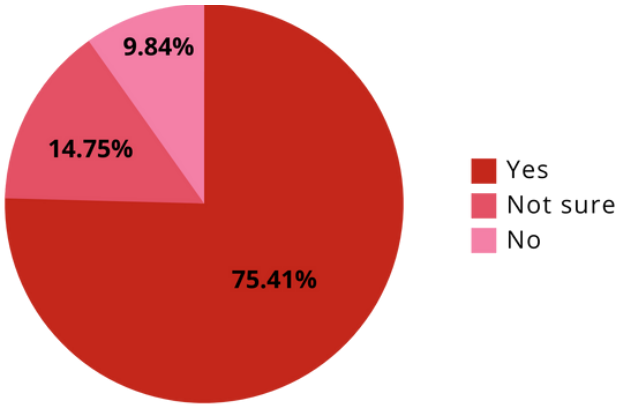


Chart 195. *Do you think the war in Ukraine will affect the stability in the region? (Thailand)*

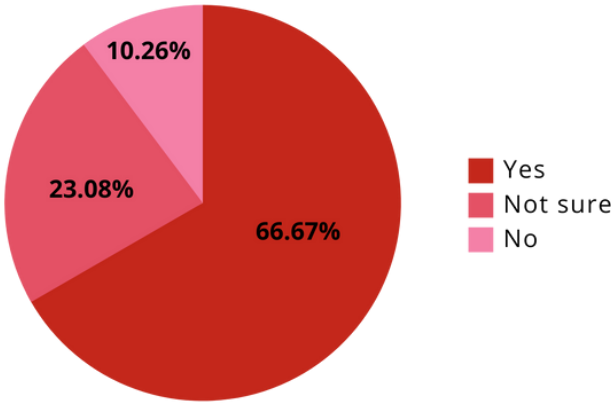
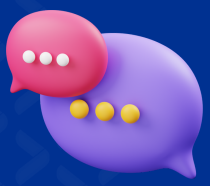


Chart 196. *Do you think the war in Ukraine will affect the stability in the region? (Vietnam)*



Subsequently, the survey also asked about **China's response to the invasion**. The most frequent answer of the respondents (27,26%) said that China should play a role in ending the war peacefully. All the Elite sub-groups said that China had an important role toward solving the war. Nonetheless, an important point to note is that around 17% of respondents said that China's response would not be enough and that China should play no role in resolving the conflict.

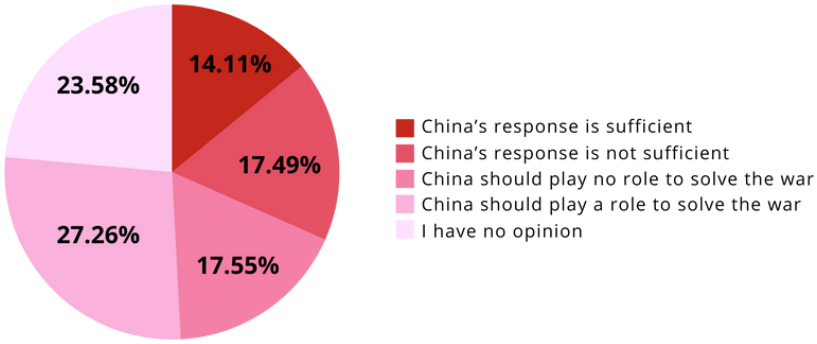


Chart 197. *What are your views on China's response to Russia's invasion of Ukraine? (General)*

23,03% of the Students said that China should play a role to solve the war while a considerable number of Students (19,51%) also said that China should not play a role. However, the most frequent answer of Students (27,97%) offered no opinion. Elites (31,72%) agreed that China should play a role, yet 19,33% believed that China's response would not be sufficient. 18,96% of Elites had no opinion.

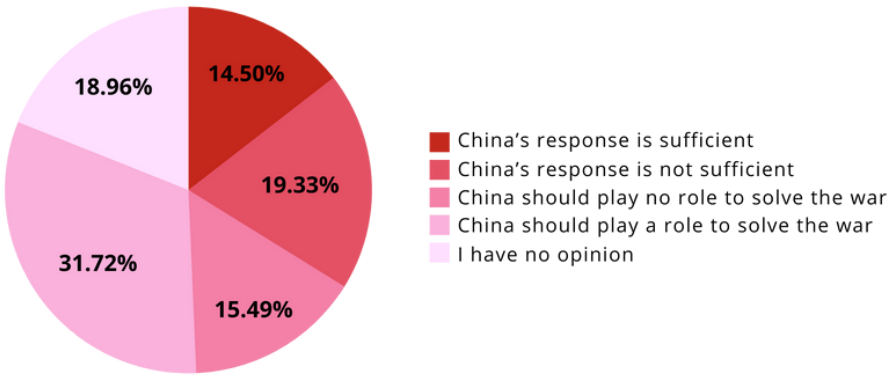


Chart 198. *What are your views on China's response to Russia's invasion of Ukraine? (Elites)*

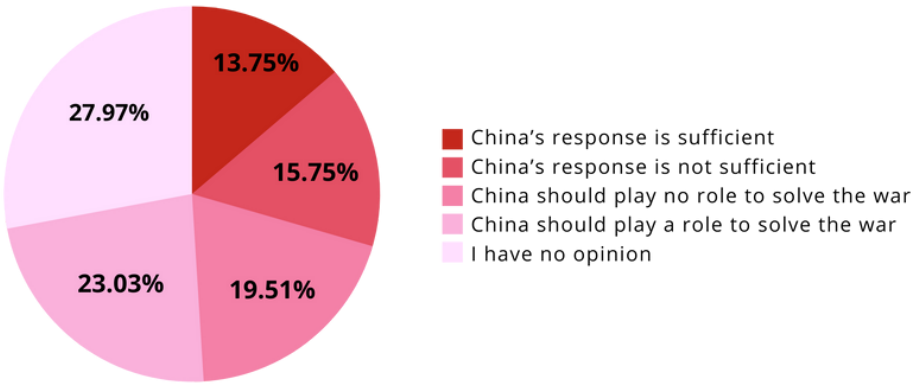


Chart 199. *What are your views on China's response to Russia's invasion of Ukraine? (Students)*

Among respondents from all ASEAN countries, those from Cambodia (37,11%), Singapore (33,33%), and Malaysia (30,51%) deemed that China should play a role to solve the war in Ukraine. Singaporean respondents notably opined that China's response currently was not sufficient (36,36%).

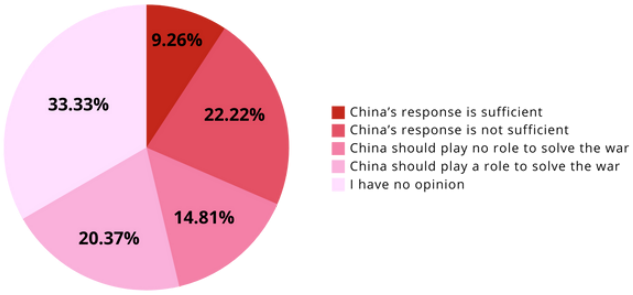


Chart 200. *What are your views on China's response to Russia's invasion of Ukraine? (Brunei)*

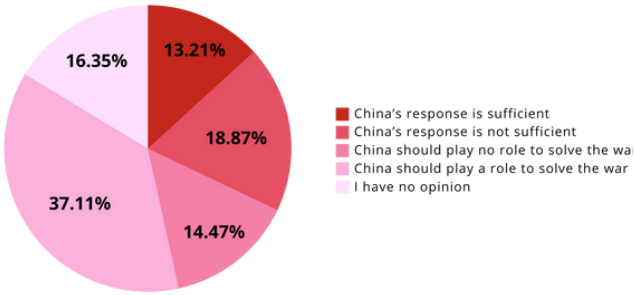


Chart 201. *What are your views on China's response to Russia's invasion of Ukraine? (Cambodia)*

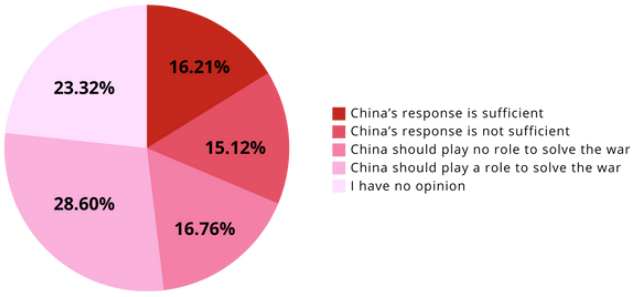


Chart 202. *What are your views on China's response to Russia's invasion of Ukraine? (Indonesia)*

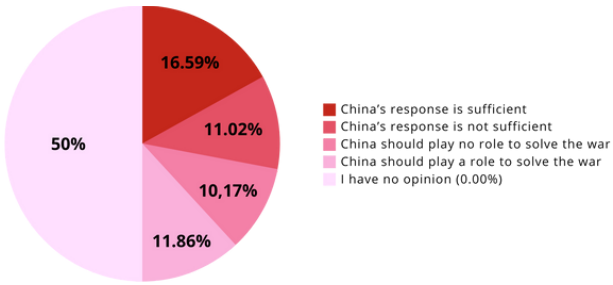


Chart 203. *What are your views on China's response to Russia's invasion of Ukraine? (Laos)*

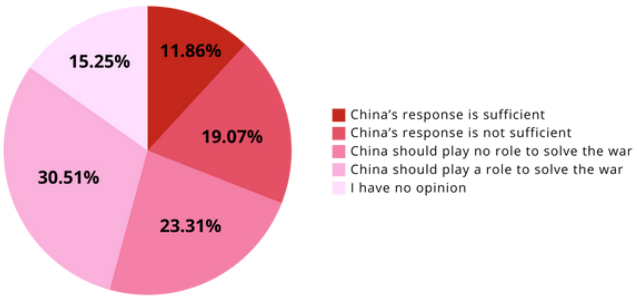


Chart 204. *What are your views on China's response to Russia's invasion of Ukraine? (Malaysia)*

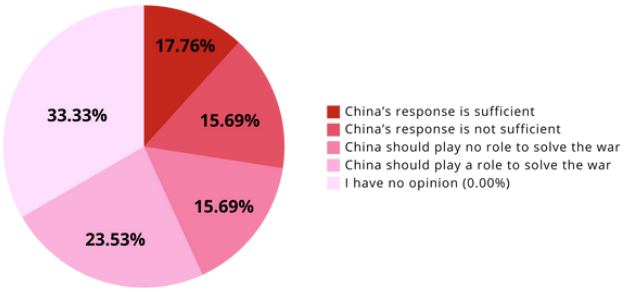


Chart 205. *What are your views on China's response to Russia's invasion of Ukraine? (Myanmar)*

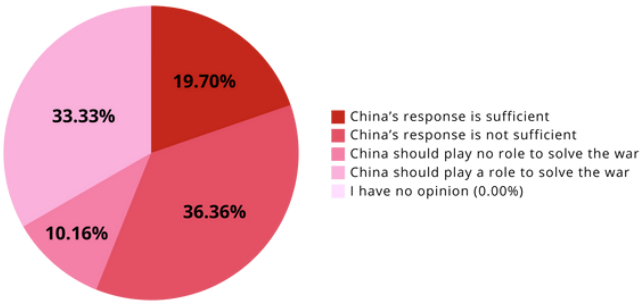


Chart 206. *What are your views on China's response to Russia's invasion of Ukraine? (Philipines)*

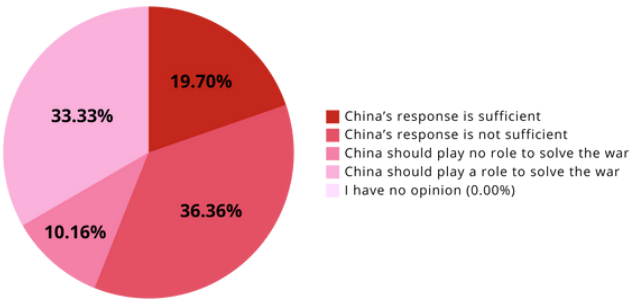


Chart 207. *What are your views on China's response to Russia's invasion of Ukraine? (Singapore)*

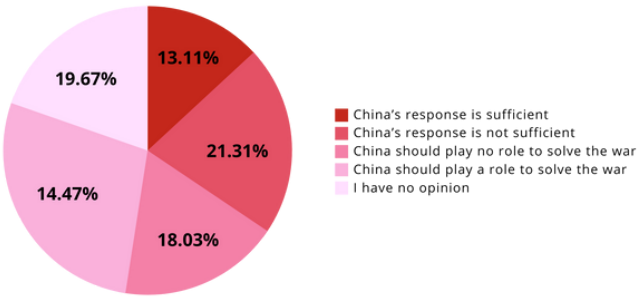


Chart 208. *What are your views on China's response to Russia's invasion of Ukraine? (Thailand)*

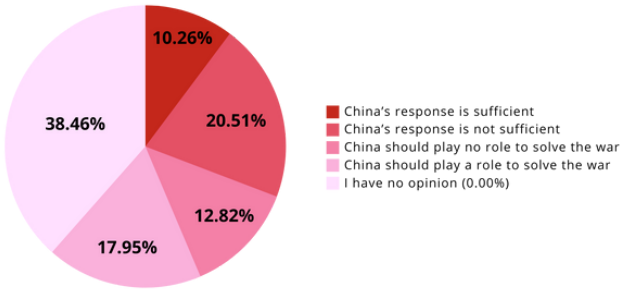


Chart 209. *What are your views on China's response to Russia's invasion of Ukraine? (Vietnam)*

B. The US-China Competition

On the **US-China relationship**, the survey results showed that most respondents (62,18%) saw the relationship as competition and only 24,97% of respondents saw it as conflict. However, there was a small group of respondents (5,97%) who saw the US and China as cooperating.

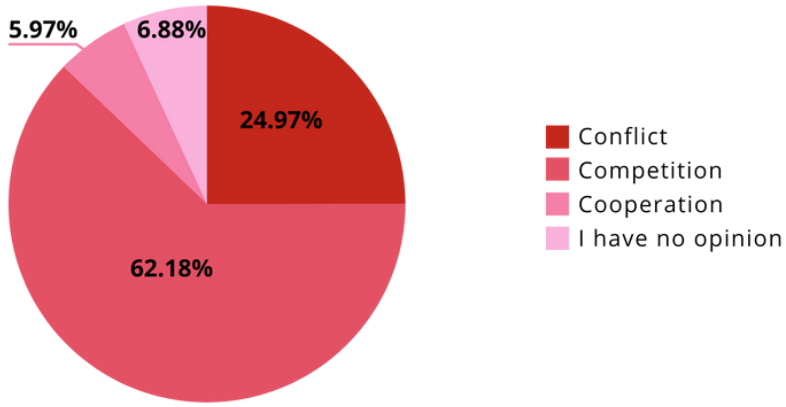


Chart 210. *How do you see the US-China relationship? (General)*

Most Elite (61,46%) and Students (62,87%) saw the US-China relationship as "competition". 29,12% of Elite and 21,03% of Students saw the relationship as "conflict".

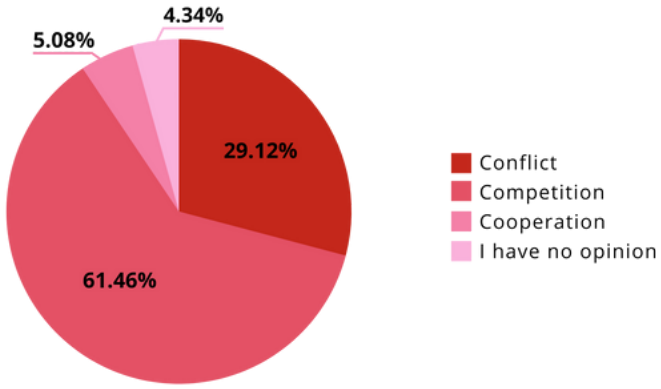


Chart 211. *How do you see the US-China relationship? (Elites)*

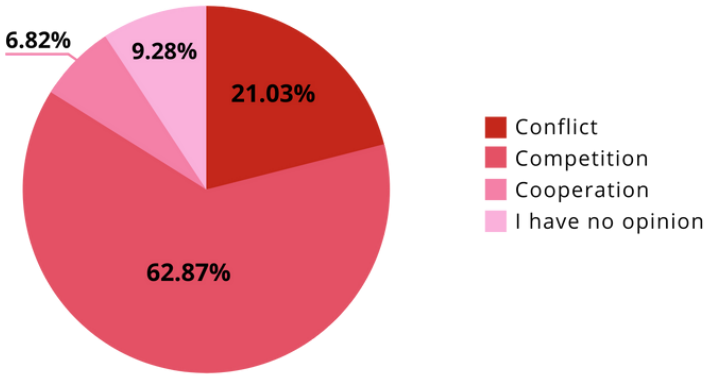


Chart 212. *How do you see the US-China relationship? (Students)*

Respondents from Singapore, in particular, were relatively split in their views on whether the US-China relationship was marked by competition or conflict.

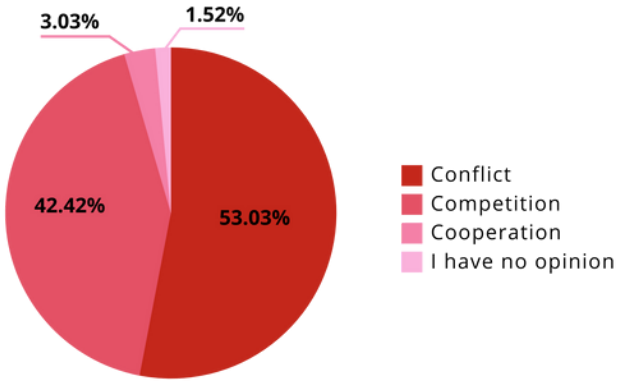


Chart 213. *How do you see the US-China relationship? (Singapore)*

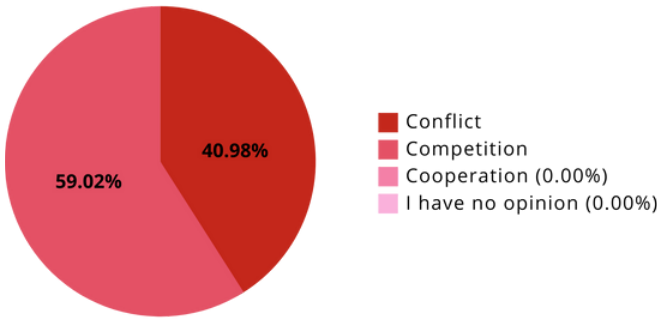


Chart 214. *How do you see the US-China relationship? (Thailand)*



Discussing **the implications of the US-China competition** in the region, the most frequent answer of the respondents (31,60%) believed that it undermined ASEAN centrality and 24,63% said it disunited ASEAN countries. Nonetheless, there was still a considerable percentage of respondents (23,70%) who saw it as bringing benefits to ASEAN countries.

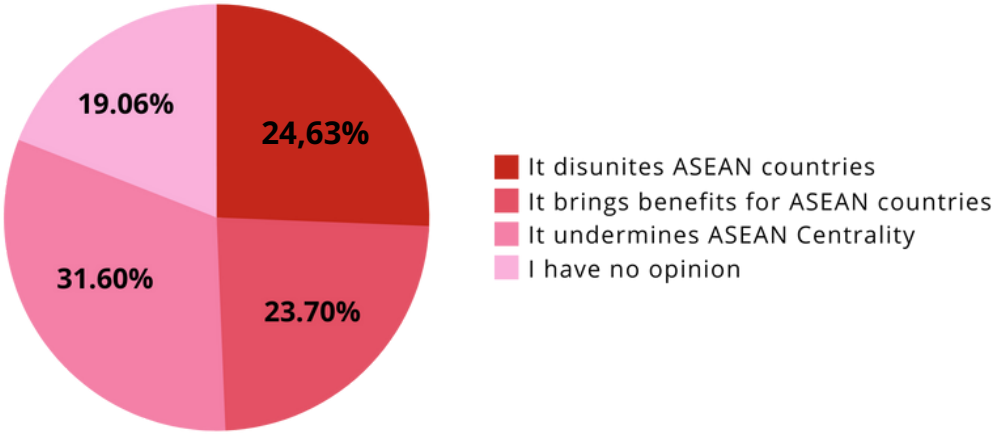


Chart 215. *How do you think the US-China relationship will affect ASEAN? (General)*

The most frequent answer of Elites (31,97%) were concerned that the US-China relationship would disunite ASEAN countries. Another concern felt by 29% was that the relationship would also undermine ASEAN centrality. However, a considerable percentage of Elites (23,92%) believed that the relationship would bring benefits to ASEAN countries.

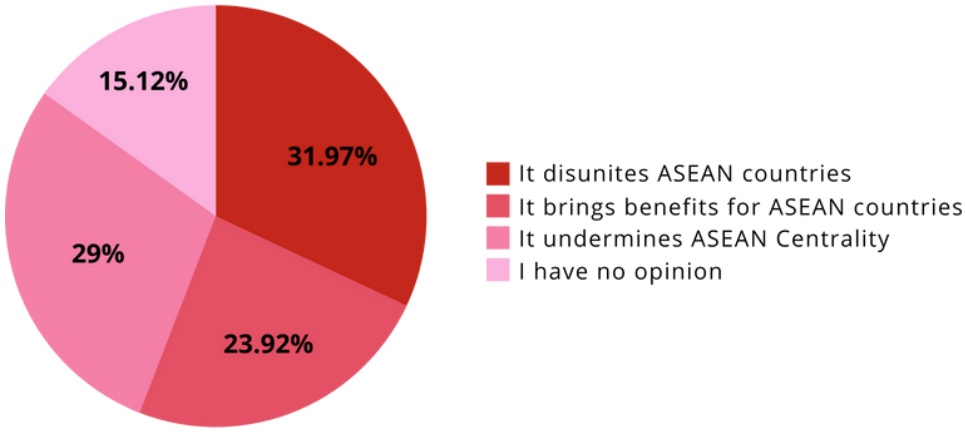


Chart 216. *How do you think the US-China relationship will affect ASEAN? (Elites)*

In contrast, Students had a view that was different from that of Elite respondents. The most frequent answer of Students (34,08%) felt that the relationship would undermine ASEAN centrality, while 23,50% believed that it would benefit ASEAN countries. 22,80% of Students had no opinion.

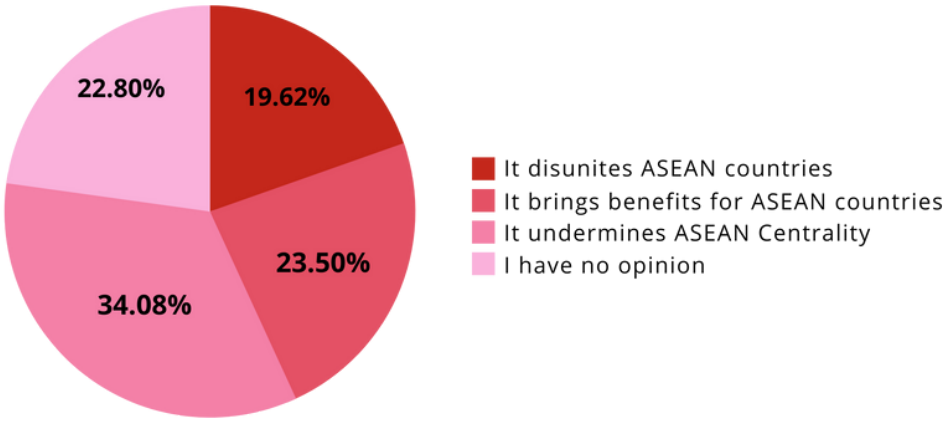


Chart 217. *How do you think the US-China relationship will affect ASEAN? (Students)*

The Elites have more dynamic views. Business Communities (34,51%) and Officials (33,89%) saw that the competition would disunite ASEAN. Academia (34,44%) saw the competition as undermining ASEAN centrality. Civil Societies (30,33%) saw it in a different way: that the competition would benefit ASEAN.

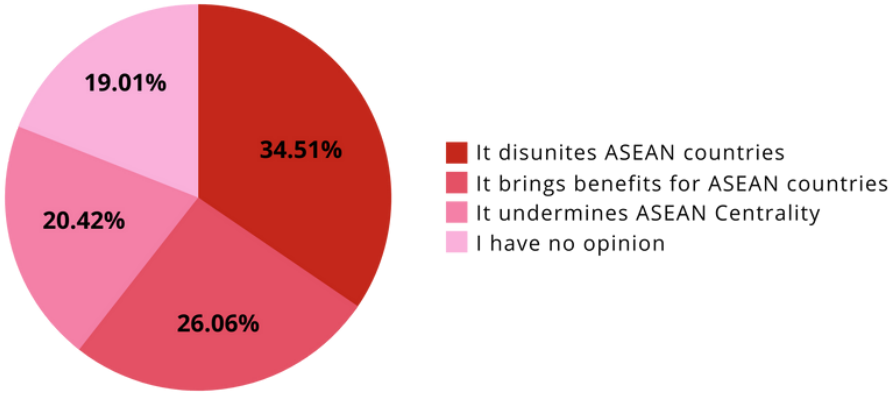


Chart 218. *How do you think the US-China relationship will affect ASEAN? (Business Community)*

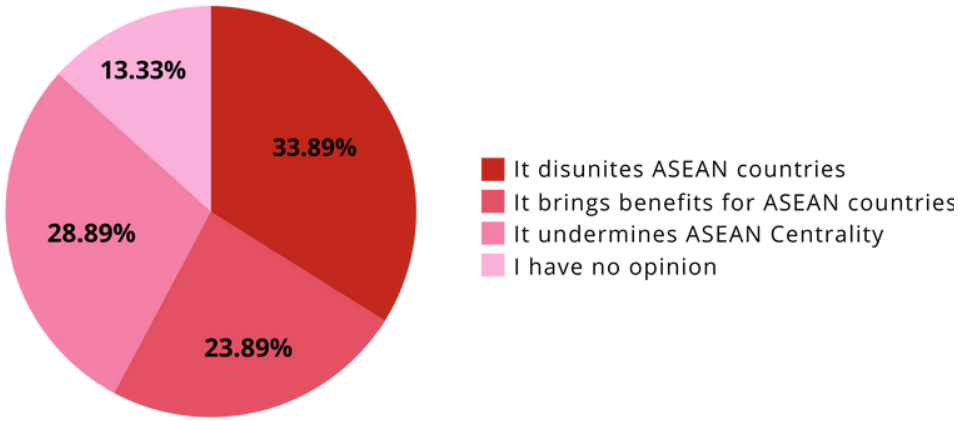


Chart 219. *How do you think the US-China relationship will affect ASEAN? (Officials)*

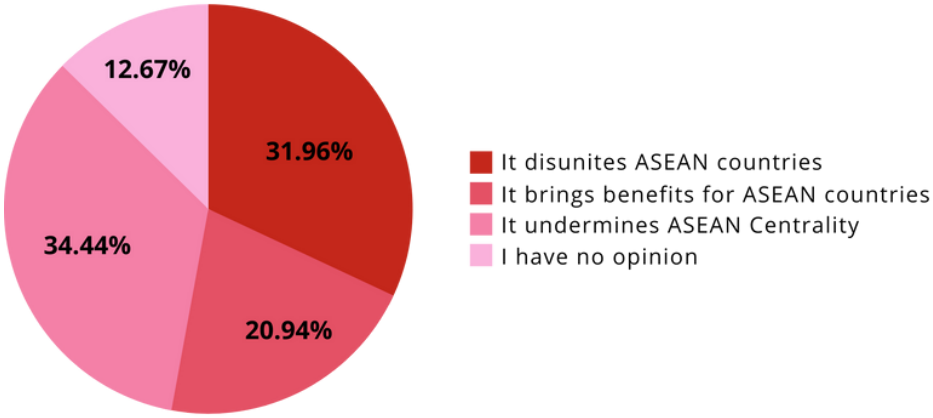


Chart 220. *How do you think the US-China relationship will affect ASEAN? (Academia)*

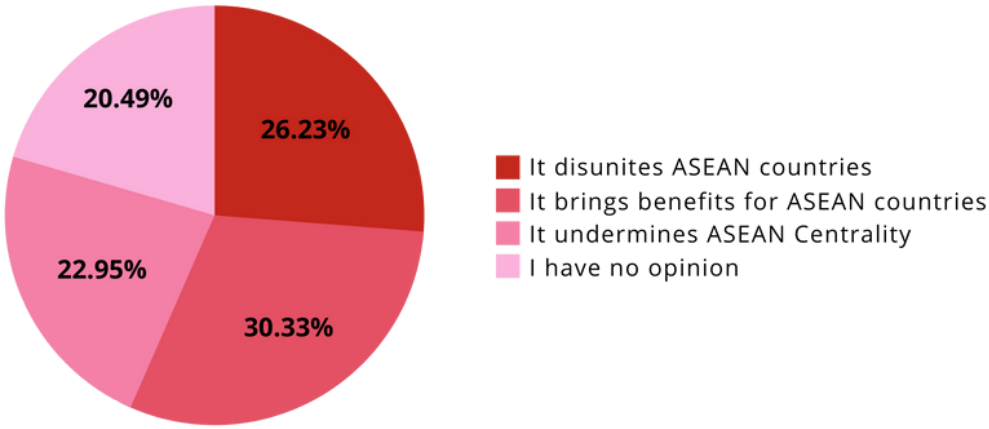


Chart 221. *How do you think the US-China relationship will affect ASEAN? (Civil Society)*

In country analysis, respondents from Singapore (48,48%) and Vietnam (46,15%) were strongly of the view that the US-China relationship disunited ASEAN countries. Those from Malaysia (41,10%) noted that it could even undermine ASEAN centrality.

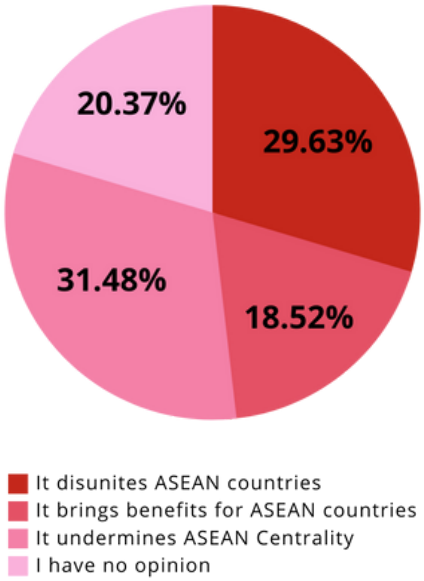


Chart 222. *How do you think the US-China relationship will affect ASEAN? (Brunei)*

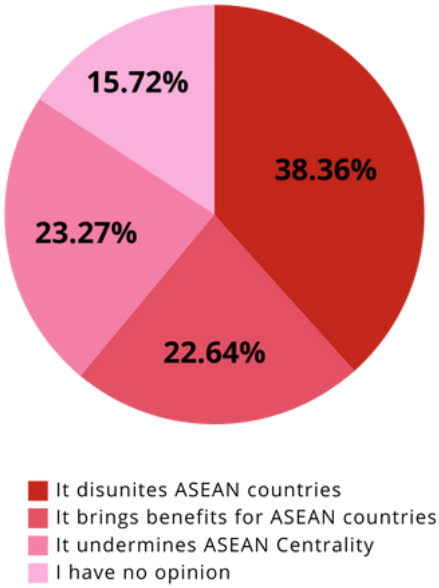


Chart 223. *How do you think the US-China relationship will affect ASEAN? (Cambodia)*

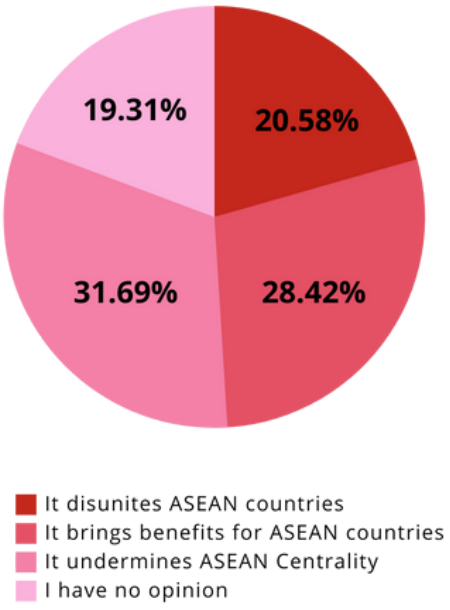


Chart 224. *How do you think the US-China relationship will affect ASEAN? (Indonesia)*

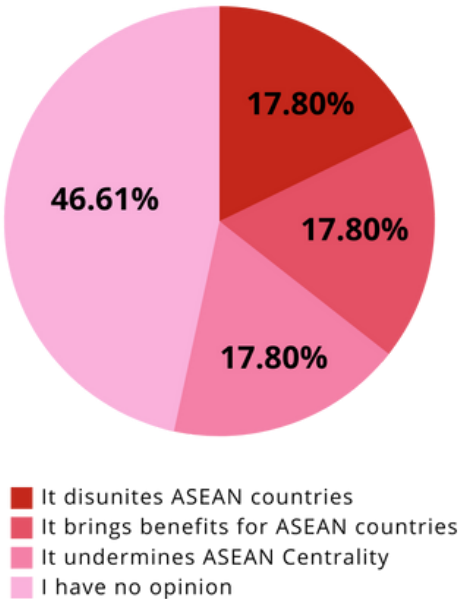


Chart 225. *How do you think the US-China relationship will affect ASEAN? (Laos)*

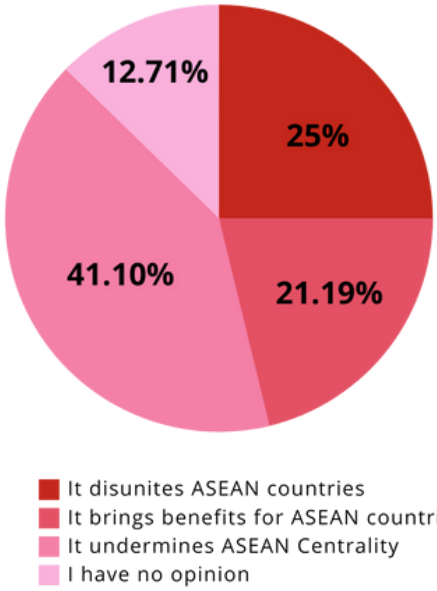


Chart 226. *How do you think the US-China relationship will affect ASEAN? (Malaysia)*

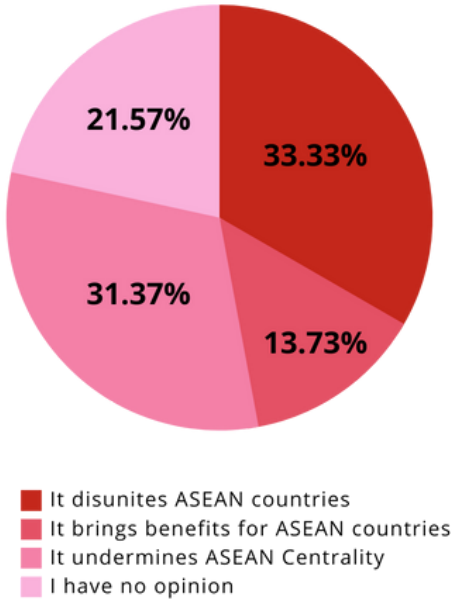


Chart 227. *How do you think the US-China relationship will affect ASEAN? (Myanmar)*

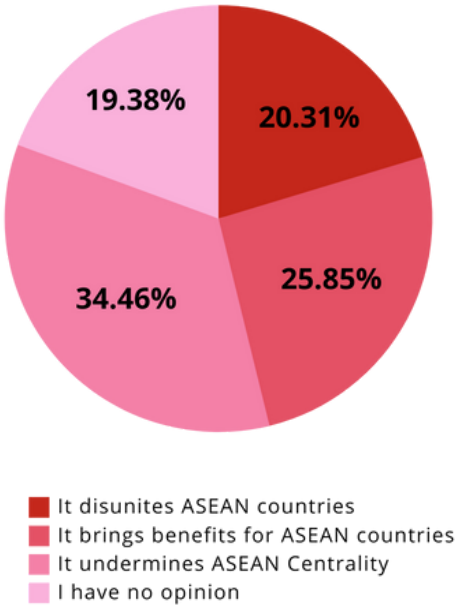


Chart 228. *How do you think the US-China relationship will affect ASEAN? (Philippines)*

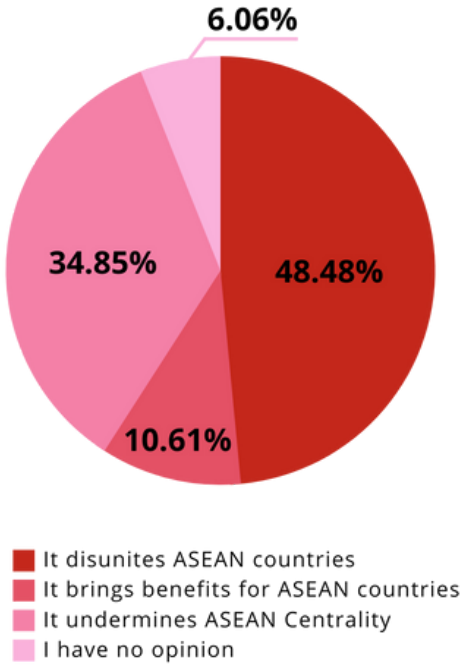


Chart 229. *How do you think the US-China relationship will affect ASEAN? (Singapore)*

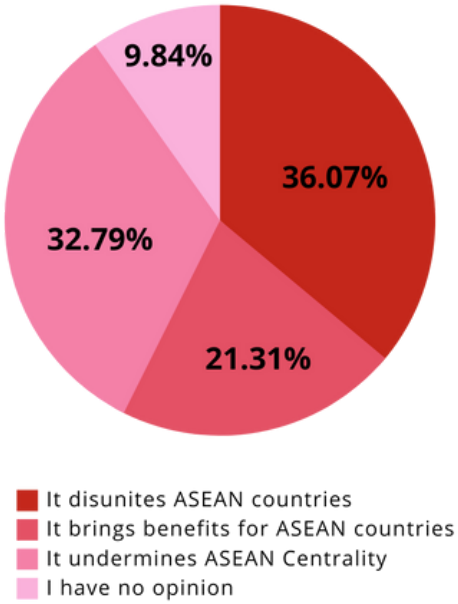


Chart 230. *How do you think the US-China relationship will affect ASEAN? (Thailand)*

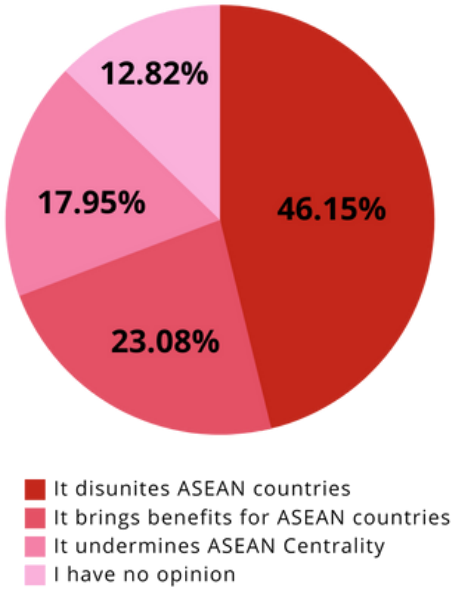


Chart 231. *How do you think the US-China relationship will affect ASEAN? (Vietnam)*



Looking into the strategic competition between the US and China, **what is the most strategic step** that ASEAN can take in addressing the competition? In the survey results almost half of the respondents (49,82%) suggested that ASEAN take a balanced approach and cooperate with both powers. The Elites saw the need to maintain equidistance through balancing the relationship. The most popular answers of respondents were also of the view that ASEAN should continue to promote progressive dialogue between the US and China through ASEAN-led mechanisms.

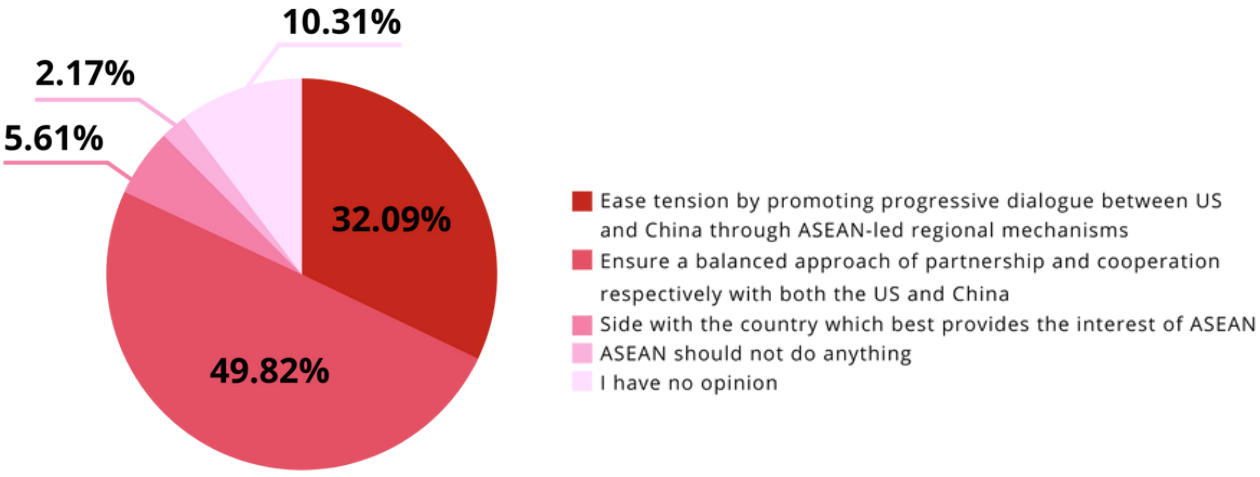


Chart 232. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (General)*

On the question of how ASEAN should respond to the US-China strategic competition, relatively half of both Elite (51,43%) and Students (48,30%) said it was best to "ensure a balanced approach of partnership and cooperation respectively with both the US and China". Ranking second among the answers was that ASEAN should ease tension by promoting progressive dialogue between US and China through ASEAN-led regional mechanisms.

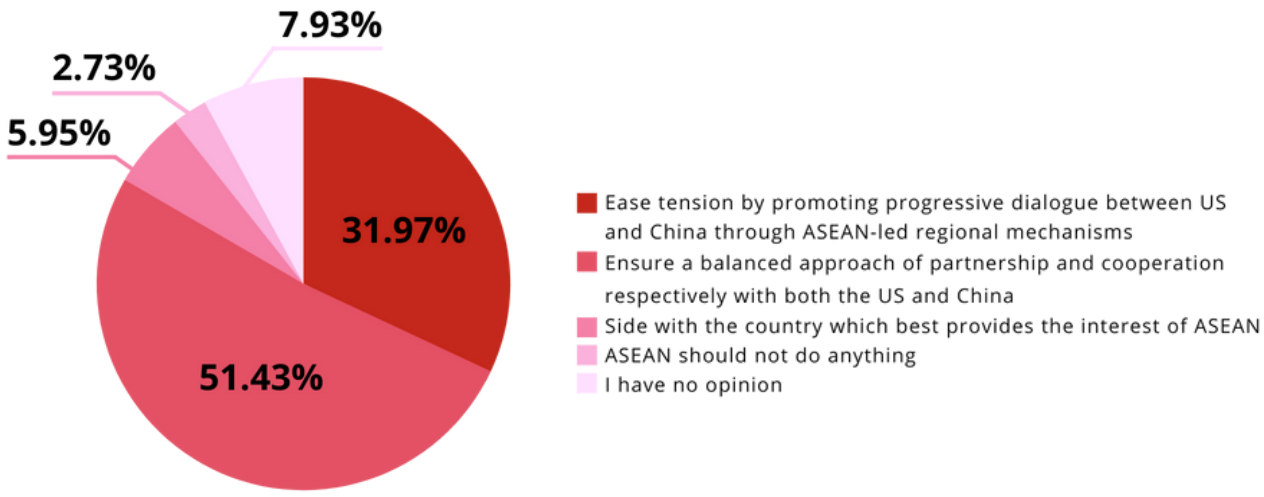


Chart 233. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (Elites)*

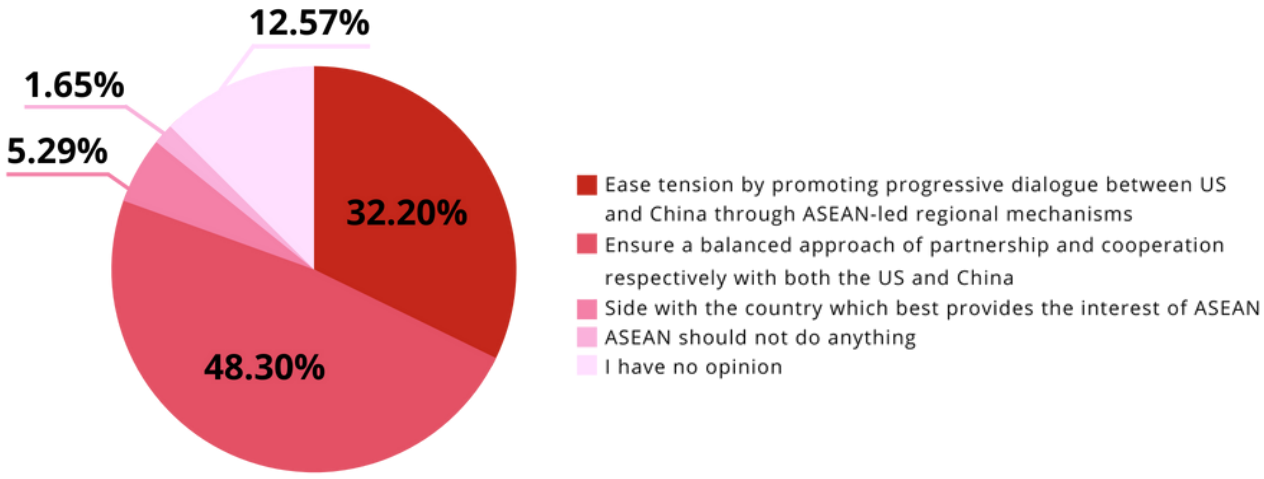


Chart 234. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (Students)*

C. QUAD, AUKUS, and NATO

The minilateral arrangements that recently emerged in the Indo-Pacific have been gaining attention and support. The Quadrilateral Security Dialogues (QUAD) and the Australia, the United Kingdom, and the United States (AUKUS) security cooperation are the most widely known and they have strategic implications for Southeast Asia. The survey asked the respondents about **the effect of both arrangements on Southeast Asia's stability**. Interestingly, the most popular answer of the respondents on QUAD (42,40%) and on AUKUS (39,81%) had no opinion on the minilateral arrangement in question. However, among those who gave an opinion, most of them said that Quad and AUKUS would undermine regional stability, with 25,51% referring to QUAD and 28,35% referring to AUKUS. Nonetheless, 20% of respondents, a considerable percentage, opined that the QUAD would strengthen regional stability. 24,59% of respondents from Civil Societies shared this view.

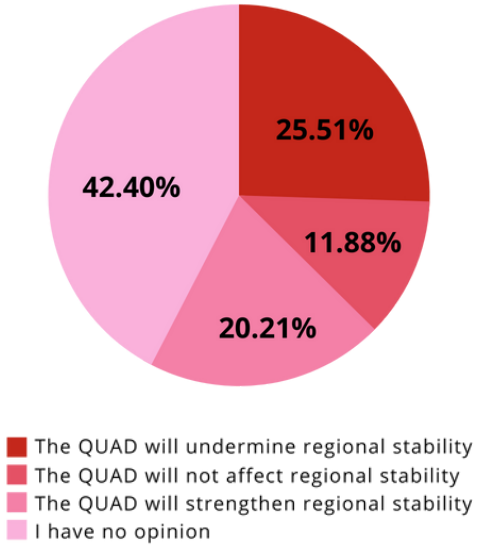


Chart 235. *How will the QUAD affect regional stability in Southeast Asia? (General)*

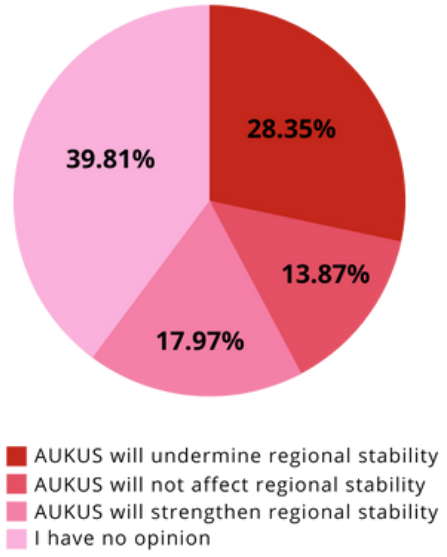


Chart 236. *How will AUKUS affect regional stability in Southeast Asia? (General)*

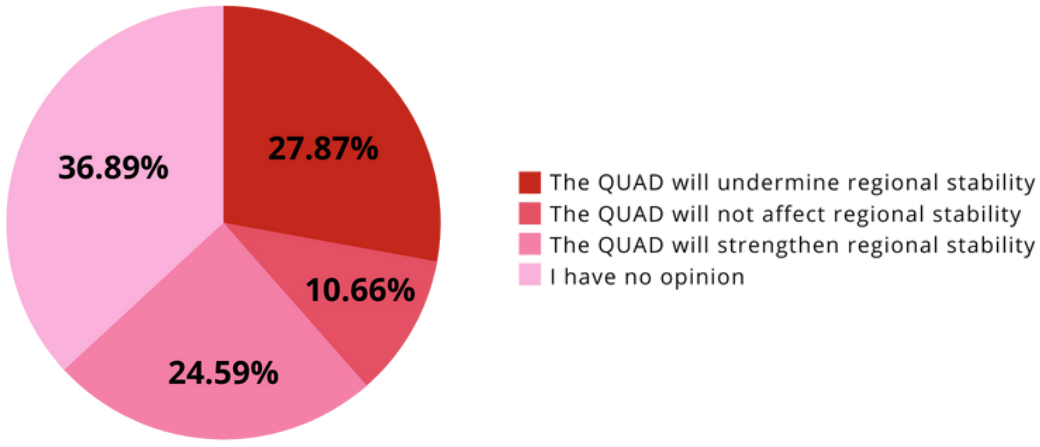


Chart 237. *How will the QUAD affect regional stability in Southeast Asia? (Civil Societies)*

The most popular answer of both Elite **(36,68%)** and Student **(47,83%)** respondents had no opinion whether the QUAD and AUKUS would affect regional stability. The second most frequent answer by both Elites and Students was that the QUAD and AUKUS would undermine regional stability.

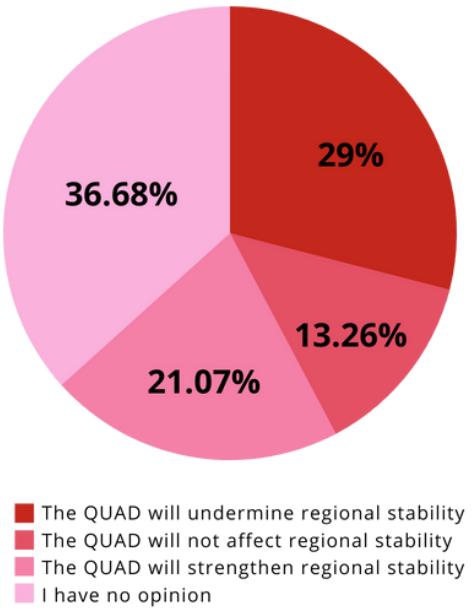


Chart 238. *How will the QUAD affect regional stability in Southeast Asia? (Elites)*

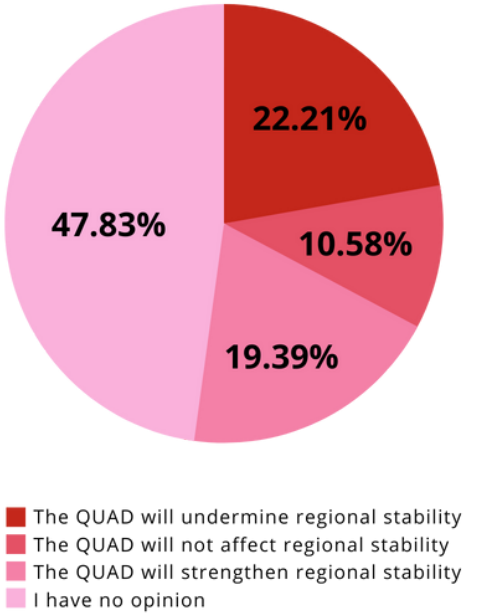


Chart 239. *How will the QUAD affect regional stability in Southeast Asia? (Students)*

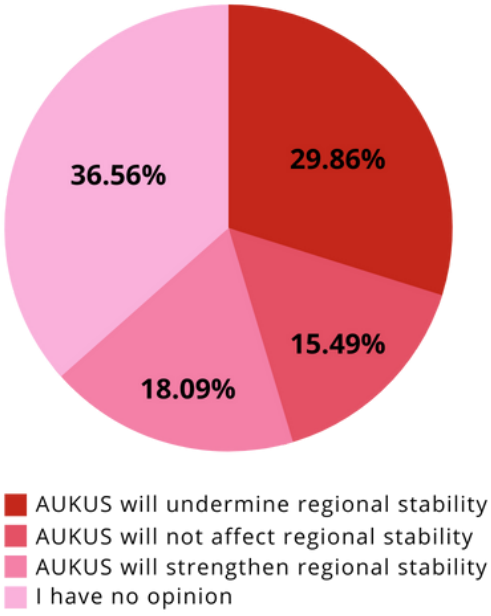


Chart 240. *How will AUKUS affect regional stability in Southeast Asia? (Elites)*

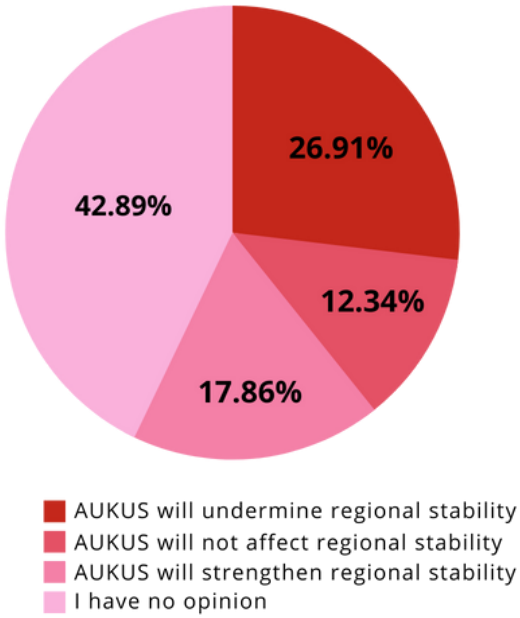


Chart 241. *How will AUKUS affect regional stability in Southeast Asia? (Students)*

While on the whole most respondents from ASEAN countries had no opinion on this question, nearly 35% of respondents from Singapore expressed the view that the QUAD would undermine regional stability. The same view was expressed by 33,05% of Malaysian respondents and 30,19% of Cambodian respondents

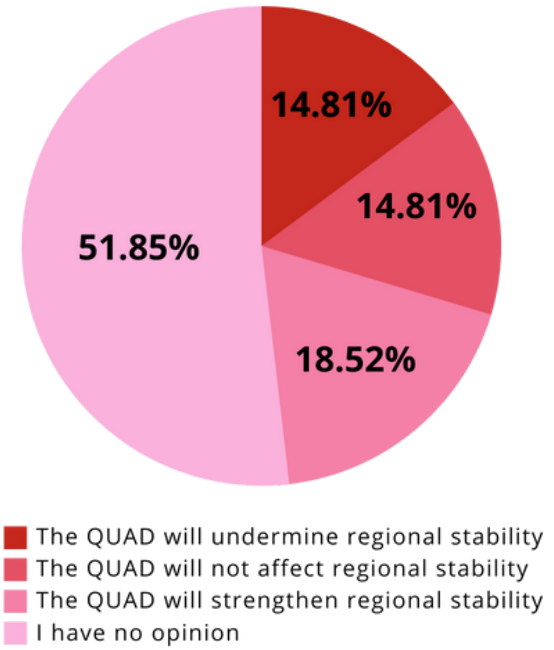


Chart 242. *How will the QUAD affect regional stability in Southeast Asia? (Brunei)*

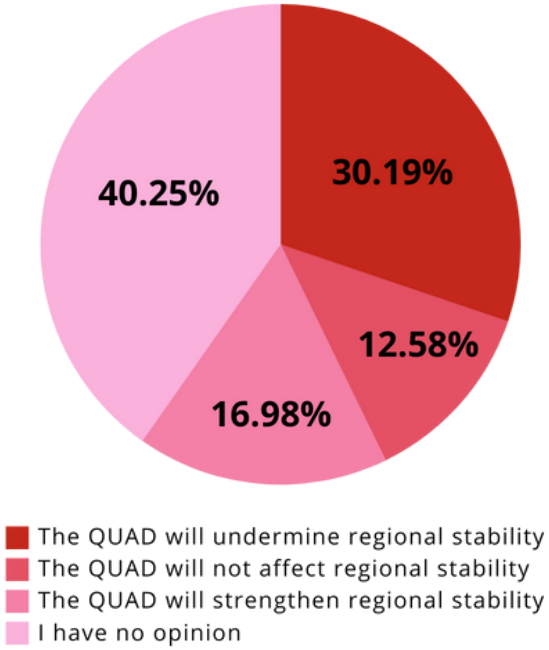


Chart 243. *How will the QUAD affect regional stability in Southeast Asia? (Cambodia)*

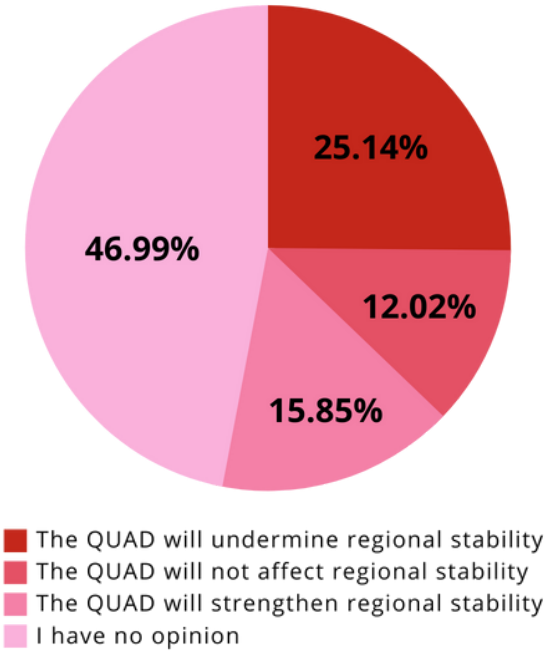


Chart 244. *How will the QUAD affect regional stability in Southeast Asia? (Indonesia)*

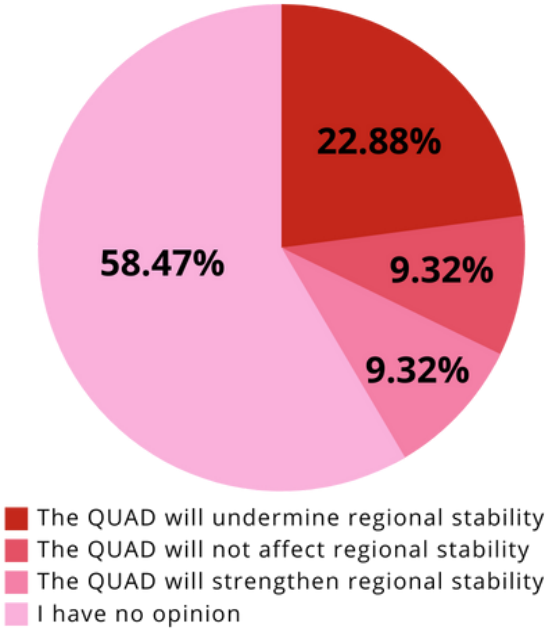


Chart 245. *How will the QUAD affect regional stability in Southeast Asia? (Laos)*

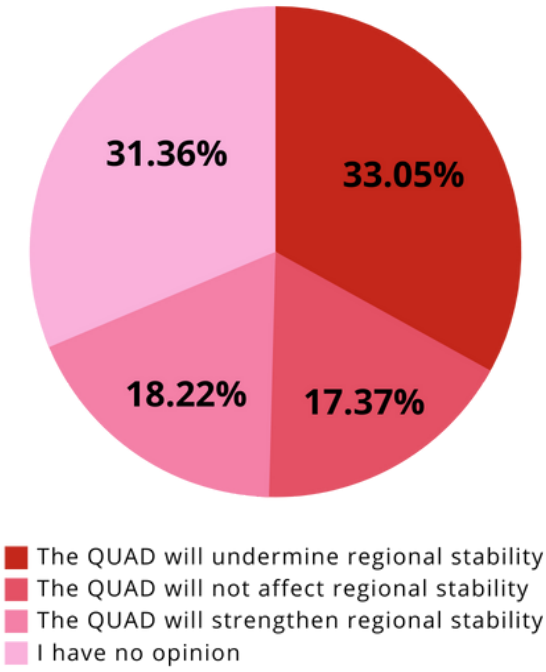


Chart 246. *How will the QUAD affect regional stability in Southeast Asia? (Malaysia)*

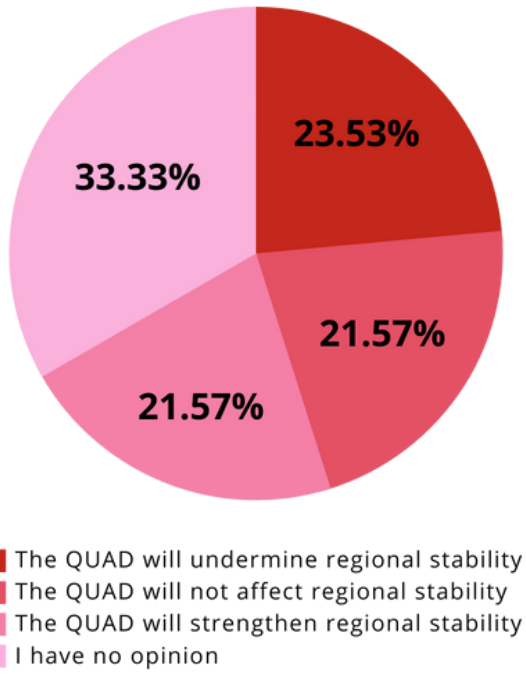


Chart 247. *How will the QUAD affect regional stability in Southeast Asia? (Myanmar)*

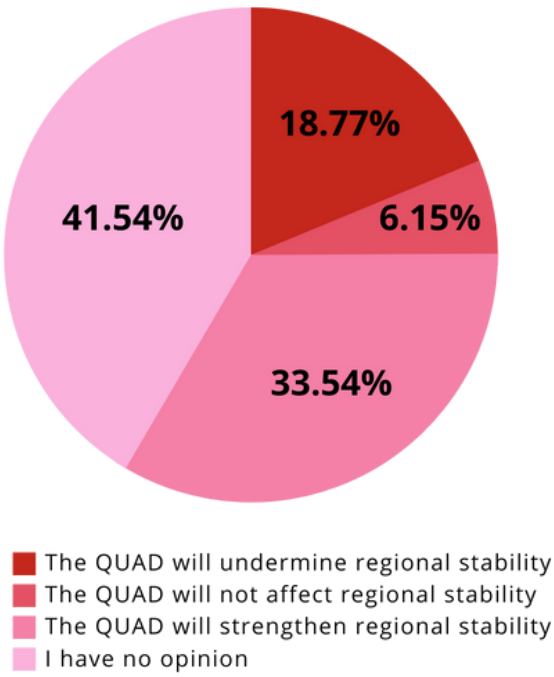


Chart 248. *How will the QUAD affect regional stability in Southeast Asia? (Philippines)*

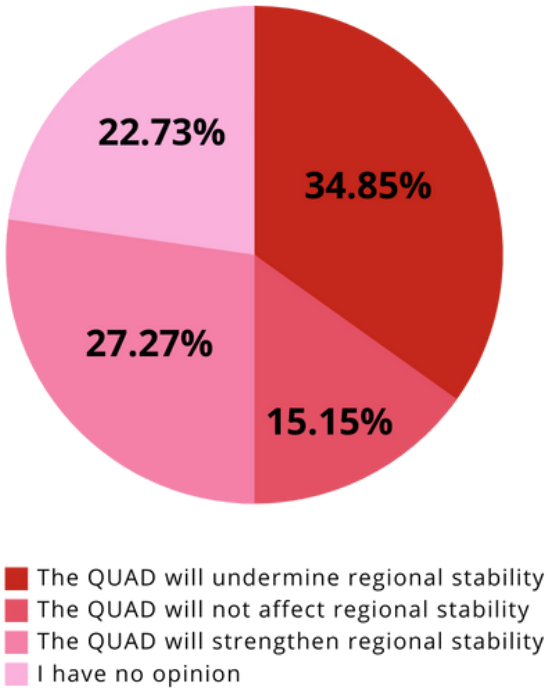


Chart 249. *How will the QUAD affect regional stability in Southeast Asia? (Singapore)*

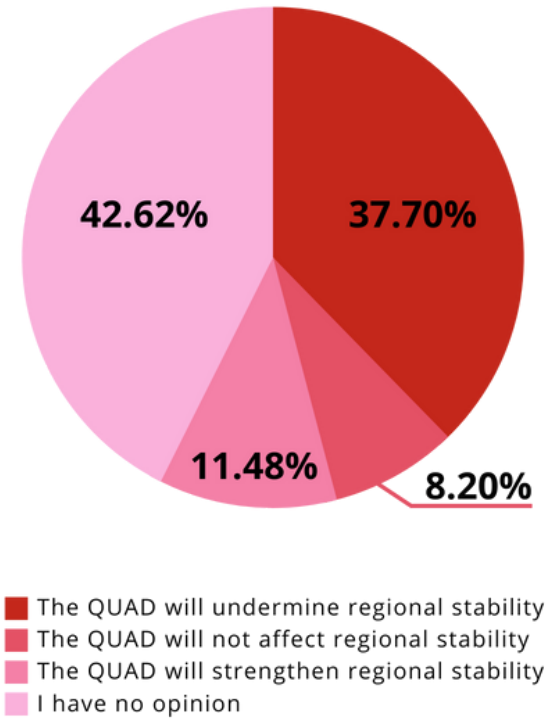


Chart 250. *How will the QUAD affect regional stability in Southeast Asia? (Thailand)*

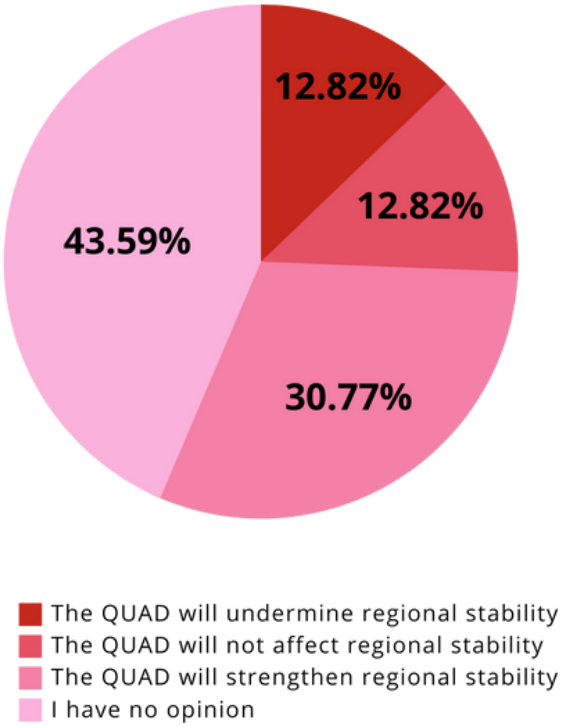


Chart 251. *How will the QUAD affect regional stability in Southeast Asia? (Vietnam)*

It is fair to note that while many of the respondents had no opinion about the QUAD and AUKUS, a considerable percentage of respondents, 20%, opined that QUAD would strengthen regional stability, indicating that respondents were more open to the QUAD compared to the AUKUS.

In recent years, the Southeast Asia region has seen an increasing presence of European navies in the waters of the region, and NATO has been signaling an intention to increase its engagement with the region. The survey respondents saw this as an important development. Most frequent answer of the respondents (38,06%) saw that **NATO intended to increase its presence in the region. The greatest believers in this were respondents from the Business Communities** (38,06%). However, 33,17% of respondents were still unsure of NATO's intention. Moreover, the most popular answer of the respondents (43,31%) were concerned about NATO's presence in the region. Among the Elites, Officials were the most concerned at 50%, yet a considerable percentage (41.13%) had not decided or were neutral about it.

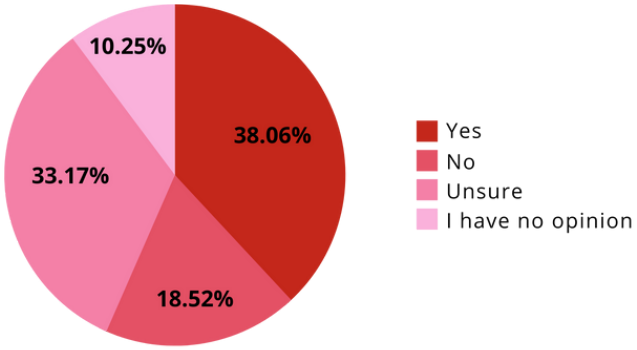


Chart 252. *Do you think that NATO is intending to increase their presence in the region? (General)*

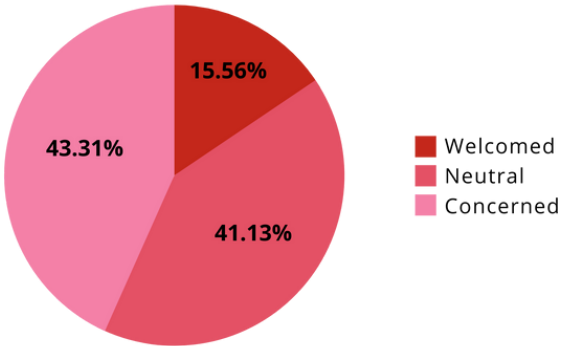


Chart 253. *What is your view on the potential increased NATO presence in the region? (General)*

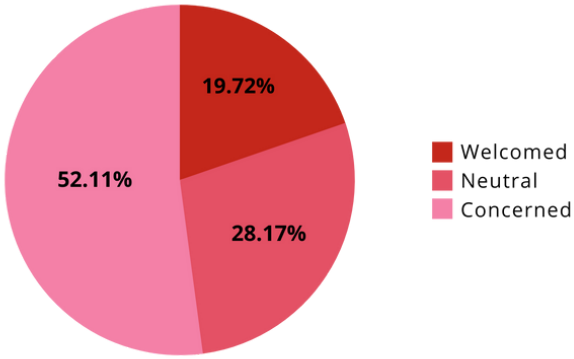


Chart 254. *What is your view on the potential increased NATO presence in the region? (Business Community)*

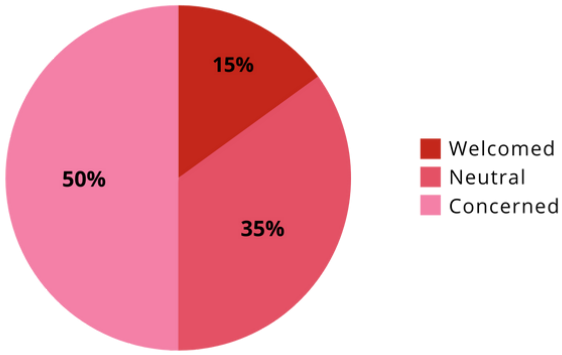


Chart 255. *What is your view on the potential increased NATO presence in the region? (Officials)*

The Elite and Students had slightly different views regarding NATO's intention in the region. The most frequent answer of Elite (39,03%) respondents believed that NATO intended to increase its presence in the region, while the most frequent answer of Students (37,84%) were unsure. A slightly smaller cohort, 37,13% of Students, were sure that NATO intended to increase its presence. Furthermore, 28,25% of Elite respondents were unsure. All in all, both the Elite and Students were almost equally split in their views regarding NATO's intention in the region.

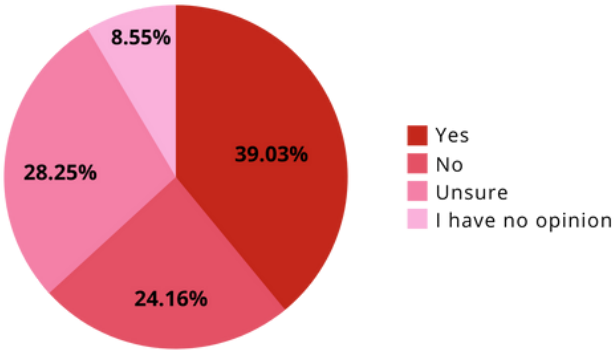


Chart 256. *Do you think that NATO is intending to increase their presence in the region? (Elites)*

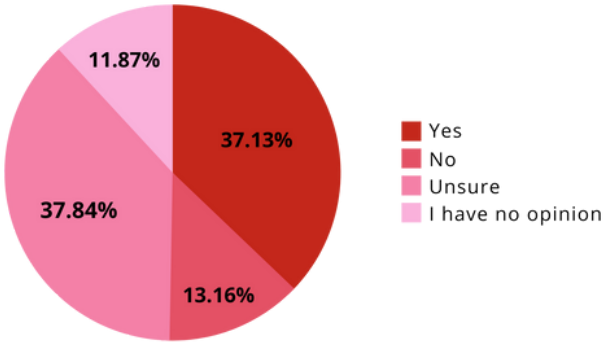


Chart 257. *Do you think that NATO is intending to increase their presence in the region? (Students)*

When asked about their attitude to the potential increase of NATO presence in the region, almost half of the Elite (47,96%) said they were concerned while 46,18% of Students were neutral.

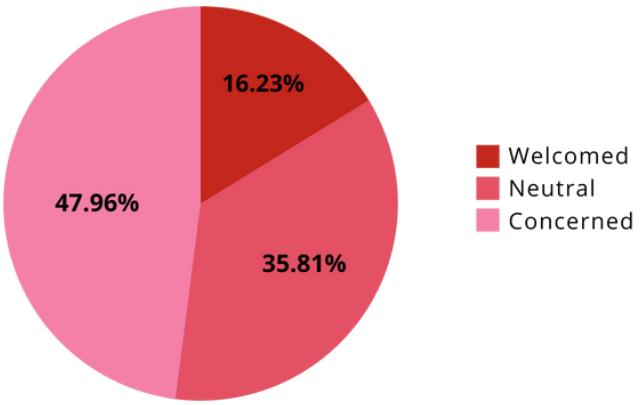


Chart 258. *What is your view on the potential increased NATO presence in the region? (Elites)*

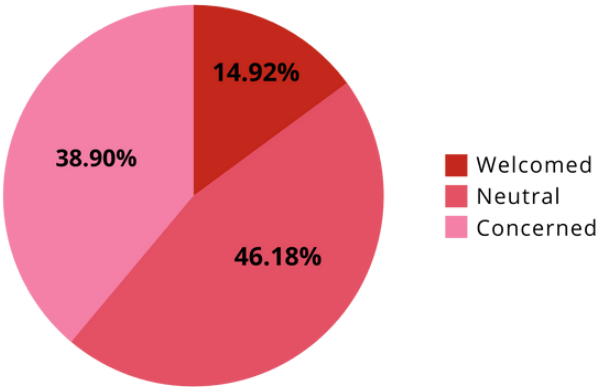


Chart 259. *What is your view on the potential increased NATO presence in the region? (Students)*

Respondents from Singapore and the Philippines were split in their views regarding NATO's intention to increase its presence in the region. In both the cases of Singapore and the Philippines the percentage of respondents who agreed that NATO intended to increase its presence in the region were about equal to the percentage of respondents who disagreed. Meanwhile, most respondents from Cambodia (47,80%), Philippines (40,92%), and Indonesia (40,80%) agreed that NATO wanted to increase its presence in Southeast Asia.

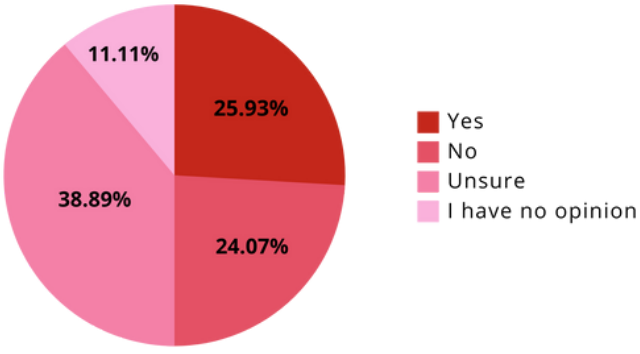


Chart 260. *Do you think that NATO is intending to increase their presence in the region? (Brunei)*

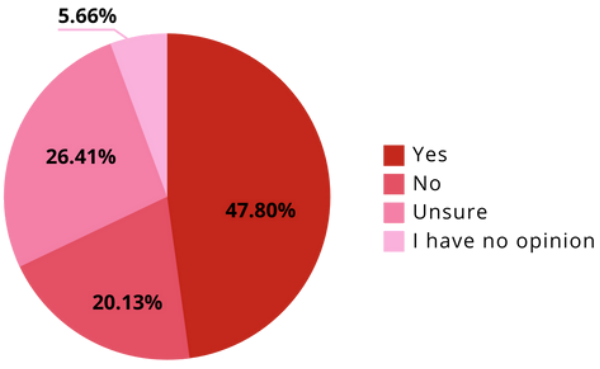


Chart 261. *Do you think that NATO is intending to increase their presence in the region? (Cambodia)*

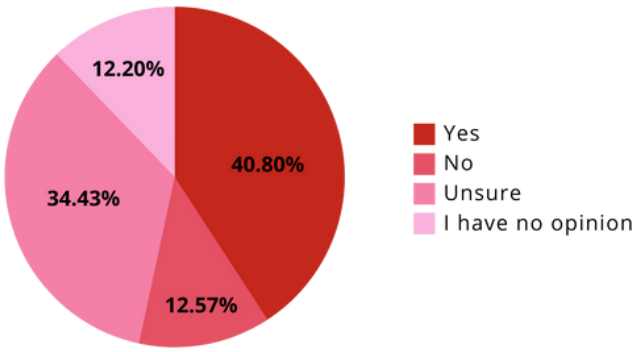


Chart 262. *Do you think that NATO is intending to increase their presence in the region? (Indonesia)*

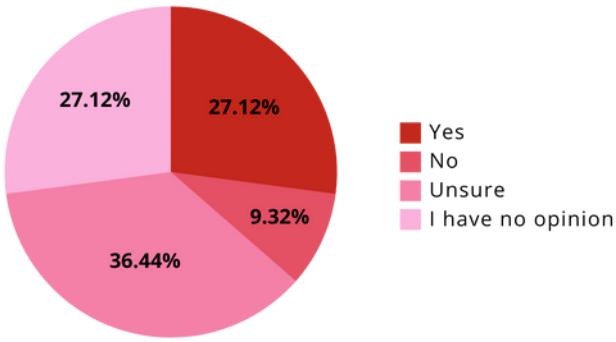


Chart 263. *Do you think that NATO is intending to increase their presence in the region? (Laos)*

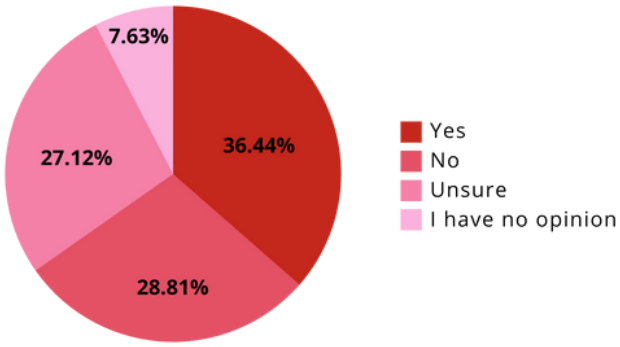


Chart 264. *Do you think that NATO is intending to increase their presence in the region? (Malaysia)*

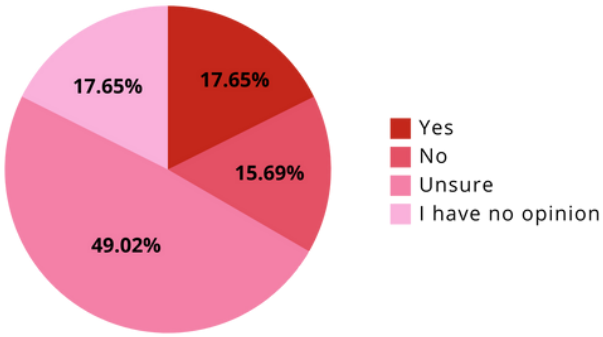


Chart 265. *Do you think that NATO is intending to increase their presence in the region? (Myanmar)*

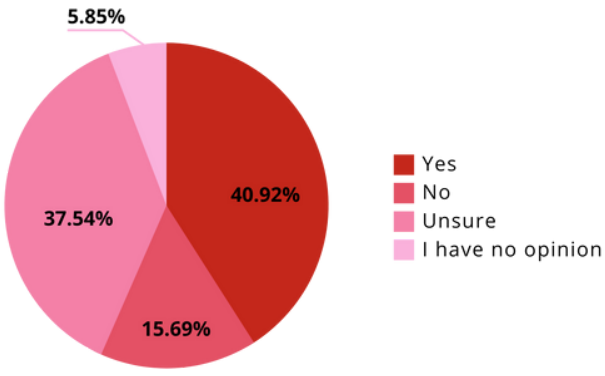


Chart 266. *Do you think that NATO is intending to increase their presence in the region? (Philippines)*

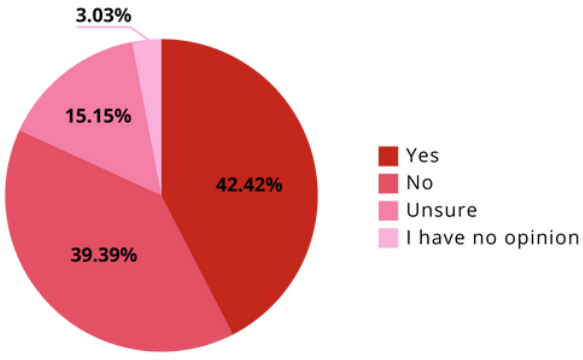


Chart 267. *Do you think that NATO is intending to increase their presence in the region? (Singapore)*

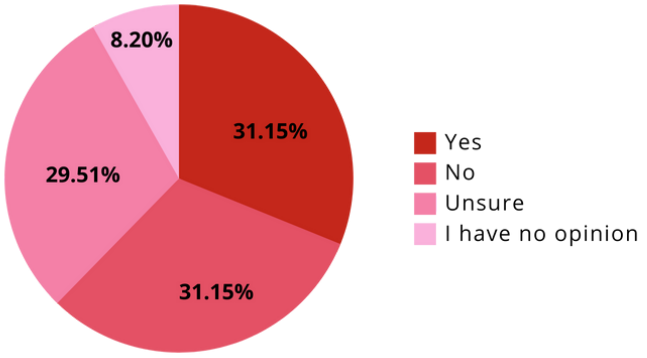


Chart 268. *Do you think that NATO is intending to increase their presence in the region? (Thailand)*

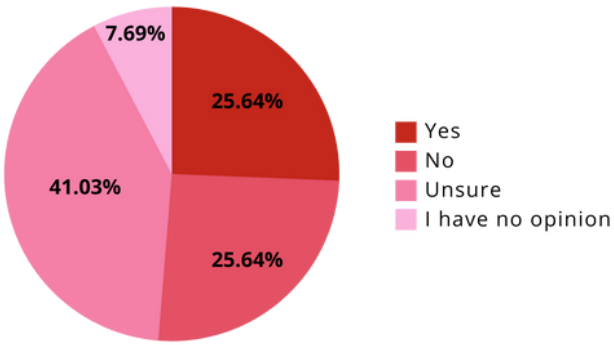


Chart 269. *Do you think that NATO is intending to increase their presence in the region? (Vietnam)*

An average of 40% of all respondents from Indonesia, Cambodia, the Philippines, and Singapore were concerned with the prospect of increased NATO presence in Southeast Asia. Meanwhile, the majority of respondents from other ASEAN countries were neutral.

D. The Myanmar Issue

Asked to assess ASEAN's effort at addressing the crisis in Myanmar, the most frequent answer of the respondents (27,68%) deemed ASEAN as not attentive and responsive enough while 24,97% regarded ASEAN as too slow on this issue.

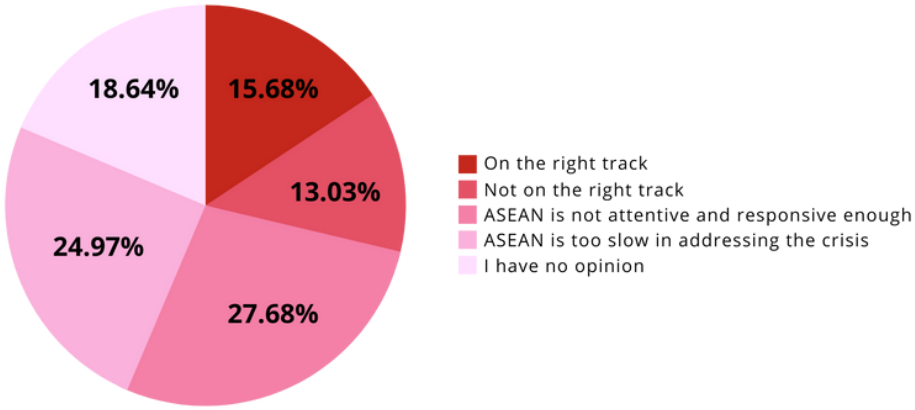


Chart 270. *Is ASEAN's effort to address Myanmar's political crisis on the right track? (General)*

The most frequent answer of the Elite (27,88%) found ASEAN too slow in addressing Myanmar's political crisis, while 25,90% regarded ASEAN as not attentive and responsive enough to address the crisis. While the most frequent answer of Students also said that ASEAN was too slow. 23,38% of the Students said that they did not have an opinion, while 22,21% of the Students thought that ASEAN was not attentive and responsive enough.

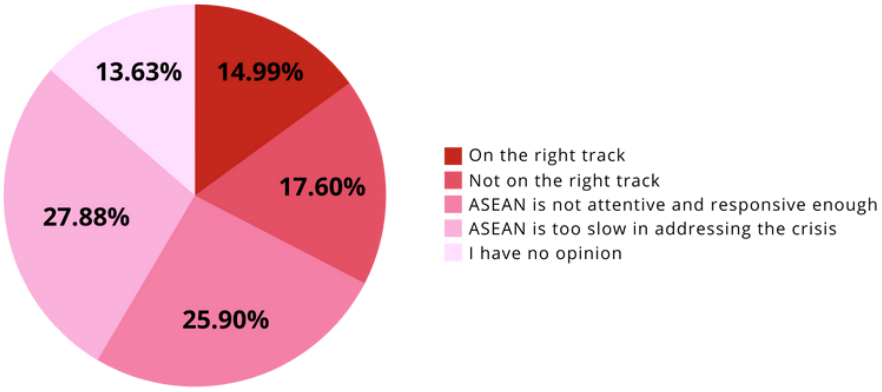


Chart 271. *Is ASEAN's effort to address Myanmar's political crisis on the right track? (Elites)*

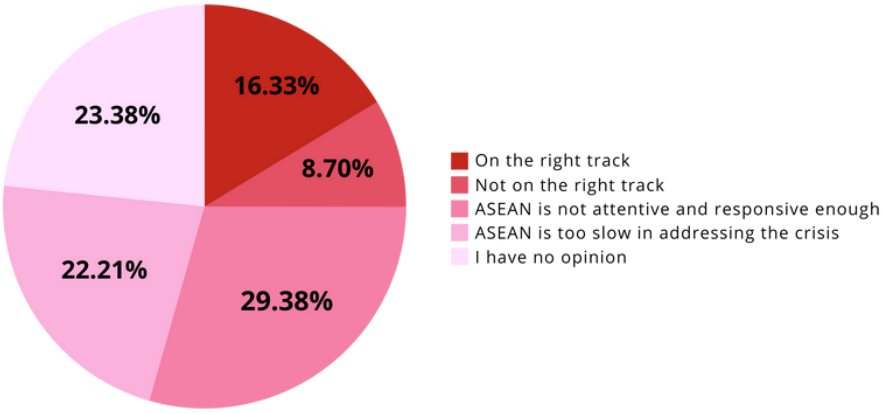


Chart 272. *Is ASEAN's effort to address Myanmar's political crisis on the right track? (Students)*



Among the Elites, we can see more details of respondents' sentiments. Civil Societies (31,97%), Business Communities (30,28%), and Officials (30%) regarded ASEAN as not attentive and responsive enough. Academia had a slightly different view: 31,68% saw ASEAN as too slow in addressing the crisis.

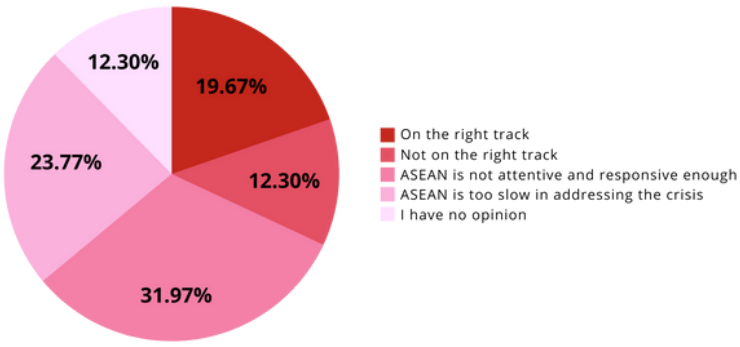


Chart 273. *Is ASEAN's effort to address Myanmar's political crisis on the right track? (Civil Society)*

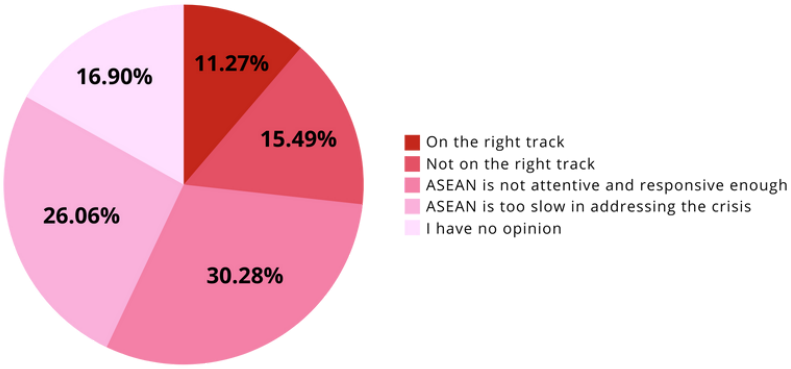


Chart 274. *Is ASEAN's effort to address Myanmar's political crisis on the right track? (Business Community)*

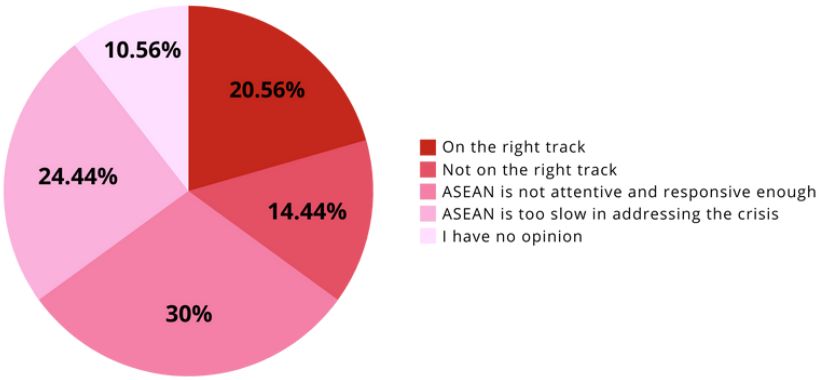


Chart 275. *Is ASEAN's effort to address Myanmar's political crisis on the right track? (Officials)*

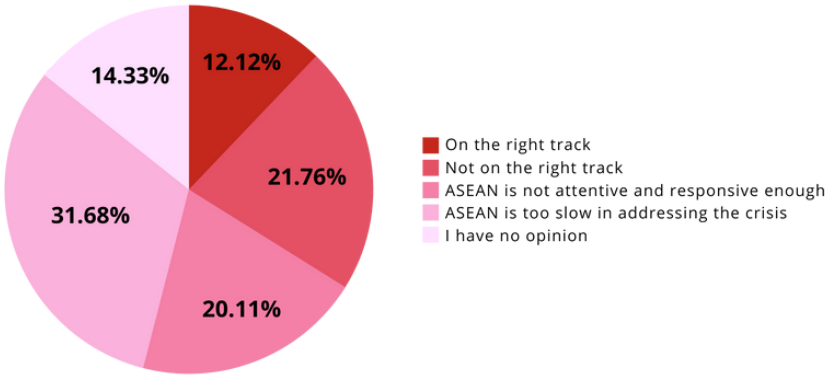


Chart 276. *Is ASEAN's effort to address Myanmar's political crisis on the right track? (Academia)*

Still on the Myanmar political crisis, the survey asked respondents about **China's role in the crisis**. Almost half of respondents or 46,32% had no clear knowledge of it while 20,27% of respondents had no opinion on it. This pattern was confirmed by the finding that all of the Elite groups had no clear answer on China's role in the crisis.

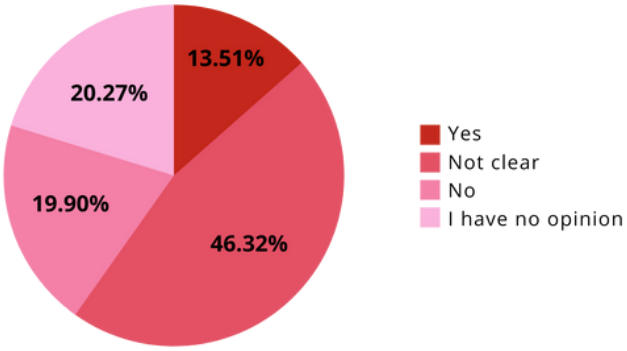


Chart 277. *Has China's role with regard to Myanmar's political crisis been contributing positively to ASEAN's effort in addressing the conflict? (General)*

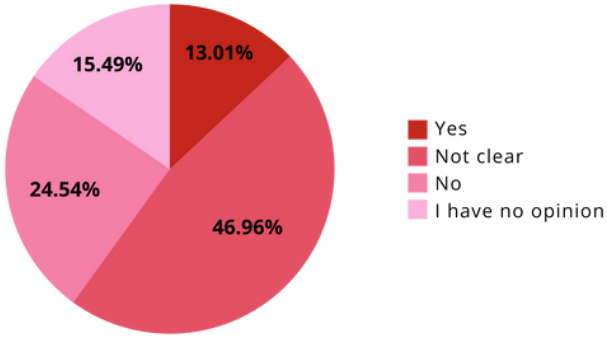


Chart 278. *Has China's role with regard to Myanmar's political crisis been contributing positively to ASEAN's effort in addressing the conflict? (Elites)*

With regard to China's role in Myanmar's political crisis, the majority of both Elite and Students were not clear on whether China had been contributing positively to ASEAN's efforts in addressing the conflict. 24,54% of the Elite said that China had not been contributing positively while 24,79% of Students had no opinion.

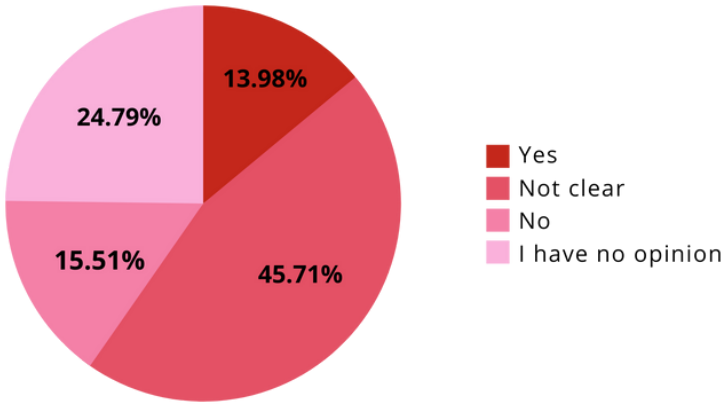


Chart 279. *Has China's role with regard to Myanmar's political crisis been contributing positively to ASEAN's effort in addressing the conflict? (Students)*

The most popular answer of respondents from Thailand, Malaysia, and Singapore at 44,26%, 35,17%, and 34,85% respectively were of the view that China's role had not been contributing positively to addressing the political crisis in Myanmar.

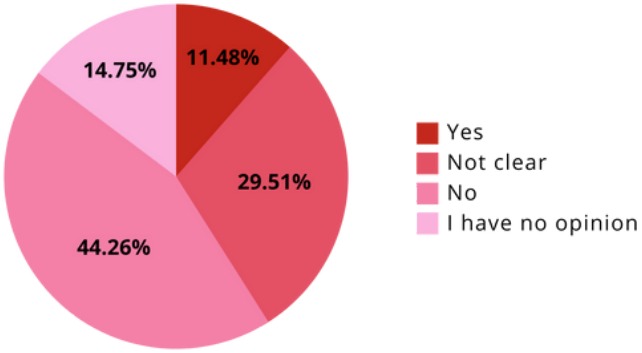


Chart 280. *Has China's role with regard to Myanmar's political crisis been contributing positively to ASEAN's effort in addressing the conflict? (Thailand)*

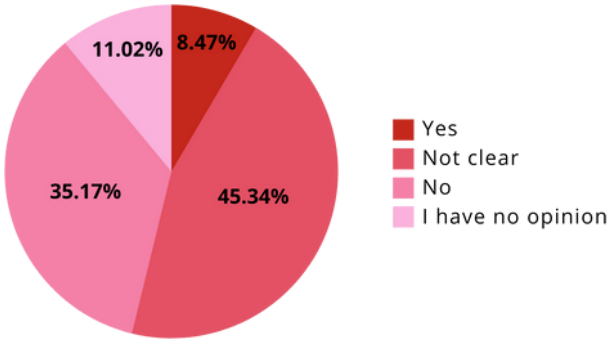


Chart 281. *Has China's role with regard to Myanmar's political crisis been contributing positively to ASEAN's effort in addressing the conflict? (Malaysia)*

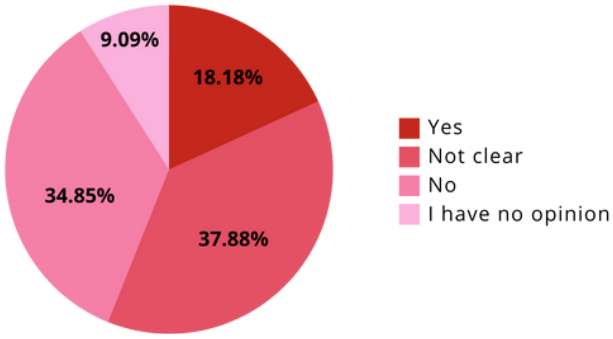


Chart 282. *Has China's role with regard to Myanmar's political crisis been contributing positively to ASEAN's effort in addressing the conflict? (Singapore)*

E. The South China Sea and the Mekong River

Most frequent answer of the respondents (23,10%) were of the view that the management of the South China Sea dispute was not on the right track. 15,62 percent deemed ASEAN as too slow while 14,90% found ASEAN not attentive and not responsive enough.

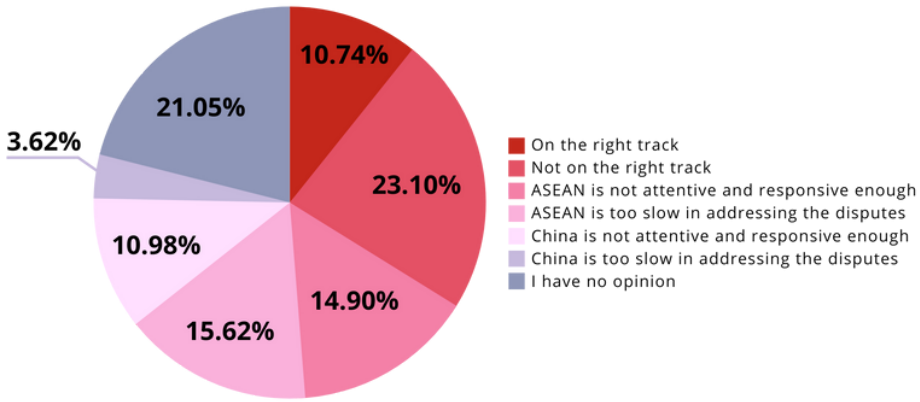


Chart 283. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (General)*

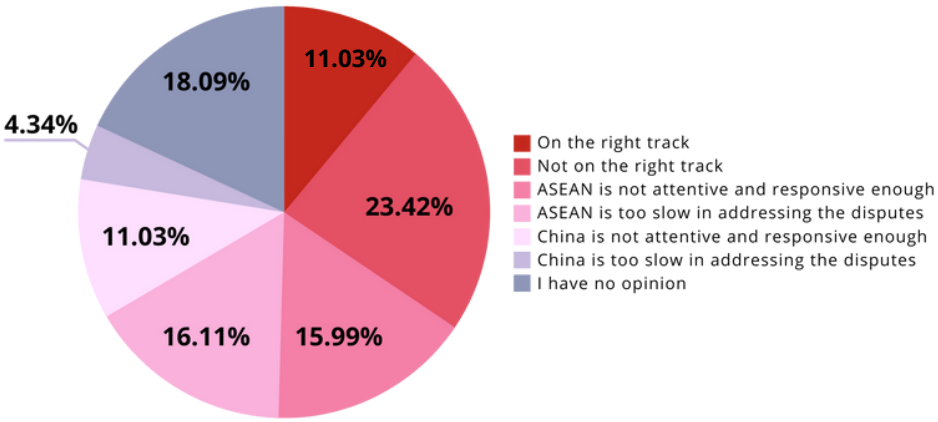


Chart 284. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Elites)*

The most frequent answer of Elites (23,42%) were of the view that the management of the South China Sea disputes between ASEAN member countries and China was not on the right track. However, in the Students group, the most voted answer is (23,85%) no opinion on the issue. A close second opinion shared by the Students (22,80%) was that dispute management was not on the right track.

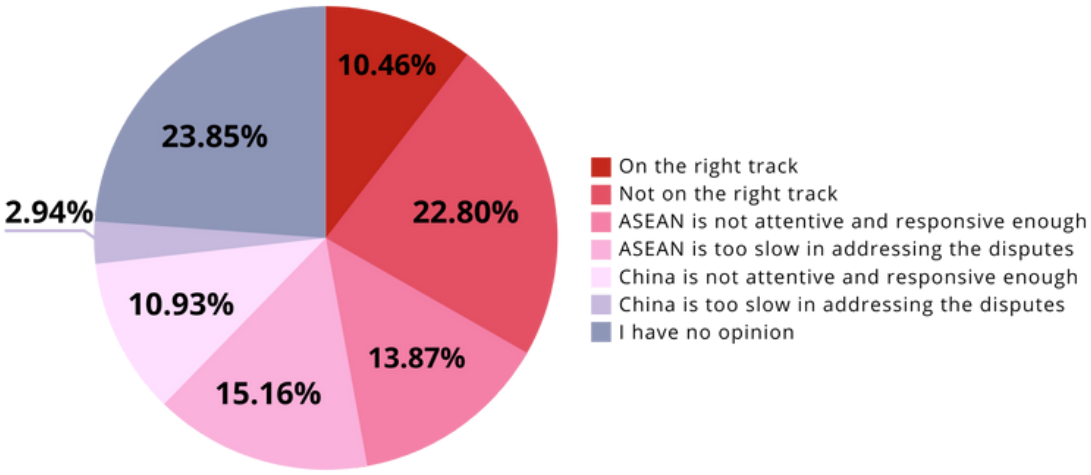


Chart 285. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Students)*

In this year's survey, respondents from Vietnam (41,03%), Brunei Darussalam (31,48%), Malaysia (28,39%), and Singapore (27,27%) topped the list of ASEAN countries that viewed the management of the South China Sea dispute as not on the right track at all.

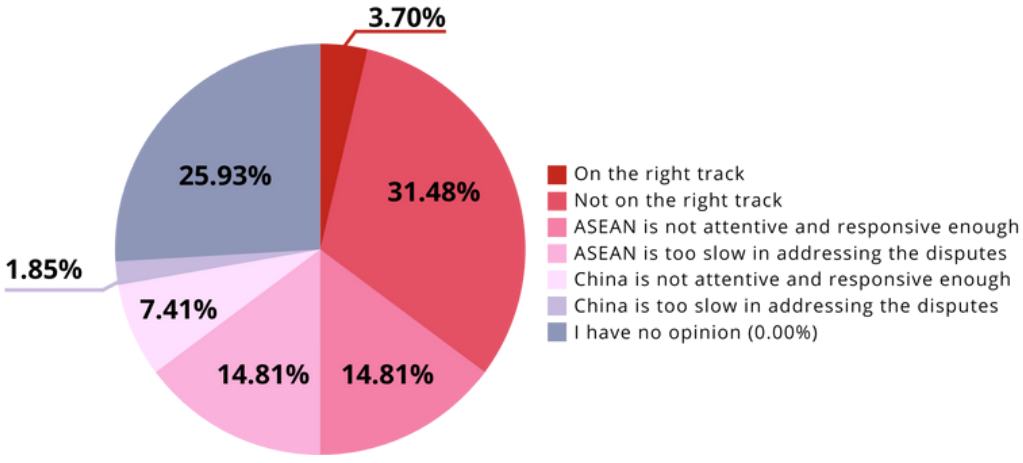


Chart 286. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Brunei)*

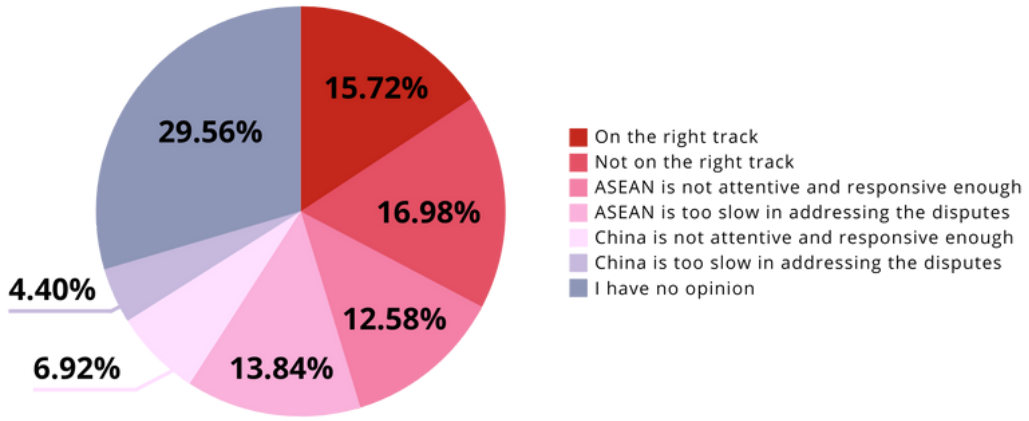


Chart 287. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Cambodia)*

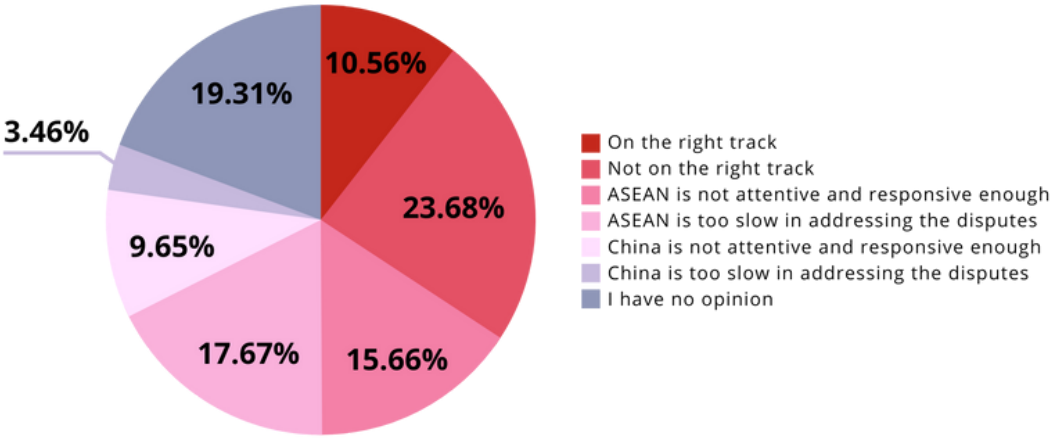


Chart 288. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Indonesia)*

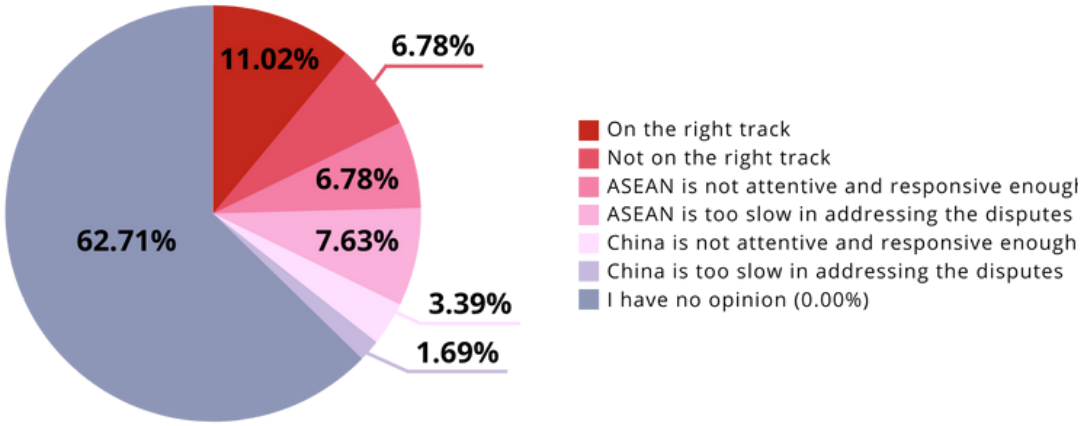


Chart 289. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Laos)*

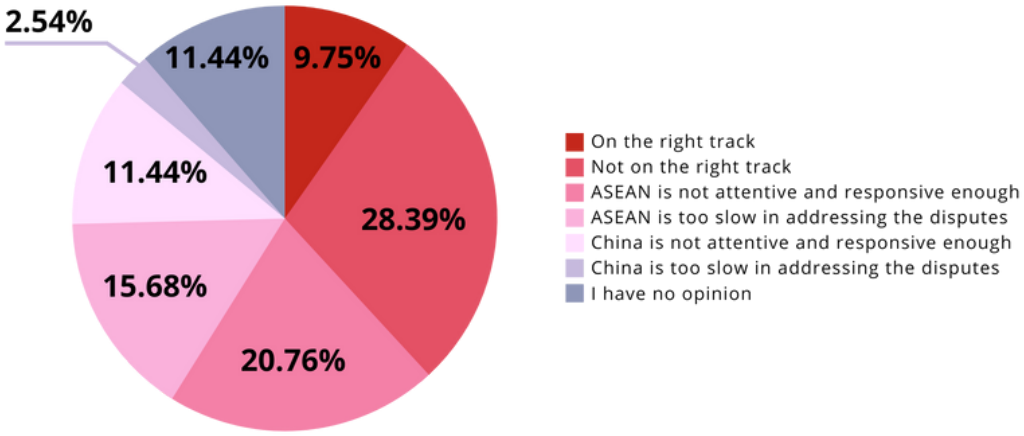


Chart 290. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Malaysia)*

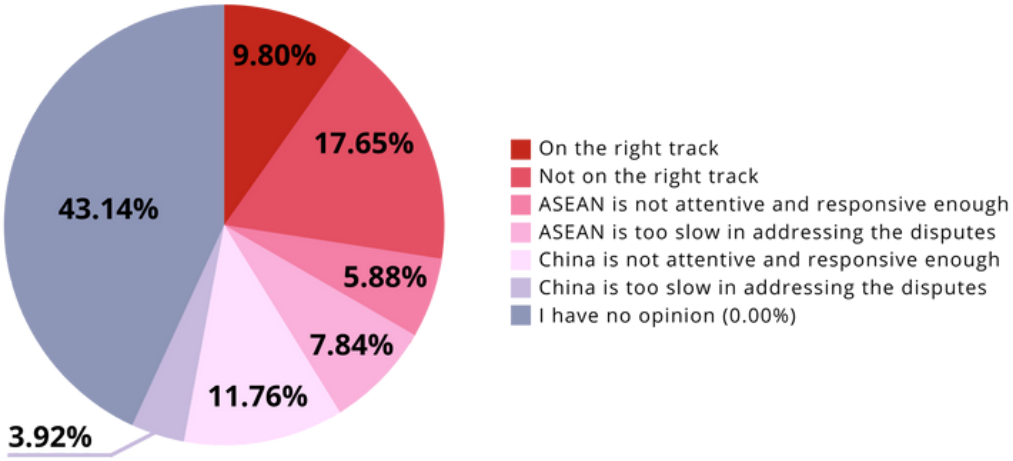


Chart 291. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Myanmar)*

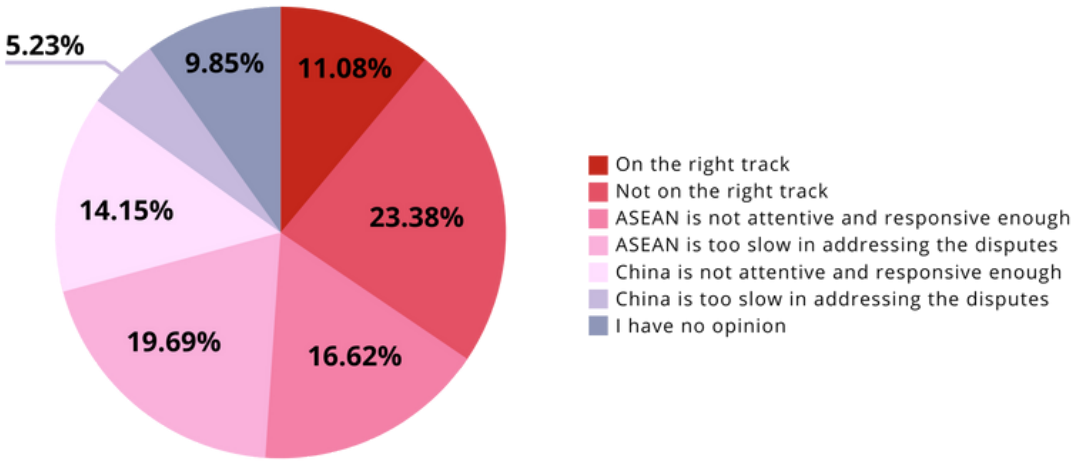


Chart 292. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Philippines)*

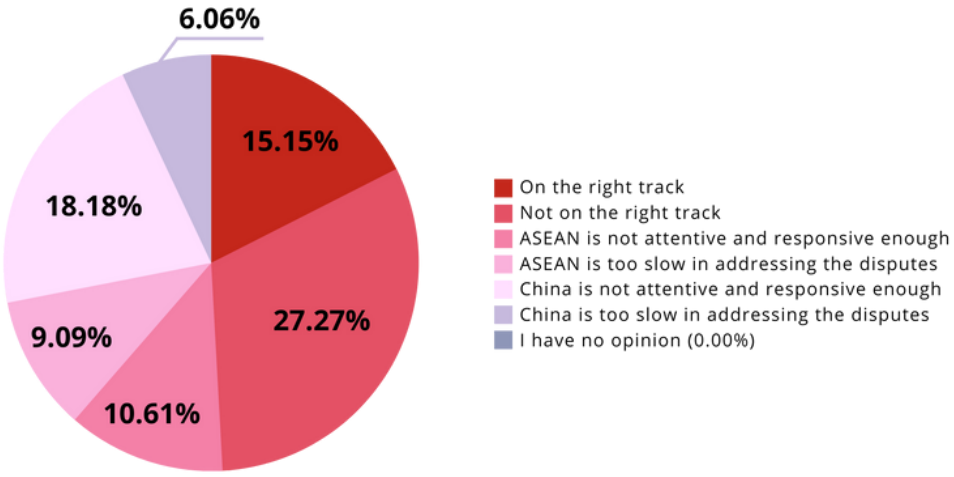


Chart 293. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Singapore)*

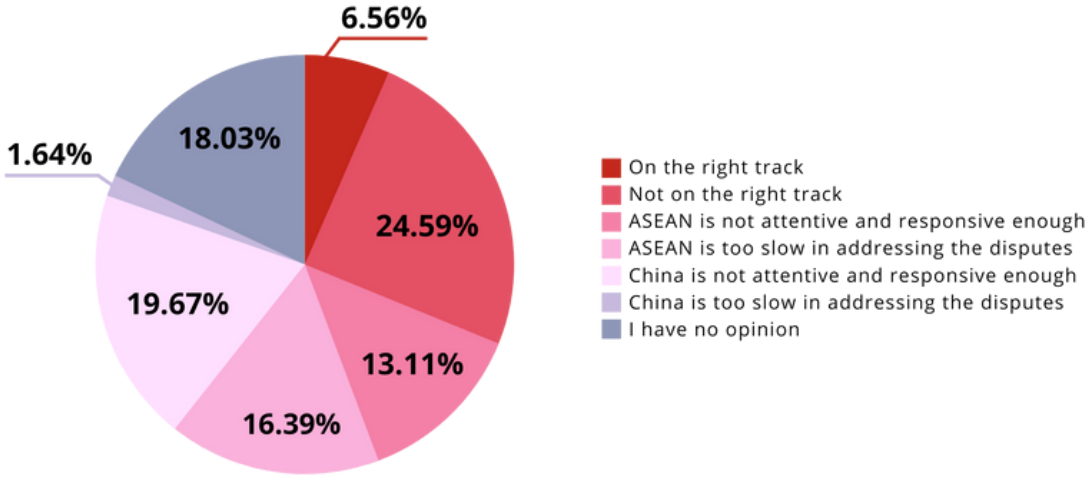


Chart 294. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Thailand)*

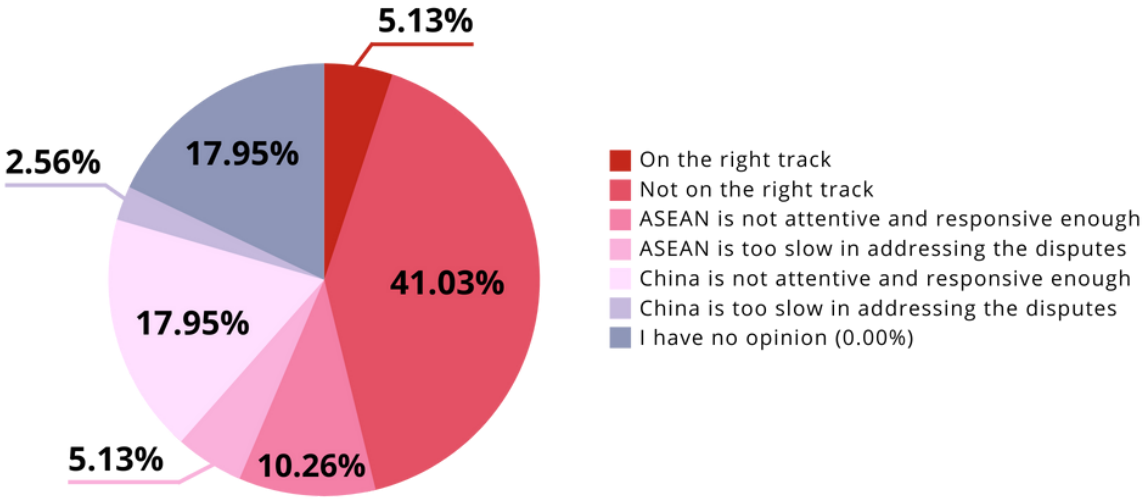


Chart 295. *How do you perceive the management of South China Sea disputes between ASEAN countries and China? (Vietnam)*

Besides the South China Sea disputes, another strategic issue is the Mekong River. According to the survey results, 41,31% of respondents regarded water resource management in the Mekong River as both a source of cooperation and conflict between ASEAN and China.

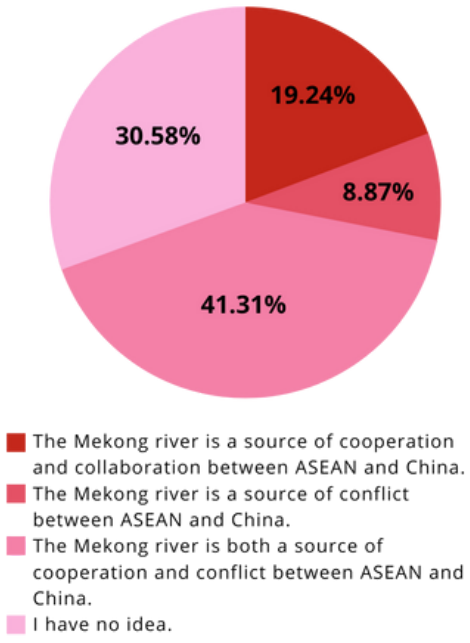


Chart 296. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (General)*

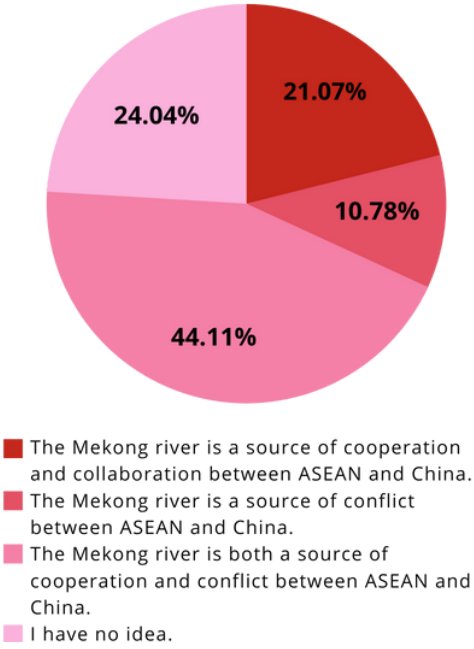


Chart 297. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Elites)*

The most popular of both Elites (44,11%) and Students (38,66%) agreed that the Mekong river was a source of cooperation and conflict between ASEAN and China. Yet there was also a significant number of Students (36,78%) that did not have an idea of the issue.

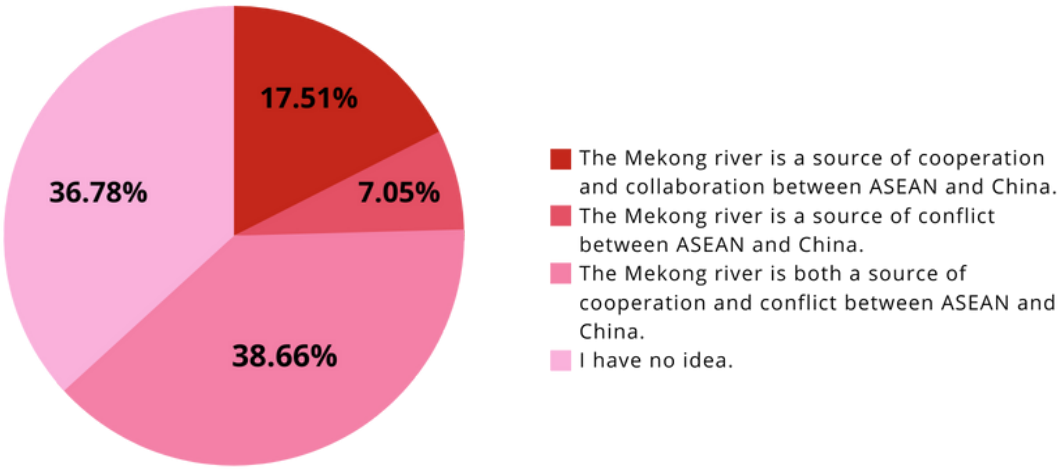


Chart 298. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Students)*

Such a view was shared amongst the respondents from Thailand (77,05%), Vietnam (66,67%), and Singapore (63,64%). However, this issue was not generally known in all ASEAN countries. A significant percentage of respondents from Brunei Darussalam, Indonesia, and the Philippines, for example, said that they were not aware or had no opinion about it.

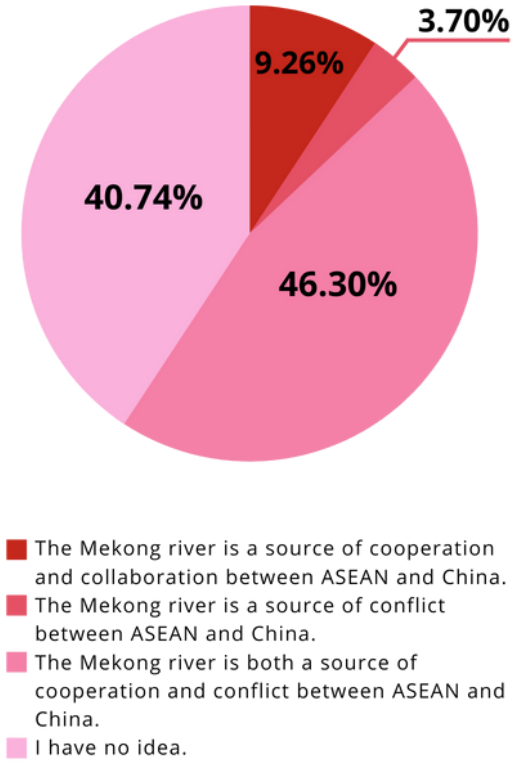


Chart 299. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Brunei)*

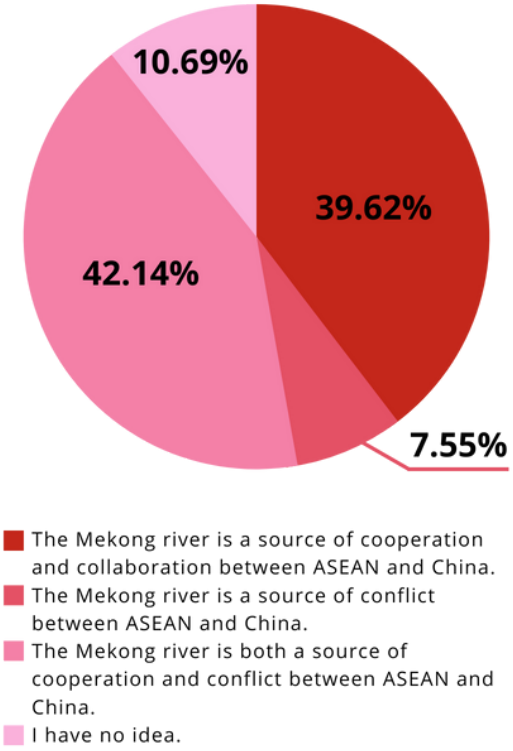


Chart 300. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Cambodia)*

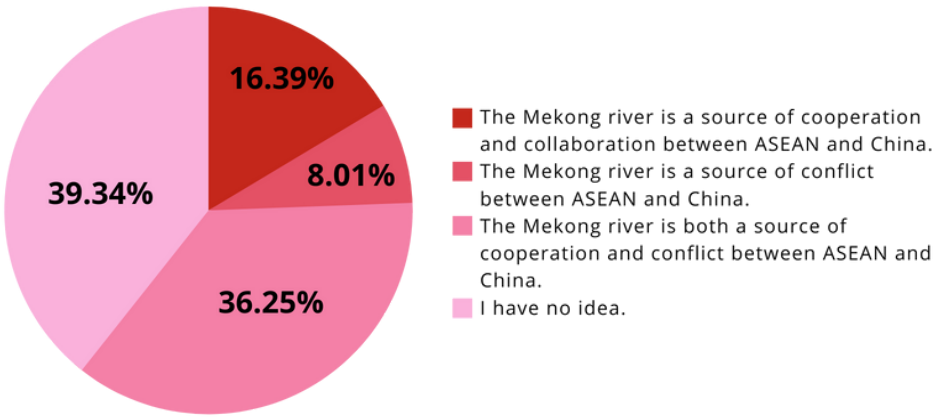


Chart 301. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Indonesia)*

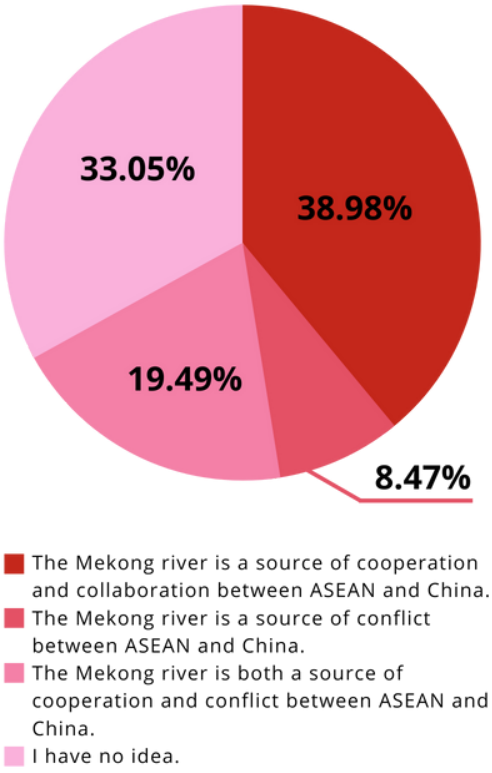


Chart 302. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Laos)*

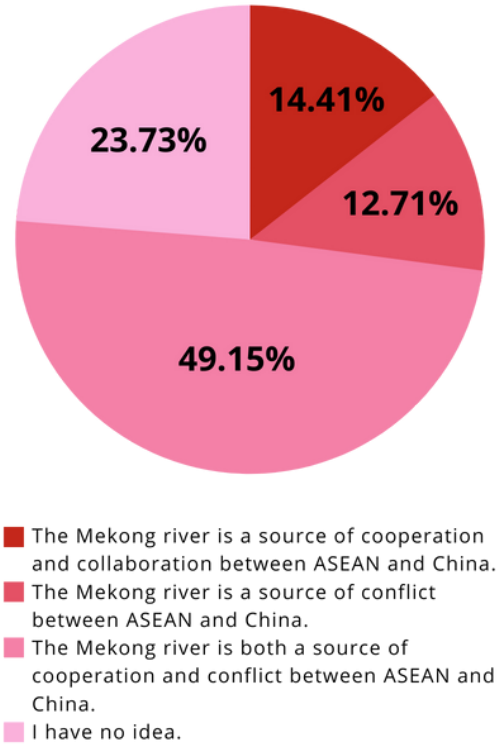


Chart 303. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Malaysia)*



Chart 304. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Myanmar)*

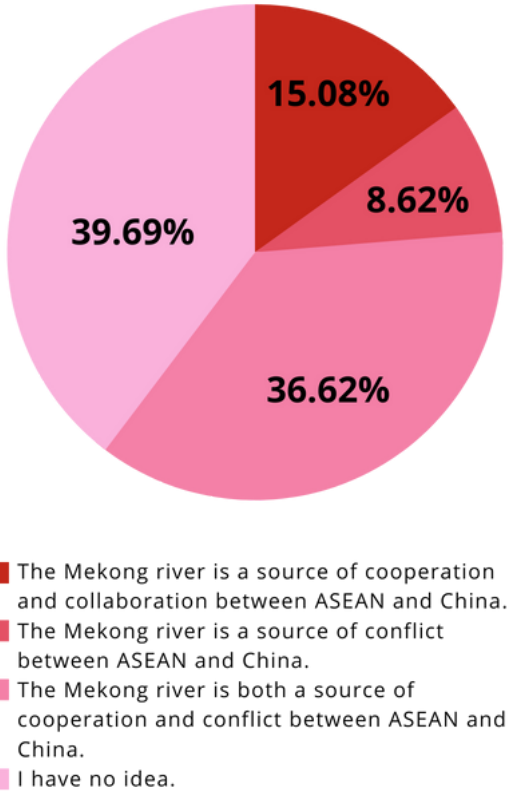


Chart 305. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Philippines)*

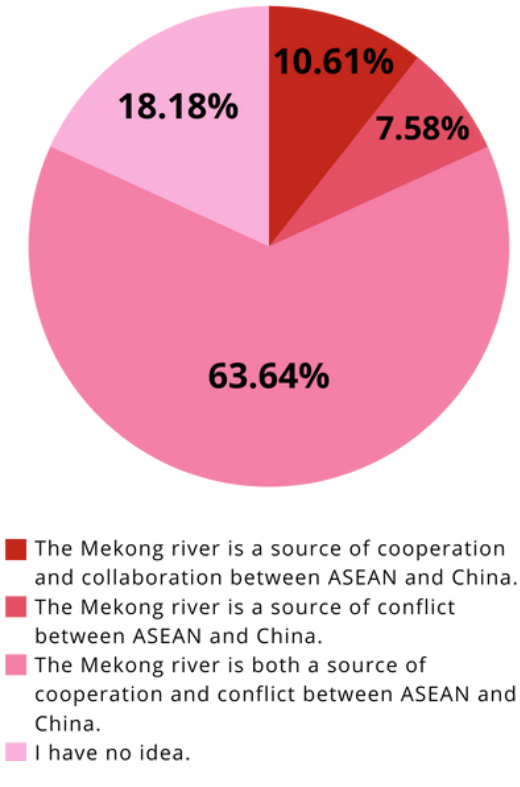


Chart 306. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Singapore)*

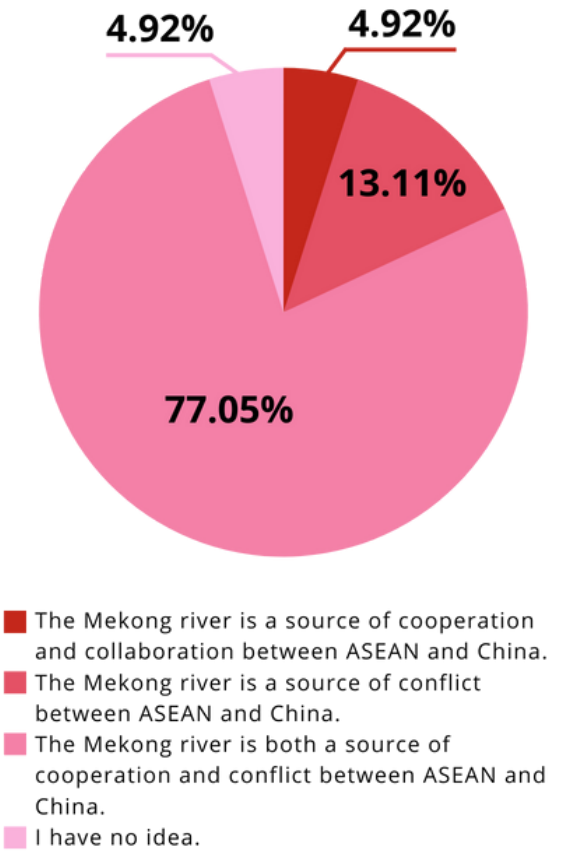


Chart 307. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Thailand)*

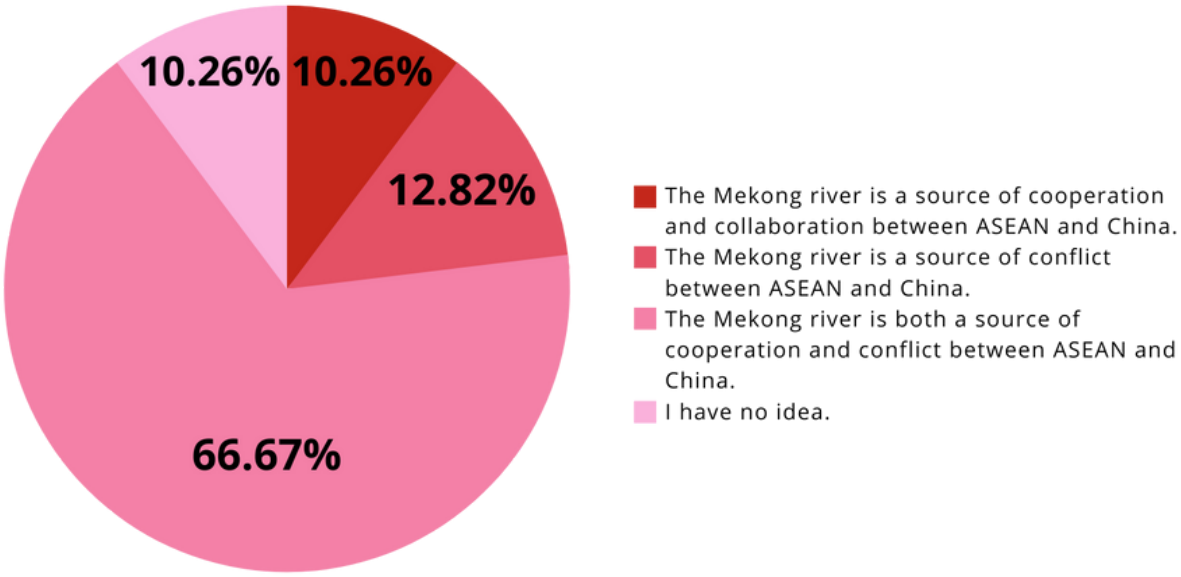


Chart 308. *How do you perceive the water resources management issue in the Mekong river affect ASEAN-China relationship? (Vietnam)*

F. China and the CPTPP and ASEAN Countries' Participation in the IPEF

China's interest in being a member of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) has drawn the attention of the Southeast Asian public. Interestingly, the survey found that 52,29% of respondents supported China's membership in the CPTPP. Particularly 61,27% of the Business Communities were supportive.

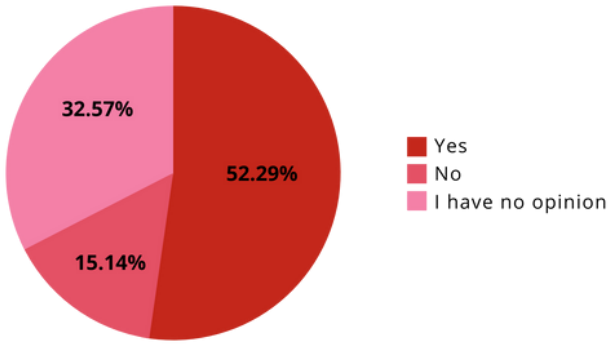


Chart 309. *Do you support China's entry to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) trade pact? (General)*

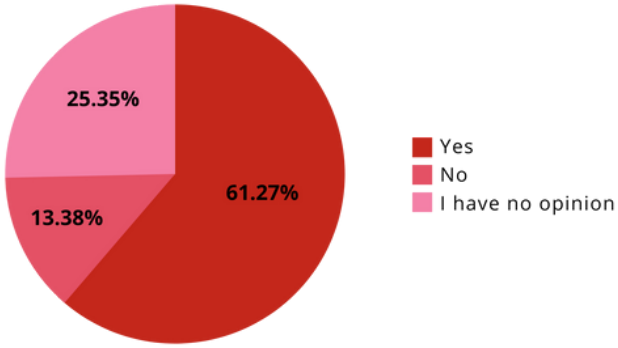


Chart 310. *Do you support China's entry to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) trade pact? (Business Community)*

More than half of the Elites **(55,89%)** supported China's entry into CPTPP. Almost half of Students **(48,88%)** also supported but 36,78% of Students did not have an opinion.

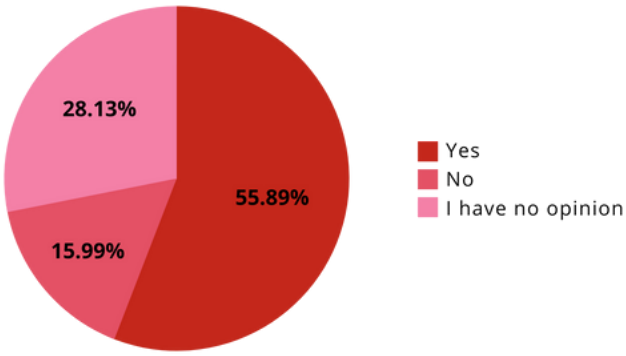


Chart 311. *Do you support China's entry to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) trade pact? (Elites)*

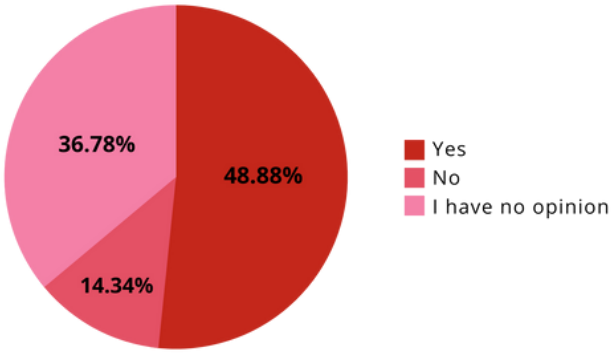


Chart 312. *Do you support China's entry to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) trade pact? (Students)*

At nearly 75%, respondents from Singapore expressed the strongest support for China's entry into the CPTPP. On the other hand, 41,06% of respondents from Vietnam and 36,07% of respondents from Thailand opposed it.

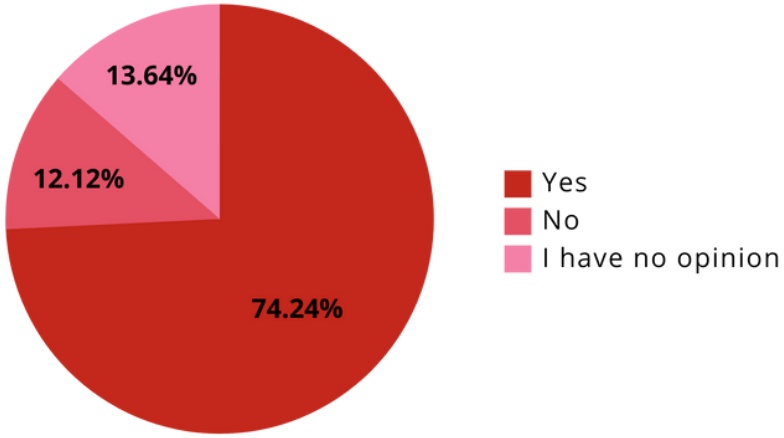


Chart 313. *Do you support China's entry to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) trade pact? (Singapore)*



As the US has not joined either RCEP or CPTPP, it launched its own initiative called **the Indo-Pacific Economic Framework (IPEF)**. The survey found that almost half of the respondents (48,61%) had no opinion or were neutral about. However, 36,25% of all respondents welcomed the US initiative, with 41,55 of respondents from the Business Communities welcoming it. Furthermore, the survey asked how will ASEAN countries' participation in the initiative would impact their relations with China. The result showed that 52,68% of respondents believed that participation in the initiative would balance ASEAN engagement with the US and China. The Academia respondents had the highest percentage of respondents (58,68%) who saw IPEF participation as ASEAN's way of balancing its approach to the two major powers.

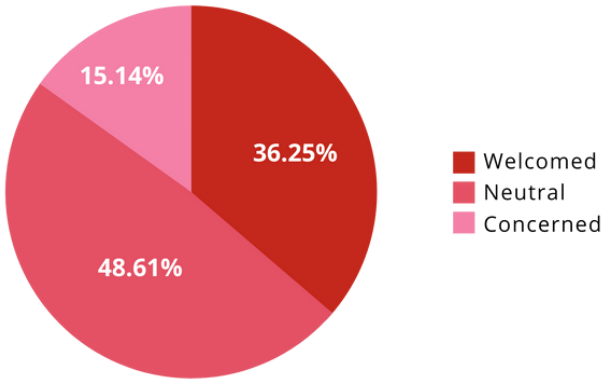


Chart 314. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (General)*

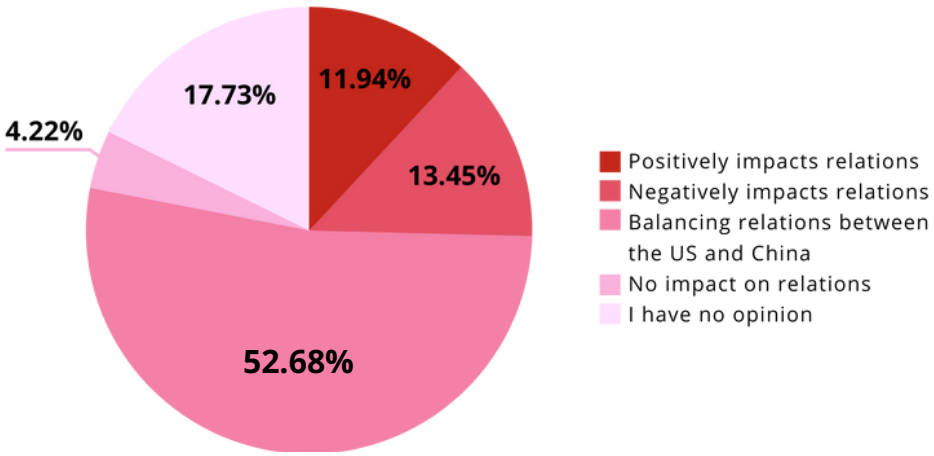


Chart 315. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (General)*

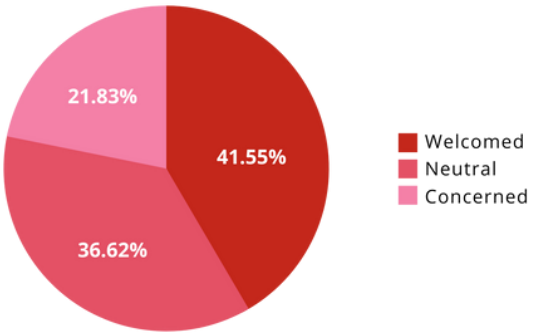


Chart 316. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Business Community)*

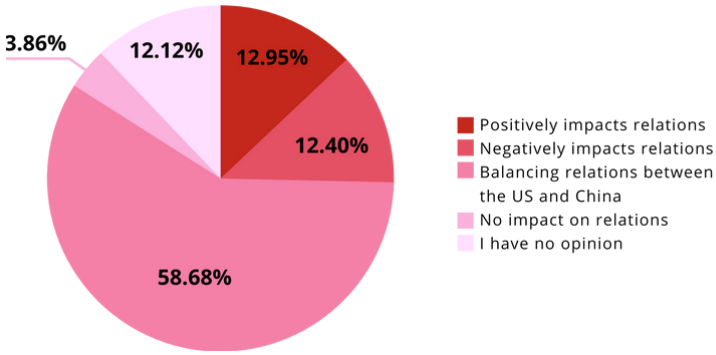


Chart 317. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Academia)*

The most popular answer of both Elites (42,63%) and Students (54,29%) were neutral about the IPEF. 33,25% of Students welcomed it and 12,46% of Students were concerned. On the other hand, 39,41% of the Elite welcomed it while 17,97% of the Elite said that they were concerned.

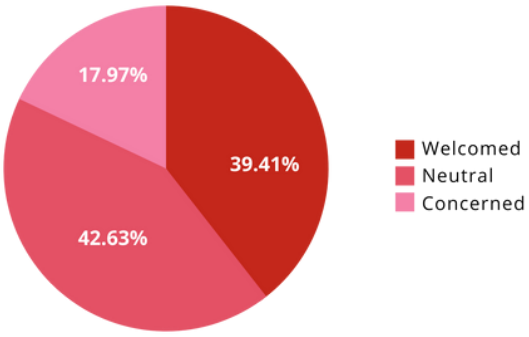


Chart 318. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Elites)*

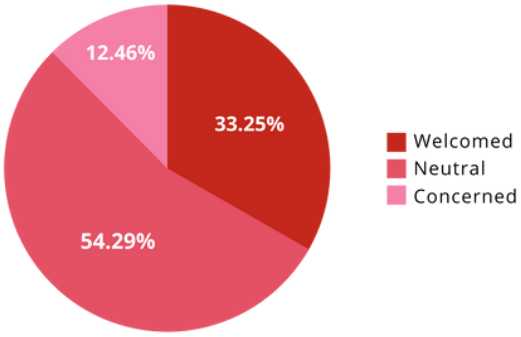


Chart 319. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Students)*

On how ASEAN countries relations with China will get affected by ASEAN member states participation in the US's IPEF, more than half of both Elite (52,66%) and Students (52,64%) were of the view that it would balance ASEAN relations with the US and China. 15,12% of Elite respondents said that it would negatively impact relations while 20,92% of Students had no idea of what the impact would be.

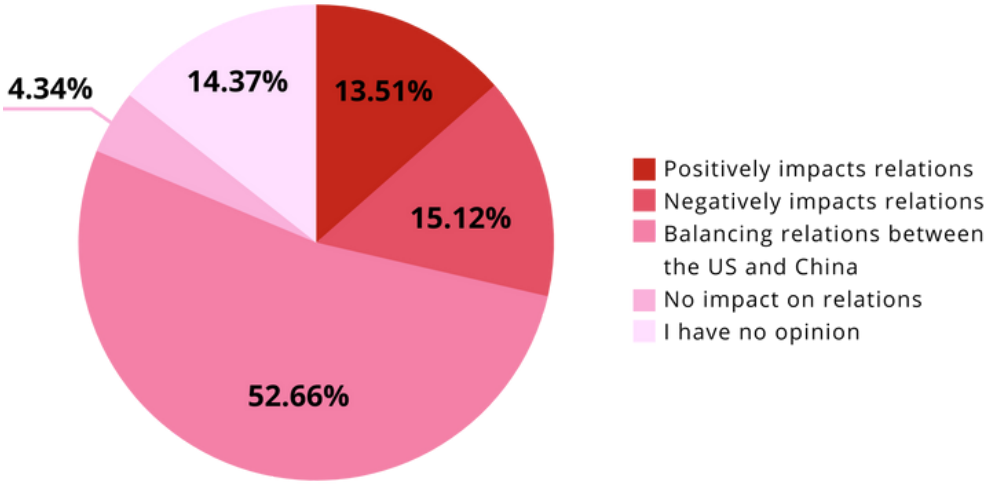


Chart 320. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Elites)*

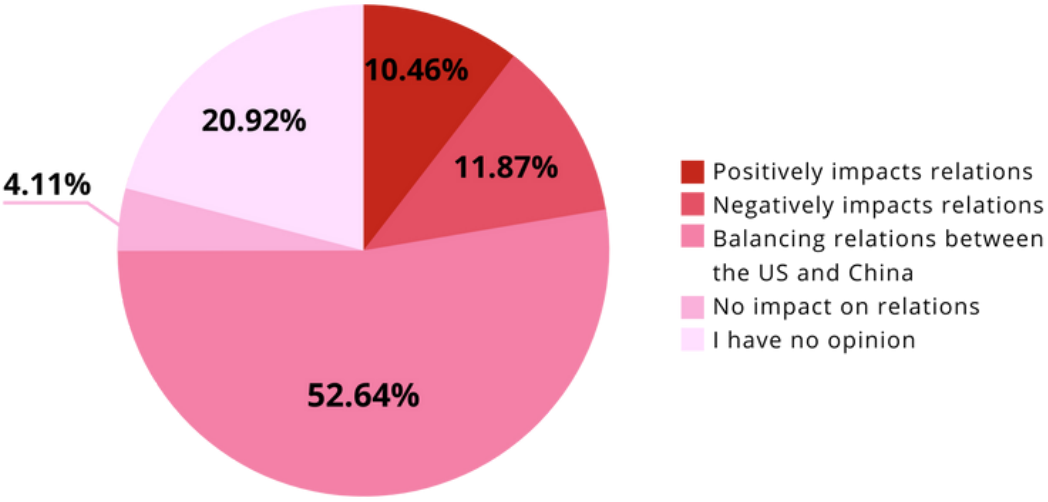


Chart 321. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Students)*

The US-initiated IPEF was most welcomed by respondents from Singapore (54,55%) and Vietnam (46,15%). However, most other respondents from the rest of the ASEAN countries were on this question.

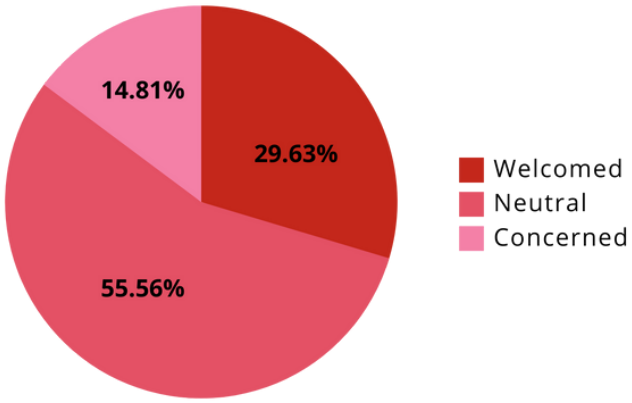


Chart 322. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Brunei)*

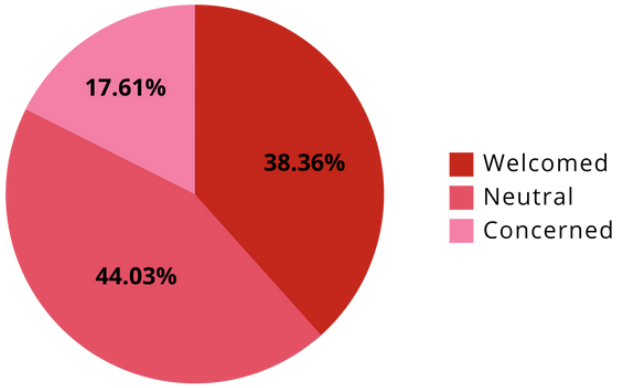


Chart 323. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Cambodia)*

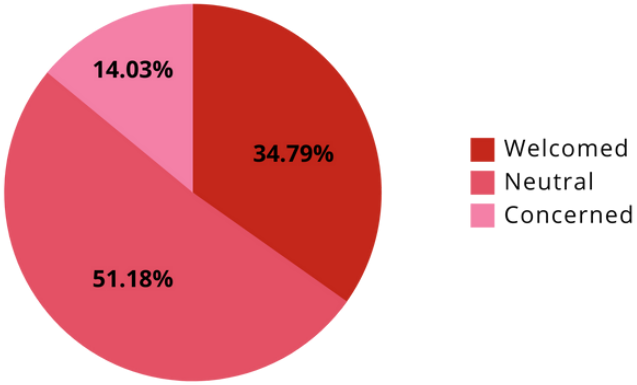


Chart 324. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Indonesia)*

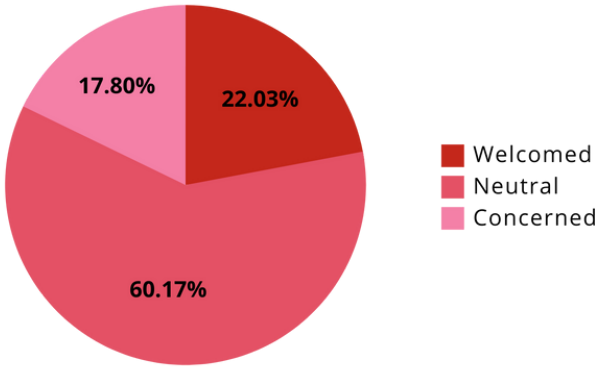


Chart 325. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Laos)*

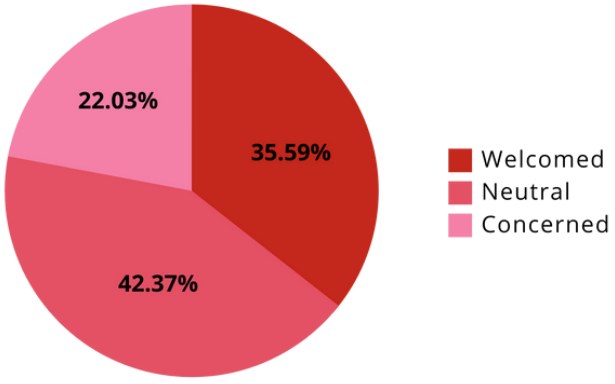


Chart 326. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Malaysia)*

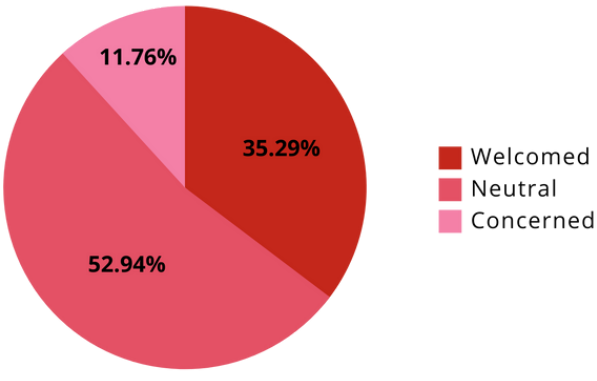


Chart 327. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Myanmar)*

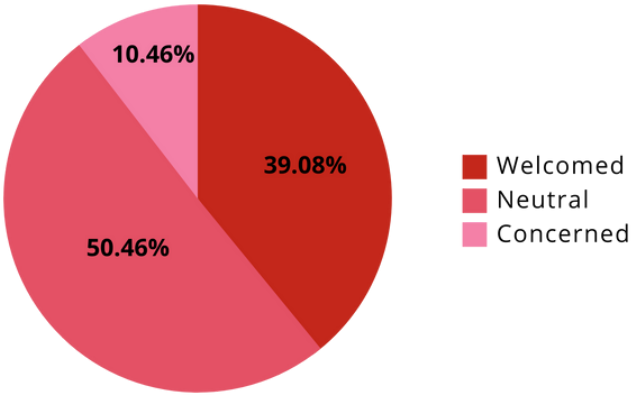


Chart 328. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Philippines)*

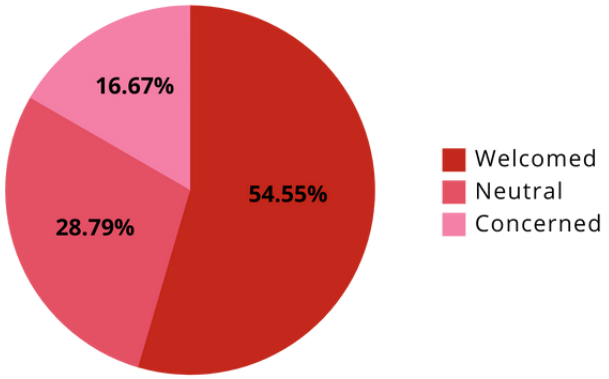


Chart 329. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Singapore)*

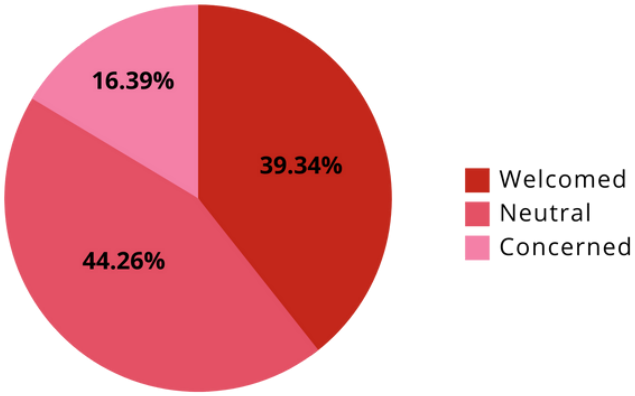


Chart 330. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Thailand)*

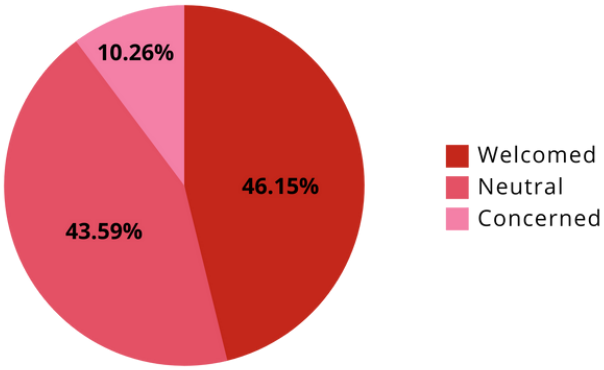


Chart 331. *How do you perceive the US-sponsored Indo-Pacific Economic Framework (IPEF)? (Vietnam)*

Generally, respondents from almost all ASEAN countries regarded IPEF as a way of balancing relations with China. The only exception was found in the responses from Laos, where nearly 45% of respondents said they had no opinion on the matter.

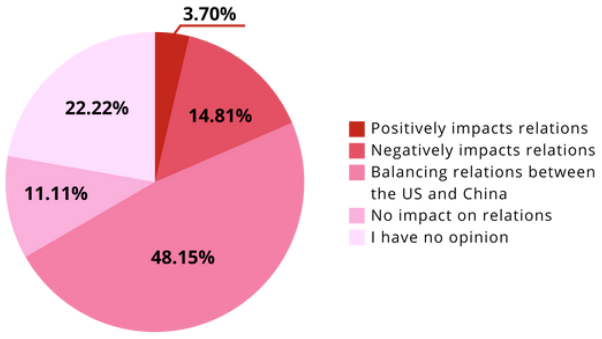


Chart 332. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Brunei)*

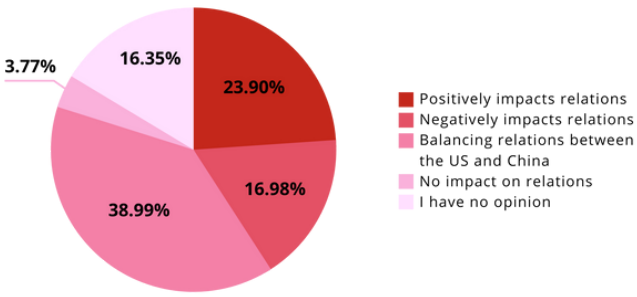


Chart 333. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Cambodia)*

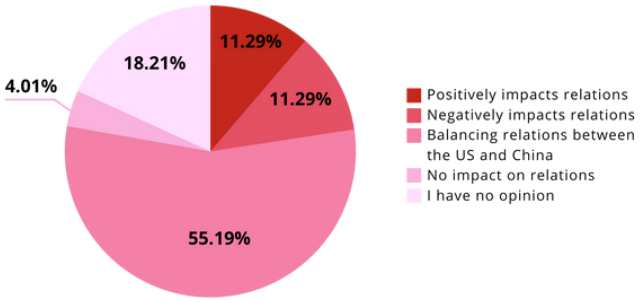


Chart 334. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Indonesia)*

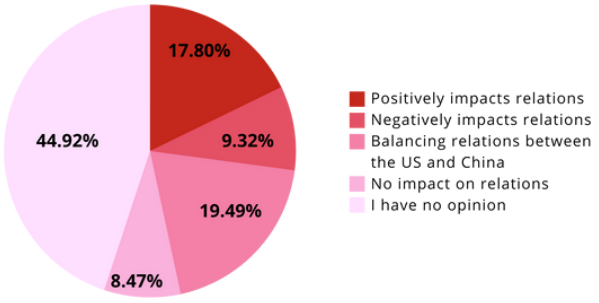


Chart 335. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Laos)*

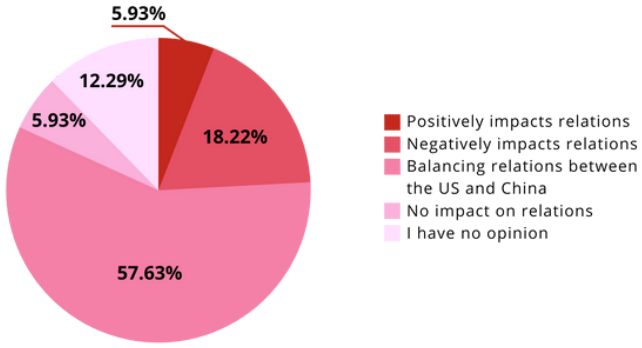


Chart 336. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Malaysia)*

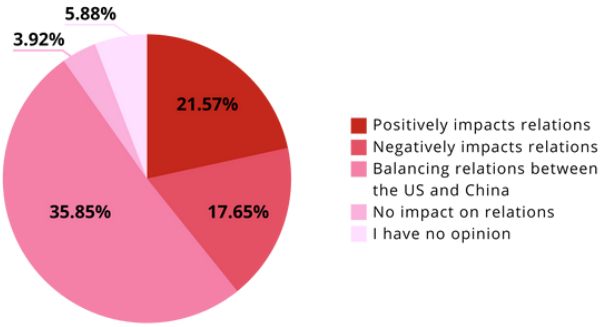


Chart 337. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Myanmar)*

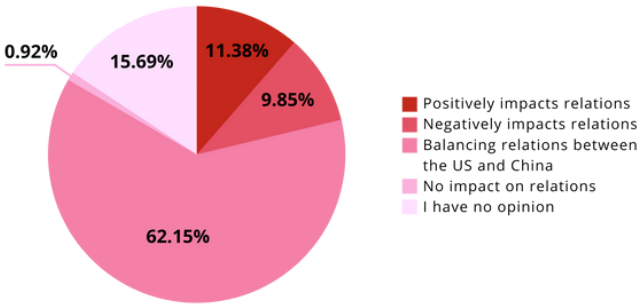


Chart 338. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Philippines)*

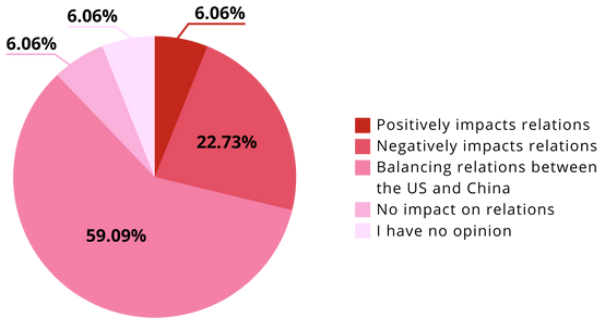


Chart 339. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Singapore)*

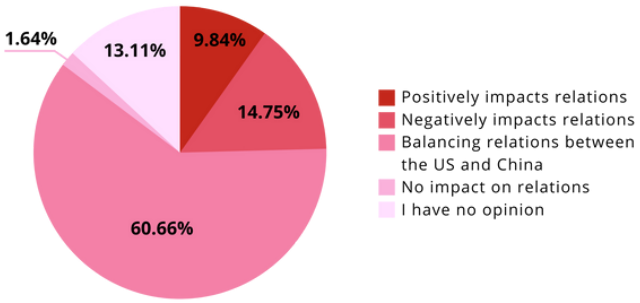


Chart 340. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Thailand)*

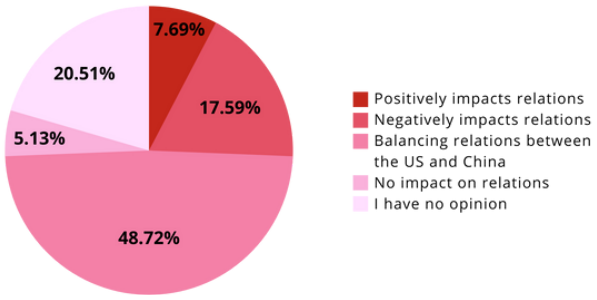


Chart 341. *How will the participation of ASEAN countries in the US-sponsored Indo-Pacific Economic Framework affect its relations with China? (Vietnam)*

G. Rankings

The strategic theatre of Southeast Asia has been the focus of many initiatives. The US, China, India, Japan, South Korea, Australia, and the EU have all embarked on initiatives that have benefited Southeast Asia. The survey asked respondents **to select the top three initiatives based on their contributions to the ASEAN vision**. The result was that China's Belt and Road Initiative, Global Development Initiative (GDI) & Global Security Initiative (GSI) was ranked first; the US Indo-Pacific Strategy and Indo-Pacific Economic Framework were ranked second, and South Korea's New Southern Policy placed in the third.

List of Initiatives Based on Its Contribution to the ASEAN Vision

- India's Act East Policy
- China's Belt and Road Initiative, Global Development Initiative, and Global Security Initiative
- US Indo-Pacific Strategy, Indo-Pacific Economic Framework
- Japan's Free and Open Indo-Pacific
- South Korea's New Southern Policy
- Australia's Strategic View of the Indo-Pacific
- EU Indo-Pacific Strategy, Global Gateway Project

Top 3 Initiatives Based on Its Contribution to the ASEAN Vision

1st	
2nd	
3rd	

Chart 342. *Which of the following initiatives do you think contribute positively towards ASEAN's vision? (General)*

1st	
2nd	
3rd	

Chart 343. *Which of the following initiatives do you think contribute positively towards ASEAN's vision? (Elites)*

1st	
2nd	
3rd	

Chart 344. *Which of the following initiatives do you think contribute positively towards ASEAN's vision? (Students)*

Elites put China's Belt and Road Initiative, Global Development Initiative, and Global Security Initiative in the first place based on their positive contributions to the ASEAN vision. This was followed by Australia's Strategic View of the Indo-Pacific and South Korea's New Southern Policy.

Students also placed China's initiatives in the first rank, but Students chose differently for the second and the third places. Students picked US Indo-Pacific Strategy and Indo-Pacific Economic Framework as second and EU Indo-Pacific Strategy and Global Gateway Project as third.

Still, on the same question, consistent with the general findings, China's initiatives were ranked first among Officials, Academia, and Civil Society groups. However, the respondents had different views as to which initiatives should be ranked number two and number three. Officials placed both the US's Indo-pacific strategy including IPEF and Japan's Free and Open Indo-Pacific at number two. Academia placed Australia's Strategic view on the Indo-Pacific at number two. Differing from both groups, Civil Societies placed India's Act East Policy at number two. Officials and Civil Societies put the Korean New Southern Policy at number three. Academia placed the US initiative at number three.

1st	
2nd	
3rd	

Chart 345. *Which of the following initiatives do you think contribute positively towards ASEAN's vision? (Academia)*

1st	
2nd	
3rd	

Chart 346. *Which of the following initiatives do you think contribute positively towards ASEAN's vision? (Officials)*

1st	
2nd	
3rd	

Chart 347. *Which of the following initiatives do you think contribute positively towards ASEAN's vision? (Civil Society)*

1st	
2nd	
3rd	

Chart 348. *Which of the following initiatives do you think contribute positively towards ASEAN's vision? (Business Community)*

While in almost all ASEAN countries China's policies were ranked first for contributing the most to the fulfillment of ASEAN's vision, Most voted answer of respondents from Vietnam chose the US Indo-Pacific Strategy for the first rank, the EU's Indo-Pacific Strategy second, and India's Look East Policy third. China was notably absent from the top three rankings in the assessment of Vietnamese respondents.

1st	
2nd	
3rd	

Chart 349. *Which of the following initiatives do you think contribute positively towards ASEAN's vision? (Vietnam)*

List of ASEAN Dialogue Partners

- Australia
- Canada
- China
- European Union
- India
- Japan
- Republic of Korea
- Russian Federation
- New Zealand
- United Kingdom
- United States

Top 5 ASEAN Dialogue Partners Based on Their Influence To the Region

The survey asked respondents to choose five ASEAN dialogue partners and rank them according to their influence on the region. The result showed China being ranked number one, followed by the US, Japan, South Korea, and India.

1st	
2nd	
3rd	
4rd	
5th	

Chart 350. *Please rank ASEAN Dialogue Partners based on their overall influence in the region (General)*

Both Elite and Student respondents chose five ASEAN dialogue partners and ranked them according to their overall influence in the region. The number 1 rank was given to China followed by the US, Japan, and South Korea. Students chose India and Elite respondents picked the UK for the fifth rank.

1st	
2nd	
3rd	
4rd	
5th	

Chart 351. *Please rank ASEAN Dialogue Partners based on their overall influence in the region (Elites)*

1st	
2nd	
3rd	
4rd	
5th	

Chart 352. *Please rank ASEAN Dialogue Partners based on their overall influence in the region (Students)*

Diving deeper into each country's analysis reveals that certain dialogue partners are competing for the first rank. For example, almost an equal percentage of respondents from the Philippines chose both China and the US together as the dialogue partner most influential in the region. Likewise Vietnamese respondents gave equal first rank status to China and Russia.

1st	
2nd	
3rd	
4th	
5th	

Chart 353. *Please rank ASEAN Dialogue Partners based on their overall influence in the region (Philippines)*

1st	
2nd	
3rd	
4th	
5th	

Chart 354. *Please rank ASEAN Dialogue Partners based on their overall influence in the region (Vietnam)*

1st	
2nd	
3rd	
4th	
5th	

Chart 355. *Please rank ASEAN Dialogue Partners based on their overall influence in the region (Singapore)*

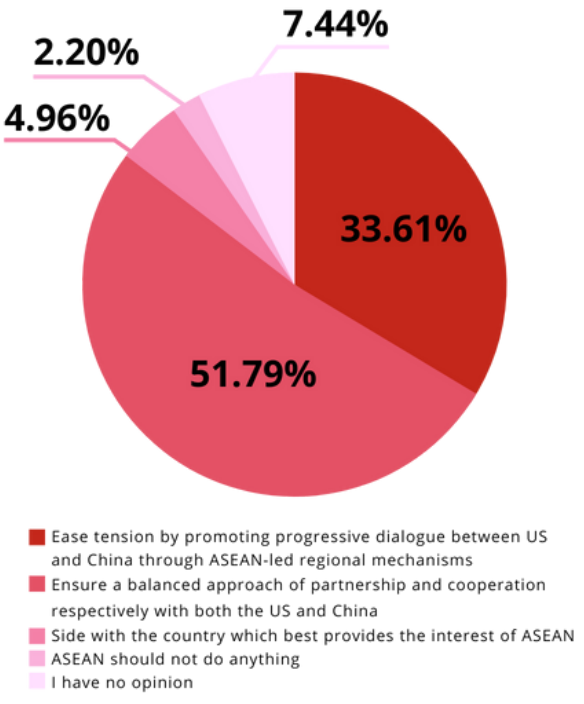


Chart 356. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (Academia)*

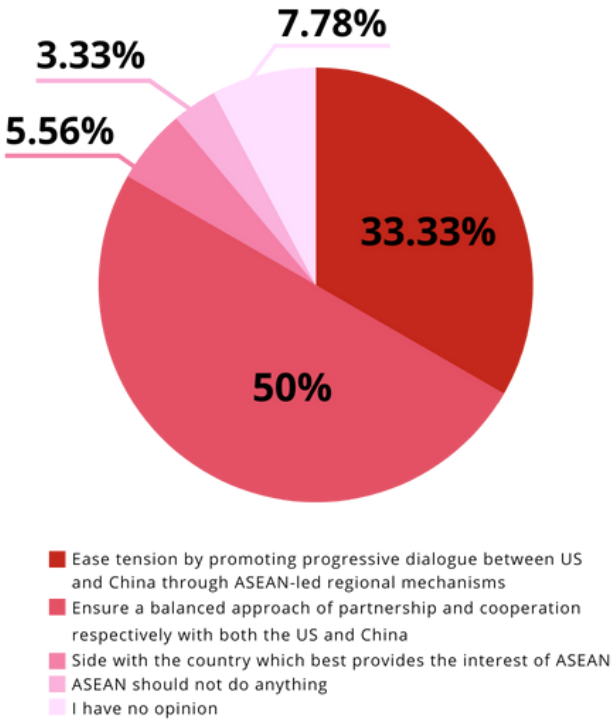


Chart 357. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (Officials)*

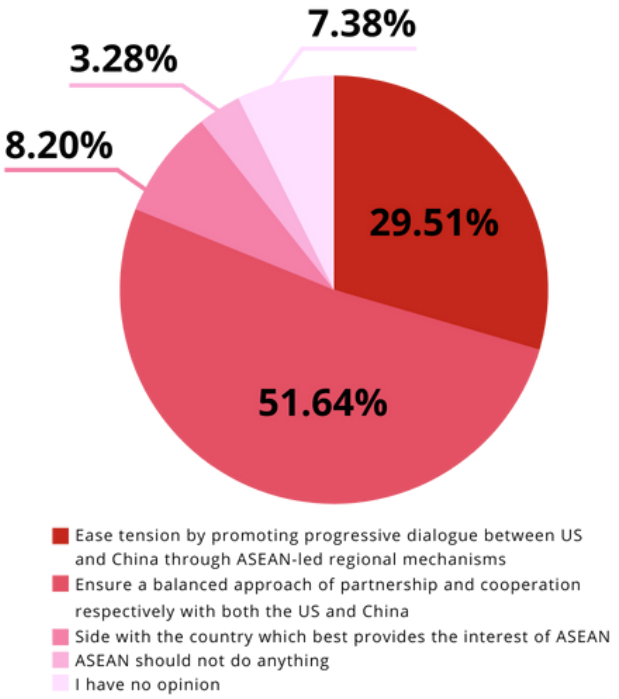


Chart 358. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (Civil Society)*

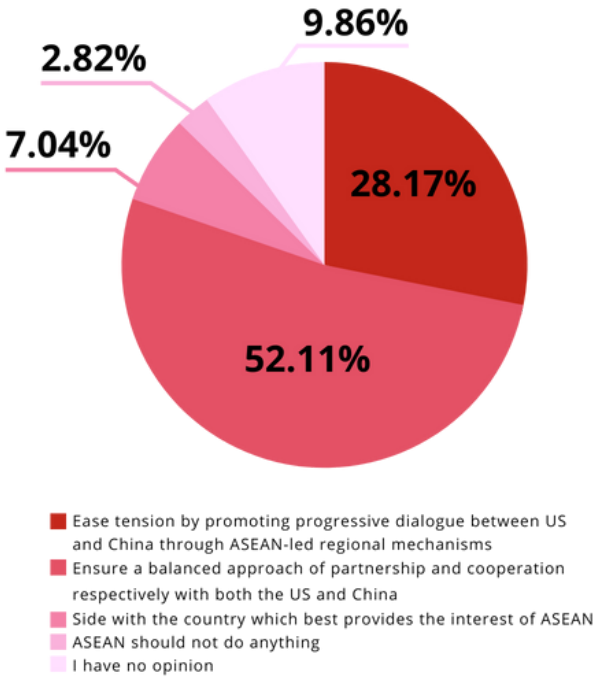


Chart 359. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (Business Community)*

While the majority of respondents from most ASEAN countries were of the view that taking a balanced approach to partnership with both the US and China would be the most important step for ASEAN to take, nearly half of Singaporean and Filipino respondents were also of the view that promoting progressive dialogue between Washington and Beijing was equally important.

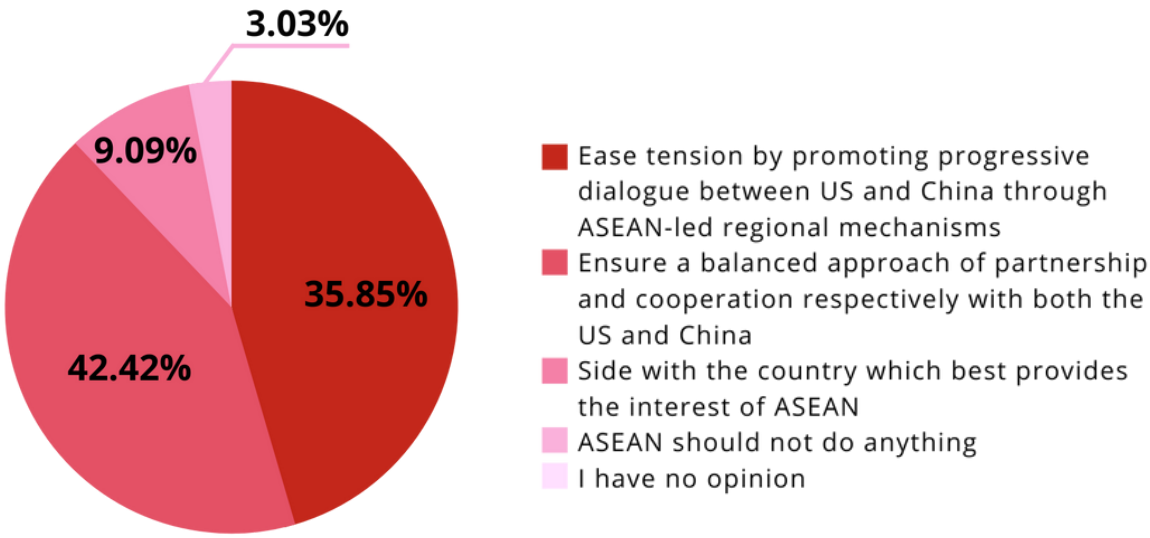


Chart 360. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (Singapore)*

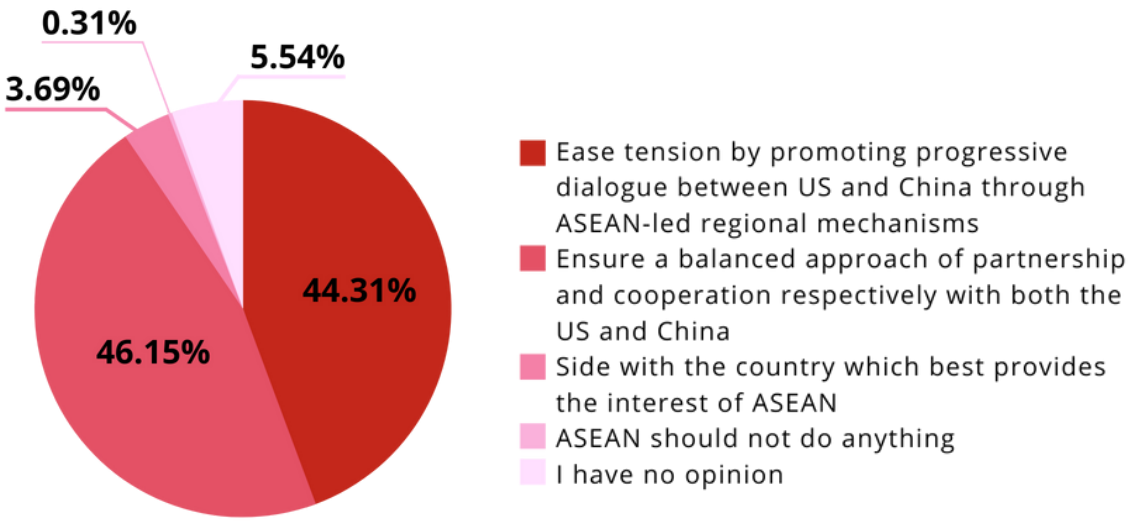


Chart 361. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition? (Philippines)*



UNDERSTANDING THE TRENDS

This section focuses on the comparison of the 2020,2021, and 2022 survey results to show the general trends. From this, we can identify the continuity and changes in the ASEAN-China relationship.

A. Most and Least Satisfactory Aspects of ASEAN-China Relations

The top 5 aspects of ASEAN-China cooperation in the 2022 edition of the Survey showed a number of continuities and changes. Consistently during the three years 2020,2021, and 2022, Trade and Investment were found to be the most satisfying aspects of ASEAN-China relations, followed by cooperation in Tourism and Technology. Changes were found in the aspects of Education and Industry 4.0. The Education aspect only managed to get to the top 5 in 2021; in 2020 and 2022, this aspect was relegated to sixth place. However, Industry 4.0 was not included in the 2021 survey, although this aspect was among the top 5 in 2020 and 2022.

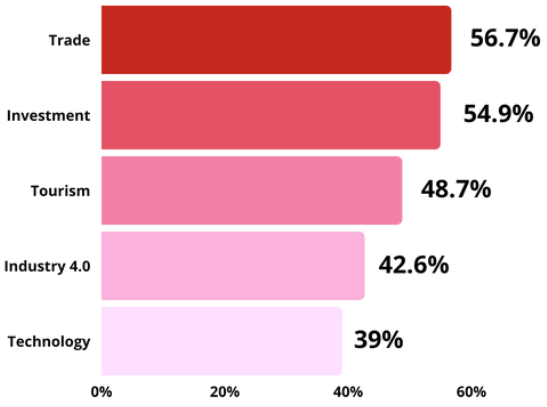


Chart 362. *Most Satisfactory Aspects of ASEAN-China Cooperation (2020)*

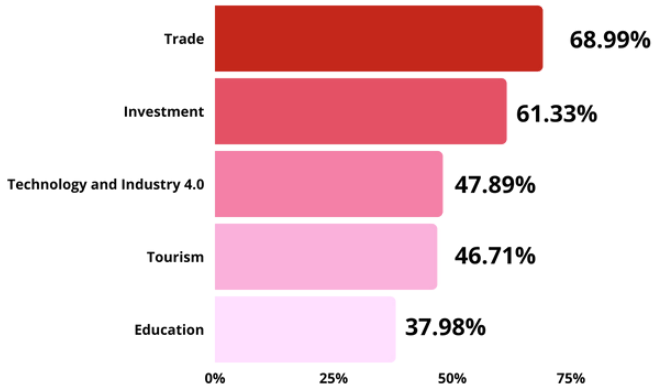


Chart 363. *Most Satisfactory Aspects of ASEAN-China Cooperation (2021)*

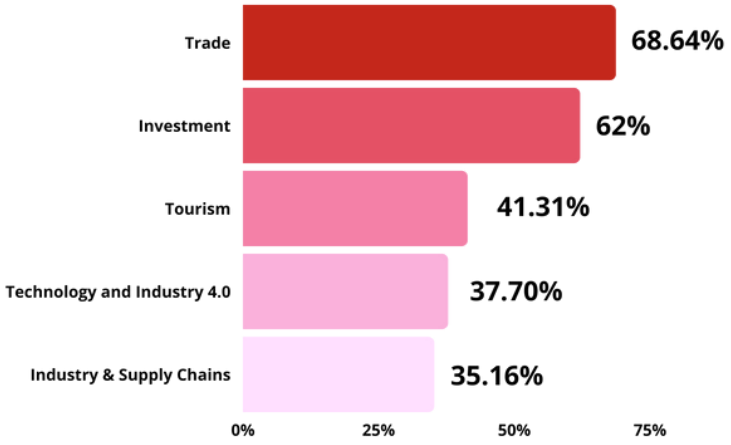


Chart 364. *Most Satisfactory Aspects of ASEAN-China Cooperation (2022)*

The least satisfactory aspects of ASEAN-China cooperation were mostly related to the political security aspects in the past three years. The biggest number of negative opinions in 2022 was leveled at the defense aspect, chosen by 46.26% of the respondents. It was followed by Cyber Security at 44.15%, Environment at 41.92%, Transnational Crime at 39.57%, and then Immigration and Borders at 35.28%.

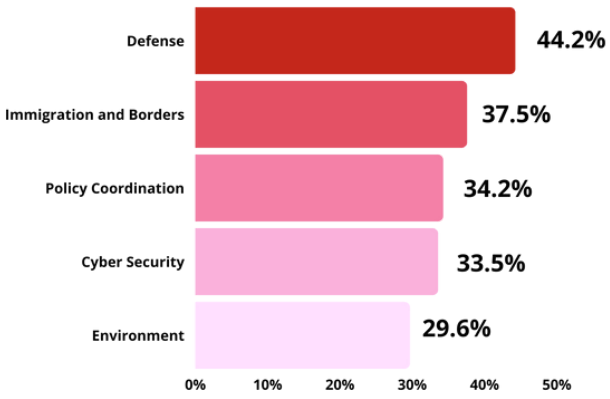


Chart 365. *Least Satisfactory Aspects of ASEAN-China Relations (2020)*

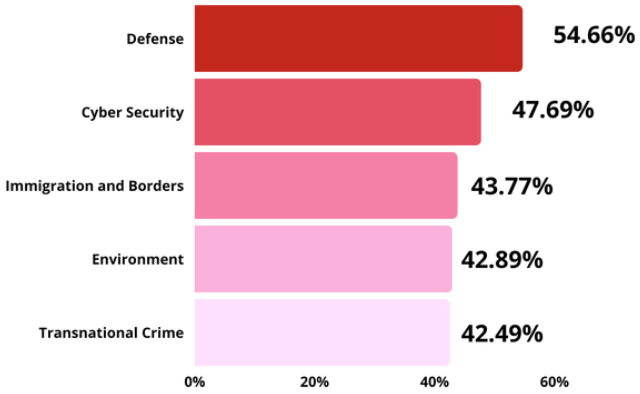


Chart 366. *Least Satisfactory Aspects of ASEAN-China Relations (2021)*

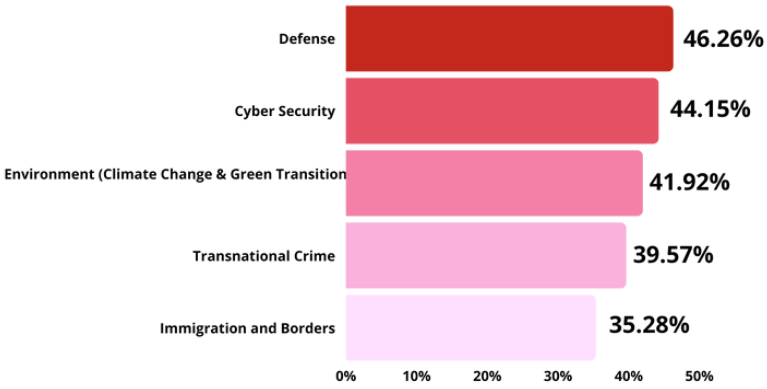


Chart 367. *Least Satisfactory Aspects of ASEAN-China Relations (2022)*

The surveys in 2021 and 2022 were consistent with regard to the least satisfactory aspects of ASEAN-China cooperation. Although in a slightly different order, the bottom two remained the same. Cyber Security, Environment, and Transnational Crime, had insignificant changes of percentage from last year. It is worth noting that in the past three years, the Defense aspect was deemed the least satisfactory aspect of the cooperation, although the numbers in three years fluctuated: 44% (2020), 54,66% (2021), and 46,26% (2022). This trend was similarly shown in the Immigration and Borders aspect, as the number in 2020, which was 38% significantly increased to 43.77% in 2021, and then went down to 35.28% this year. This trend was also shown in the sixth least satisfactory aspect– Natural Resources (fisheries, agriculture, etc.)– which was also ranked sixth last year.

B. Perception on ASEAN-China Relations

In recent years, the ASEAN-China relationship has strengthened and this survey concludes that the majority of respondents believed that the relationship was mutually beneficial to both parties. Throughout the three-year period from 2020 until 2022, most respondents agreed with the statement, "The current relationship between China and ASEAN benefits both ASEAN and China," with the most positive outcome emerging in 2021. In that year, **64,48%** of the respondents believed that the ASEAN-China relationship was mutually beneficial, while in 2020 and 2022, the numbers were at **46,03%** and **55,37%** respectively.

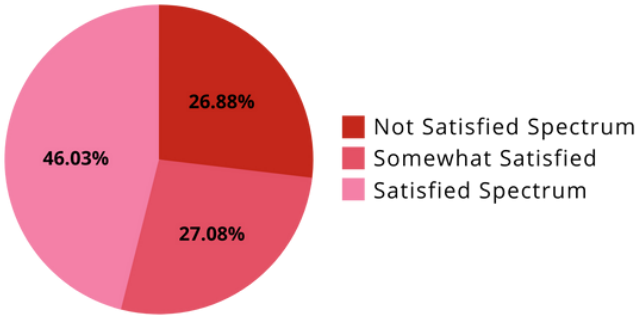


Chart 368. *The current relationship between ASEAN and China benefits both ASEAN and China (2020)*

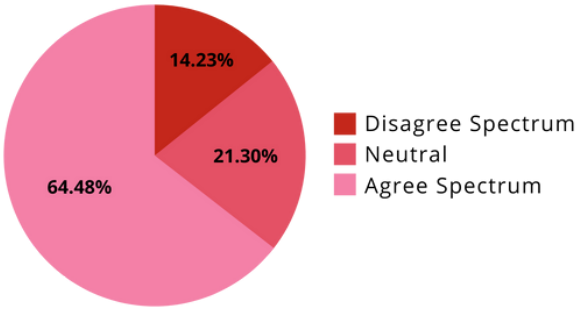


Chart 369. *The current relationship between ASEAN and China benefits both ASEAN and China (2021)*

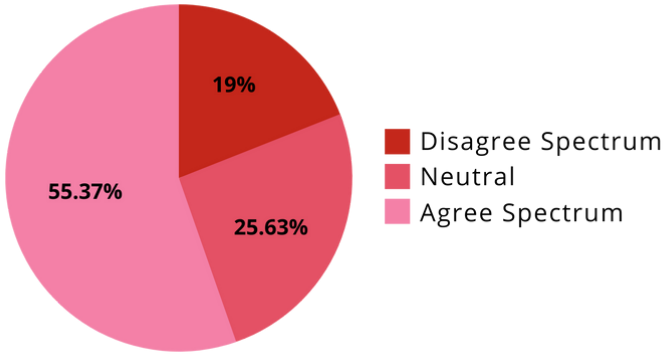


Chart 370. *The current relationship between ASEAN and China benefits both ASEAN and China (2022)*

There is consistent satisfaction among Southeast Asians with the ASEAN-China Free Trade Area during the three-year period under study. Respondents in the satisfied spectrum were at 43.46% in 2020 and 40.23% in 2021. In 2022, the percentage of respondents in the satisfied spectrum increased significantly to 52.23%.

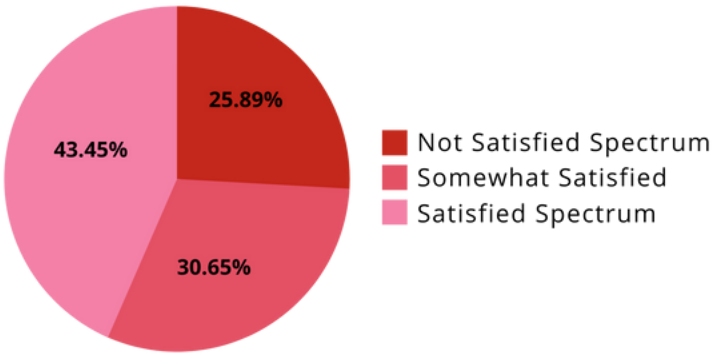


Chart 371. *ASEAN-China Free Trade Area (2020)*

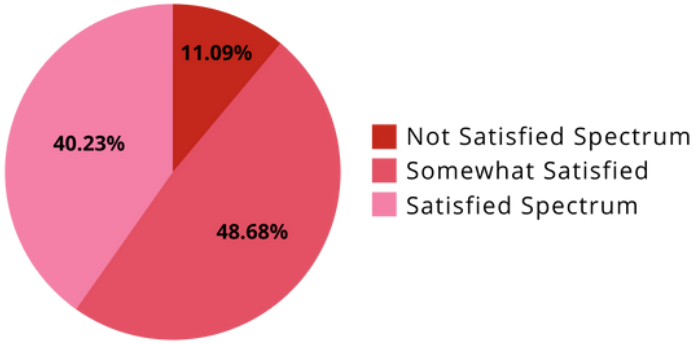


Chart 372. *ASEAN-China Free Trade Area (2021)*

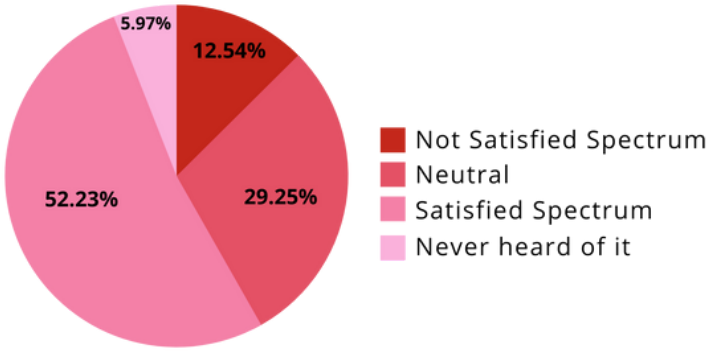


Chart 373. *ASEAN-China Free Trade Area (2022)*

ASEAN-China partnership that was upgraded to comprehensive strategic partnership (CSP) in 2022 consistently received a relatively positive assessment. In 2020 and 2021, where the survey did not provide a “neutral” option, most respondents answered in the positive spectrum (including “somewhat satisfied'') when asked about their assessment on ASEAN-China comprehensive partnership. On the newly agreed CSP, the most frequent answer is on the positive spectrum (40,78%), while the second most frequent answer is “neutral” with 38,42%. This shows that in general, the upgrade to CSP is welcomed relatively positively.

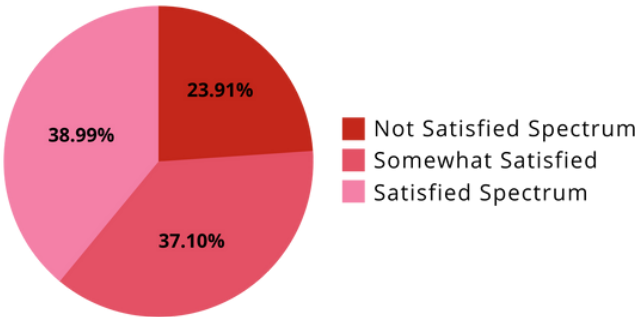


Chart 374. *The ASEAN-China Strategic Partnership (2020)*

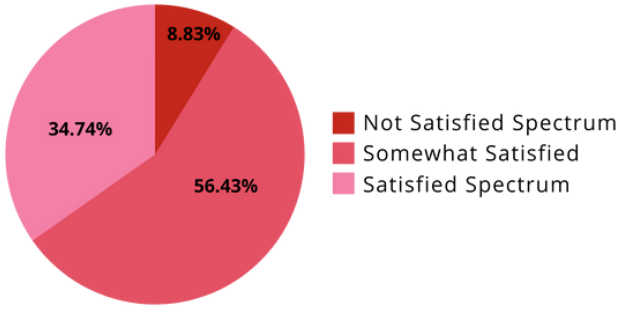


Chart 375. *The ASEAN-China Strategic Partnership (2021)*

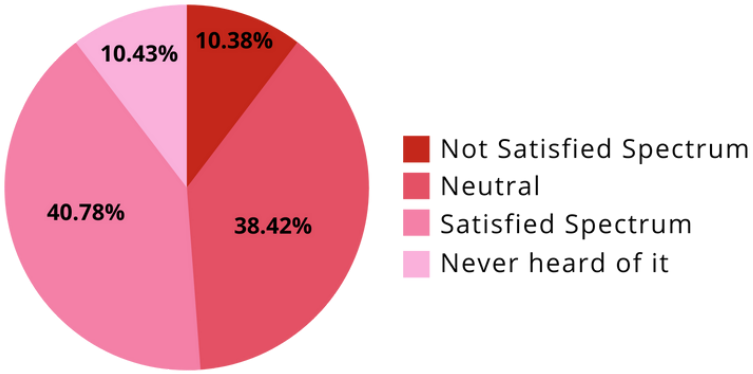


Chart 376. *The ASEAN-China Strategic Partnership (2022)*

On people to people relations, the survey found in 2020 and 2021 that this aspect enjoyed positive responses at above 60% in both years. However, there was a significant drop to 46,5% in 2022, with 33,59% of respondents taking a neutral view.

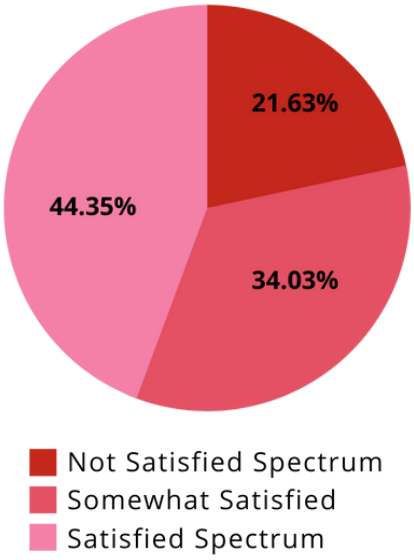


Chart 377. *ASEAN-China people to people exchanges and cooperation (2022)*

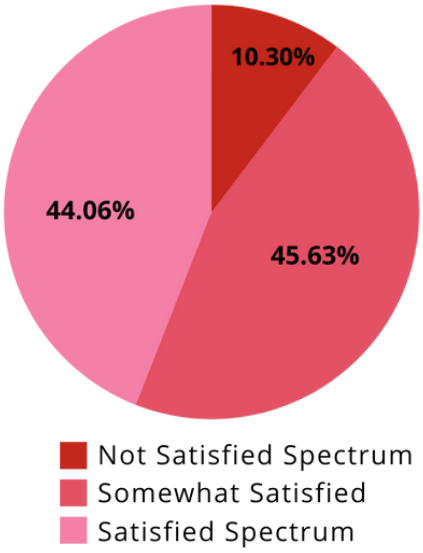


Chart 378. *ASEAN-China people to people exchanges and cooperation (2021)*

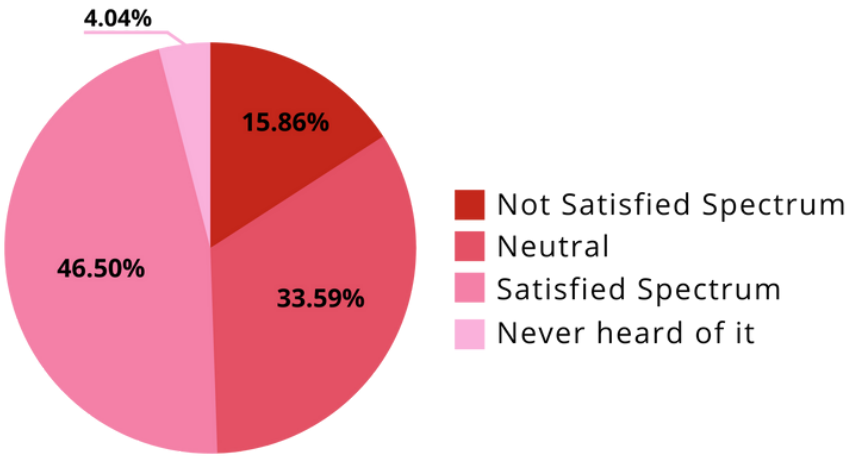


Chart 379. *ASEAN-China people to people exchanges and cooperation (2022)*

The survey asked about the respondents' satisfaction with ASEAN-China Cooperation on Youth Leader Scholarship. Year after year, half of respondents were satisfied with this cooperation, with an average satisfaction rate each year exceeding 50%.

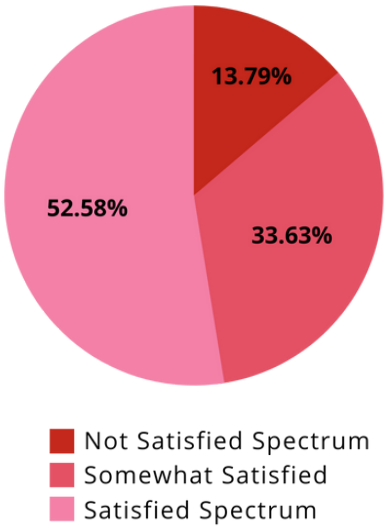


Chart 380. *ASEAN-China people to people exchanges and cooperation (2020)*

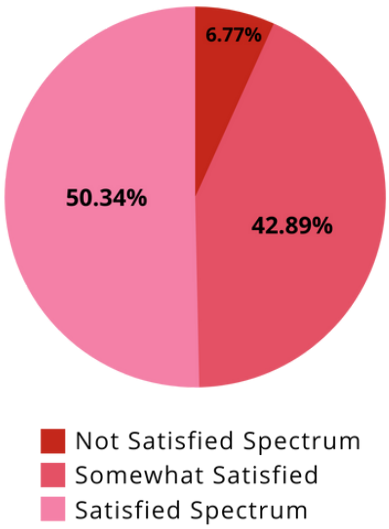


Chart 381. *ASEAN-China people to people exchanges and cooperation (2021)*

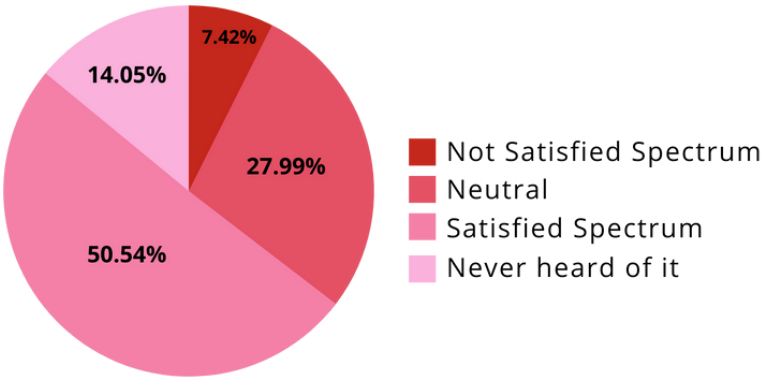


Chart 382. *ASEAN-China people to people exchanges and cooperation (2022)*

As in previous years, the survey asked respondents' perception of ASEAN-China relations. Most respondents were enthusiastic about deepening ASEAN-China relations, with 55.46% within the "agree spectrum" in 2020, 62,22% in 2021, and 61,04% in 2022. This question is related to the previous question (Q11-G); 42,28% of respondents were enthusiastic about deepening the cooperation.

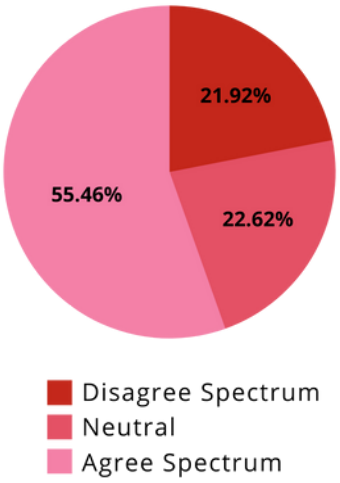


Chart 383. *I am enthusiastic about deepening cooperation between ASEAN and China (2020)*

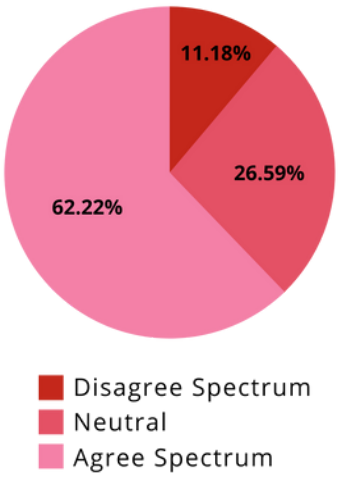


Chart 384. *I am enthusiastic about deepening cooperation between ASEAN and China (2021)*

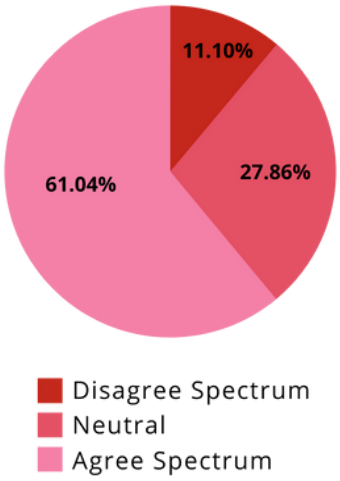


Chart 385. *I am enthusiastic about deepening cooperation between ASEAN and China (2022)*

On whether **"China respects the national unity, sovereignty, and territorial integrity of ASEAN countries"** the most popular answer of respondents from year to year disagreed with it. But there was a fluctuation in the level of disagreement. In 2020, 53% of respondents disagreed. In 2021, 32.09% of respondents disagreed. In 2022 the percentage of respondents who disagreed increased again to 39,45%, while 29,19% were neutral.

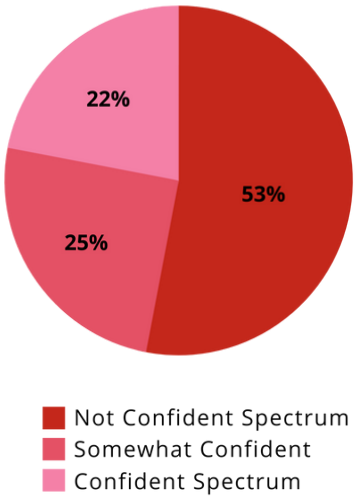


Chart 386. *China respects the national unity and territorial integrity of ASEAN countries (2020)*

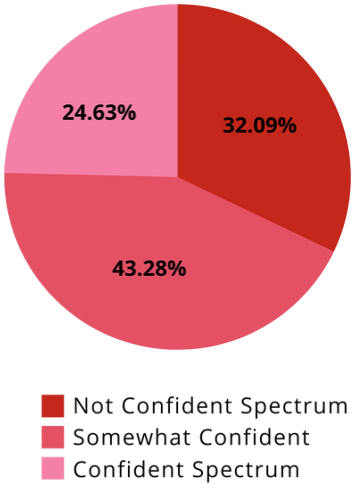


Chart 387. *China respects the national unity and territorial integrity of ASEAN countries (2021)*

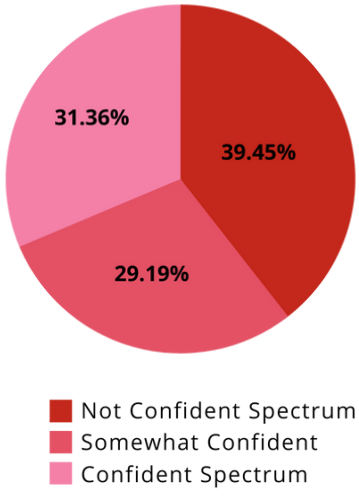


Chart 388. *China respects the national unity and territorial integrity of ASEAN countries (2022)*

In the past three years, the survey has been asking about Southeast Asians' perception on whether China respects the national unity, sovereignty, and territorial integrity of ASEAN countries. We see a consistent pattern in 2020 and 2021 wherein the respondents disagreed with the statement (2020: 52,78% and 2021: 51,8% in the negative spectrum). However, an important note is that in 2021, we provided an option "somewhat not confident" and this option was chosen by most respondents in responding to the statement. This year, because of this new option, there was a slightly different outcome: the most voted answer is neutral on the question. Nevertheless, when we checked the replies of the rest of the respondents, we found that 39,45% disagreed with the statement.

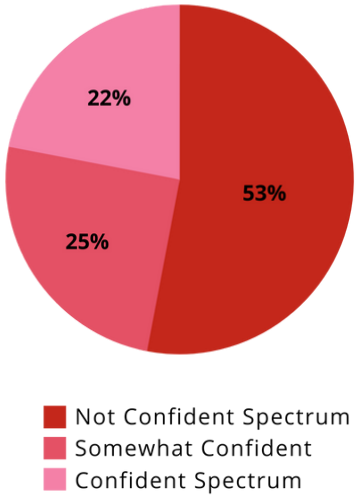


Chart 389. *China respects the national unity and territorial integrity of ASEAN countries (2020)*

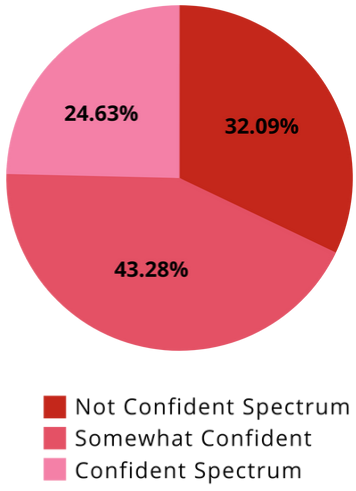


Chart 390. *China respects the national unity and territorial integrity of ASEAN countries (2021)*

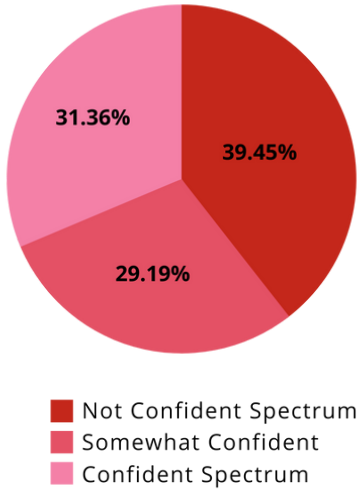


Chart 391. *China respects the national unity and territorial integrity of ASEAN countries (2022)*

On the statement that **China treats ASEAN as equal partners**, respondents in the three annual surveys were split in their responses. The most positive result was in 2020 when 26.69% were confident and 29,76% were somewhat confident in the statement, with the most popular answer in the positive spectrum. In 2021 the respondents were split between 50.66% who gave a positive against 50.44% who were negative on the statement. This year, again despite the neutral spectrum getting the most popular of responses , those who were not neutral were split, with 31,36 % in the disagree spectrum against 33,9 in the agree spectrum.

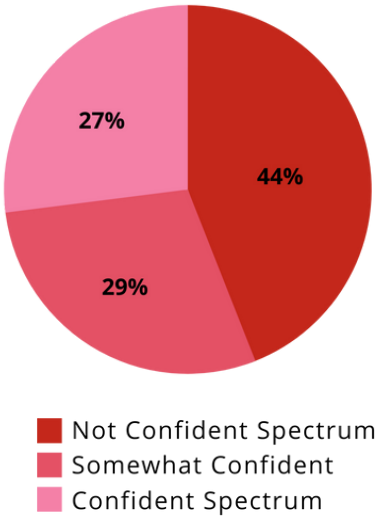


Chart 392. *China treats ASEAN as equal partners (2020)*

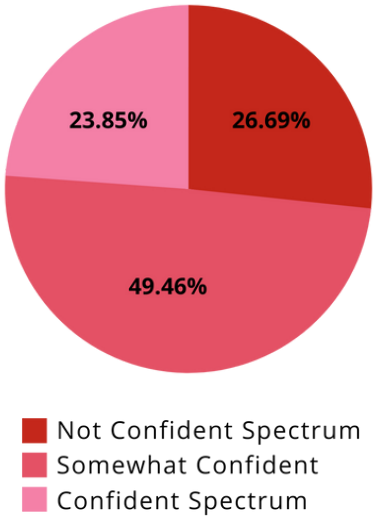


Chart 393. *China treats ASEAN as equal partners (2021)*

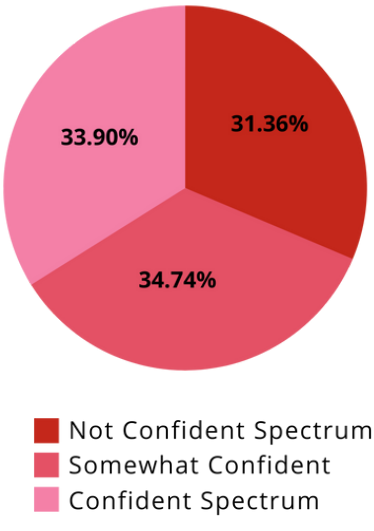


Chart 394. *China treats ASEAN as equal partners (2022)*

C. Geopolitics and Strategic Issue

On the statement that China proactively tries to defuse geopolitical rivalry and tension in the region, 2020 was the year when respondents were most positive on the statement, with 52,9% of them in the confidence spectrum. However, 2021 and 2022 showed a negative pattern with 2021's results with 56,53% of respondents in the negative spectrum. In 2022 the results showed 32,09% of respondents in the negative spectrum compared to 29,74% on the positive side of the statement. However, consistent with previous political-security questions, there was a considerable percentage of neutral at 38,18%.

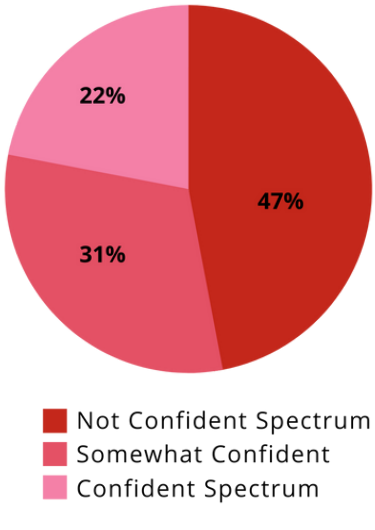


Chart 395. *China proactively tries to defuse geopolitical rivalry and tensions (2020)*

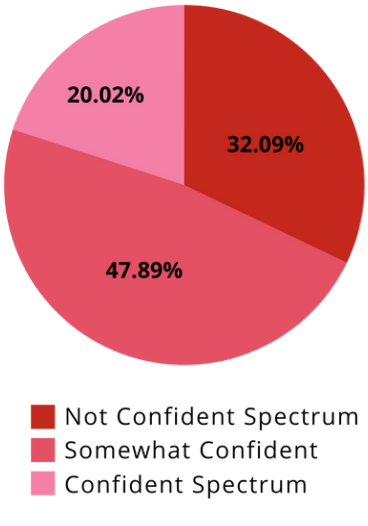


Chart 396. *China proactively tries to defuse geopolitical rivalry and tensions (2021)*

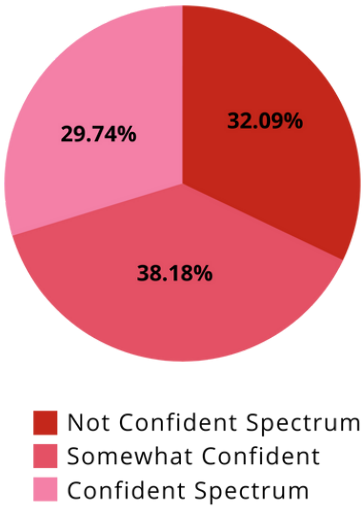


Chart 397. *China proactively tries to defuse geopolitical rivalry and tensions (2022)*

Responses in the 2022 survey showed a divergence from past survey results regarding this issue. In the 2020 survey the most frequent answer of respondents at 31,55% were within the neutral spectrum. In 2021, there was a change, with 62,81% in the positive spectrum, with a considerable number of respondents coming out as somewhat confident at 29,54%. However, in the 2022 survey, the most popular answer of respondents fell within the agree spectrum with 45.30% of respondents agreeing and 13.15% of respondents strongly agreeing, for a total of 58.45% of respondents going into the agree spectrum. The second highest percentage of respondents, 31.24%, went into the neutral spectrum.

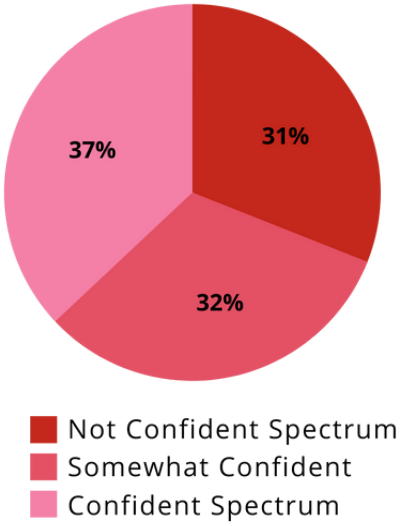


Chart 398. *The Belt and Road Initiative by China has become a key feature of ASEAN-China win-win cooperation (2020)*

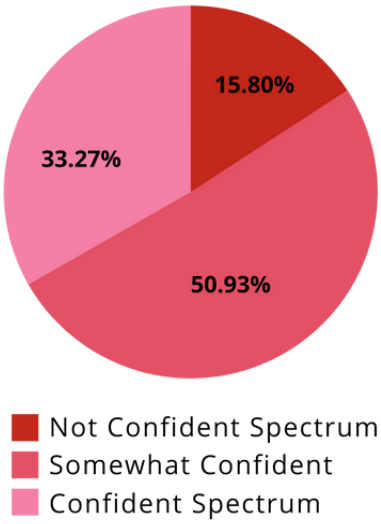


Chart 399. *The Belt and Road Initiative by China has become a key feature of ASEAN-China win-win cooperation (2021)*

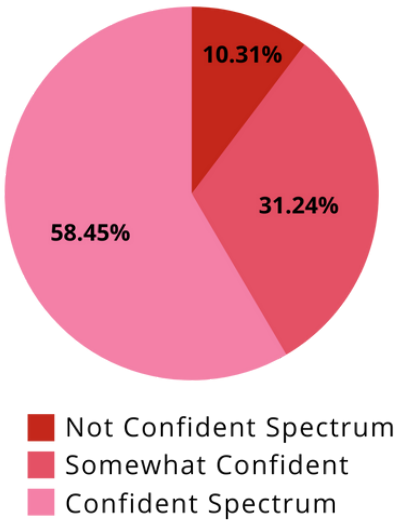


Chart 400. *The Belt and Road Initiative by China has become a key feature of ASEAN-China win-win cooperation (2022)*

South China Sea is the most strategic political-security issue for ASEAN-China. During the three years under study, the survey asked the respondents about their perception on the ongoing negotiations toward a Code of Conduct in the South China Sea. On the average, the respondents have been on the positive side of the statement. In 2020, 54,96% of respondents were in the positive spectrum, and by 2021 the survey found a split of the respondents, with 49,33% in the negative spectrum while 50,74 were in the positive spectrum with regard to the statement. Interestingly, a different set of results were found in 2022. Most respondents (46,5%) said they were satisfied with the statement, with a considerable 33,59% indicating neutrality. No result on this question has been particularly remarkable in the past three years.

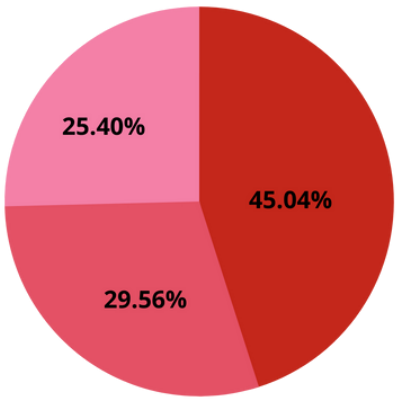


Chart 401. *Consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) (2020)*

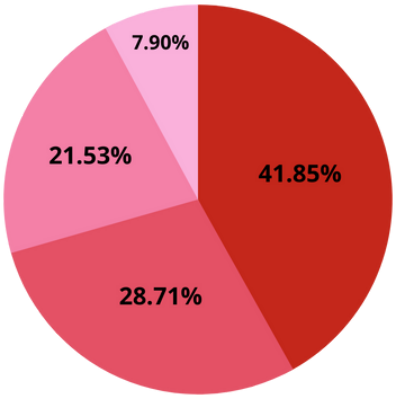


Chart 402. *Consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) (2021)*

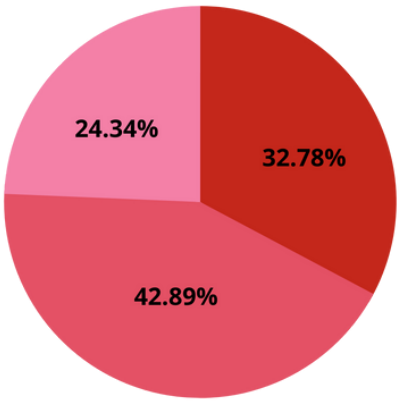


Chart 403. *Consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) (2022)*

In the past three years, the survey always asked the respondents about the strategic relationship between the US and China. Most of the public discourse labeled the relationship as a strategic rivalry. However, in 2022 it turned out that 62,18% of respondents saw the relationship as competition, and in 2021 54,66% saw this as competition and rivalry.



Chart 404. *How do you see the current US-China relationship (2021)*

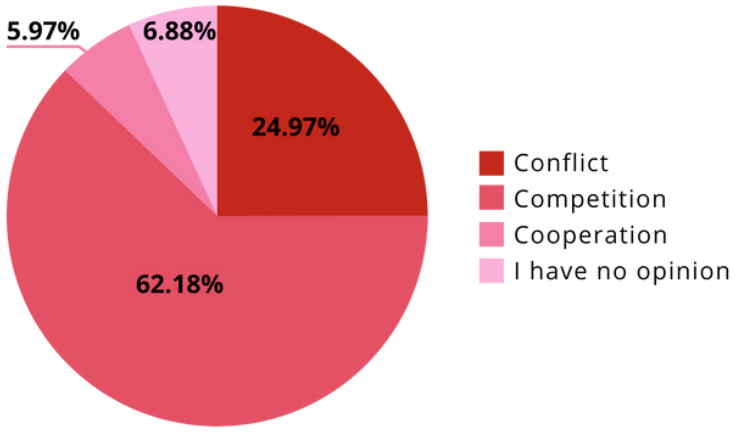


Chart 405. *How do you see the current US-China relationship (2022)*

In the past three years, on the average, 42% of Southeast Asian respondents have been consistently saying that ASEAN should balance its approach to both powers. It is important to note that in the past three years, on the average, 27,19% of respondents said that ASEAN should promote dialogue to ease the tension. In 2020 and 2021, an average of 31,63% believed that while power politics was being exercised in the region, ASEAN should strengthen its integration and centrality.

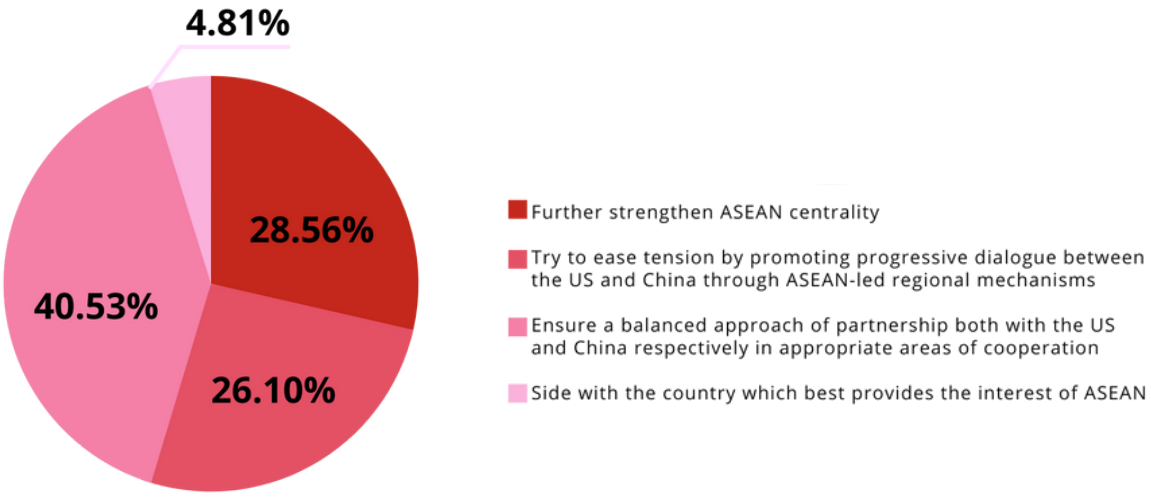


Chart 406. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition (2020)*

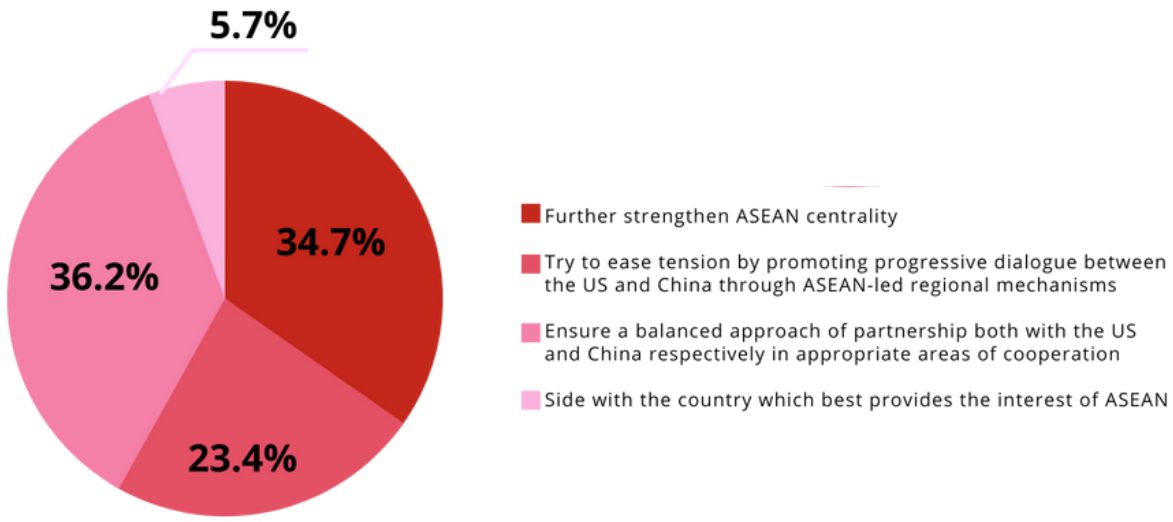


Chart 407. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition (2021)*

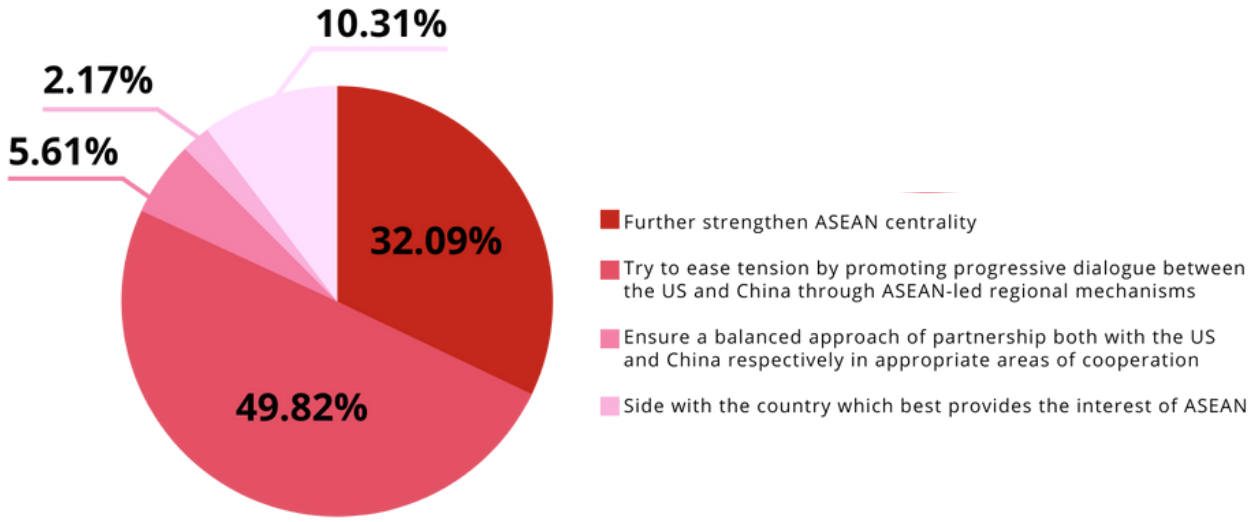


Chart 408. *What is the most important strategic step that ASEAN can do in facing the US-China strategic competition (2022)*



CONCLUSION: NAVIGATING AN INCREASINGLY TURBULENT WORLD

A. Conclusion

"Winter is coming," warned President Joko Widodo of Indonesia during his opening speech at the IMF-World Bank Annual Meeting in Bali in 2018. The reality might be harsher than what he had predicted. In 2020, the world will soon be disrupted by the worst pandemic after a century, with multiplier effects on different aspects of human livelihood. Battered and wounded, the global economy attempted to recover in 2021 and 2022, only to be further pressured by the increasing geopolitical tensions in different parts of the world, including the ongoing war in Ukraine. Leaders and people alike now have to navigate uncertainty, which had become the most certain feature of our life today.

Against this backdrop, our survey found that amidst such uncertainty, most respondents still see the importance of maintaining and developing a strong and mutually beneficial relationship with China. As in the previous editions of our ASEAN-China Survey, economic and socio-cultural aspects are where the assessments were tilted more into the positive spectrum, while political and security issues of the relationship remain to be the aspect where anxiety remains. For example, the surveys in 2021 and 2022 showed that these choices remain consistent as the top least satisfactory aspects of ASEAN-China cooperation. Although with slightly different order, the top two remain the same. Cyber security, environment, and transnational crime, have insignificant change of percentage from last year. Initiatives on economic and socio-cultural cooperation such as the Belt and Road Initiative, ACFTA, and ASEAN-China Young Leaders Scholarship received more positive assessments than the negative ones.

It is worth noting that in the past three years, the defense aspect has been labelled as the aspect with the highest dissatisfaction, although the numbers in 3 years have fluctuated: 44% (2020), 54,66% (2021), and 46,26% (2022). This trend is also similarly shown in immigration and borders aspect, as the number in 2020 was 38% significantly increased to 43.77% in 2021, and down to 35.28% this year. This trend is also shown in the sixth least satisfactory aspect– natural resources (fisheries, agriculture, etc.)– which was also ranked sixth last year. Dissatisfaction and negative assessment are also prevalent in assessing the progress of the South China Sea Code of Conduct negotiation. Despite all of these anxieties, most respondents agree on the importance of the relationship.

While agreeing on the importance of ASEAN-China cooperation, the survey also found that there is a strong nuance in the perception of ASEAN people towards China. The survey asked about respondents' perception of China's goodwill towards ASEAN countries and the result is that the most frequent answer of respondents are neutral on it at 38,42%, and the respondents who agree that China has a goodwill towards ASEAN is the second largest group at 30,94%. A similar pattern to this is on whether China treats ASEAN countries as equal partners. The most voted answer of respondents stand neutral on it at 34,74% and second, voted answer is the respondents who agree on it at 28,71%. It is also interesting to note that many respondents agree with the statement that "China respects ASEAN Centrality" at 38,36% (agree spectrum), with the remainder neutral at 33,96%. An opposite situation is found in the statement that China respects ASEAN countries' national unity, sovereignty, and territorial integrity, where most of the respondents disagree with 39,45% of respondents are in the disagree spectrum and 29,19% are neutral.

On the trust towards China, 42,76% of respondents chose to not answer the question. However, those who answered the question are more inclined to not trust China at 29,86% compared to those who trust China at 27,38%. The country variations are also important: Cambodia and Laos are having the largest percentage of respondents that answered that they trust China. On the other hand, Thailand and Vietnam had the largest percentage of respondents who answered that they do not trust China. Singapore is an interesting case since it shows a huge percentage of respondents say that they are trusting or distrusting China (other countries show huge numbers of neutral answers).

The result of the survey also shows that most of the respondents are aware that they are living in an age of geopolitical tension. Most respondents see that the war in Ukraine will have consequences towards the stability of the region. They also see that there is an increasing geopolitical tension in the region, marked by increasing US-China rivalry, the emergence of competing initiatives, as well as the rise of many sub regional groupings in Southeast Asia and beyond. Against this backdrop, most of the respondents see that ASEAN and ASEAN countries must navigate this situation wisely by preserving its strategic autonomy and not being sucked up into the great power rivalry.

The high number of neutral in the questions related to security issues and their perceptions on China shows that the relationship between ASEAN and China is a complex and nuanced one, in which most of the respondents could not be categorized as simply "anti" or "pro" China. In this context, it is important to recognize that ASEAN (in ASEAN's people perspective) wants their agency to be recognized by the Great Powers.

However, it also needs to be recognized that ASEAN faces its own internal challenges. It needs to strengthen its centrality not by demanding it, but also by proving it. For example, a relatively negative assessment on ASEAN's response towards the Myanmar crisis is a wakeup call that ASEAN needs to be more effective. Without an effective ASEAN, there will be no ASEAN centrality and ASEAN countries will be more vulnerable in this coming age of geopolitical tension.

B. Recommendation

Based on the survey results, we believe that some steps need to be taken to build a stronger and more mutually beneficial relationship between ASEAN and China.

1. **Both ASEAN and China need to use the Comprehensive Strategic Partnership to bolster economic cooperation between ASEAN members and China**. With the economic recovery still slow and the geopolitical tension looming on the horizon, stronger economic cooperation is necessary to provide ASEAN member states as well as China sources of economic growth. Tourism, technology and industry 4.0, and the development of a more resilient supply chain are identified as important sectors to be prioritized in the context of post-pandemic recovery.

2. While economic cooperation generally receives positive assessments, they are connected to other aspects. The survey shows that there is a growing concern about the environmental and social impacts of such cooperation projects, such as infrastructure development. **China and ASEAN need to be more transparent and accountable in considering and mitigating the environmental and social impacts of cooperation initiatives, especially related to projects to develop connectivity (mainly physical connectivity, such as transport and energy infrastructures).**

3. **ASEAN and China must develop stronger cooperation on environmental issues**. In the past 3 years, the survey found that environmental cooperation is always among the list of cooperation assessed with least satisfaction. Furthermore, It is also becoming a potential avenue for cooperation that needs to be elaborated more due to the impact of climate change, which can already be felt today in ASEAN member countries as well as in China.

4. **ASEAN and China need to show and communicate their goodwill to make progress in difficult political-security issues such as the negotiation of the South China Sea Code of Conduct.** The ongoing geopolitical tension inevitably affected the calculation of leaders in the region and beyond. If not managed well, the anxiety in political-security aspects of the relationship between ASEAN and China, which is a relatively persistent feature of ASEAN-China relationship, could be worse and could lead to regional instability.

5. **Amidst the increasing geopolitical tensions, ASEAN and China can develop more channels for developing mutual trusts.** This can be done by developing more platforms to discuss different issues in Track 2 (non-governmental actors) as well as Track 1.5 (combination of governmental and non-governmental actors).

6. **ASEAN and China can open dialogues on how to translate ASEAN Outlook on the Indo-Pacific into concrete initiatives**. Beijing should revisit its view of the Indo-Pacific concept due to its geopolitical overtone. Rather than keeping a distance with the concept, China can work together with ASEAN to reinterpret, adapt, and modify the concept for the interests of ASEAN, China, as well as other actors.

7. **ASEAN needs to ensure that it can be an effective organization, especially in dealing with pressing issues such as the Myanmar Crisis**. If ASEAN remains ineffective in dealing with Myanmar, its claim for centrality in the region will be less legitimate.

Check the Data Table and Download
the 2020 and 2021's Survey Reports at

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