

**ASEAN-China
Survey 2021**



ASEAN-CHINA RELATIONS AFTER 30 YEARS

**Changing Perceptions,
Remaining Anxieties,
and New Opportunities**

FPCI

FOREIGN POLICY
COMMUNITY
OF INDONESIA

ASEAN-China Survey 2021

ASEAN-CHINA RELATIONS AFTER 30 YEARS: Changing Perceptions, Remaining Anxieties, and New Opportunities

Survey Report

ASEAN-China Survey 2021

ASEAN-CHINA RELATIONS AFTER 30 YEARS: Changing Perceptions, Remaining Anxieties, and New Opportunities

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FOREWORD



I am pleased to present the ASEAN-China Survey 2021: “Changing Perceptions, Remaining Anxieties, and New Opportunities”.

This survey is produced in anticipation of an important diplomatic milestone of 30 years ASEAN-China relationship.

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

This survey aims to capture and highlight the various shades and nuances of view from Southeast Asian people towards ASEAN-China relations. This year’s survey edition also pays attention to the shift, consistency, and changes of Southeast Asian people’s perception of China. 2021’s survey was participated by 1019 respondents from 10 ASEAN countries and from 5 groups of officials, academia, the business community, civil society, and students. The questions that we asked the respondents were broad, ranging from geopolitics, economics, social-culture, people to people, and political-security. What makes it even particularly interesting is that the survey just like last year's edition was conducted during the time of pandemic added with the surge of Delta variant as well as regional political challenges posed from Myanmar – an extremely difficult time where regionalism, cooperation, and resilience was being tested.

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

Salam,

A handwritten signature in black ink, appearing to read 'Djalal', written in a cursive style.

Dr. Dino Patti Djalal

Founder and Chairman of Foreign Policy Community of Indonesia

FOREWORD



It is said that history is shaped by two patterns: a long period of stability (not necessarily peaceful, but a stable status quo is more or less maintained) and a short, rapid period of change called the historical disjuncture. We might soon, or some argue already, enter the latter. After a long period of Post-Cold War status quo in the world and in the region, changes are accelerating at multiple dimensions of international relations. The COVID-19 pandemic does not cause this disruption, but rather exposing and accelerating changes that are already taking place.

Amidst that situation, this survey aims to capture the diversity and complexity of perspectives among the people of ASEAN towards ASEAN-China cooperation. Since the 2020 Survey, many significant developments happened, such as the deepening of the pandemic in Southeast Asia and the political crisis in Myanmar which poses a credibility problem for ASEAN. Furthermore, this year also marks 3 decades of ASEAN-China relationship. While perceptions are not the only factor in the relationship, it is always beneficial to listen and understand what the people think and say, if ASEAN is true to its commitment for being “people-centered.” For this reason, too, we included student respondents from all ASEAN countries as part of the respondents, highlighting the importance of listening to the youth who will shape our future.

We would like to thank our partners: ASEAN Youth Organization, Asian Law Students Association, International Relations Institute of Cambodia, New Era University, UGM ASEAN Society, Malaysian Youth Diplomacy, Universiti Malaya, ASEAN Foundation, and UNAM Youth. This project would not be completed without your kind support. Of course, all errors and mistakes are our own.

Thank you very much! Enjoy reading!

With best wishes,

A handwritten signature in black ink, consisting of several fluid, connected strokes.

Dr. Shofwan Al Banna Choiruzzad
Supervisor of ASEAN-China Survey Program

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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 INSTITUTIONAL PARTNERS



ASEAN FOUNDATION



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I. INTRODUCTION

A. BACKGROUND

Thirty years is not a short time in International Relations. In the span of thirty years, we have witnessed the dissolution of the Soviet Union, the 9/11 terrorist attack, several global and regional economic crises, the beginning, and the ending of multiple conflicts in different parts of the globe, as well as the greatest pandemic since the 20th Century. The world in 1991 was a different world compared to ours now in 2021. For ASEAN and China relationship, these 30 years have been a significant phase in their own histories. At the Opening Ceremony of the Conference on Celebrating the 30th Anniversary of ASEAN-China Dialogue Relations, 28 July 2021, State Councilor and Minister of Foreign Affairs of the People's Republic of China, Wang Yi, mentioned 2021 as a "big year with special significance¹," while the ASEAN Secretary-General, Dato Lim Jock Hoi, praised the "spirit of sharing and mutual assistance" of both parties.² As ASEAN and China celebrate the 30th anniversary in 2021, both sides realized that they have come a long way.

In the 1980s, many ASEAN countries had limited interactions with China. Some even have no diplomatic relations due to the Cold War geopolitics. Much has changed now. China is now having the largest GDP (adjusted to PPP) in the world, although the US still holds that position in nominal terms. China has become ASEAN's largest trading partner since 2009 and increasingly becoming one of the most important sources of investment in ASEAN. China is the country that holds the highest foreign reserves with 3,349 billion US Dollars, making it on the top list of the potential partners for infrastructure financing which most ASEAN countries desperately need. COVID-19 pandemic also created a stronger need for a cordial relationship between the two neighbours.

Furthermore, many significant developments also occur in 2020-2021. From 2020 until today, we experienced the COVID 19 pandemic, and the cooperation to mitigate its impacts had been a crucial feature in the ASEAN-China relationship. Regional Comprehensive Economic Partnership (RCEP) was signed in November 2020, bringing a lot of optimism for stronger and deeper economic cooperation in the region. The ongoing political and humanitarian crisis in Myanmar has created challenges for ASEAN, China, and the relationship between ASEAN and China.

The world is changing, so is the relationship between ASEAN and China. But how do people in ASEAN perceive this change? Do perceptions towards China also undergo significant change in these 30 years in the minds of the people of ASEAN? Are there any old perceptions that remain popular today? What images are evolving together with the maturing relationship? How do these views affect their perception of the current and future relationship between ASEAN and China? Against this backdrop, the Research and Analysis department of the Foreign Policy Community of Indonesia conducted the "ASEAN-China Survey 2021: Assessing 30 Years of Relationship" from 1 July to 10 August 2021. In this 2021 survey, we aim to integrate this question into the set of questions on how people in ASEAN perceive ASEAN-China relations.

This survey successfully collected data from 1,019 respondents from all ASEAN member countries: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Vietnam.

In emphasizing the importance of current relations and future directions for cooperation, this survey targets two different respondent groups, classified into Elites and Students. Perspectives from Elites contribute to the review of ongoing relations based on the discourse among those who are involved in the field of public policy, directly or indirectly, through their influence, advocacy, activity, or occupation, as current stakeholders – Academia, Business Community, Civil Society, and Officials. It is also important to include the view of Students in the survey, noting that the aspirations of this group serve as one of the future determinants of how relations between ASEAN and China should and would be conducted. As an improvement from the first ASEAN-China Survey in 2020, this second ASEAN-China Survey also elaborates the patterns in each individual ASEAN country, apart from the regional perception.

¹H.E. Wang Yi, "Build on Past Achievements and Scale New Heights," Transcript of speech delivered at the Opening Ceremony of the Conference on Celebrating the 30th Anniversary of ASEAN-China Dialogue Relations on July 28, 2020, <http://id.china-embassy.org/eng/xwdt/t1895887.htm> accessed on 15 October 2021.

²China International Development Cooperation Agency, "Wang Yi Meets with ASEAN Secretary-General Dato Lim Jock Hoi," 9 June 2021, http://subsites.chinadaily.com.cn/cidca/2021-06/09/c_631380.htm, accessed on 15 October 2021.

B. AIM

This survey study aims to provide evidence-based policy recommendations on the relationship between ASEAN and China by exploring perceptions and attitudes of the people of ASEAN from all relevant sectors, in 10 ASEAN Countries. Consequently, it hopes to capture nuances within the public discourse on a comprehensive set of issues spanning from economic, social-cultural, and political-security, to identify gaps needed to be addressed and opportunities to be taken. It also attempts to provide insights on public attitudes on the existing cooperation initiatives and mechanisms to review current relations between ASEAN and China. In short, this survey aims to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse.

Since 2021 is the 30th anniversary of ASEAN-China Relations, 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.

The questions are based on the first ASEAN-China Survey conducted by FPCI in 2020 to allow us to capture evolving trends. Improvements are made to ensure that the survey captures the perceptions more accurately.

Furthermore, since this survey also aims to provide a deeper assessment by looking at how the current perceptions illustrate changes and continuities after 30 years of relationship, the team also developed a set of questions specifically designed to look at specific images of China that were popular before the establishment of an official relationship. To construct these specific sets of questions, the team conducted preliminary research by relying on in-depth interviews with senior diplomats that were active in the 1980s, news articles during the 1970s-1990s, as well as academic sources. The questionnaire is then discussed in a panel discussion composed of experts before being finalized and distributed to the respondents.

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 compared or treated as such. Since the aim of this survey is to capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries' public discourse, it focuses more on how each category in each country is adequately represented rather than on how the samples are reflecting the demographic composition.

Based on this methodological construction, the FPCI team decided to put 1000 respondents as the target. As a benchmark, similar research on the future of the Indo Pacific conducted by the US think tank, the Center for Strategic and International Studies (CSIS) relied on responses from 201 respondents.³ The State of South East Asia Survey 2021 by ASEAN Studies Centre, ISEAS Singapore, also used the responses from 1,032 respondents.⁴

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

³Michael J. Green, Amy Searight, & Patrick Gerard Buchan, Powers, Norms, and Institutions: The Future of the Indo-Pacific from a Southeast Asia Perspective (Washington D.C.: Center for Strategic and International Studies, 2020), <https://www.csis.org/analysis/powers-norms-and-institutions-future-indo-pacific-southeast-asia-perspective>, 5.

⁴Sharon Seah, et al., The State of Southeast Asia: 2021, ((Singapore: ISEAS-Yusof Ishak Institute, 2021) <https://www.iseas.edu.sg/wp-content/uploads/2021/01/The-State-of-SEA-2021-v2.pdf>, 1.

After the respondents are identified, the data is collected through an online survey template which was fielded electronically from 1 July 2021. The use of an online template allowed for completion in 15 minutes or less, increasing the chance for response. After the data is returned, researchers analyze and compare the results to formulate the findings and policy recommendations.

After data collection was completed, the team analyzed 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 10 August 2021. In the FGD, the team presented the findings and asked for feedback from the stakeholders. The analysis was calibrated and enriched based on the feedback. To provoke candid and honest comments, the FGD is conducted under the Chatham House Rule and thus this report does not provide the list of the participants and does not refer to their comments directly, but it gains and uses the insights from the participants.

D. RESPONDENTS PROFILE

Based on the database as well as through institutional cooperation with ASEAN-related institutions such as (mention the partners), the team sent the online questionnaires to more than 6000 potential respondents from different categories and ASEAN countries. As expected and common in this type of research, not all forms are returned by the potential respondents. On 10 August 2021, the total number of responses reached the target of 1000. The composition of categories is also quite balanced, with 38,27% coming from Students and 61,73% coming from Elites. The composition within the Elite category is also quite well distributed.

Thus, based on this composition, the research team is quite confident that the perceptions captured by the first phase of this survey are quite representative and can capture a comprehensive range of perceptions of and attitudes towards ASEAN-China cooperation that exist in ASEAN countries public discourse.

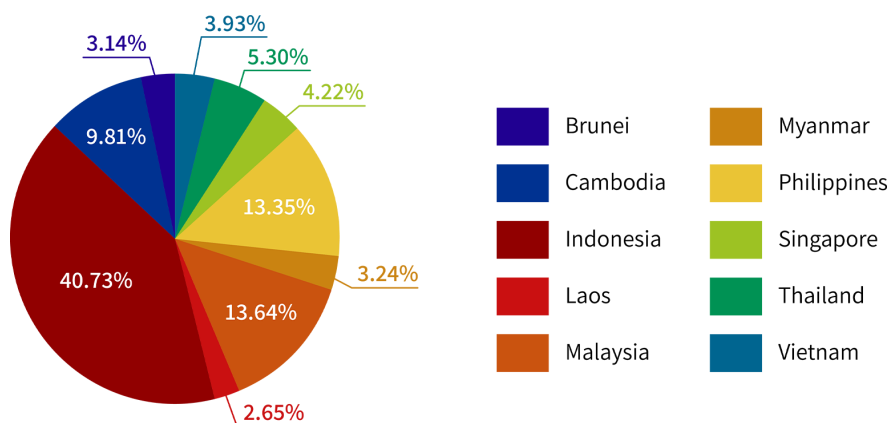


Chart 01. Respondents Composition Based on Nationality

	Elite				Students	Total
	Government	Academia	Business	Civil Society		
Brunei Darussalam	9	6	11	3	3	32
Cambodia	34	19	5	8	34	100
Indonesia	54	72	75	40	174	415
Laos	7	11	1	2	6	27
Malaysia	6	30	14	9	81	139
Myanmar	5	16	2	6	4	33
Philippines	16	40	8	15	57	136
Singapore	4	23	5	6	5	43
Thailand	7	28	4	4	11	54
Vietnam	6	16	1	2	15	40
Total	147	261	126	95	390	1019

Table 01. Respondent's Distribution Based on Nationality and Category

II. REGIONAL VIEW

A. Introduction

In this section, this report elaborates the result of the survey at the regional level to gain an understanding on the perspectives of the people of ASEAN on ASEAN-China relations. This means that the responses discussed in this Chapter are the cumulative responses from all ASEAN countries (all 1019 respondents). The result in the specific ASEAN Member States will be discussed in Chapter III.

To make the discussion easy to follow, we organize the analysis of the responses into seven sections. The first section looks at the general trends and patterns. In this section, we highlight the most important trends and patterns generated from the survey result. The second section elaborates the perceptions of the respondents on the overall relationship and existing cooperation. The third section discusses the results on the questions related to the norms and values in the ASEAN-China relationship, such as respect for sovereignty and non-intervention. The fourth section looks at some specific issues, such as US-China Rivalry, South China Sea, Quad, and Myanmar. The fifth section looks at the people of ASEAN's perception of China. This section is particularly interesting to understand how ASEAN's people view China after 30 years of official cooperation. Since COVID-19 has defined global and regional relationships since 2020, we dive into the perceptions of the respondents on how the ASEAN-China relationship is affected by the pandemic. Not only looking at the perceptions on the COVID 19 related cooperation, but we also look at how other dimensions of cooperation are influenced by the pandemic. Finally, the last sections compare the results of the 2021 survey with the 2020 survey to understand changes and continuities in this dynamic period. Each section consists of three subsections: (1) general (total respondents), (2) comparison between elite and students, and (3) comparison between different categories of elite respondents (Officials, Academia, Business, and Civil Society).

To make it easier to follow, this report is using “spectrums” to show the perspective of the respondents rather than mentioning the composition of each response. These spectrums were representing the rate of Agreement, Satisfaction, Confidence, and Importance of issues and cooperation that exist between ASEAN and China. This means that some degrees of answers (for example: “strongly agree” and “agree” are combined into a single spectrum of “agree”).

B. General Trends and Patterns

B.1. All Respondents

The relationship between ASEAN and China is one of the most comprehensive and intense cooperation of ASEAN has with a major power. This year's edition of the ASEAN-China survey aims to study and identify perceptions, patterns, and trends of Southeast Asian people's perspective to the ASEAN-China relationship in the time of the pandemic.

The results of the survey illustrated the diversity of perceptions among ASEAN people. However, there are two major patterns identified from the survey result.

First, the survey identified that all of the cooperation that brings direct and tangible benefits to Southeast Asian people was welcomed positively with little hesitancy. For instance, on the question “Does the Cooperation with China help alleviate the pandemic?” an overwhelming 67,12 % of the total respondents agree that the cooperation does help to alleviate the pandemic. On the statement that “China's support of vaccines is well-intentioned,” 58,48% of the total respondents agree that the support was well-intentioned. The survey also confirmed that 73,50% of the total respondents see ASEAN-China economic ties become more important especially during the pandemic. However, while leaning on the positive spectrum, respondents also show some hesitancy on their satisfaction to ASEAN-China Free Trade Area (FTA) and the recently signed Regional Comprehensive Economic Partnership (RCEP). The survey found that 41,23 % of the total respondents are satisfied with the FTA, yet 34,25% are only “somewhat satisfied.” A similar number goes to the RCEP with 41,90% of respondents satisfied and 36,70% somewhat satisfied.

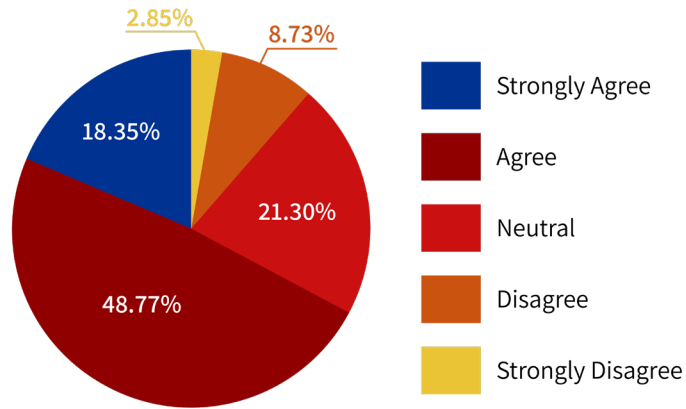


Chart 02. Close cooperation between ASEAN and China helps alleviate the pandemic

Second, the political-security issue is the issue where anxieties and hesitance dominate, as indicated by the high “somewhat” responses. Here are some of the responses: 41,81 % of respondents are somewhat satisfied with ASEAN-China strategic partnership, while 30,72% are somewhat confident that China respects ASEAN Centrality.

Nonetheless, the survey confirmed that ASEAN people see that the partnership between ASEAN and China contributes to regional peace, stability, and prosperity (59,17% of respondents agree with the statement). Respondents also hope that the partnership is meant to strengthen regional and global multilateralism. Respondents see that a substantive partnership of ASEAN and China is a good example of exercising effective multilateralism cooperation – 68,50% of respondents saw this as an important aspiration.

In the questions of geopolitical dynamics, the survey found that 54,66% of respondents define the US-China relationship as a state of strategic rivalry and competition. Interestingly, 37,98% of respondents also believe that there is tension between China and the Quad and 40,92% are still unsure. Against this backdrop, most respondents (40,53%) see that ASEAN must not side with any of the great powers but keep a balanced approach instead.

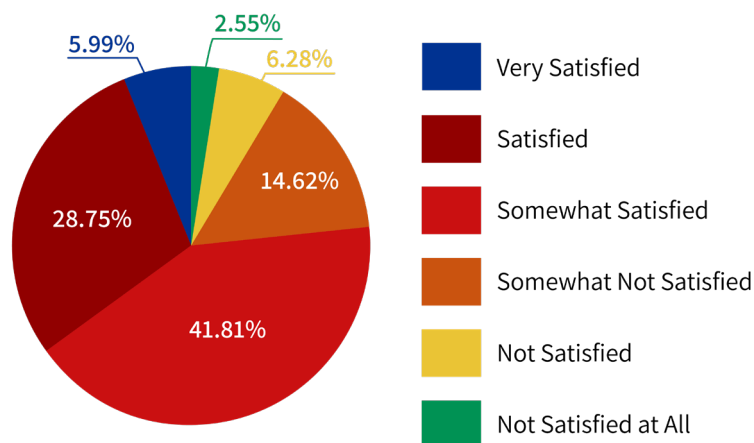


Chart 03. View on ASEAN-China Strategic Partnership

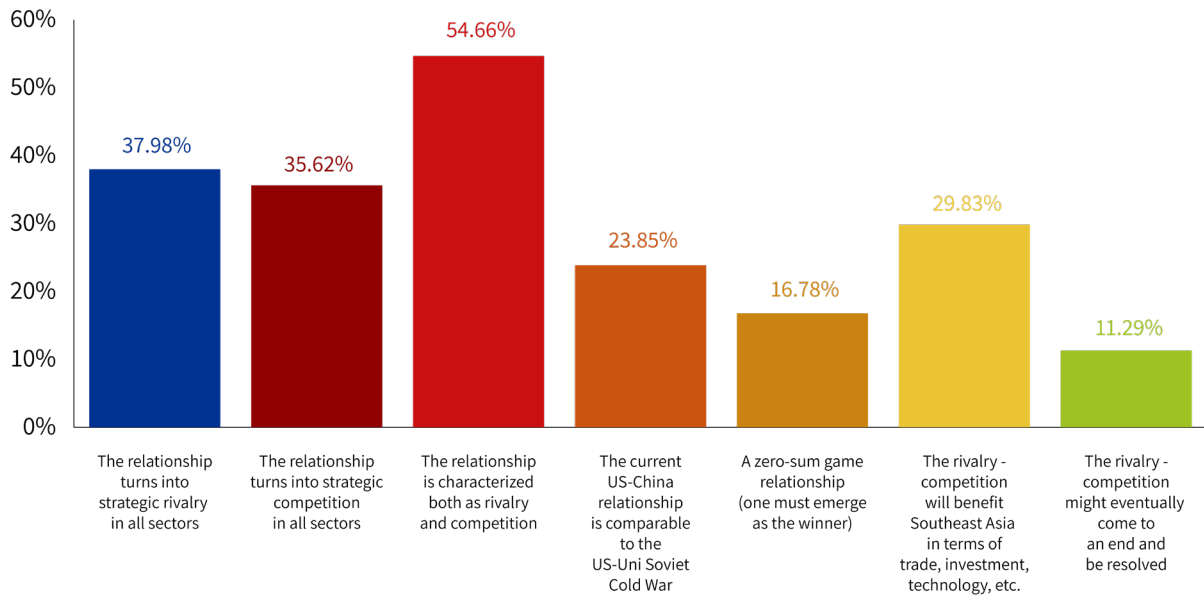


Chart 04. View on US-China Relationship

B.2. Comparing Elites and Students

First, the survey identified that all cooperation that brings direct and tangible benefits to Southeast Asian people are welcomed positively with a little hesitancy.

65,89% of Students and 67,89% of Elites are within the “agree” spectrum that Cooperation with China helps alleviate the pandemic. This explains why most Elites (51,83%) and Students (48,21%) respondents agree that ASEAN and China’s economic ties become ever more important amid the pandemic. China’s intention in providing vaccine support for ASEAN is also regarded positively by both Elites (57,71%) and Students (59,74%).

Nevertheless, Elite respondents have lingering doubts on the ASEAN-China Free Trade Area (FTA) and the Regional Comprehensive Economic Partnership (RCEP). Most Elites (37,68%) are somewhat satisfied and 34,82% are either very satisfied or satisfied with the FTA. Furthermore, 38,64% of Elites are within the satisfied range and another 37,36% of Elites are somewhat satisfied with the RCEP.

Students, however, are more satisfied in the FTA than Elites as almost half of the Student respondents are either very satisfied or satisfied. On the other hand, regarding the RCEP, Students also reflect a similar sentiment shared with Elites as 35,64% of Students are somewhat satisfied and 47,18% are within the satisfied spectrum.

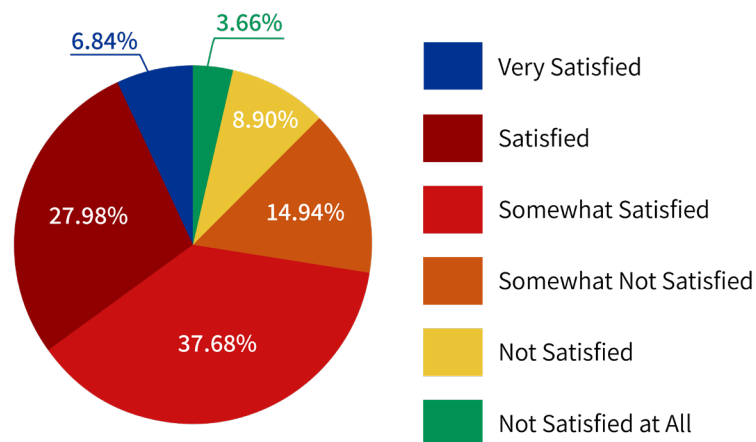


Chart 05. Elites' Satisfaction on Free Trade Area

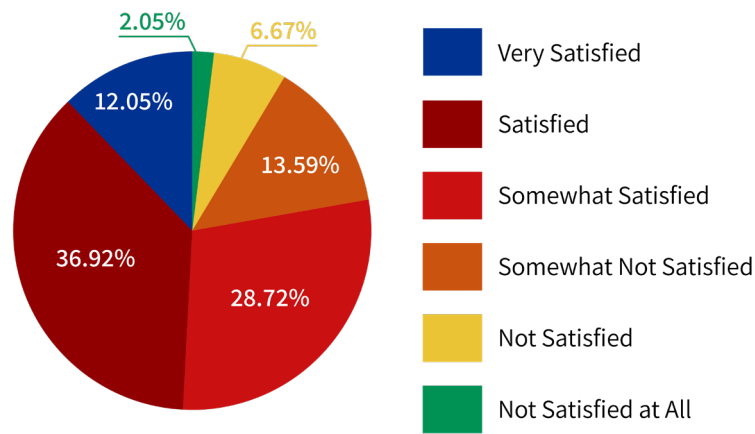


Chart 06. Students' Satisfaction on Free Trade Area

Second, the political-security issue yields to a high hesitancy in behavior and perception of respondents to China and the relationship.

The top answer in both Elites (40,70%) and Students (43,59%) is that the ASEAN- China strategic partnership is still somewhat satisfying. 34,62% of Students and 28,30% of Elites are somewhat confident that China will respect ASEAN centrality. Furthermore, both Elites and Students are mainly neutral on whether China has a good will towards ASEAN countries.

However, the survey also shows optimism for ASEAN and China relations especially regarding ASEAN-China cooperation to strengthen multilateralism. 68,05% of Elites and 69,23% of Students deem it as highly important or important. Furthermore, more than half of both Elites and Student respondents strongly agree or agree that ASEAN-China Strategic Partnership contributes to regional peace, stability, development, and prosperity.

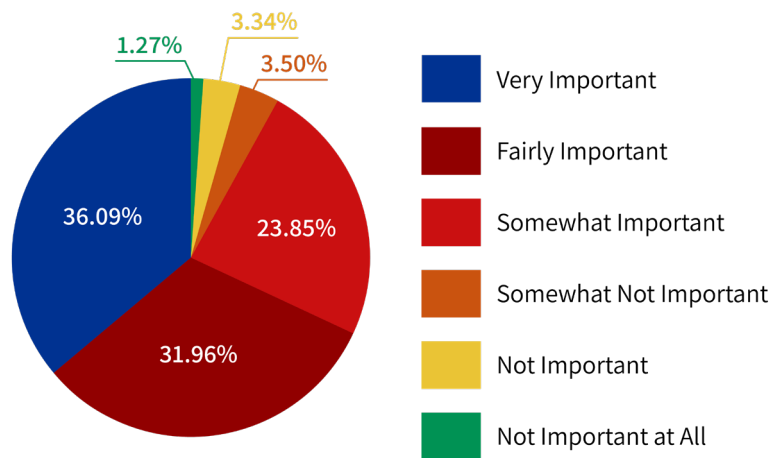


Chart 07. Elites' View on ASEAN-China Cooperation's Importance to Multilateralism

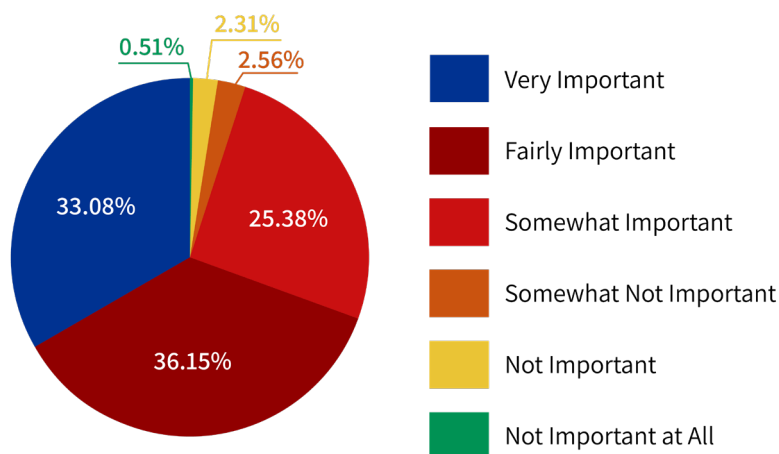


Chart 08. Students' View on ASEAN-China Cooperation's Importance to Multilateralism

Regarding the dynamic of geopolitics in the region, the survey revealed that the majority of Elites are split on whether to regard the US-China relationship as a strategic rivalry or a strategic competition. In contrast, most Students see it as a strategic rivalry (42,31%). 40,54% of Elites and 33,59% of Students also think that there is absolutely a geopolitical tension between China and the Quad. In managing the Myanmar crisis, a notable figure of 34.03% of Elites and 28,20% of Students are not confident that China is acting as a responsible partner. The survey results capture the worry and doubt over the region's geopolitical dynamic, yet the majority of both Elites and Students believe that ASEAN should maintain a balanced approach.

B.3. Comparing Different Groups in the Elites Category

In this section, the discussion compares the responses of different groups within the elite category, which consist of Academia, Government Officials, Business Community, and Civil Society. The 4 groups generally hold positive views on the ASEAN-China relationship, by agreeing to the statement that the relationship has contributed to regional peace, stability, development, and prosperity. 72,11% of respondents in the “public officials” category supported this statement. Other categories of elites also echoed this trend, although the number is lower at around 60%. On the statement that the relationship between ASEAN and China benefits both parties, 70,75% of Officials, 68,20% of Academia, and 66,32% of the Business community agree to such a view.

However, it is also important to note that hesitancy was present in the perceptions of China's attitude and motivation towards ASEAN. The majority of respondents in the Academia and Civil Society categories chose to be neutral in assessing China's good will towards ASEAN Countries. The majority of respondents in all elites group categories were also anxious about China's influence in ASEAN Countries. 60% of respondents from the Civil Society and 55,94 % of respondents from the Academia expressed their worries. These numbers are higher compared to their counterparts from Government Officials and the Business Community.

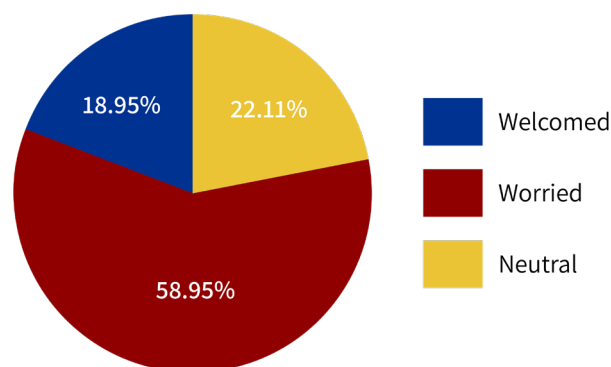


Chart 09. Civil Society's View on China's Influence Among ASEAN Member States

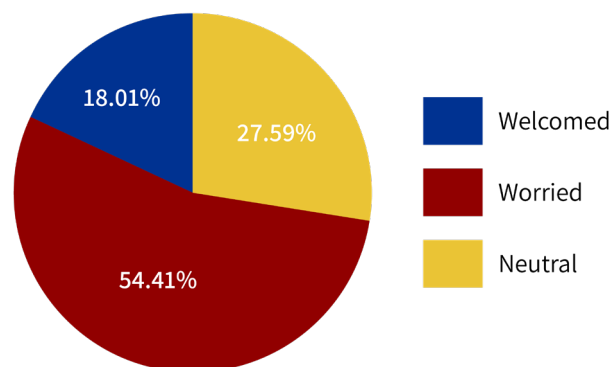


Chart 10. Academia's View on China's Influence Among ASEAN Member States

Despite some apparent worries, the elites expressed their enthusiasm in deepening ASEAN cooperation with China, with 76,19% of respondents from the Government Officials, 69,04% from the Business Community, and 56,84% from the Civil Society agreed to such a statement.

Amidst the pandemic, cooperation in pandemic control and vaccine production and distribution are seen very positively across all categories. In the broader context, economic and socio-cultural cooperation are generally assessed positively across all categories. Respondents in the Business Community (74,60%), Civil Society (76,84%),

Official (70,07%), and Academia (65,52%) put trade as the most satisfactory cooperation. Investment, technology and industry 4.0, and tourism are following next.

It is interesting to note that the degree of satisfaction is different between the business community and other categories on the issue of ASEAN-China Free Trade. While most respondents in the Business Sector are satisfied, most respondents in Academia, Officials, and Civil Society categories are only “somewhat satisfied” with ASEAN-China Free Trade. A different picture was obtained in the question on Regional Comprehensive Economic Partnership (RCEP), where respondents in the Government Official category are more satisfied with the RCEP while the business community still mostly answered “somewhat satisfied.”

Consistent with the general trend, the elites in all categories show anxieties in the issues pertaining to politics and security. On the questions of geopolitics, half of the elites confirm that the US and China relationship is defined as rivalry and competition. The QUAD is also added to the geopolitical equation for Southeast Asians. 45,21% of Academia and 43,16% of Civil Society believe that there is increasing tension between China and the Quad.

C. Overall Relationship and Existing Cooperation

C.1. All Respondents

In general, the survey found that the relationship has been received positively by the Southeast Asian people. 67,48% of the total respondents found that cooperation with China is benefiting ASEAN. In the time of the pandemic, 67,12% of respondents agreed that ASEAN cooperation with China helps alleviate the pandemic and 58,48% of respondents say that China’s COVID-19 vaccine support is well-intentioned. This sentiment leads to the aspiration of 73,50% of respondents that economic cooperation with China becomes more important in the time of the pandemic.

On the questions about the overall relationship, 43,47% of the respondents agree that ASEAN-China cooperation is on the right track, while 36,60% are neutral, and the rest (19,92%) disagree. A similar result was also found on the statement that the 30 years of relationship is successful (48,57% agree, 36,60% neutral, and 14,82% disagree).

It is important to note that 62,22% of respondents are enthusiastic to deepen the ASEAN-China partnership.

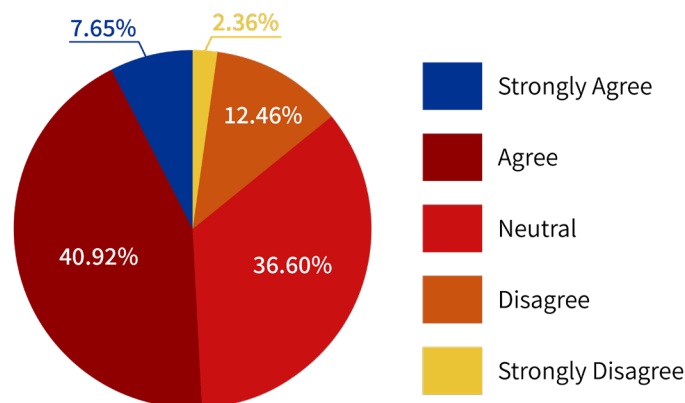


Chart 11. Perspective on the Success of ASEAN-China’s 30-year of Partnership

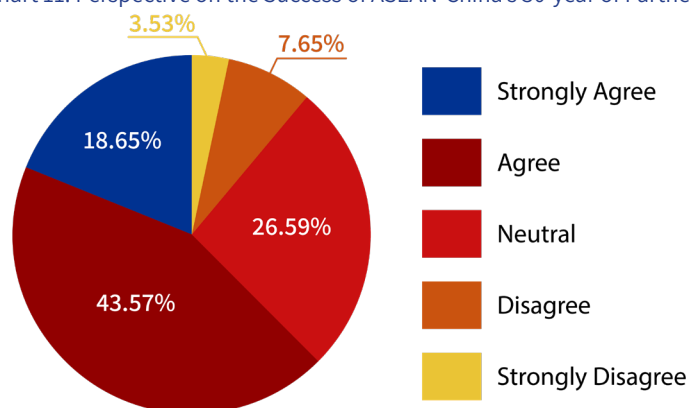


Chart 12. Enthusiasm about Deepening Cooperation between ASEAN and China

The perceptions of the existing cooperation and mechanism are quite diverse. In general, all existing cooperation related to the economy and people-to-people cooperation gets a relatively high rate of satisfaction. For instance, 74,48% of respondents are on the satisfied spectrum on the Free Trade Agreement between ASEAN and China. The recently signed Regional Comprehensive Economic Partnership (RCEP) also evaluated positively, with 78,60% of respondents being on the satisfied spectrum. Tourism, youth exchanges, and education were collected to get a high satisfaction rate. 83,12% of respondents answered in a positive spectrum on the youth leader’s scholarship program and 77,72% also answered in a positive spectrum for the people-to-people cooperation in general.

The survey also identified 5 aspects of cooperation that are seen as the most satisfactory as follows: trade (68,99%), investment (61,33%), technology and industry 4.0 (47,89%), tourism (46,71%), and education (37,98%). All this cooperation should be maintained and improved. The survey also identified 5 aspects of cooperation which are the least satisfactory as follows: defense (54,66%), cyber security (47,69%), immigration and borders (43,77%), environment (42,89%), and transnational crime (42,49%).

Respondents also identify vaccine cooperation, post-pandemic recovery, e-commerce, technology, and industry 4.0 as the new aspects of cooperation that should be pursued by policymakers to elevate the ASEAN-China partnership.

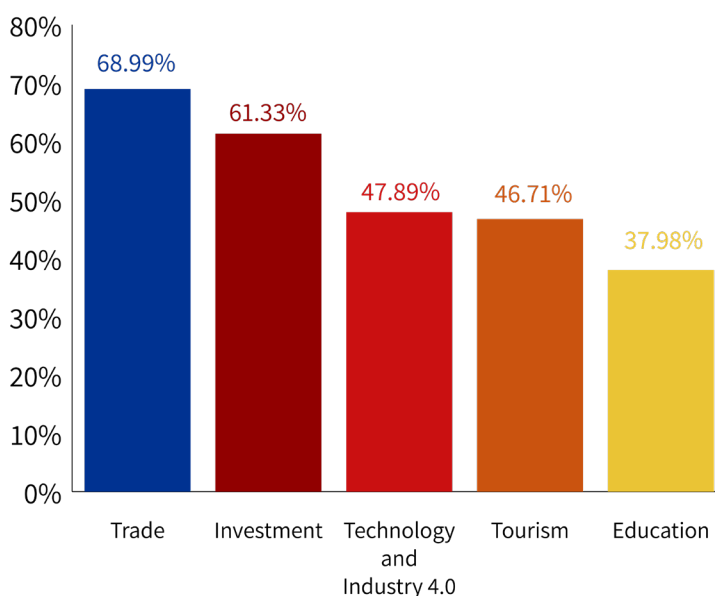


Chart 13. Most Satisfactory Aspects of ASEAN-China Cooperation

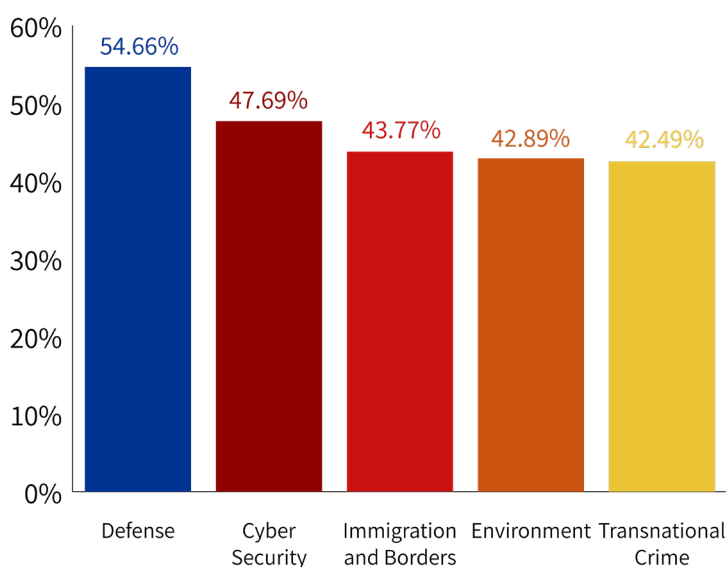


Chart 14. Least Satisfactory Aspects of ASEAN-China Cooperation

Within the dimension of socio-cultural cooperation, the survey posed questions related to education, language, and tourism. In the education sector, the result shows that 41,51% of respondents are still considering pursuing their higher education in China and only 18,84% said yes to it. The survey also found 3 contributions of the graduates from China to their country and the region as follows; first, the graduates help ASEAN countries better understand China (27,38%). Second, the graduates significantly contribute towards market connectivity between ASEAN and China (26,99%). Third, the graduates contribute to the product and technology innovation of ASEAN countries (25,32%).

In terms of the Chinese language, all respondents agree that the Chinese language is important; 23,75% said it was very important, 26,79% said it was fairly important, and 25,42% said it was important. In total 75,96% of respondents sit in the positive spectrum of the Chinese language. Only 7.07% of respondents said it is not important.

Finally, for tourism in the time of the pandemic, 38,17% of respondents saw China as their top tourism destination. The majority of 44,36% is still considering it. Only 17,47% of respondents do not prefer China as their top tourism destination.

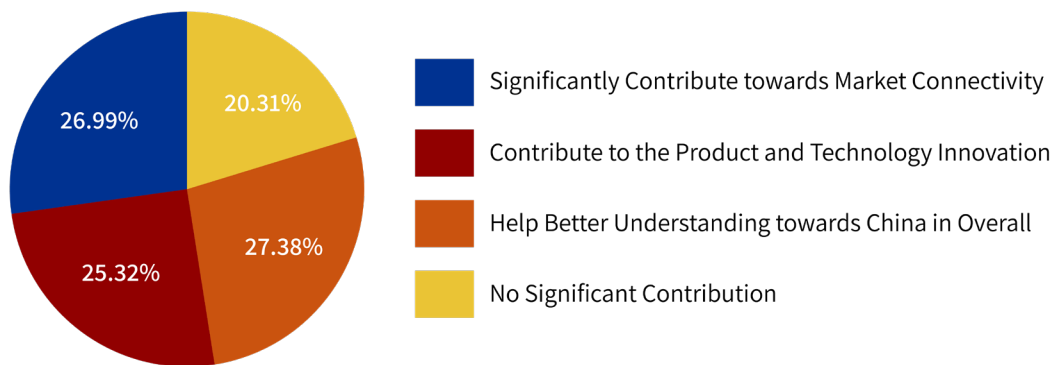


Chart 15. Views on Contributions of Chinese Education Graduates

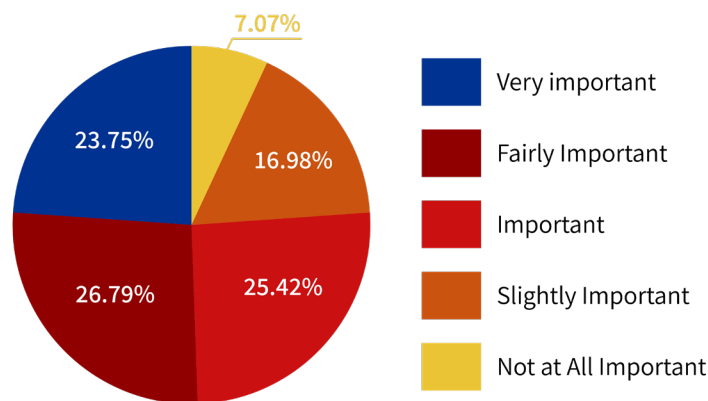


Chart 16. Views on Chinese Language Importance

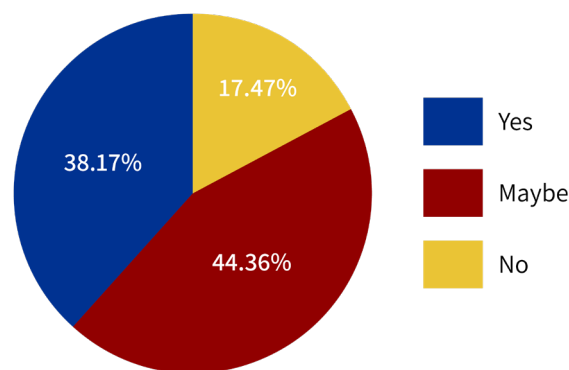


Chart 17. Views on China as a Top Tourism Destination

C.2. Comparing Elites and Students

The survey highlights that generally the ASEAN-China relationship is evaluated in a positive manner by Southeast Asian people. The majority of both Elite (65,18%) and Student (63,34%) respondents agreed that the current relationship brings benefits to both ASEAN and China.

67,89% of Elites and 65,89% of Students acknowledge that cooperation between ASEAN and China helps alleviate the pandemic. Furthermore, China's vaccine provision to Southeast Asian countries is positively seen as China's good intention towards the region by most Elites (57,71%) and Students (59,74%) as well. Most Elites (73,61%) and Students (73,34%) also viewed that economic cooperation with China is becoming more vital during the pandemic.

It is important to note that when asked about whether ASEAN-China cooperation is on the right track, both Elites (35,77%) and Students (37,95%) show the same pattern in expressing slightly a bigger share of responses in the neutral spectrum, although a majority still answered that they agreed. A similar response also applies to the question of whether the 30-year-old partnership is successful or not. A considerable number of Elites (35,93%) and Students (37,69%) were neutral about it while 48,81% of Elites and 48,21% of Students were within the agreed spectrum.

All in all, the majority of respondents in both Elites (62,96%) and Students (61,03%) were enthusiastic about deepening the ASEAN-China relations.

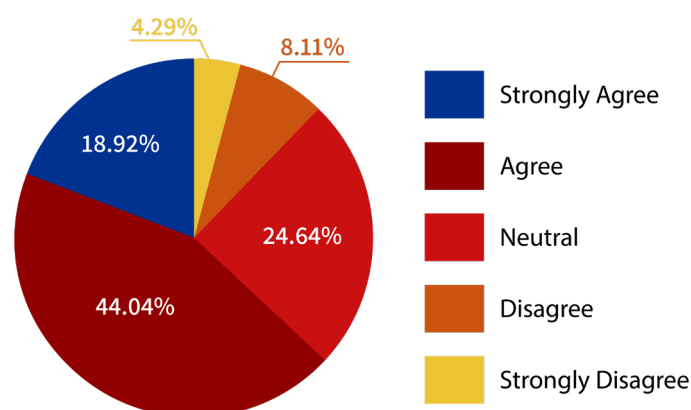


Chart 18. Elites' Enthusiasm about Deepening Cooperation between ASEAN and China

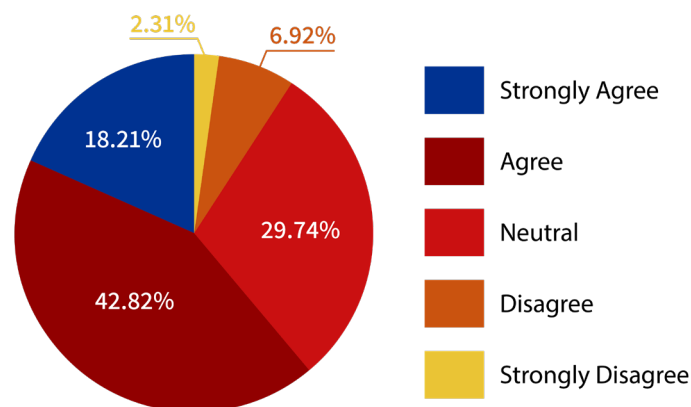


Chart 19. Students' Enthusiasm about Deepening Cooperation between ASEAN and China

In general, both Elites and Students show satisfaction in the economic and people-to-people ASEAN-China cooperation. Regarding the ASEAN-China Free Trade Area, a majority of Elite respondents (37,68%) were somewhat satisfied while the majority of Students (48,97%) were 'very satisfied' and 'satisfied'. Moreover, 76% of Elites respondents and 83% of Students were within the satisfied spectrum (Very Satisfied, Satisfied, Somewhat Satisfied) for the Regional Comprehensive Economic Partnership (RCEP).

For the ASEAN-China People-to-People Exchanges and Cooperation, 75,52% of Elites and 81,28% of Students were within the satisfied spectrum. Both Elites (79,97%) and Students (88,20%) show the biggest number of satisfactions in the ASEAN-China Young Leaders Scholarship cooperation to other areas of cooperation asked in this survey. As the primary stakeholders and direct beneficiaries of the cooperation, more than half of the students (57,43%) were generally pleased (very satisfied and satisfied).

Both Elites and Students show consistency in choosing Trade, Investment, Technology and Industry 4.0, Education, and Tourism as the most satisfactory areas of cooperation between ASEAN and China out of 20 areas. While on the flip side, the top 5 areas of cooperation that were least satisfactory areas by both students and all parts of Elites were Defense, Cyber Security, Environment, Transnational Crime, and Immigration and Borders.

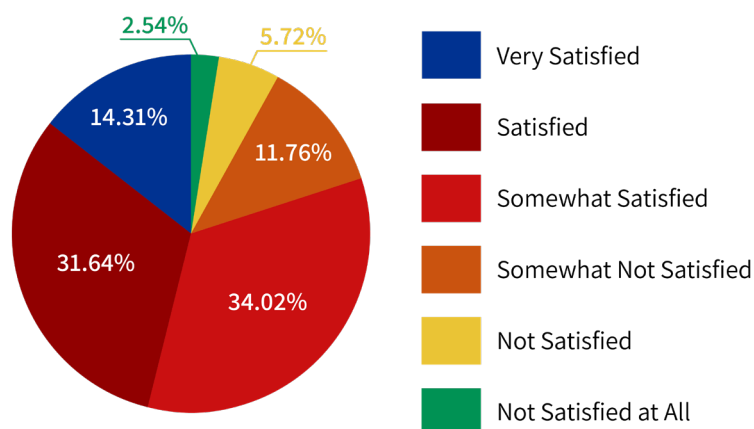


Chart 20. Elites' View on ASEAN-China Young Leaders Scholarship

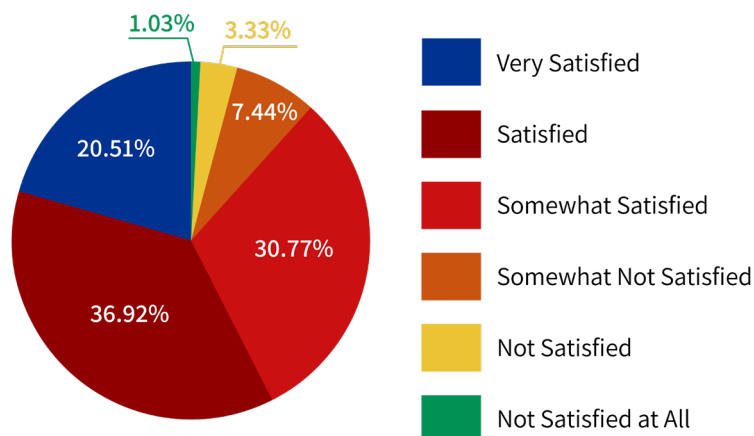


Chart 21. Students' View on ASEAN-China Young Leaders Scholarship

C.3 Comparing Different Groups in the Elites Category

On the statement that the relationship between ASEAN and China benefits both, the majority of the elites are positive and agree with such assessment. Respondents in the Government Official category have the highest percentage of positive answers with 70,75%. This is higher than 68,20% in Academia and 65,87% in the Business Community. It is interesting to note that slightly lower than half of the respondents in the Civil Society group agreed with the statement (47,47%). A similar view on the statement that ASEAN-China strategic partnership contributes to regional peace, stability, development, and prosperity. Government Officials recorded the highest percentage of positive answers with 72,11% while Civil Society recorded the lowest, although the number was still at a significant 49,47%.

Different responses were recorded on the question “China has a good will towards ASEAN countries.” Academia and Civil Society are quite divided, with the highest percentage of responses (36,78% in academia and 33,68% in Civil Society) choose the neutral option. On the other two categories, the perception is more positive, with 57,15% of respondents in the Government Official category and 55,55% in the Business Community see that China has a good will.

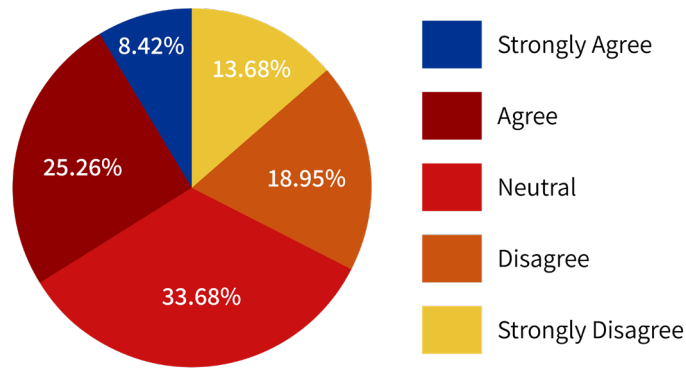


Chart 22. Civil Society's View on Whether China has a Good Will towards ASEAN

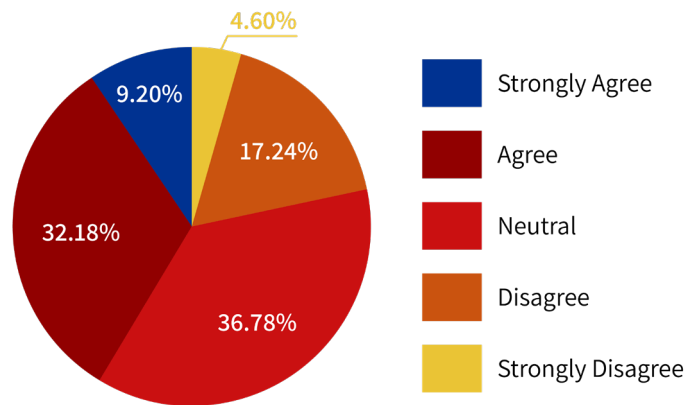


Chart 23. Academia's View on Whether China has a Good Will towards ASEAN

On the question of whether the relationship between ASEAN and China is on the right track, Academia and Civil Society tend to be more neutral, while Government Officials and Business Community tend to be more positive. 53,06% of respondents from Government Officials and 49,21% from the Business Community believed that the relationship is on the right track.

Most respondents in the elite category believe that China's support in COVID-19 vaccination is well-intentioned. The majority of the elites welcome it positively – 70,75% of Officials, 61,91% of the Business Community, and 52,49% of Academia. However, slightly less than half of the respondents in the Civil Society category (46,31%) agree with such a view.

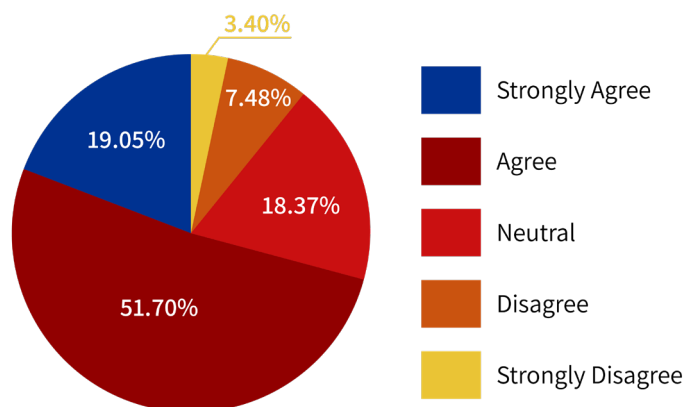


Chart 24. Officials' View on Whether China's Support of Vaccines for ASEAN COVID-19 Response is Well-Intentioned

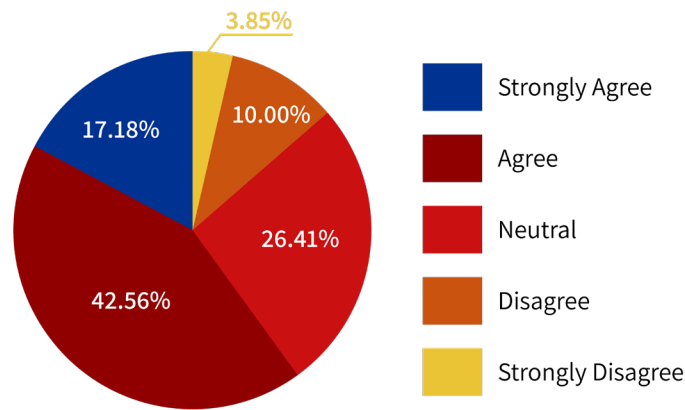


Chart 25. Students' View on Whether China's Support of Vaccines for ASEAN COVID-19 Response is Well-Intentioned

The responses on the evaluation of existing cooperation and mechanisms also illustrate the diversity within the elite category. In the ASEAN-China Free Trade Area (FTA), respondents in the business community are the most positive with 44,44% of respondents standing in the "satisfied" spectrum. In other categories, the highest percentage of responses go to "somewhat satisfied" (38,41% in academia, 41,60% in government officials, and 41,05% in civil society). On the RCEP, government officials are the most positive with 53,74% of the officials said that they are satisfied with the RCEP. Respondents in other categories have "somewhat satisfied" as the answer with the highest percentage (42,06% in Business Community, 40,61% in the Academia, and 34,74% in the Civil Society). Academia, Business Community, and Civil Society feel somewhat satisfied with the Lancang – Mekong Cooperation, while the government official category has the most positive response with 39,45% in the satisfied spectrum and 33,33% are somewhat satisfied.

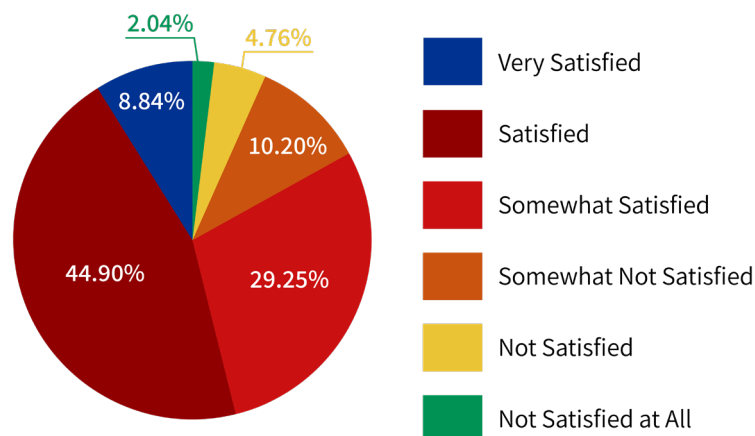


Chart 26. Officials' Satisfaction with Regional Comprehensive Economic Partnership (RCEP)

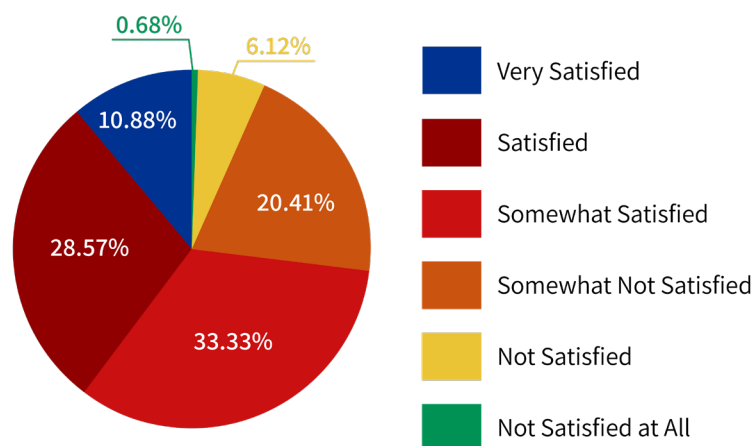


Chart 27. Officials' Satisfaction on Lancang-Mekong Cooperation

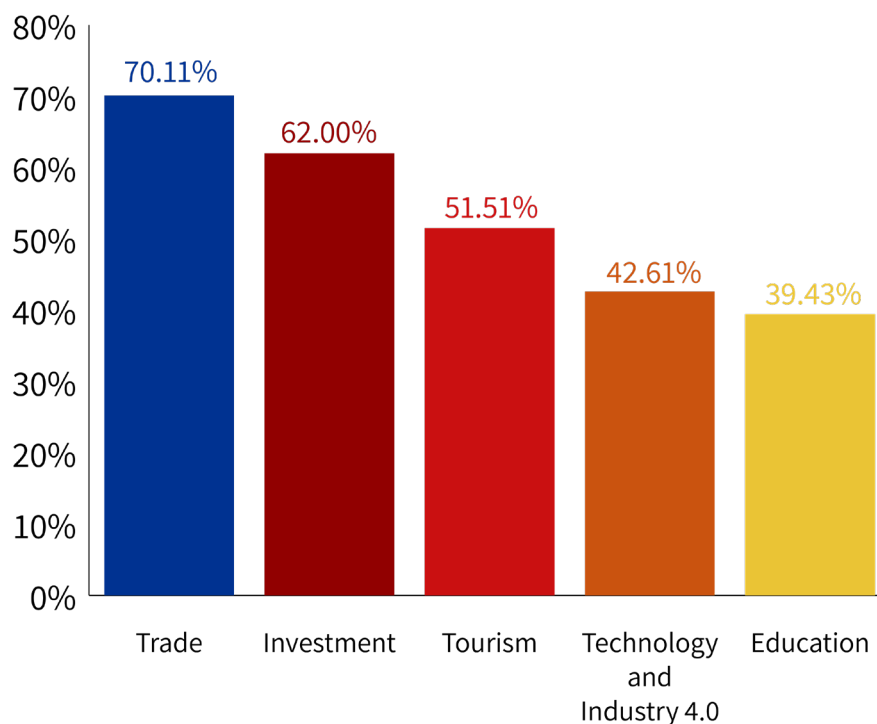


Chart 28. Elites' Most Satisfactory Aspects of ASEAN-China Cooperation

	Trade	Investment	Technology and Industry 4,0	Tourism	Education
General	68,99%	61,33%	47,89%	46,71%	37,98%
Elites	Trade	Investment	Tourism	Technology and Industry 4,0	Education
	70,11%	62,00%	51,51%	42,61%	39,43%
Academia	Trade	Investment	Tourism	Education	Academic Exchanges
	65,52%	60,15%	56,32%	47,51%	44,44%
Officials	Trade	Investment	Tourism	Education	Technology and Industry 4,0
	70,07%	64,63%	48,30	40,14%	39,46%
Business Community	Trade	Investment	Technology and Industry 4,0	Tourism	Manufacturing
	74,60%	68,25%	55,56%	44,44%	38,89%
Civil Society	Trade	Investment	Tourism	Technology and Industry 4,0	Youth Exchanges
	76,84%	54,74%	52,63%	46,32%	31,58%
Students	Trade	Investment	Technology and Industry 4,0	Tourism	Education
	67,18%	60,26%	56,41%	38,97%	35,64%

Table 02. Comparison of the Most Satisfactory Aspects of ASEAN-China Cooperation Within Elites

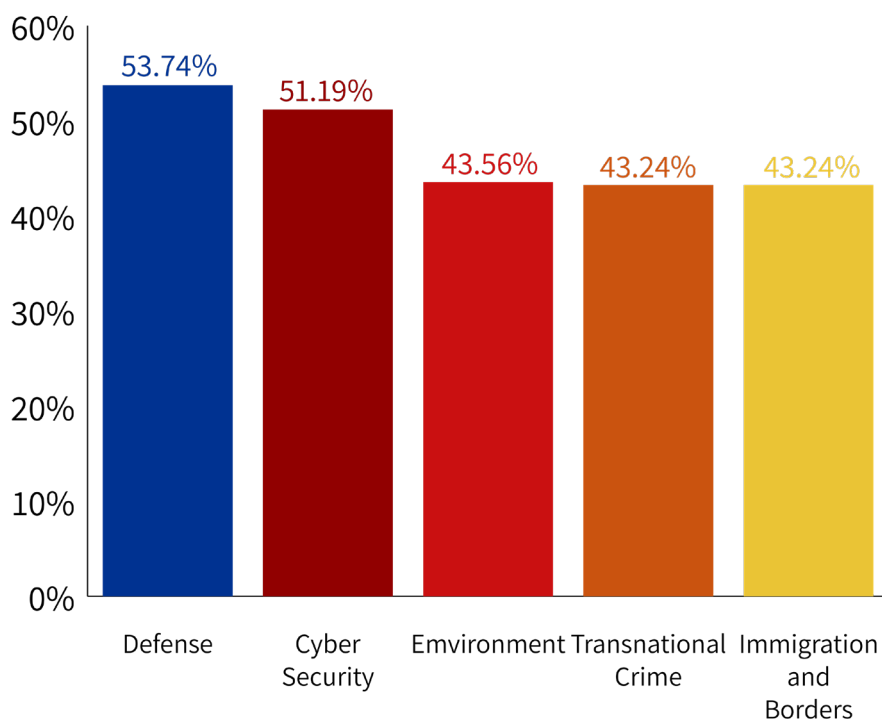


Chart 29. Elites' Least Satisfactory Aspects of ASEAN-China Cooperation

	Defense	Cyber Security	Immigration and Borders	Environment	Transnational Crime
General	54,66%	47,69%	43,77%	42,89%	42,49%
Elites	Defense	Cyber Security	Environment	Transnational Crime / Immigration and Borders	Natural resources
	53,74%	51,19%	43,56%	43,24%	40,86%
Academia	Defense	Cyber Security	Natural resources	Environment	Immigration and Borders
	56,32%	53,64%	49,04%	44,83%	44,06%
Officials	Defense	Cyber Security	Transnational Crime	Environment	Immigration and Borders
	53,74%	53,06%	47,62%	40,14%	39,46%
Business Community	Defense	Immigration and Borders	Cyber Security / Environment	Transnational Crime	Natural resources
	50,00%	49,21%	45,24%	37,30%	34,13%
Civil Society	Defense	Cyber Security	Transnational Crime	Environment	Media and Journalism
	51,58%	49,47%	46,32%	43,16%	42,11%
Students	Defense	Immigration and Borders	Cyber Security	Environment	Transnational Crime
	56,15%	44,62%	42,05%	41,79%	41,28%

Table 03. Comparison of the Least Satisfactory Aspects of ASEAN-China Cooperation Within Elites

D. Norms and Values

D.1. All Respondents

While 76,55% of respondents sit in the positive spectrum in evaluating the strategic partnership, if we look more closely only 34,76% of respondents are firmly satisfied. A significant 41,81% are still “somewhat satisfied.” While the survey did not test correlation, we might find clues in understanding this hesitancy if we look at the perceptions of the respondents on the discussion on norms and values. The survey shows that only 26,49% of respondents are firmly confident with China’s respect for the ASEAN Centrality and 30,72% felt somewhat confident. Subsequently, in the question of “China respects the national unity, sovereignty, and territorial integrity of ASEAN countries”, 32,09% of respondents are not confident and 20,71% are somewhat not confident in total 52,80% of respondents stood in the negative spectrum.

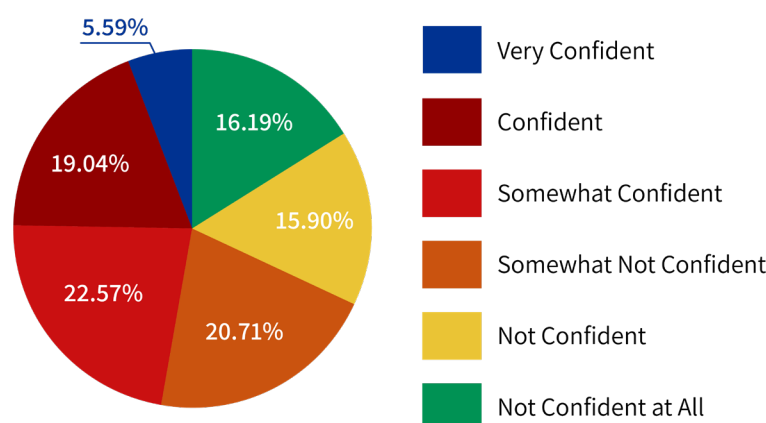


Chart 30. Views on Whether China Respects the National Unity, Sovereignty, and Territorial Integrity of ASEAN Countries

The survey shows a split result between confident and not confident on the statement that China treats ASEAN countries as equal partners. 49,56% of respondents are on the agree spectrum while 50,44% sit in the disagree spectrum.

Nonetheless, respondents are relatively confident that China is adhering to the principle of non-intervention. 29,94% of respondents are confident that China adheres to the principle and 25,91% are somewhat confident. A positive result is also found in the existing cooperation of the Belt and Route Initiative. 33,27% of respondents are confident of it and 29,54% are somewhat confident.

D.2. Comparing Elites and Students

In the survey, respondents were asked to rate their confidence regarding how China treats, acts, and views ASEAN and its member states. Most Elites (40,70%) and Students (43,59%) are somewhat satisfied with the ASEAN-China Strategic Partnership.

When asked how confident were the respondents that China respects the ASEAN centrality, the survey reveals that 55% of Elite respondents and a bigger number of Students (61%) were in a confident range (very confident, confident, somewhat confident). The top answers in both Elites (28,30%) and Students (34,62%) are that they were somewhat confident.

22,58% of elites are somewhat not confident while 24,10% of students are somewhat confident that China respects the national unity, sovereignty, and territorial integrity of ASEAN countries. Furthermore, there is a divide among Student respondents where 50% were in the confident spectrum and another 50% in the not confident range.

The split was also seen in the question on whether China treats ASEAN as equal partners, 52,94% of Elites answers are within the ‘not confident’ spectrum and 53,59% of Students answered within the ‘confident’ spectrum, which means that the number was almost 50-50 in both categories.

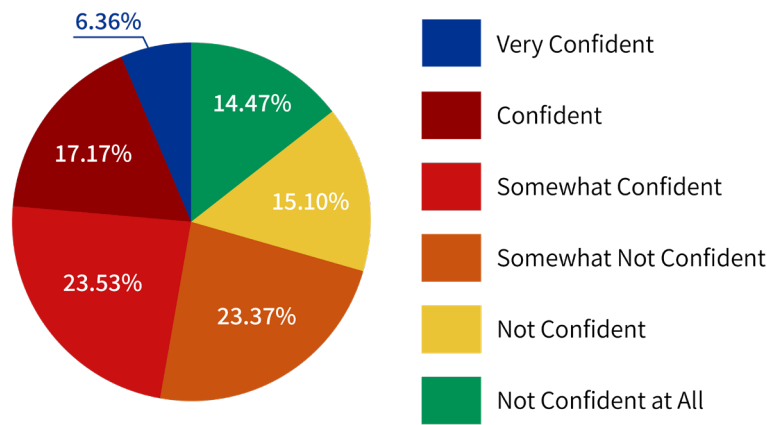


Chart 31. Elites' Views on Whether China Treats ASEAN as Equal Partners

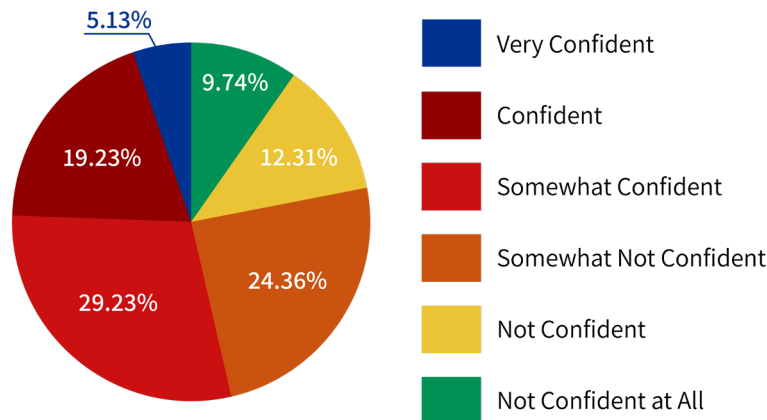


Chart 32. Students' Views on Whether China Treats ASEAN as Equal Partners

When asked about China's non-intervention principle in the political development of ASEAN countries, 55% of Elites and 57% of Students are very confident or confident or somewhat confident. 'Somewhat confident' option is the majority answer by both Elites (25,60%) and Students (26,41%).

Regarding the Belt and Road Initiative (BRI), the majority of both Elites (61%) and Students (65%) were uniformed within the confident spectrum. Most Elites (29,57%) answered they were somewhat confident and so were Students (29,49%).

D.3 Comparing Different Groups in the Elites Category

On the question of whether China respects ASEAN Centrality, most respondents tend to be hesitant. The majority of respondents stand in the somewhat spectrum. Half of the academia stand in the "somewhat" spectrum (27,59% are "somewhat not confident" and 22,99% are "somewhat confident"). A similar pattern is also observed in the business community and civil society. The officials are found to be most confident with China whereby 36,05% stand in the confident spectrum and 29,93% answered "somewhat confident."

The survey also found a different pattern of answer in the question of China's respect for AMS' national unity, sovereignty, and territorial integrity. Officials and the Business community are found to be the most confident with China, with half of the respondents in the Officials and Business community categories stand-in "confident" and "somewhat confident" spectrum. On the other hand, more than half of Academia and Civil Society stand-in the "somewhat not confident" and "not confident" spectrum.

Does China apply the principle of non-intervention in their relationship with ASEAN countries? Half of all elites groups sit in confident and somewhat confident spectrums. Does China treat ASEAN as an equal partner? Among the respondents in the Officials category, 33,33% are confident and 27,21% are somewhat confident. On the contrary, Civil Society recorded the highest number of "not confident" answers with 36,84% (although 27,37% of them still answered "somewhat confident").

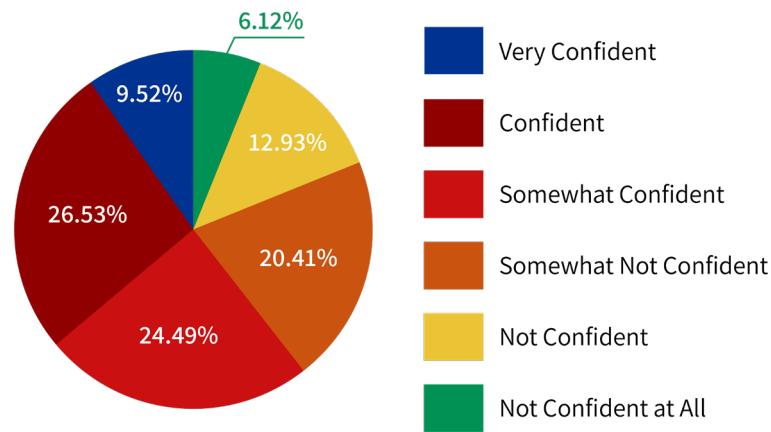


Chart 33. Officials' View whether China Applies the Principle of Non-Intervention regarding the Political Development of ASEAN Countries

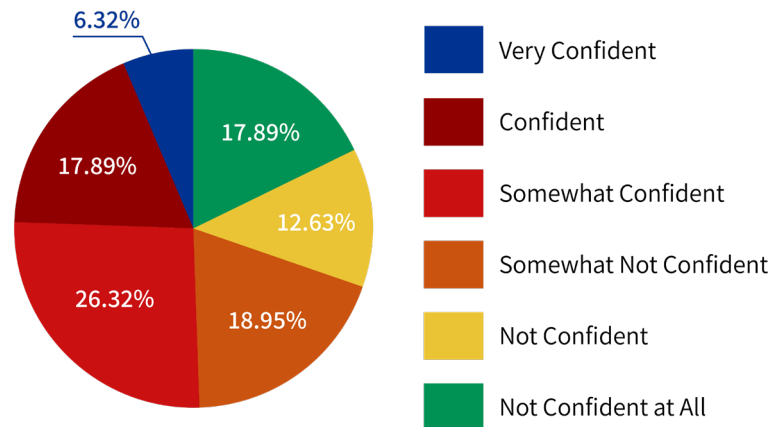


Chart 34. Civil Society's View whether China Applies the Principle of Non-Intervention regarding the Political Development of ASEAN Countries

On socio-cultural aspects, there are also interesting insights. On the question “Is China your preference for higher education?” 50,95% of the academia firmly said no. Officials, Business Community, and Civil Society, on the other hand, are divided between “Considering it” and “No”. On the question “How do you see the Chinese higher education system contributing towards your countries?” Academia, Business Community, and Civil Society see that the Chinese graduates contribute to a better understanding of their country towards China. Officials sees that the Chinese graduates contribute towards market connectivity between ASEAN countries and China. However, there are groups within Civil Society that do not see any significant contribution from the graduates. While there are differences in the question on education, respondents in different elite categories solidly confirmed that Chinese language proficiency is important for ASEAN people. On the question of China as a top tourism destination, the majority of the elites answered “maybe.” Officials are more positive, recording the highest answer of “yes” with 43,54%. The business community has a split answer between “yes” and “maybe” with 38,89%.

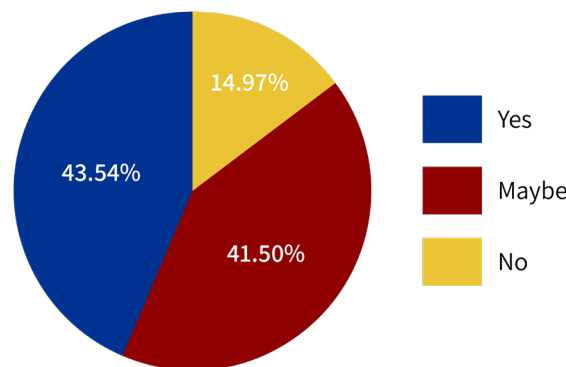


Chart 35. Officials' View on China as a Top Tourism Destination

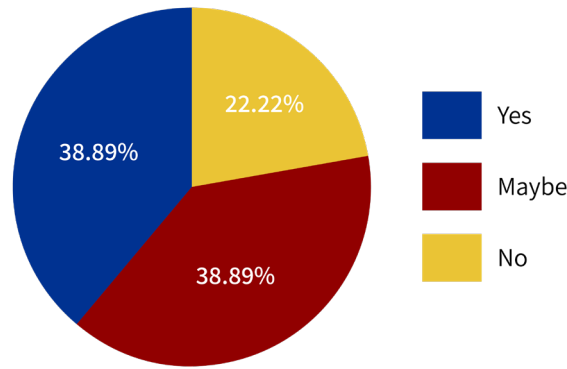


Chart 36. Business Community's View on China as a Top Tourism Destination

E. Specific Issues

E.1. All respondents

There are four specific issues asked by the respondents: the continuous competition and rivalry between the US-China, the development of the QUAD, the development in the South China Sea which includes the delayed negotiation of the Code of Conduct, and the political and humanitarian crisis in Myanmar.

In the process of the Code of Conduct, 24,34% of respondents were satisfied, 24,93% were somewhat satisfied, 17,96% were somewhat not satisfied, and 32,78% were not satisfied. A split is also seen on the question of whether China has goodwill in the process of Code of Conduct negotiation. The result shows that 48,77% of the respondents stood in the positive spectrum while 51,22% stood in the negative spectrum.

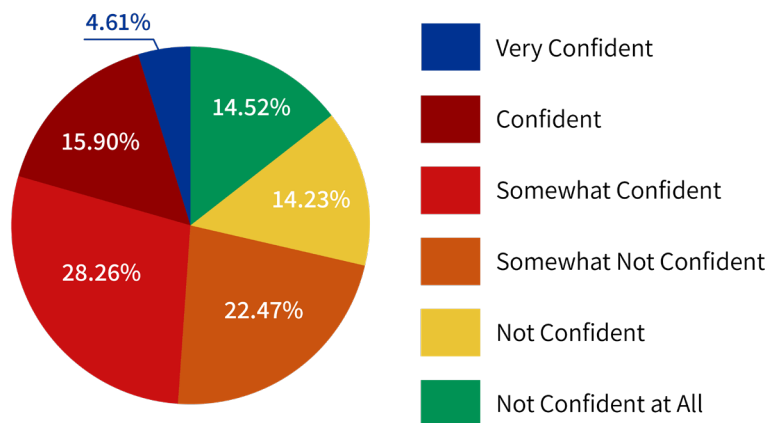


Chart 37. Views on China's Good Intentions in the Negotiation of the Code of Conduct

On the Myanmar crisis, the survey asked respondents "Does China act as a responsible partner in defusing the Myanmar crisis?" 18,84% are confident that China acts as a responsible partner, 24,83% are somewhat confident, 24,53% are somewhat not confident, and 31,79% are not confident of it. Despite the skepticism, respondents generally see that China should play a bigger role. 38,57% of respondents believe this although 37,49% of them have no clear suggestion on how China should play that role. However, 43,96% of respondents say that China should follow and support ASEAN's response mechanism and process.

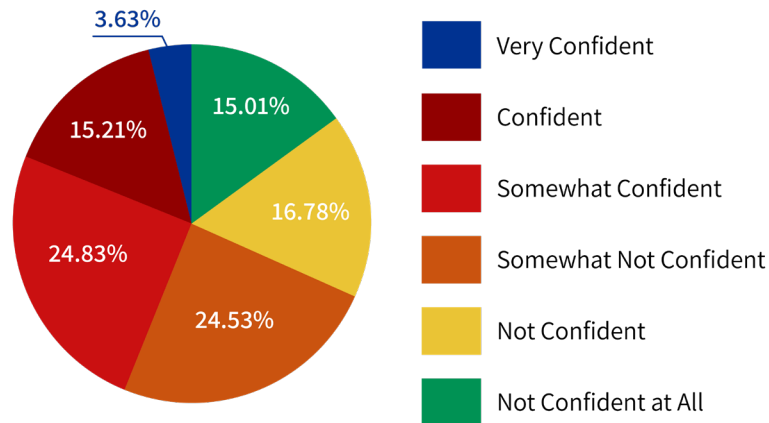


Chart 38. Views on China as a Responsible Partner for ASEAN in Defusing Myanmar's Crisis

E.2. Comparing Elites and Students

Regarding the US-China relationship, 50,77% of Students said the relationship is characterized both as rivalry and competition. 42,31% viewed that it has turned into strategic rivalry in all sectors and 35,13% saw it as strategic competition in all sectors. A noteworthy number of 31.54% said the rivalry/competition will benefit Southeast Asia in terms of trade, investment, technology, etc.

Sharing a similar pattern with Students, 57,07% of Elites agreed that the US-China relations are marked as both rivalry and competition. 35,29% observed it as strategic rivalry in all sectors and a closed number of 35,93% perceived it as strategic competition in all sectors.

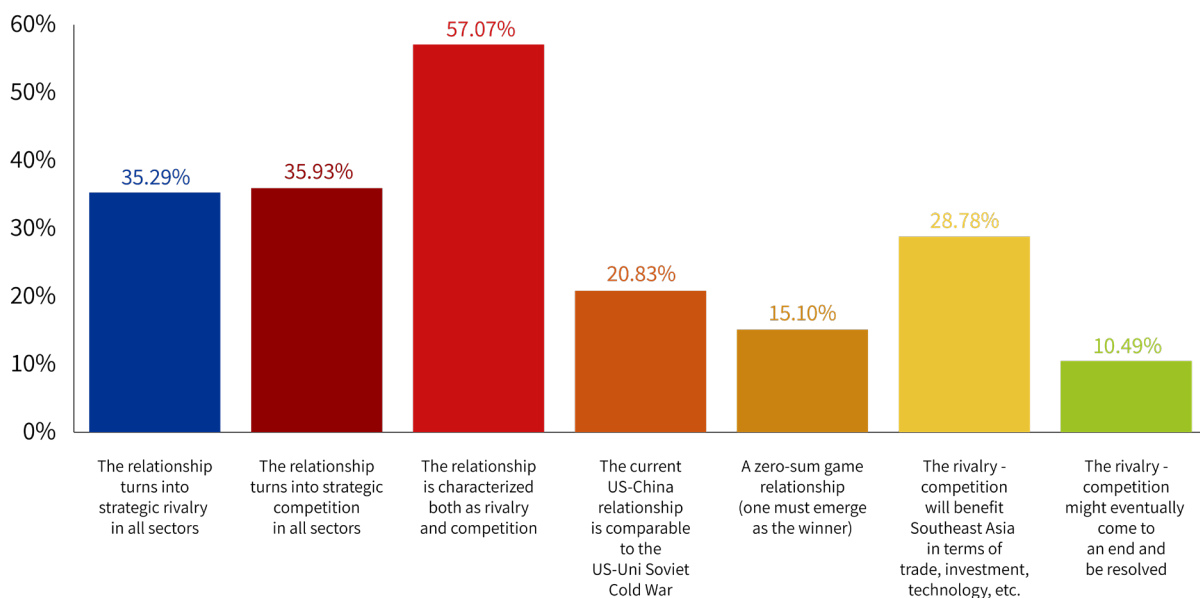


Chart 39. Elites' View on the Current US-China Relationship

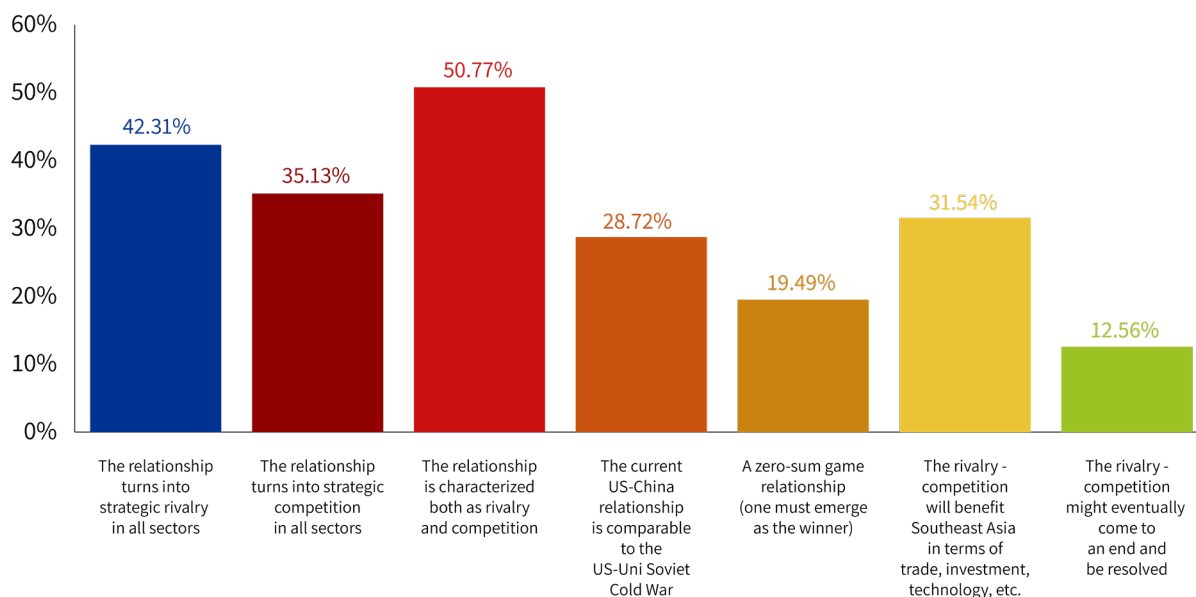


Chart 40. Students' View on the Current US-China Relationship

It is also worth noting that quite substantial numbers in both Elites (20,83%) and Students (28,72%) respondents view that the US-China relation is comparable to the US-Uni Soviet Cold War.

Regarding the effect of the US-China relationship on ASEAN regionalism, the top answer among Elites (31,16%) is that it will be a hindrance for ASEAN regional integration and development. By contrast, most Students (36,41%) consider that it will bring benefits to ASEAN member states in terms of economy and investment.

Both Elites (40,22%) and Students (41,03%) considered a balanced approach of partnership and cooperation respectively as the most important strategic step that ASEAN should take in regard to the US-China strategic competition and rivalry. The second majority of Students (30,26%) think that ASEAN should try to ease the tension through progressive dialogue between both sides through an ASEAN-led regional mechanism. Meanwhile, the second majority of Elites (31,16%) believed that ASEAN should further strengthen the ASEAN centrality.

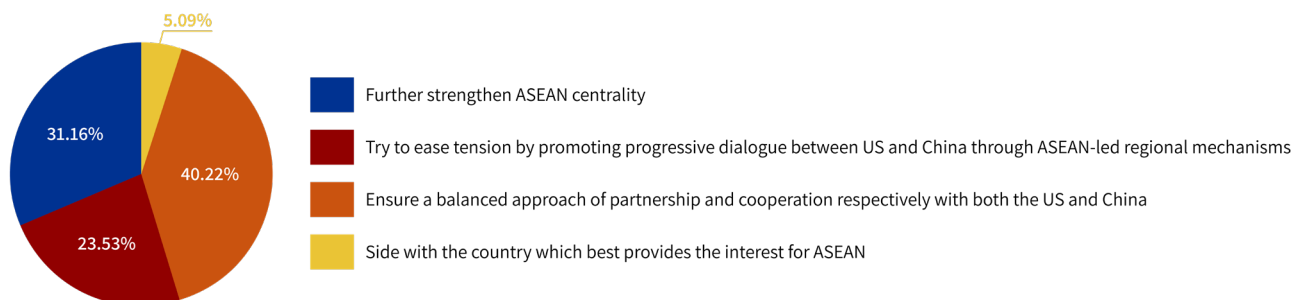


Chart 41. Elites' View on Important Strategic Step for ASEAN in Facing US-China Competition

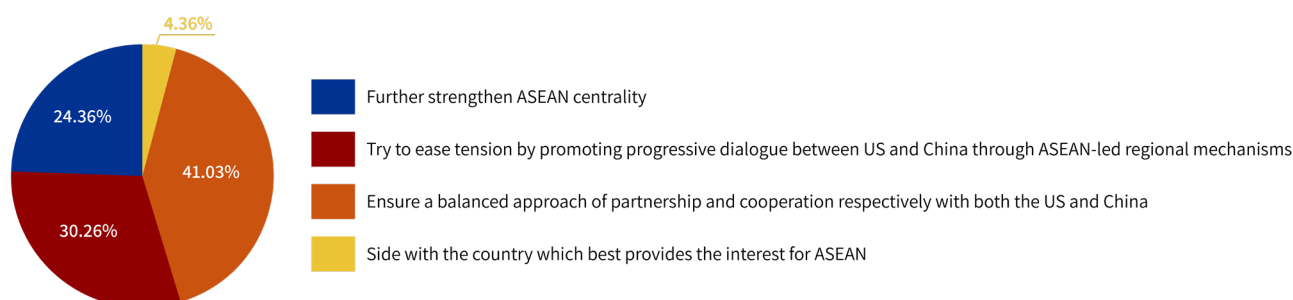


Chart 42. Students' View on Important Strategic Step for ASEAN in Facing US-China Competition

Geopolitical tension between the Quad and China

Elite respondents are split between those who regard that there is absolutely a geopolitical tension between the Quad and China (40,54%) and those who think that there is somewhat a geopolitical tension (40,06%). Concurrently, the majority of Students (42,31%) feel there is somewhat a geopolitical tension.

Questioning how it will affect ASEAN, the majority of both Elites (35,45%) and Students (31.03%) answered that it could undermine ASEAN centrality and its mechanisms.

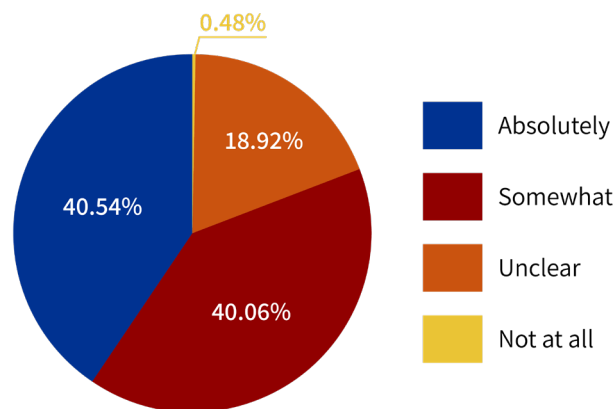


Chart 43. Elites' View on Geopolitical Tension(s) between the Quad and China

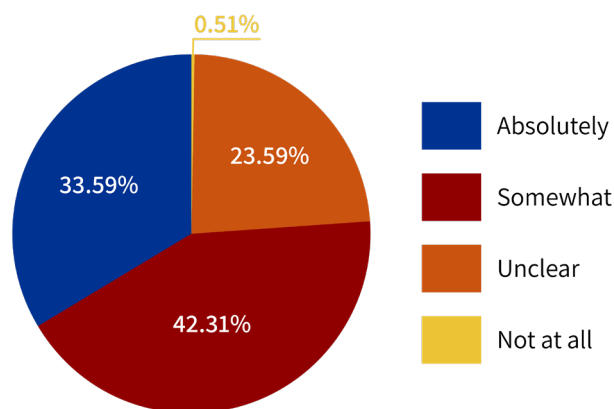


Chart 44. Students' View on Geopolitical Tension(s) between the Quad and China

COC / South China Sea

Furthermore, on the consultations between the ASEAN Member States and China on the Code of Conduct in the South China Sea, the majority of Elite said they are somewhat satisfied (23,53%) but 36,56% of Elites are in the negative spectrum.

In contrast, there is a split view among Students regarding their satisfaction on the issue. 28,46% are in the positive range, 27,18% are somewhat satisfied, 17,69% are somewhat not satisfied, 26,67% are in the negative range.

On the statement that China has good intentions in the negotiation of the Code of Conduct, the top answer among students (30,26%) is that China has good intentions. Most Elites also believe so, but there is a bigger number of Elite respondents (31,79%) that are not confident or not confident at all about it.

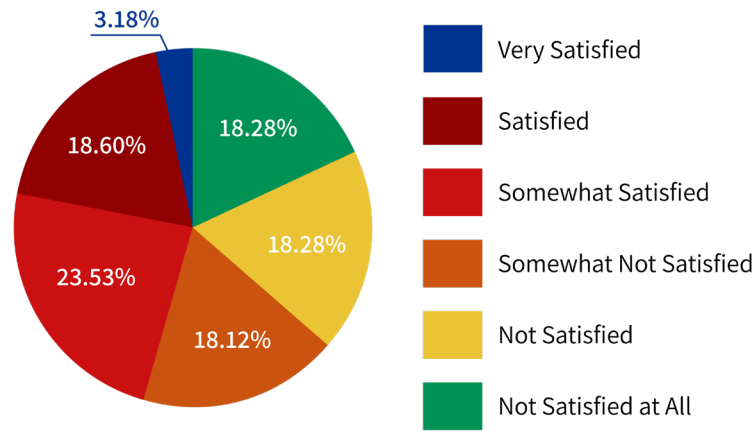


Chart 45. Elites' Satisfaction on Consultation between ASEAN and China on the Code of Conduct

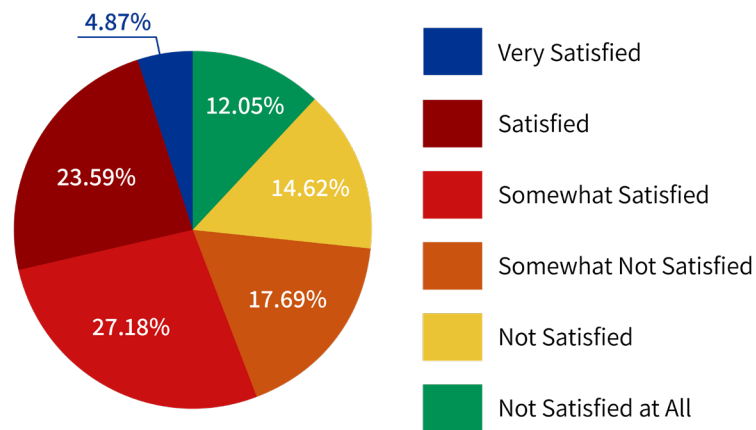


Chart 46. Students' Satisfaction on Consultation between ASEAN and China on the Code of Conduct

Myanmar Crisis

There is a split view among both Elites and Students when asked whether China acts as a responsible partner in defusing Myanmar's political crisis. 21,80% of Students are within the confident range, 25,13% are somewhat confident, 24,87% are somewhat not confident, and 28,20% are within the not confident range. On the other hand, 17,01% of Elites are very confident or confident, 24,64% are somewhat confident, 24,32% are somewhat not confident, and 34,03% are within the negative spectrum which accounts for a bigger number than that of Students.

Interestingly, on the question of 'should China play a bigger role in solving the political crisis in Myanmar', the majority of Students (40,77%) felt unclear about it. As for Elite respondents, the majority of Elites agree for China to play a bigger role with a notable number of Elite respondents who are also not clear about it (35,45%).

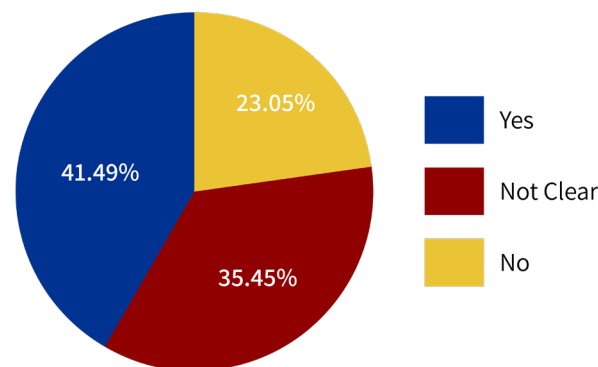


Chart 47. Elites' View on China to Play a Bigger Role in Myanmar's Crisis

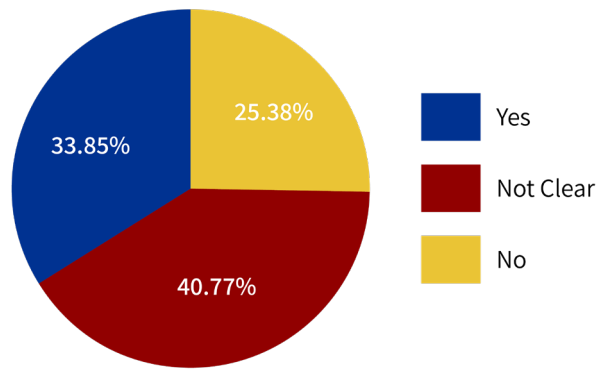


Chart 48. Students' View on China to Play a Bigger Role in Myanmar's Crisis

Nevertheless, it is necessary to know how China should support solving the dire situation in Myanmar. Both the majority of Elites (47,69%) and Students (37,95%) perceive that China should follow and support the ASEAN response mechanism and processes. The second majority of Students (33,33%) consider that China should condemn the Myanmar military (Tatmadaw) and imposed sanctions.

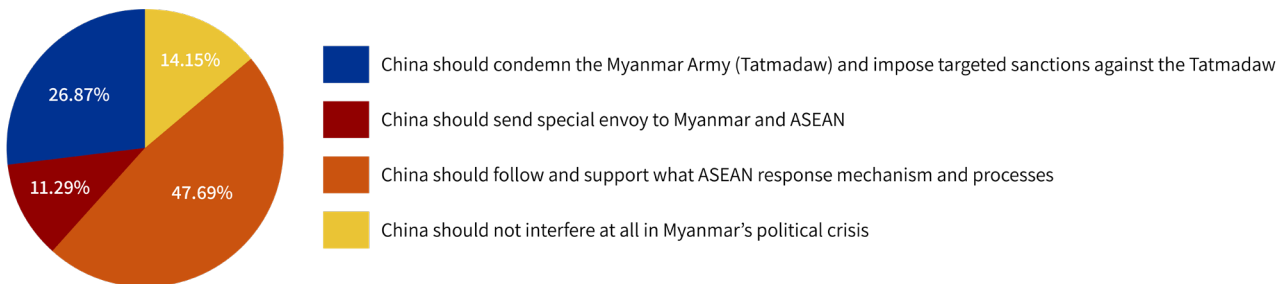


Chart 49. Elites' View on China's Act to Support Solving Myanmar's Crisis

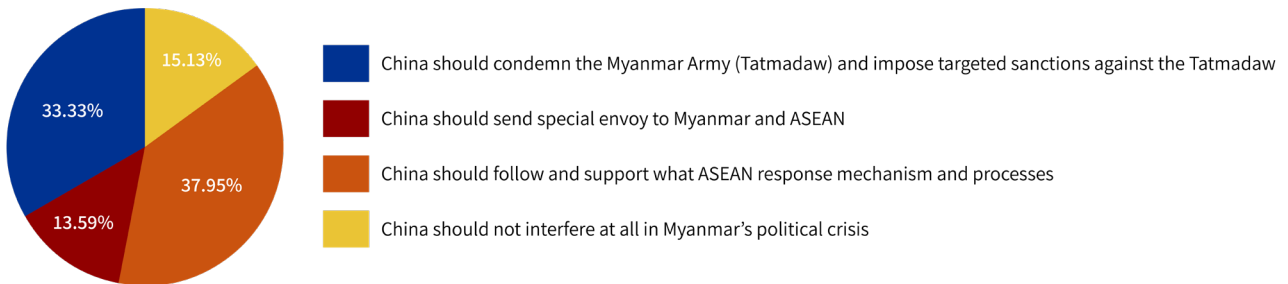


Chart 50. Students' View on China's Act to Support Solving Myanmar's Crisis

E.3 Comparing Different Groups in the Elites Category

On the negotiation of the Code of Conduct, Academia is the most not satisfied with the negotiation. 44,45% of academia sit in the not satisfied spectrum and 19,92% sit in the somewhat not satisfied spectrum. On the other hand, Officials are more positive with 36,73% answered that they are satisfied and 22,45% answered somewhat satisfied. The Civil Society has the highest percentage of not confident with China's good intentions at 41,05%. It is also important to note, however, that the group has also the highest percentage for the somewhat confident with 31,58%. Academia becomes the least confident, with half of the respondents are found in the somewhat not confident and not confident spectrum.

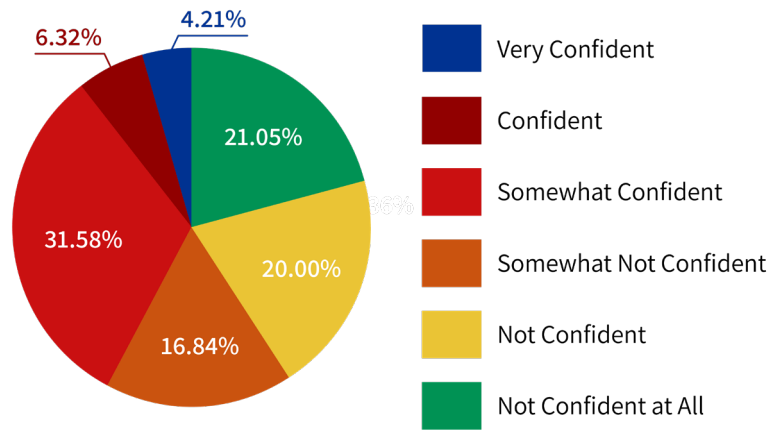


Chart 51. Civil Society's Views on China's Good Intentions in the Negotiation of the Code of Conduct

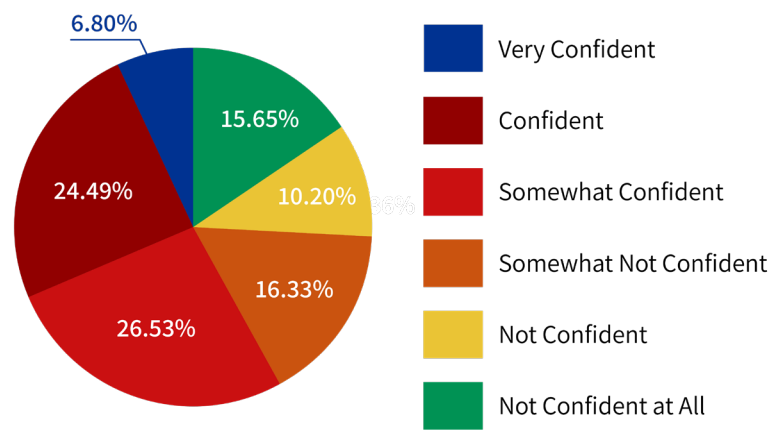


Chart 52. Officials' Views on China's Good Intentions in the Negotiation of the Code of Conduct

Myanmar Crisis

On the Myanmar crisis, respondents in Academia, Business Community, and Civil Society generally feel that ASEAN is not attentive and responsive enough. However, government officials have a more positive assessment. 31,29% of the respondents in this category (the highest percentage) see ASEAN's response about Myanmar is on the right track.

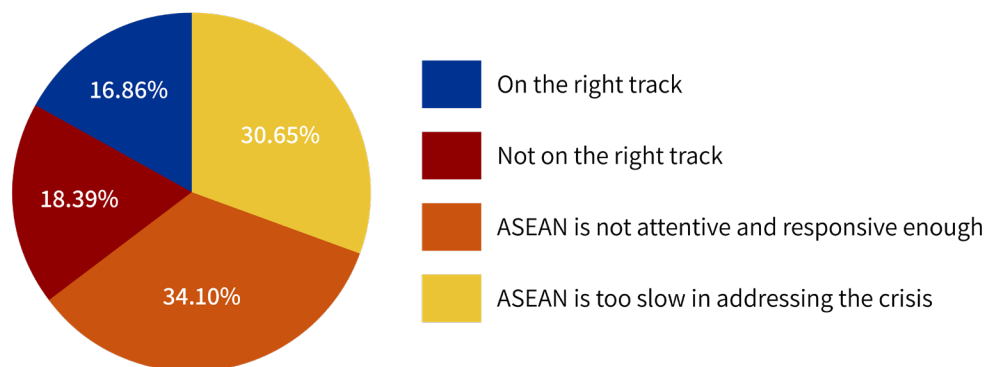


Chart 53. Academia's View on Whether ASEAN's Effort to Address Myanmar's Political Crisis on the Right Track

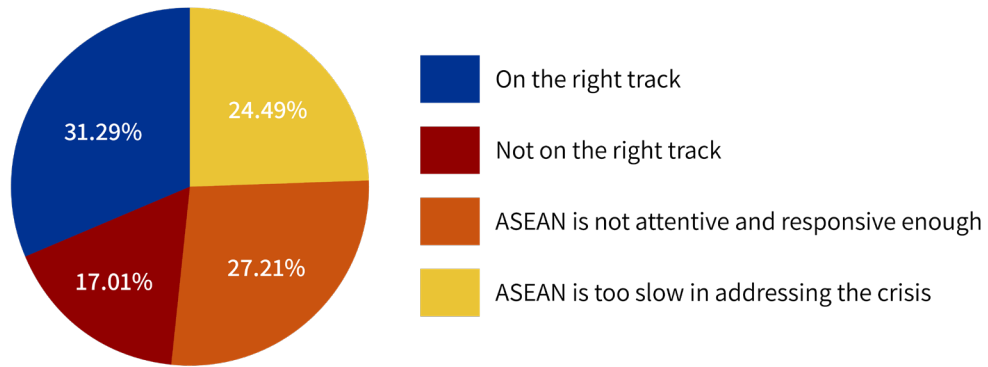


Chart 54. Officials' View on Whether ASEAN's Effort to Address Myanmar's Political Crisis on the Right Track

On the question “Does China act as a responsible dialogue partner for ASEAN in defusing the political crisis?” half of all the elites' respondents sit in somewhat spectrums. Among respondents in the Business Community category, there 50,79% are in somewhat spectrums (26,19% are somewhat not confident and 24,60% are somewhat confident). Civil Society became the least confident with 44,32% in the “not confident” spectrum. On how China should act to help to solve the conflict in Myanmar, the majority of the elites believe China should follow and support the ASEAN response mechanism and processes.

Geopolitical tension between the Quad and China

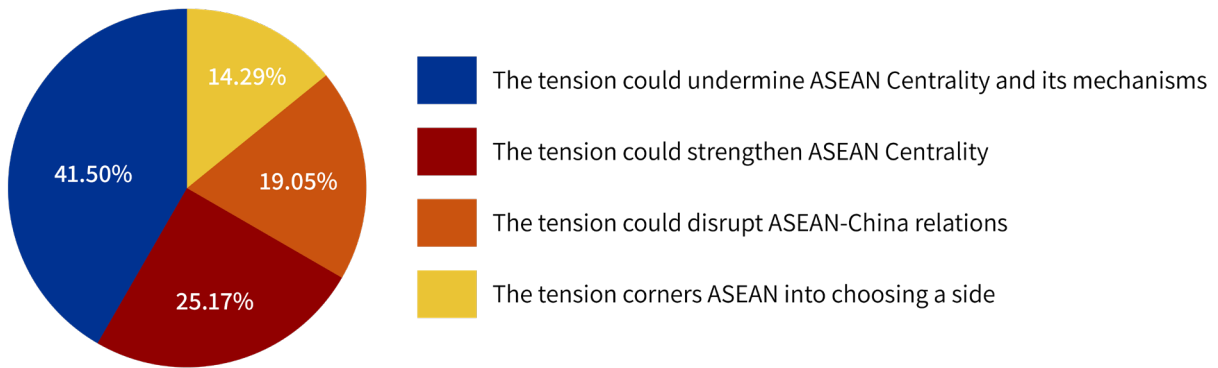
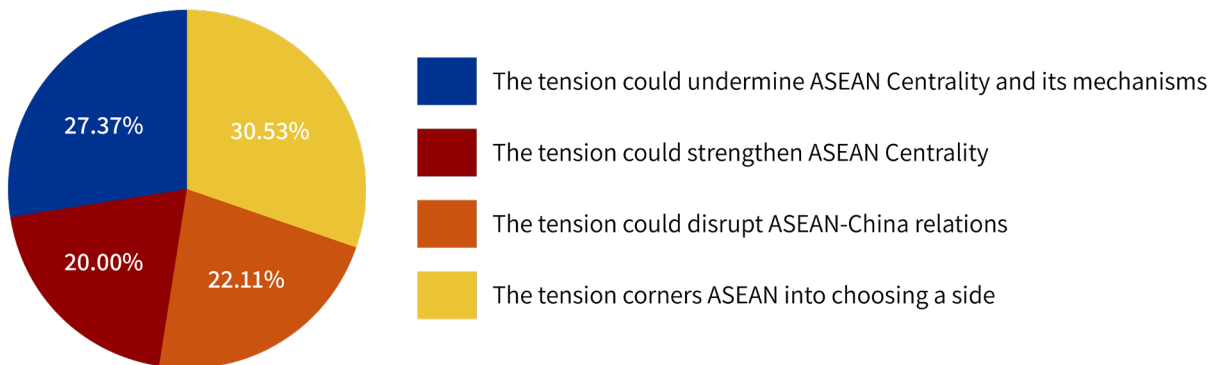


Chart 55. Officials' View on How Geopolitical Tension(s) between the Quad and China will Affect ASEAN

Chart 56. Civil Society's View on How Geopolitical Tension(s) between the Quad and China will Affect ASEAN



F. Perceptions on China

F.1. All Respondents

The survey also studies the perception of Southeast Asian people towards China. The top answer on how the respondents see China is that 46,03% of the respondents see China as an important political and economic influencer, while 37,98% saw China as an economic influencer (and not political influencer) and only 4,51% saw China as an important political influencer (but not economic influencer).

On the question of Chinese communist ideology influence in ASEAN countries, 43,57% of respondents sit in the neutral spectrum, 32,48% said that there is no, and 23,95% saw the influence in their respective country.

Similar questions were asked but on Chinese influence at a regional level. 42,59% of respondents were worried about the influence, 29,15% welcomed, and 28,26 were neutral on the question. A similar answer was found on the question of “how do you see Chinese influence in the region?” 52,97% looked at China as an important economic and political influencer. The second majority respondent of 31,70% saw China as an important economic influencer. Only 4,42% saw China as an important political influencer.

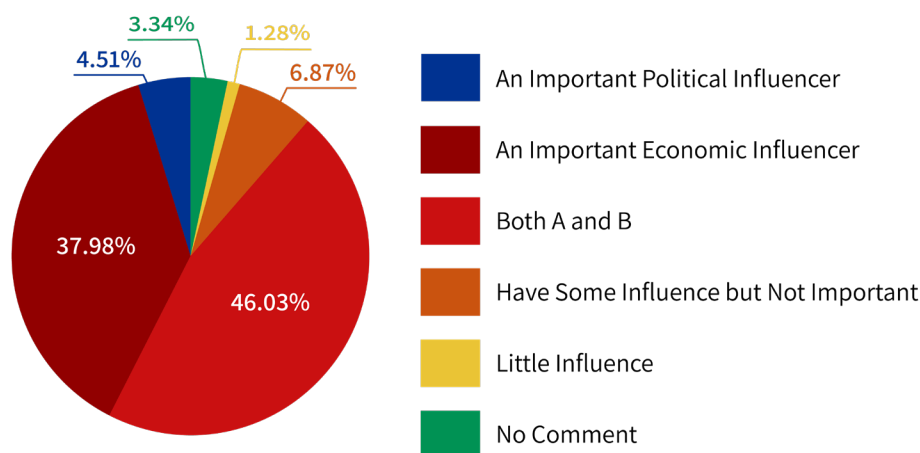


Chart 57. Views on China's Influence in Each Country

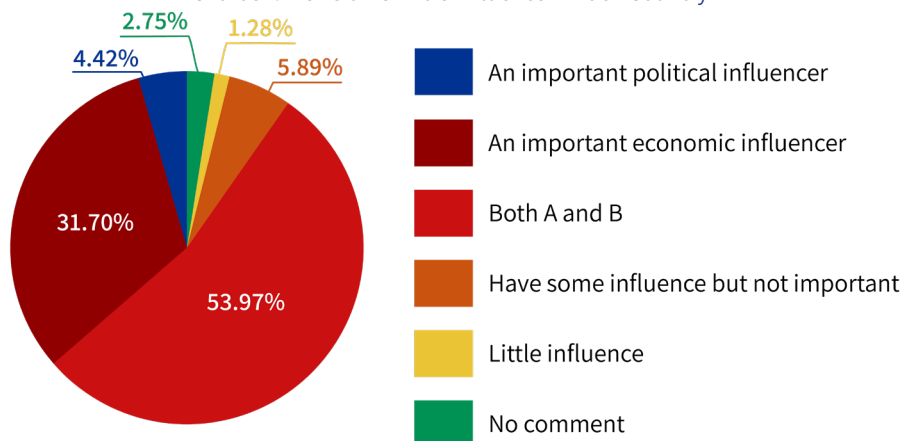


Chart 58. Views on China's Influence in the ASEAN Member States

It is interesting to note that 32,97% of respondents saw their government is very close with China, 35,43% saw it close, 27,18% somewhat close, and only 2,14% sense it somewhat distant, 0,98% think not close, and 1,28% saw not close at all.

The survey also posed a question about Is China a reliable partner for development assistance and aid. The top answer is yes with 46,22%, the second is neutral with 38,86%, while only 14,92% said no.

Finally, the survey also found the perception of what aspects of China appealed most to the Southeast Asians. Most of the respondents with 32,97% are attracted to China's economic growth amid the pandemic and the second majority of 31,40% are mesmerized by China's progress in science and technology.



Chart 59. Most Appealing Aspects of China

F.2. Comparing Elites and Students

When asked about how do you see China's influence in their country, nearly half of the Elite respondents (47,69%) perceived China as both an important economic and political influencer. Similarly, most Students (43,33%) also regard China in the same manner.

However, it is worth noting that a significant amount of both Students (42,56%) and Elites (49,60%) were worried about China's influence in their respective countries.

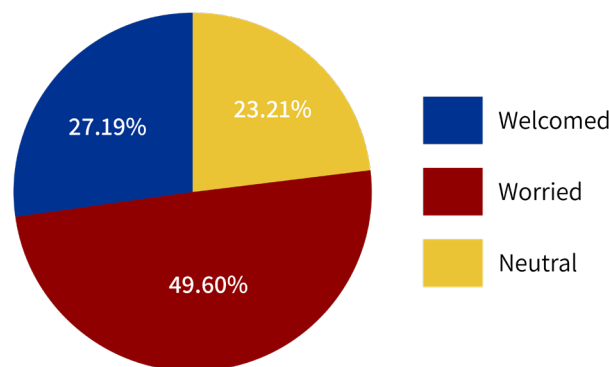


Chart 60. Elites' View on China's Influence in Each Country

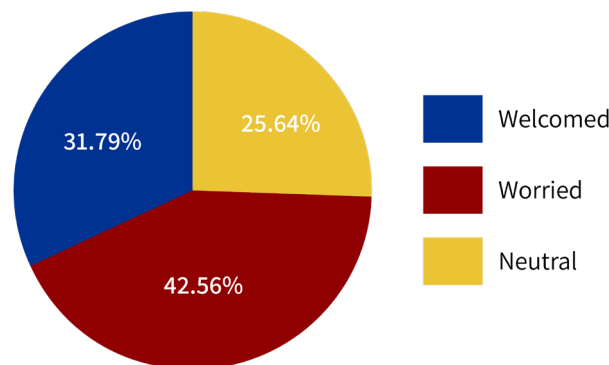


Chart 61. Students' View on China's Influence in Each Country

47,95% of Students and 46,10% of Elites respondents were certain that China has an influence on its diaspora in their respective country. 40,51% of Students and 40,38% of Elites stood to be neutral. In addition, both Elites (35,77%) and Students (39,23%) viewed that China and its diaspora in their country are maintaining close economic relations.

Most Elites (37,36%) and Students (32,31%) both acknowledged that their government is close with China. The majority of both Elites (44,83%) and Students (48,46%) agreed that China is a reliable partner for development assistance and aid. Following closely, 39,23% of Students and 38,63% of Elites chose to remain 'neutral' on it.

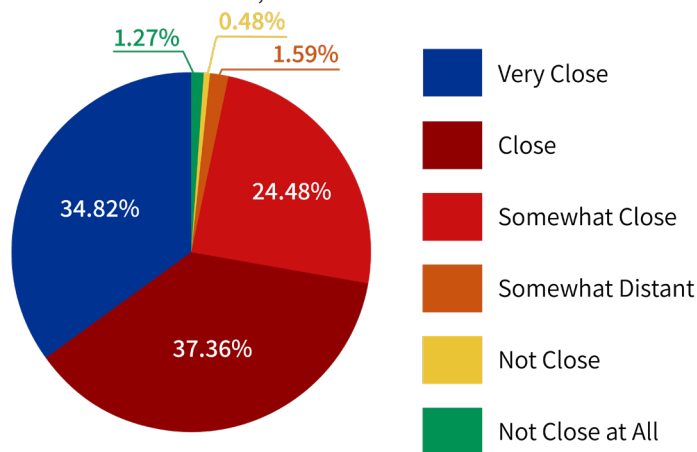


Chart 62. Elites' View on China's Closeness with ASEAN Countries' Government

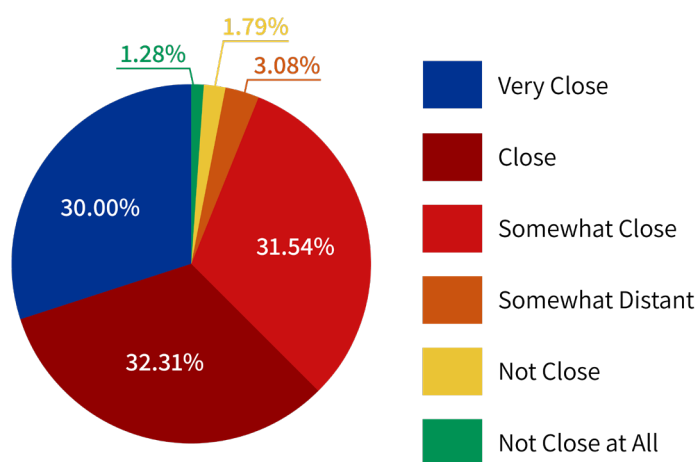


Chart 63. Students' View on China's Closeness with ASEAN Countries' Government

Regarding China's influence in the region, more than half of the Elite respondents (58,35%) perceived China as both an important economic and political influencer, and the majority of Students (46,92%) also considered China in that manner.

Students are divided in their views regarding China's influence in the region where 35,90% are worried and 35,64% are welcomed about it. As for Elites, the majority of them are worried (46,74%).

Lastly, most Elites (33,70%) answered that China's robust economic growth despite the pandemic is the most appealing aspect while the majority of Students (32,31%) think it is China's progress in science and technology that appeals the most.



Chart 64. Elites' View on China's Most Appealing Aspects



Chart 65. Students' View on China's Most Appealing Aspects

F.3 Comparing Different Groups in the Elites Category

On the question of “What is your view on China’s influence in your country?” officials are the least anxious. The majority of the elites (47,69%) see China’s influence in both politics and the economy. Except for the Business community, 52,38% of the business respondents see that Chinese influence is more evident in the economy. At the regional level, half of Academia and Civil Society is worried about China’s influence. Split views between “Welcomed” and “Worried” are also found in Officials and Business Community. Despite differences of point of view, all groups of elites confirmed that China’s influence is both politically and economically.

It is also interesting to note that 48,98% of Officials have a perception that China still has a big influence over its diaspora in ASEAN countries, while 45,59% of Academia and 47,37% of Civil Society subscribed to the same perception. The majority of the Business Community (46,03%) sit in the neutral spectrum. Then, what do the elites think of China’s relationship with its diaspora in ASEAN countries? All groups within elites agree that China maintained close relations with their diaspora mainly on economic aspects with an average of 35,77%.



Chart 66. Elites' View on China's Relationship with Its Diaspora in ASEAN Countries

For Academia, Officials, and Civil Society, China’s robust economic growth despite the pandemic is the most appealing aspect of China. Business Community and Academia are also appealed with China’s progress in science and technology. On the question of “How close is your government to China?” more than 70% of all elites groups confirm that their government is close with China. 45,58% of respondents in the Government Officials category even answered that their government relationship with China is very close.

G. COVID-19: How does the pandemic shape the ASEAN-China relationship?

G.1. All respondents

This year’s survey edition also aims to study how the pandemic shapes the ASEAN-China relationship. 48,77% of respondents suggested that the agenda of economic rebound and regional supply chain should be the top priority cooperation in the time of the pandemic.

67,12% of respondents confirmed the relationship helps to alleviate the pandemic and 73,50% agreed that ASEAN economic ties with China are more than important in the time of the pandemic. Interestingly, 51,52% of respondents believed it is important to see China increasingly becoming one of the solution providers to challenges faced by ASEAN.

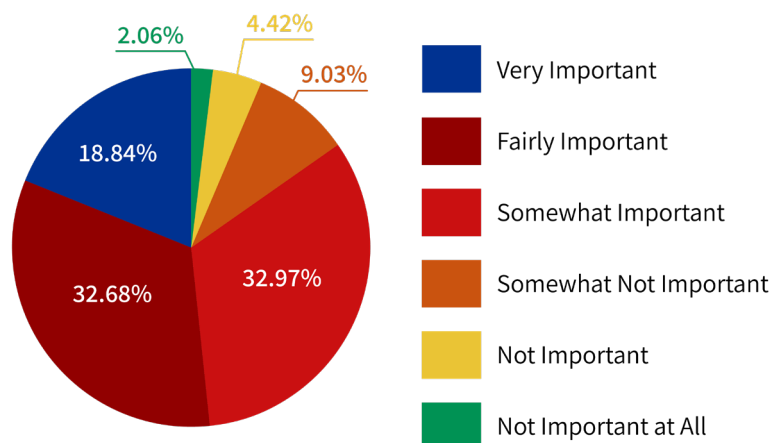


Chart 67. View on China as a Solution Provider to ASEAN's Challenges

The two figures above have given us a picture of how the relationship is being shaped by the pandemic. From the question of "what newest aspect of the relationship has the biggest potential?", the top answer is the cooperation for post-pandemic recovery with 28,95% of respondents and the second majority of respondents specifically saw the potential in COVID-19 vaccine cooperation with 27,18%. The figures suggest that the pandemic and the recovery cooperation were the suggested fields of future cooperation.

Further detail on the issues and cooperation in the time of the pandemic, the survey found that 87,93% of respondents saw the importance of COVID-19 vaccines cooperation for the ASEAN people. 72,52% of respondents also saw the importance of the partnership in supporting the work of revitalizing ASEAN's manufacturing sector.

In the political-security dimension, 71,84% of respondents confirmed the importance of the conclusion negotiation of the Code of Conduct in the South China Sea. 68,50% of respondents also suggest the importance of ASEAN-China cooperation to strengthen multilateralism.

The survey also observes the response to the questions about the Belt and Road Initiative (BRI). 55,55% of respondents say that it is important to continue, enhance, and complete the BRI projects in Southeast Asia, 30,03% saw this as somewhat important, 8,24% felt it somewhat important, and only 6,18% believed it is not important. On what aspects of the BRI need to be reviewed, the most popular answer (35,03%) is that both sides should review the long-term economic benefit for the host country as well as businesses and civil society. 24,63% of respondents think that project financing/sharing mechanism and debt sustainability should be reviewed. 17,37% of the respondents suggest a review of the project's impacts on social, environmental, and labor conditions. 15,31% of respondents suggest reviewing the overall progress, completion, and numbers of the existing projects, and lastly 7,65% suggest reviewing the employment of Chinese and local labor in a project.

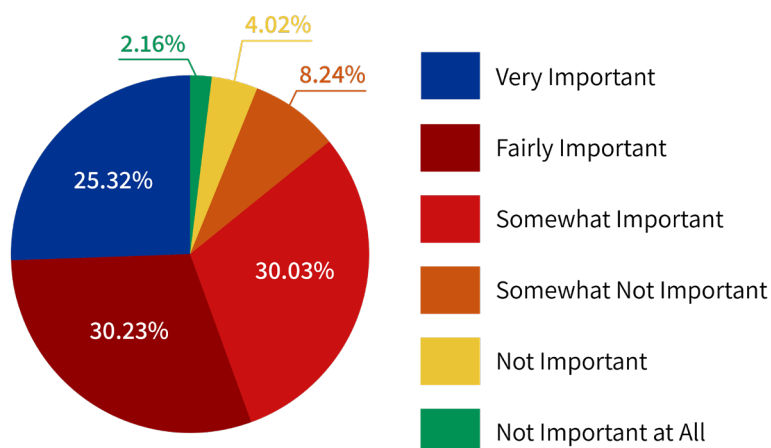


Chart 68. View on the Continuation, Enhancement, and Completion of Belt and Road Initiative (BRI) Projects

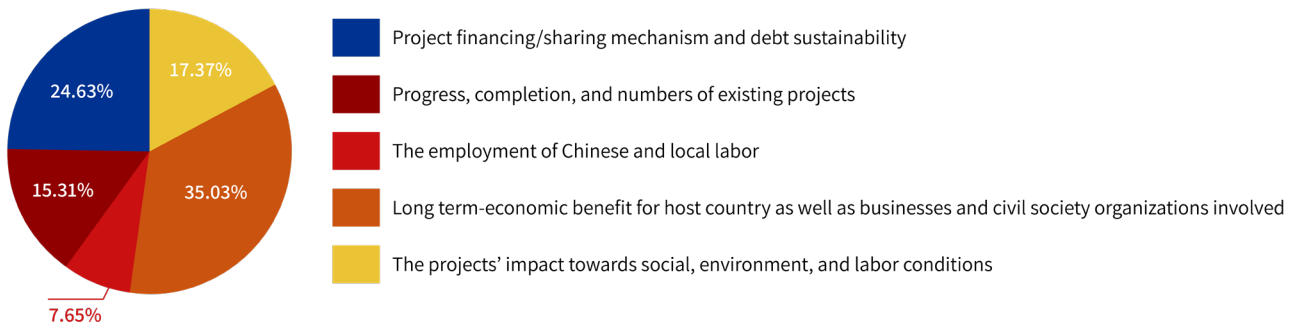


Chart 69. BRI Aspects to Review Post COVID-19 to Promote ASEAN Economic Recovery

G.2. Comparing Elites and Students

More than half of Students respondents (54,10%) and nearly half of Elites respondents (49,92%) pointed out that it is very important or fairly important for China to increasingly become one of the solution providers to the challenges faced by ASEAN.

When asked about the new areas of cooperation with the biggest potential, both Elites and Students mainly answered post-pandemic recovery and vaccine cooperation.

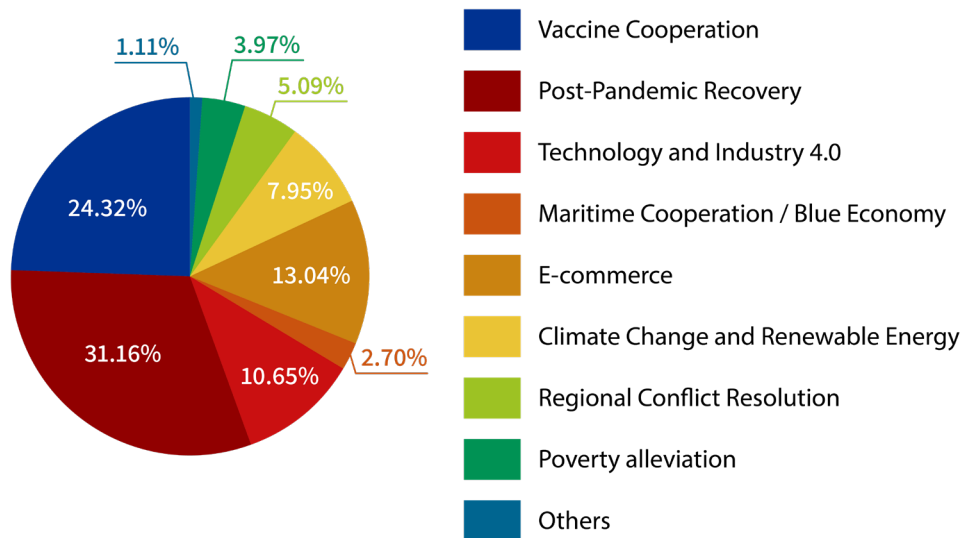


Chart 70. Elites' View on Newest Aspects of ASEAN-China Relationship with the Biggest Potential

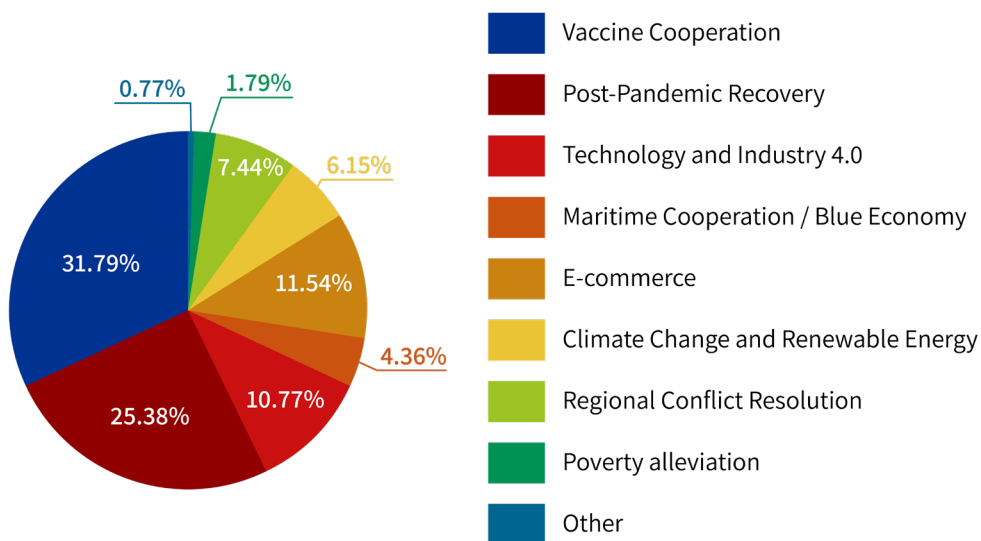


Chart 71. Students' View on Newest Aspects of ASEAN-China Relationship with the Biggest Potential

This is consistently shown when the respondents are asked to rate the importance of COVID-19 vaccines for ASEAN people. A whopping number of 85,55% of Elites and almost all Students (91,29%) deem it as important.

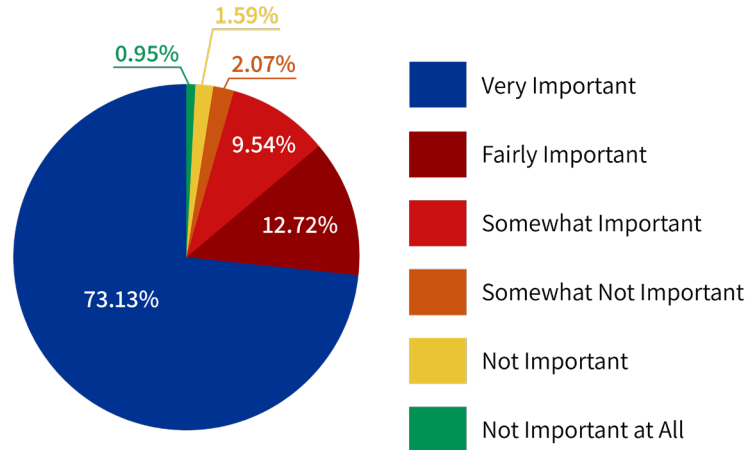


Chart 72. Elites' View on the Importance of COVID-19 Vaccines for ASEAN People

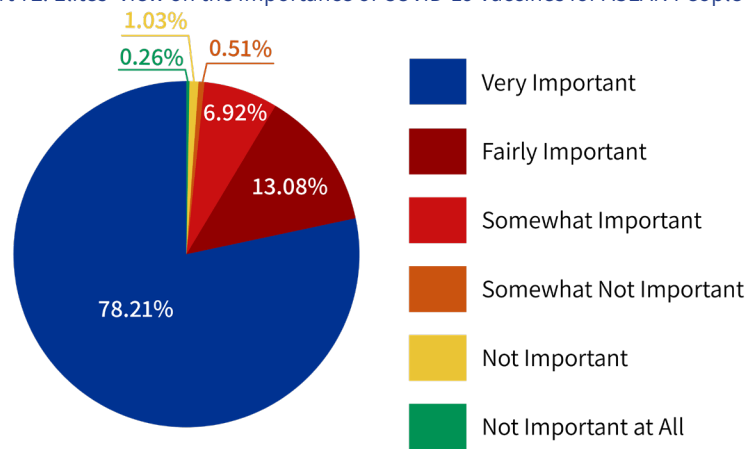


Chart 73. Students' View on the Importance of COVID-19 Vaccines for ASEAN People

Moreover, the majority of both Elites (38,95%) and Students (38,72%) see China's support to revitalize the manufacturing sector in ASEAN as very important.

53,26% of Elites recognize the importance to continue, enhance, and complete the BRI projects in Southeast Asia. 31% of Elites see it as somewhat important. On the other hand, 59,23% of Students answered it as very important or fairly important and 28,46% of Students view it as somewhat important.

Due to the pandemic, the negotiation of the Code of Conduct on the South China Sea has been delayed. The survey asked the respondents regarding the importance of concluding the negotiation, 73,13% of Elites and 69,74% of Students regard it as very important or fairly important.

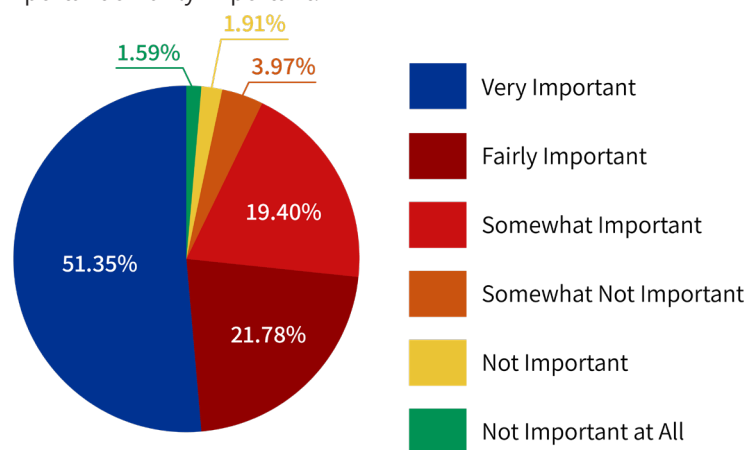


Chart 74. Elites' View on Conclusion of the Code of Conduct on the South China Sea

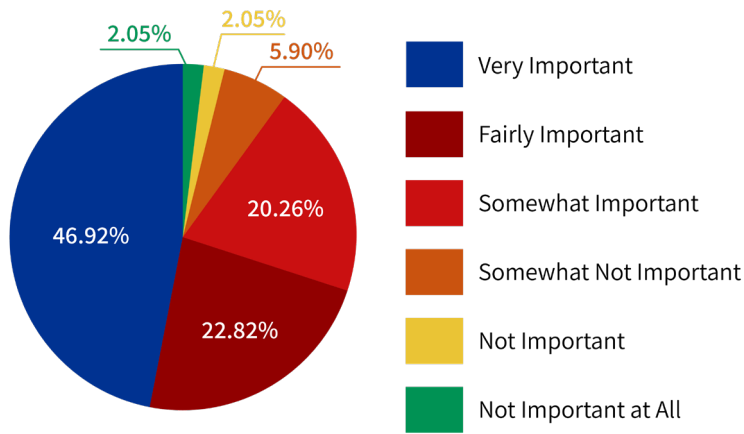


Chart 75. Students' View on Conclusion of the Code of Conduct on the South China Sea

G.3 Comparing Different Groups in the Elites Category

What would be the top priority for ASEAN in its relations with China after the COVID-19 pandemic? Respondents across different Elites groups solidly answered that the first top priority should be the economic and regional supply chain, followed by COVID-19 vaccine production and distribution, and unsettled territorial disputes. An overwhelming 85,85% of the elites also confirmed that vaccine cooperation is important.

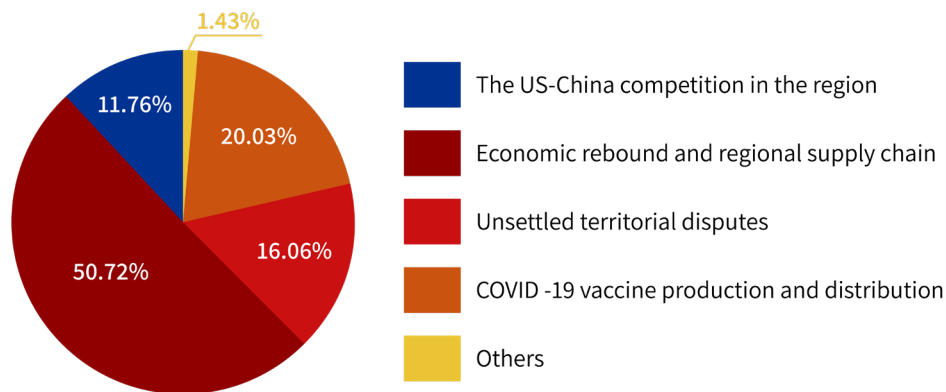


Chart 76. Elites' Top Priority for ASEAN to Heed in Its Relations with China, post COVID-19

Another important issue is the revitalization of ASEAN manufacturing. 69,95% of the elites agree that this must be on the agenda of cooperation between ASEAN and China, with 77,55% of government officials and 74,60% of the Business community supporting such a statement.

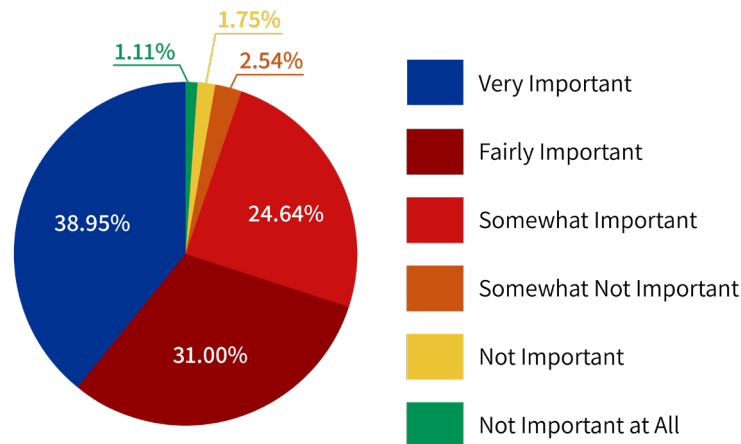


Chart 77. Elites' View on Whether China's Support to Revitalize the Manufacturing Sector in ASEAN

The Belt and Route Initiative (BRI) is viewed as important cooperation to be further developed. However, most of the respondents also stressed the importance of reviewing several aspects: (1) the long-term economic benefit for the host country, (2) project financing/sharing mechanism, and (3) debt sustainability.

H. Comparison with 2020 Survey

H.1. All Respondents

Using last year's survey results as a baseline, this year's edition attempts to see if the perceptions have been evolving in this short but dynamic period. It compares some selected and important indicators which can capture changes and continuities in the ASEAN people's views on the ASEAN-China relationship.

There is a significant increase in the view that the ASEAN-China relationship is mutually beneficial. In 2020, 46% of respondents agreed to the statement that the ASEAN-China relationship benefits both. In 2021, the number increased to 64.48%. On the other hand, there is a decrease in the spectrum of neutrality. In 2020, 26% of respondents were neutral to the statement and in 2021, the number decreased to 23.95%. Another significant decrease can be found in the spectrum of "disagreed". In 2020, 27% of respondents disagreed with the statement, and in 2021, the number significantly decreased to 14.23%.

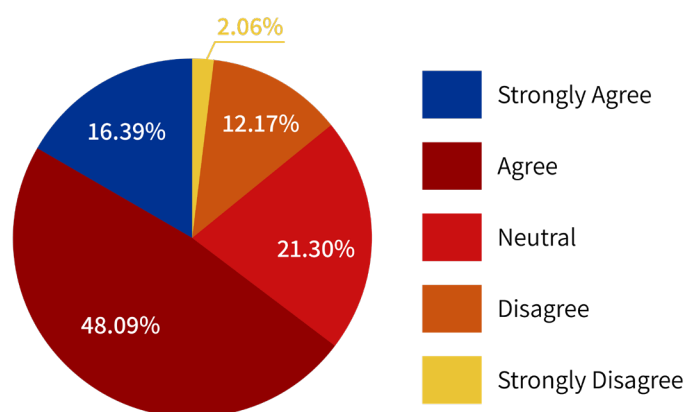


Chart 78. Views on Whether ASEAN-China Relationship is Mutually Beneficial in 2021

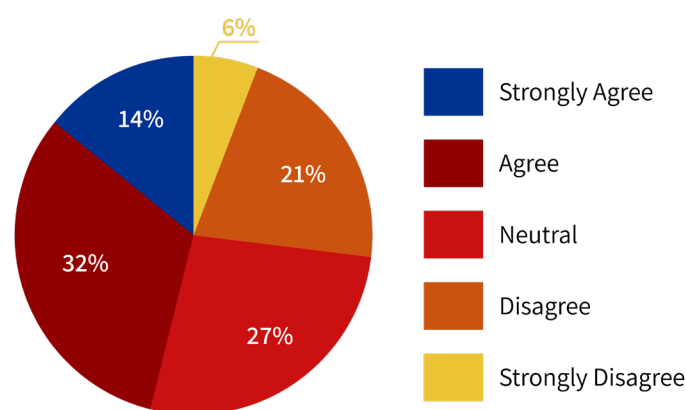


Chart 79. Views on Whether ASEAN-China Relationship is Mutually Beneficial in 2020

More respondents view that the ASEAN-China relationship contributes to regional peace, stability, and prosperity. In 2020, 47% of respondents agreed to the statement. In 2021, the number increased to 59.17%. On the neutral spectrum, the number from 26% in 2020 to 23.95% in 2021. The disagree spectrum also experienced a decline. In 2020, 27% of respondents disagreed with the statement. In 2021, the number decreased to 16.88%.

There are diverse views on the statement that the ASEAN-China relationship is on the right track. In 2020, most of the respondents with 36% chose to be neutral to the statement, whereas, in 2021, the majority of respondents (43.47%) agreed to the statement. In 2020, the second majority of respondents were found in the agreed spectrum with 30% and the rest were found in the disagreed spectrum with 34%. Whereas, in 2021, the second majority were in the neutral spectrum with 36.60% and the rest were in the disagree spectrum with 19.92%.

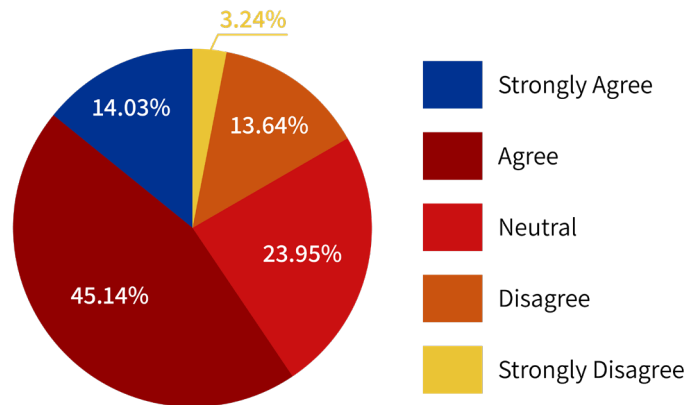


Chart 80. Views on Whether ASEAN-China Strategic Partnership Contributes to Regional Peace, Stability, Development and Prosperity in 2021

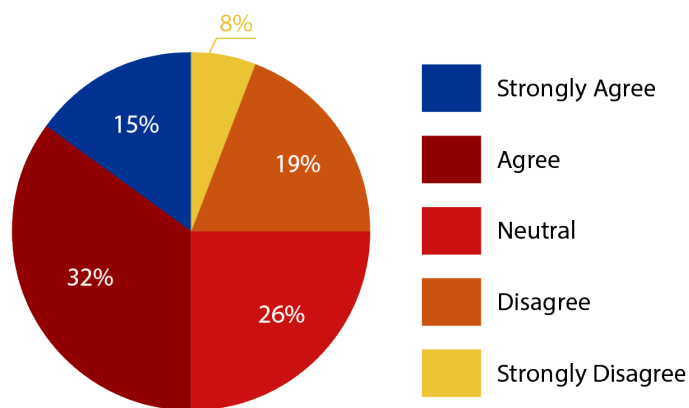


Chart 81. Views on Whether ASEAN-China Strategic Partnership Contributes to Regional Peace, Stability, Development and Prosperity in 2020

More respondents are saying that they are enthusiastic to deepen the ASEAN-China relationship. In 2020, 55% of respondents agreed to the statement. In 2021, the number increased to 62,22%. On the neutral spectrum, an increased number is also found. In 2020, 23% of respondents were neutral to the statement. In 2021, the number increased to 26,59%. A significant decrease is found in the spectrum of “disagree”. In 2020, 22% of respondents disagreed with the statement whereas, in 2021, the number decreased to 11,18%.

There is also a slight improvement in the satisfaction to ASEAN-China strategic partnership. In 2020, the majority of respondents of 39% were satisfied with the statement, 37% were somewhat satisfied, and the rest of 24% were not satisfied. In 2021, a different result was suggested. The majority of respondents of 41,81% were somewhat satisfied with the statement, 34,74% were satisfied, 14,62% were somewhat not satisfied, and the rest of 8,83% were not satisfied. There is also a slight change in the statement that China respects ASEAN centrality. In 2020, the majority of respondents of 45% were not confident in the statement. The second majority of 29% were somewhat confident and the rest of 26% were confident in the statement. In 2021, the majority of respondents of 30,72% were somewhat confident in the statement. The second majority of 26,49% were confident. The rest of 22,96% were somewhat not confident and 19,82% were not confident.

There is also a rise in the perception that China respects the national unity, sovereignty, and territorial integrity of ASEAN countries. In 2020, 53% of respondents were not confident in the statement, 25% were somewhat confident, and 22% were confident. In 2021, 32,09% were not confident in the statement and 20,71% were somewhat confident. 24,63% were confident and 22,57% were somewhat confident.

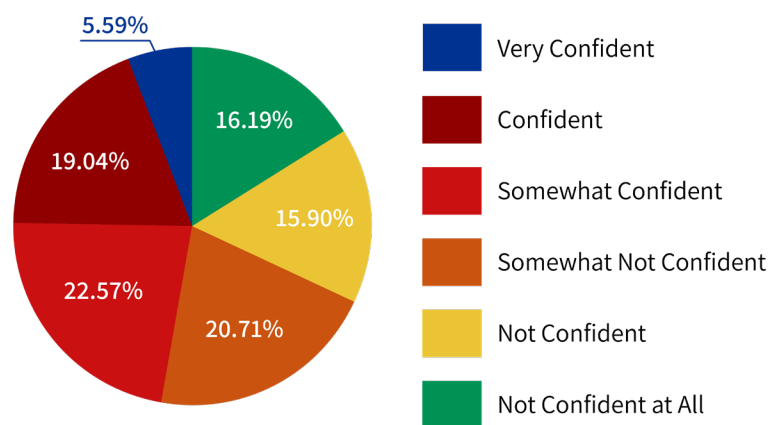


Chart 82. Views on Whether China Respects the National Unity, Sovereignty, and Territorial Integrity of ASEAN Countries in 2021

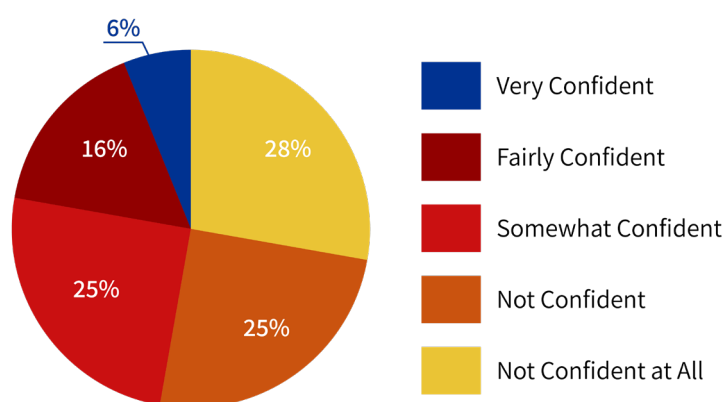


Chart 83. Views on Whether China Respects the National Unity and Territorial Integrity of ASEAN Countries in 2020

On the statement that China adheres to the principle of non-intervention to ASEAN countries' domestic politics, some differences are identified. In 2020, 39% of respondents were not confident in the statement, 32% were somewhat confident, and the rest of 29% were confident. In 2021, 23,35% of respondents were not confident in the statement and 20,80% were somewhat not confident. 29,94% were confident about it and 25,91% were somewhat confident.

A consistent trend is observed in people-to-people cooperation. In 2020, 44% of respondents were satisfied with the cooperation, 33% were somewhat satisfied, and the rest of 14% were not satisfied. In 2021, 44,06% were satisfied with the cooperation and 33,66% were somewhat satisfied. The other 11,97% were somewhat not satisfied and 10,30% were not satisfied.

2020 vs 2021: Top 5 Most Satisfactory Cooperation and Top 5 Least Most Satisfactory Cooperation

2021			2020		
No.	Cooperation	Percentage	No.	Cooperation	Percentage
1	Trade	68,99%	1	Trade	57%
2	Investment	61,33%	2	Investment	55%
3	Technology & Industry 4.0	47,89%	3	Tourism	49%
4	Tourism	46,71%	4	Industry 4.0	43%
5	Education	37,98%	5	Technology	39%

Table 04. Comparison of the Most Satisfactory Aspects of ASEAN-China Cooperation in 2020 & 2021

Top 5 Least Satisfactory Cooperation

2021			2020		
No.	Cooperation	Percentage	No.	Cooperation	Percentage
1	Defense	54,66%	1	Defense	44%
2	Cyber Security	47,69%	2	Immigration and Borders	38%
3	Immigration and Borders	43,77%	3	Policy Coordination	34%
4	Environment	42,89%	4	Cyber Security	33%
5	Transnational Crime	42,49%	5	Environment	30%

*2021's survey edition does not include policy coordination in the satisfactory cooperation question and combine technology and industry 4.0 as one category.

Table 05. Comparison of the Least Satisfactory Aspects of ASEAN-China Cooperation in 2020 & 2021

Strategic Issues

Respondents from both years are consistent in the view that China proactively tries to defuse geopolitical rivalry. In 2020, 47% of respondents were not confident in the statement, 31% were somewhat confident, and 22% were confident. In 2021, 32,09% of respondents were not confident and 23,44% somewhat noted confidence. 23,45% were somewhat confident and 20,02% were confident.

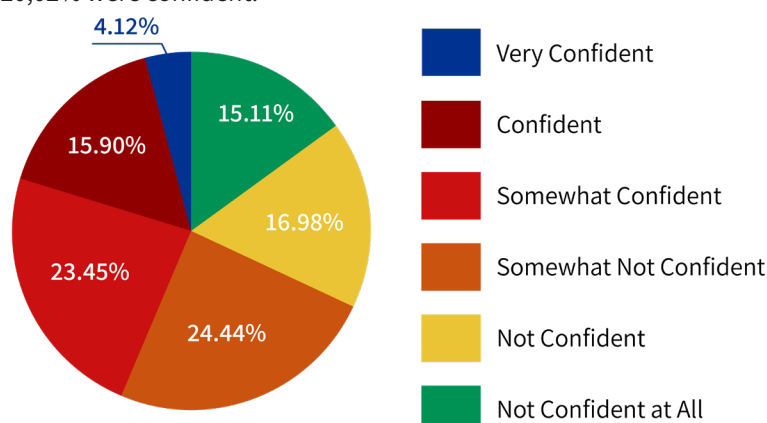


Chart 84. Views on China's Proactiveness in Defusing Geopolitical Rivalry and Tension in 2021

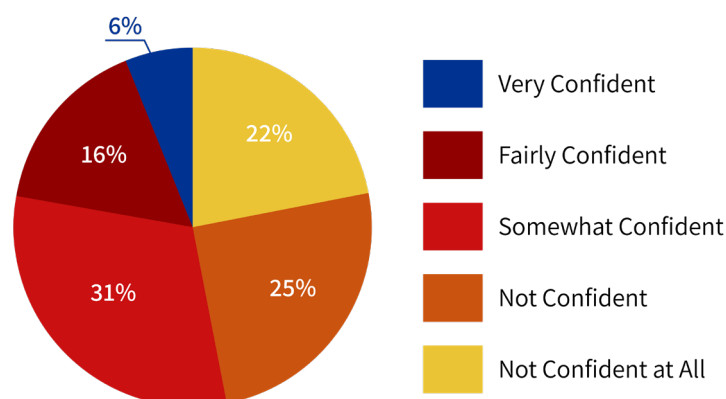


Chart 85. Views on China's Proactiveness in Defusing Geopolitical Rivalry and Tension in 2020

Another last consistent suggestion is found in the view of ASEAN's strategic step to face the US-China strategic rivalry and competition. In 2020, the majority of respondents of 36% believe ASEAN should balance its approach. The same result in 2021, majority respondents of 40,53% believes in the balanced approach. The second majority in both years also suggests the same result. In 2020, 35% of respondents suggest that ASEAN should strengthen its centrality as a

response to the dynamic. In 2021, 28,56% suggested the same answer. The third majority of both years also call for the same suggestion. In 2020, 23% of respondents suggested that ASEAN tries to ease the tension by dialogue through the ASEAN mechanism. The same answer in 2021 with 26,10% of respondents. The least respondents of both years also suggest the same answer. In 2020, 6% suggested taking sides with the US or China and in 2021, 4,81% called the same answer.

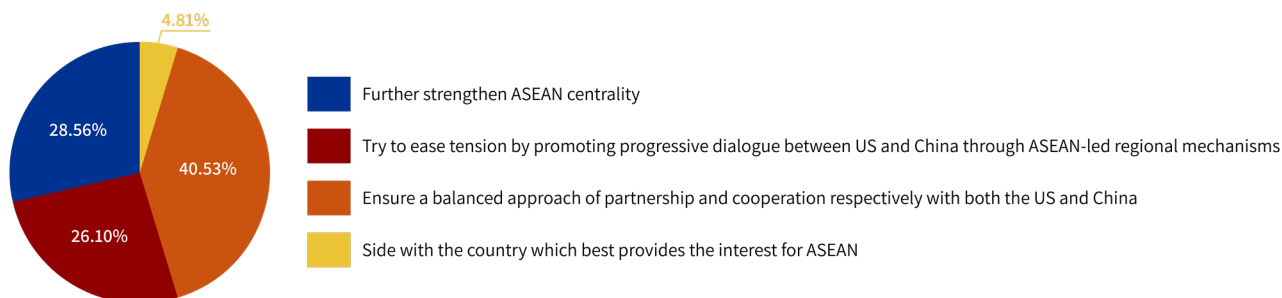


Chart 86. ASEAN's Important Strategic Steps in Facing US-China Strategic Competition in 2021

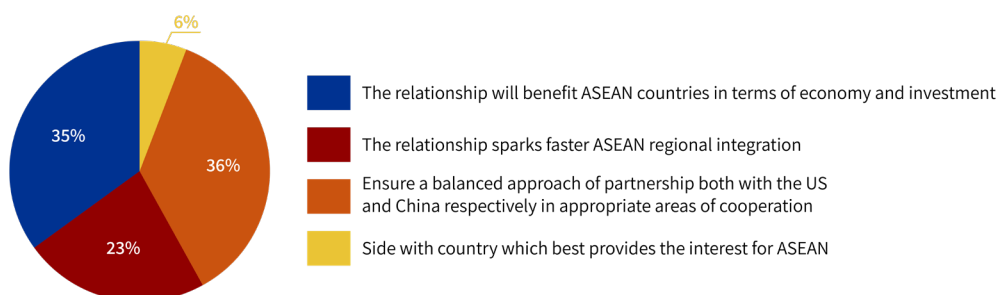


Chart 87. ASEAN's Important Strategic Steps in Facing US-China Strategic Competition in 2020

H.2. Comparing Elites and Students

In the Overall relationship, existing cooperation, there is a noteworthy rise in the number of respondents that see ASEAN-China relations bring mutual benefits.

Last year, half of the Elites respondents (50%) were within the “agree” spectrum and there is an increase of 15,18% to 65,18% in this year’s results. A similar pattern is also shown in the Students results, as it increased from 41% in 2020 to 63,34% in this year.

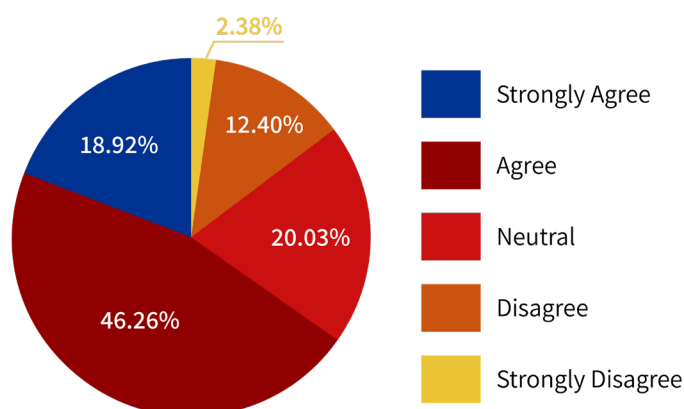


Chart 88. Elites' View on Whether ASEAN-China Relationship is Mutually Beneficial in 2021

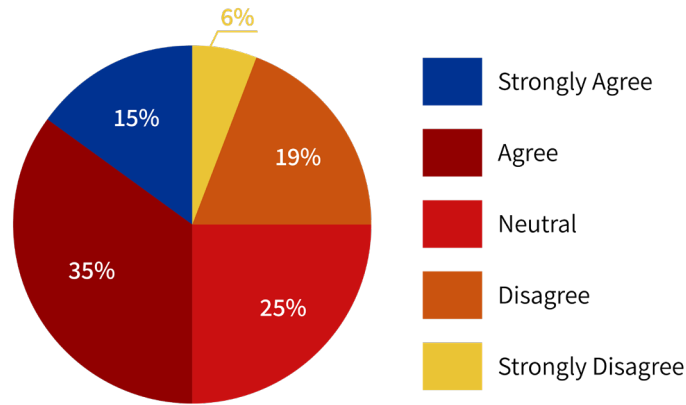


Chart 89. Elites' View on Whether ASEAN-China Relationship is Mutually Beneficial in 2020

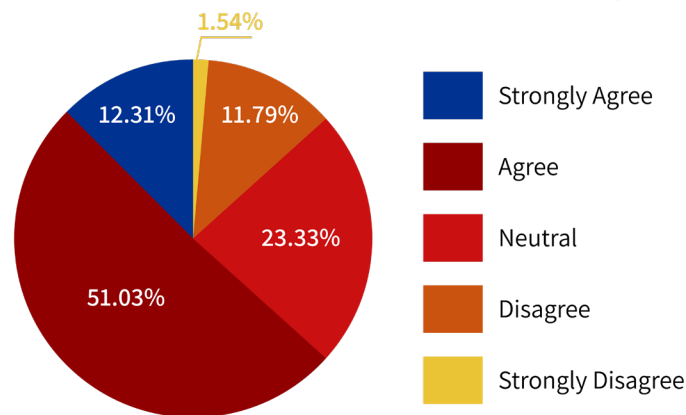


Chart 90. Students' View on Whether ASEAN-China Relationship is Mutually Beneficial in 2021

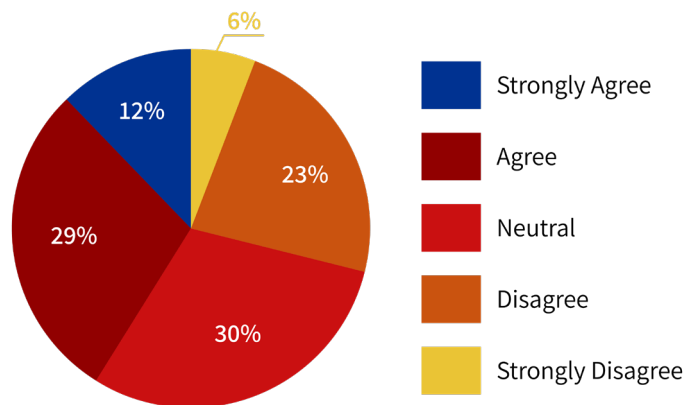


Chart 91. Students' View on Whether ASEAN-China Relationship is Mutually Beneficial in 2020

Whether the ASEAN-China relationship contributes to peace, stability, and prosperity in the region, both Elites and Students data encounter growth in terms of the agreement. From 50%, the number of Elite respondents this year in the “agree” spectrum has increased from 11 to 61,05%. As for Students, a rise from 41 to 56,15%. Student data also show that there is little change in the number of respondents who are neutral, yet there is a notable decrease within the disagree spectrum from 33% to 16,41%. A similar pattern does not show in the Elite respondents.

The sentiments shared by both Elites and Students regarding whether or not the ASEAN-China relationship is on the right track have shifted into more positive. Last year, the majority of both Elites (36%) and Students (40%) were neutral, while this year the majority of Elites (43,40%) and Students (43,59%) answers are in the “agree” spectrum.

There is also an improvement in which both Elites and Students are enthusiastic about the deepening relations of ASEAN and China. A rise of 14,96% to 62,96% for Elites and a 10% growth for Students in the “agree” spectrum. Since there are changes in the “agree” spectrum, not many changes occur in the neutral data but the number of disagreements is down by 12-14%.

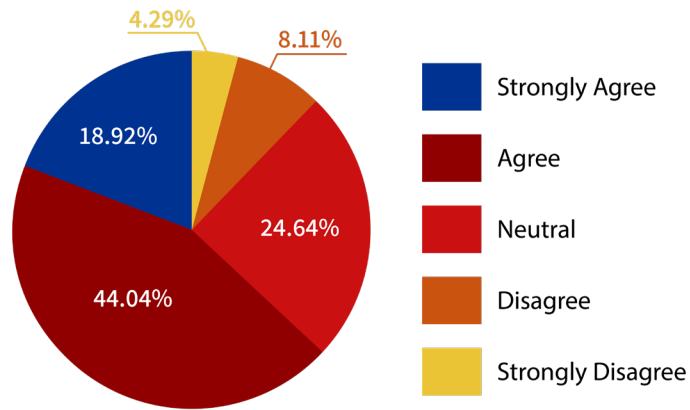


Chart 92. Elites' Enthusiasm in Deepening ASEAN-China Cooperation in 2021

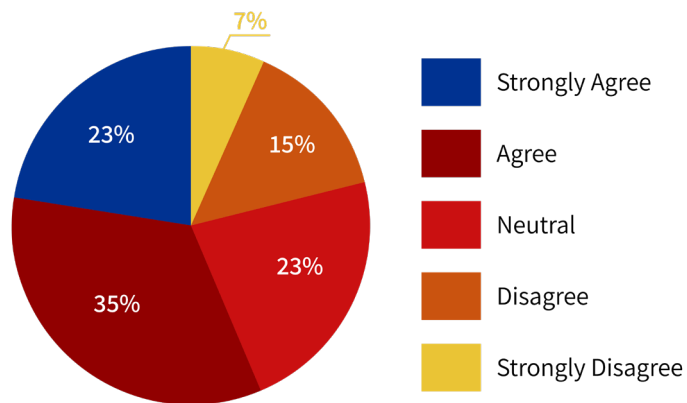


Chart 93. Elites' Enthusiasm in Deepening ASEAN-China Cooperation in 2020

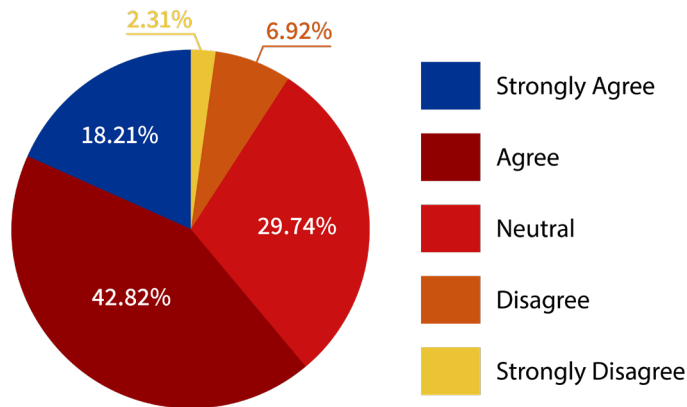


Chart 94. Students' Enthusiasm in Deepening ASEAN-China Cooperation in 2021

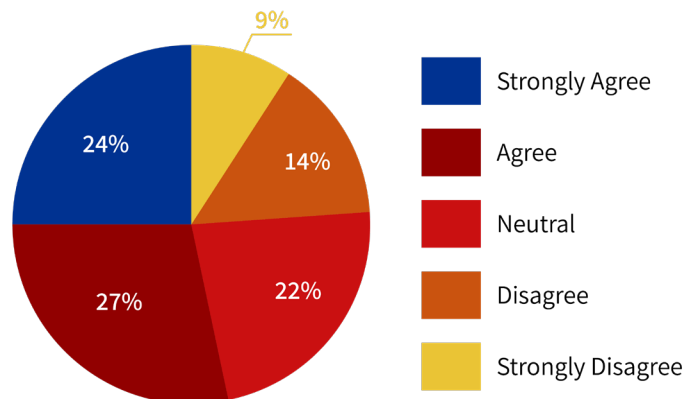


Chart 95. Students' Enthusiasm in Deepening ASEAN-China Cooperation in 2020

There is a declining rate of satisfaction in the ASEAN-China Strategic Partnership. The majority numbers have transferred from the satisfied spectrum to somewhat satisfied in both Elites and Students. Most of Students (40%) responses were within the satisfied spectrum but this year it has changed to the majority of Students (43,49%) are somewhat satisfied. 38% of Elites were in the satisfied spectrum while in this year most Elites (40,70%) are somewhat satisfied.

The most popular answer among Elite respondents (40%) in last year's survey were somewhat satisfied in ASEAN-China Free Trade Area. This year, most Elites (37,68%) are still somewhat satisfied. On the other hand, most students in this year (48,97%) and last year's survey (47%) are within the satisfied range.

There are not many differences in this year and last year's results regarding the satisfaction rate of several ASEAN-China key cooperation such as People to People exchanges and cooperation, ASEAN-China Young Leaders Scholarship. The majority of both Elites and Students are still satisfied with both areas of cooperation.

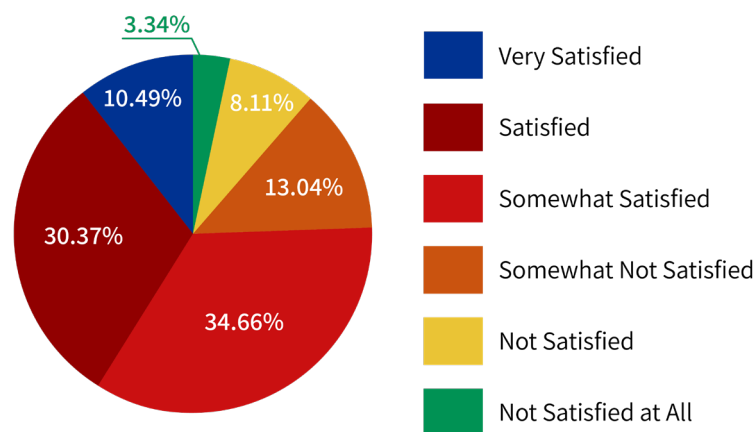


Chart 96. Elites' View on ASEAN-China People to People Exchanges and Cooperation in 2021

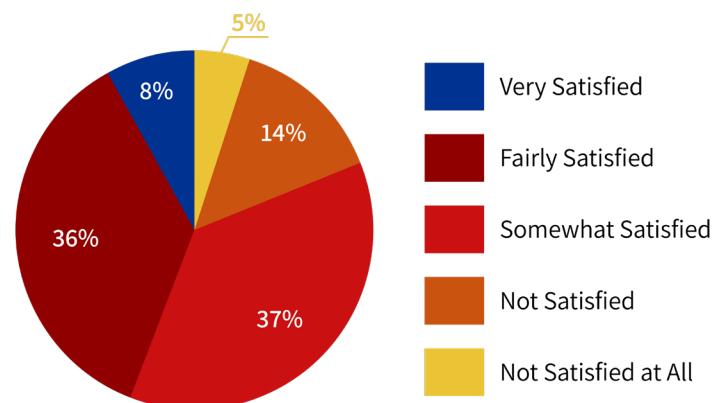


Chart 97. Students' View on ASEAN-China People to People Exchanges and Cooperation in 2020

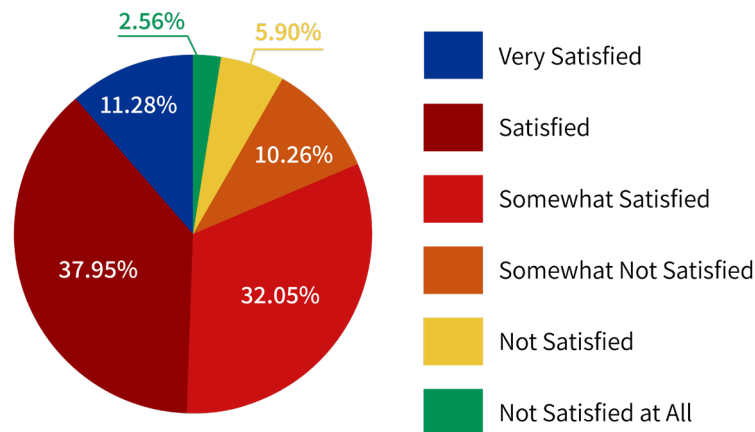


Chart 98. Students' View on ASEAN-China People to People Exchanges and Cooperation in 2021

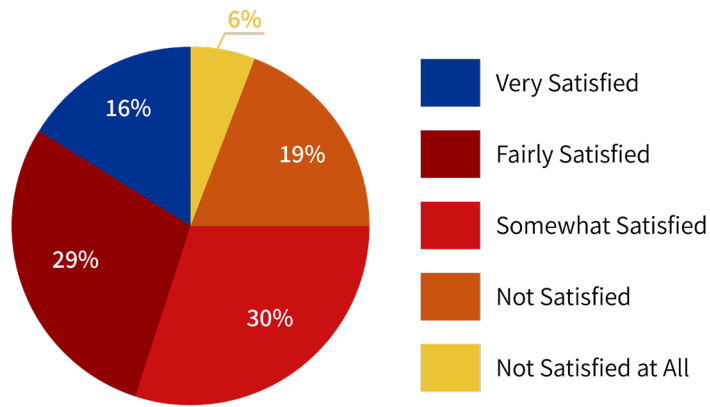


Chart 99. Students' View on ASEAN-China People to People Exchanges and Cooperation in 2020

Strategic Issue

We begin with the negotiation on the Code of Conduct, Elites remain consistent in this year's survey results but Students, interestingly, manifest a different sentiment this year. The majority of Elite respondents regard the negotiation as within the non-satisfactory spectrum in this year (48%) and last year's survey (36,56%). On the contrary, this year data shows that students are almost equally divided although last year Students were mostly in the not satisfied range (41%). 28,46% answers in the satisfied range, 27,18% are somewhat satisfied, 17,69% are somewhat not satisfied, 26,67% answers are in the not satisfied spectrum.

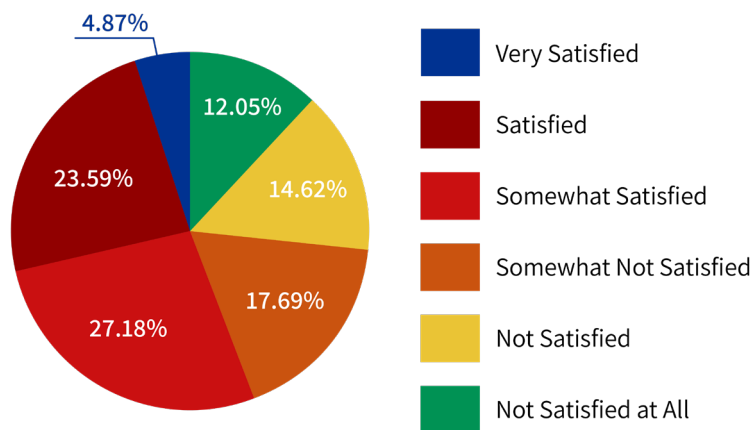


Chart 100. Students' Satisfaction in ASEAN-China Consultations on the Code of Conduct in 2021

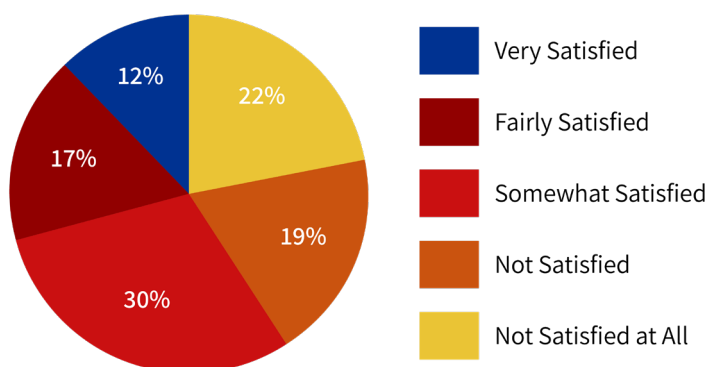


Chart 101. Students' Satisfaction in ASEAN-China Consultations on the Code of Conduct in 2020

When posed about how US-China strategic competition and rivalry will impact ASEAN in the time of the pandemic, the most popular response among Elite respondents in both this year (31,16%) and last year (35%) was that they believe it will be an obstacle for ASEAN regional integration. Quite different from the Elites, the most popular response among Students (36,41%) perceive that the US-China rivalry will benefit ASEAN in terms of economic and investment. In 2020, most Students (30%) thought that it will be a bottleneck for ASEAN regional integration.

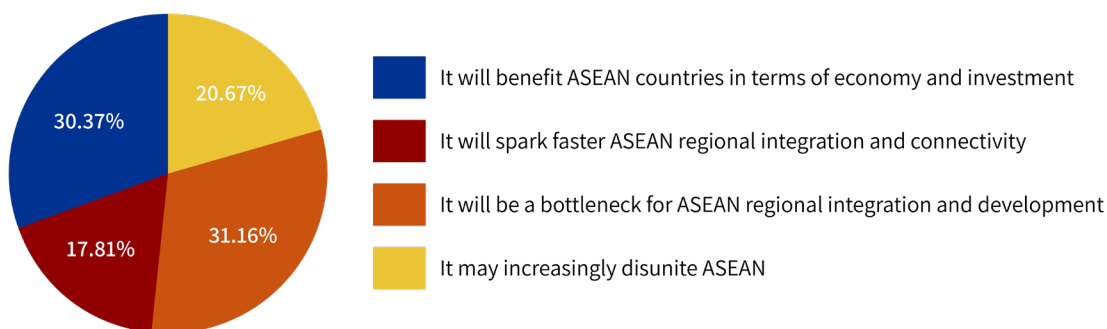


Chart 102. Elites' View on China-US Relationship Impacts on ASEAN Regionalism in 2021

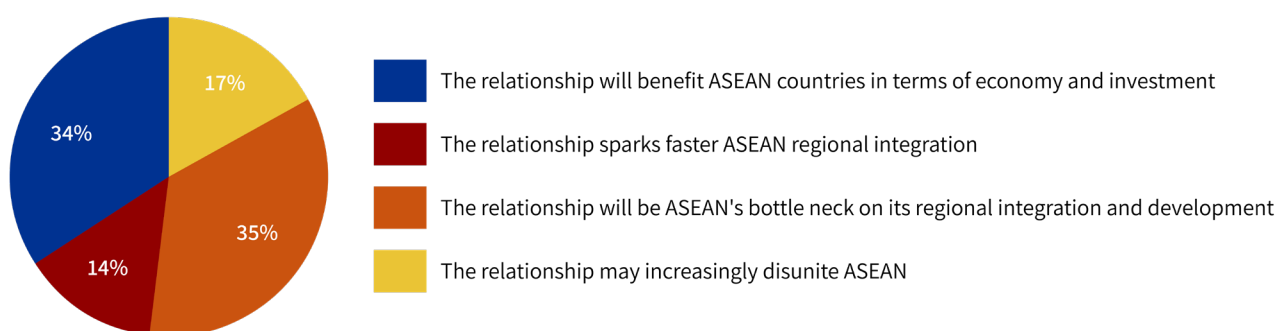


Chart 103. Elites' View on China-US Relationship Impacts on ASEAN Regionalism in 2020

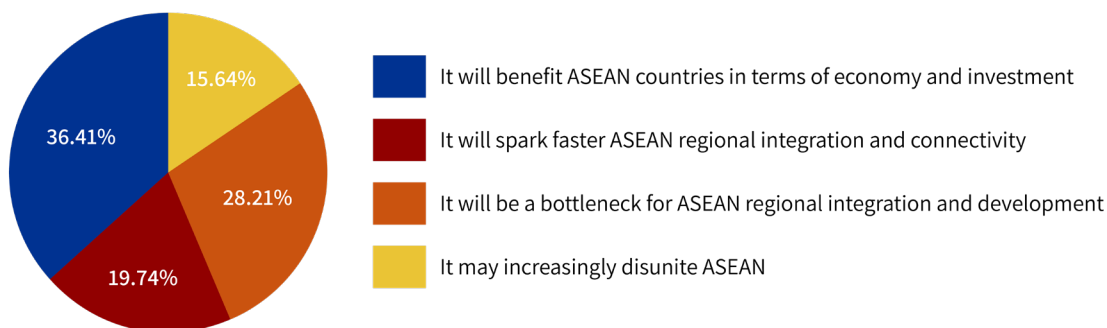


Chart 104. Students' View on China-US Relationship Impacts on ASEAN Regionalism in 2021

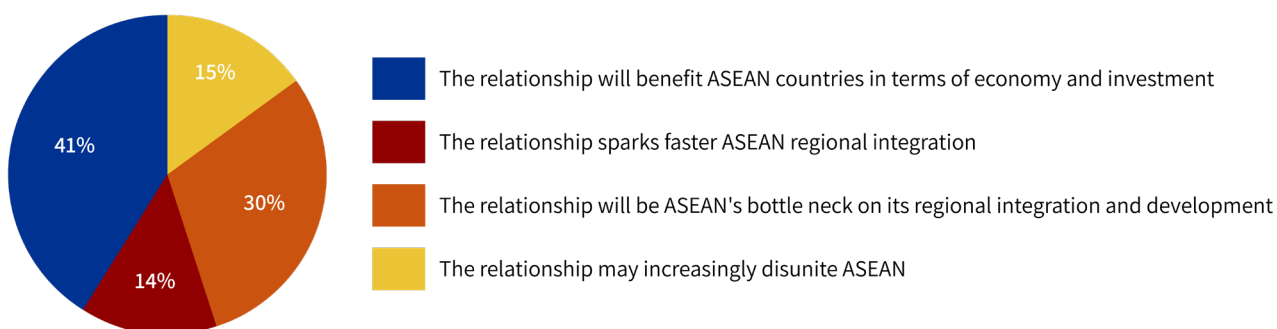


Chart 105. Students' Views on China-US Relationship Impacts on ASEAN Regionalism in 2020

By the same token, both Elites and Students are consistent in this year and last year's survey as well that ASEAN should maintain a balanced approach in addressing the US-China competition and rivalry.

H.3 Comparing Different Groups in the Elites Category

Among respondents in the elite category, there is a significant increase in the view that the current relationship benefits both ASEAN and China. In 2020, 50% of respondents in the Elites category agreed to the statement. In 2021, the number increased to 65,18%. A decline is also found in the neutral answer. In 2020, 25% of elite respondents were neutral to the statement. In 2021, the number goes down to 20,03%.

A significant increase has happened to the view that the relationship between ASEAN and China is on the right track. In 2020, the highest percentage of answers in the elite respondents was neutral with 36% were neutral to the statement. In 2021, the most frequent answer is in the “agree” spectrum (including agree and very agree) with 43,40%. Officials experienced a significant increase in the “agree” spectrum from 33% to 53,06% as well as the Business Community from 38% in the same spectrum to 49,21%.

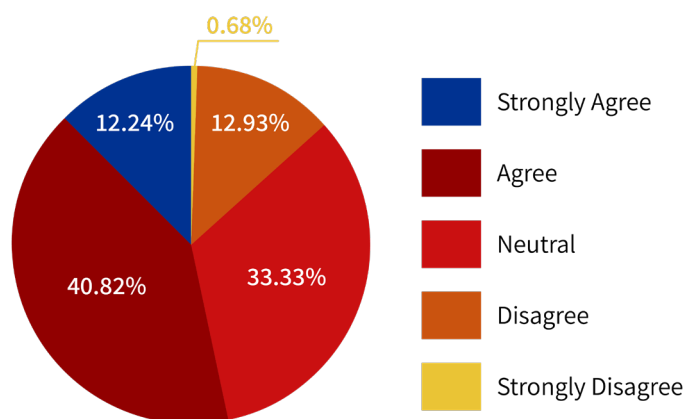


Chart 106. Officials' View on Whether ASEAN and China's Relationship is On the Right Track in 2021

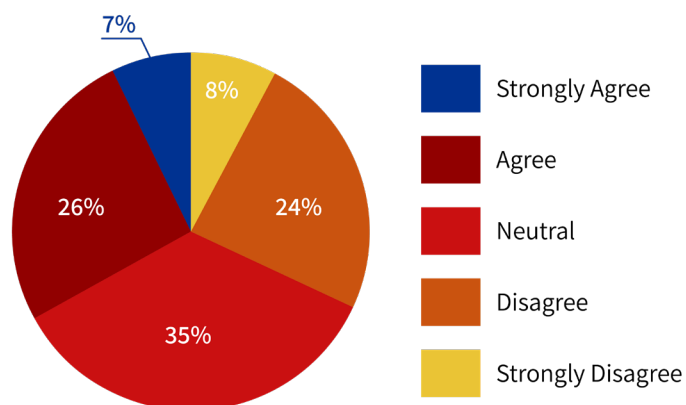


Chart 107. Officials' View on Whether ASEAN and China's Relationship is On the Right Track in 2020

It is also interesting to compare the list of most satisfactory cooperation and least satisfactory cooperation in 2020 and 2021. There is a strong consistency between the 2020 and 2021 list.

Elite Respondents' Top 5 Most Satisfactory Cooperation

2021			2020		
No.	Cooperation	Percentage	No.	Cooperation	Percentage
1	Trade	70,11%	1	Trade	61%
2	Investment	62%	2	Investment	56%
3	Tourism	51,51%	3	Tourism	56%
4	Technology & Industry 4.0	42,61%	4	Industry 4.0	36%
5	Education	39,43%	5	Education	36%

Table 06. Comparison of Elites' Most Satisfactory Aspects of ASEAN-China Cooperation in 2020 & 2021

Elite Respondents' Top 5 Least Satisfactory Cooperation

2021			2020		
No.	Cooperation	Percentage	No.	Cooperation	Percentage
1	Defense	53,74%	1	Defense	47%
2	Cyber Security	51,19%	2	Immigration and Borders	36%
3	Environment	43,56%	3	Cyber Security	35%
4	Immigration and Borders	43,24%	4	Environment	32%
5	Transnational Crime	43,24%	5	Transnational Crime	29%

*2021's survey edition does not include policy coordination in the satisfactory cooperation question and combine the technology and industry 4.0 as one category.

Table 07. Comparison of Elites' Most Satisfactory Aspects of ASEAN-China Cooperation in 2020 & 2021

III. COUNTRY ANALYSIS AND COMPARISONS

A. Introduction

The ASEAN-China Survey 2021 brings a new perspective on the region's relations with China by presenting views from a domestic lens, broken down into specific country categorizations. This section serves as analytical points of how respondents from each of the ten ASEAN Member States view the region's relations with China as, noting that respondents' views are likely to be influenced with factors such as domestic relations or the country's history and past relationship with China.

It should be noted that views provided here should not be taken as general representative of the whole country. Whereas sufficient samples were achieved in countries like Indonesia (415 respondents), Malaysia (139 respondents), Philippines (136 respondents), and Cambodia (100 respondents), respondents from Myanmar (33) and Laos (27) are limited. Therefore, views outlined in this section are thus views from respondents from specific countries, not an official position or stance of its respective governments. Where applicable and providing sufficient samples, the analysis will note comparative views of respondents based on their affiliation (Students, Officials, Business Community, Civil Society, or Academia) within the specific country scope.

Part B thus provides a breakdown of respondents' views per country on the overall scope of the survey, presenting notable trends, patterns, and anomalies, between and within the ten ASEAN Member States. It will also observe respondents' views on strategic issues in the region such as the South China Sea unsettled territorial dispute, the Myanmar political crisis, as well as perspectives on the US-China relations and its potential implications to the region, as well as the Belt and Road Initiative (BRI). On the other hand, Part C, will dive deep into specific country's views, identifying notable moods or nuances shared by respondents of common nationality on various issues, such as: the prevailing or shifting paradigms on the influence of China's communist ideology, diaspora relations, and issues of top concern in respective countries, among others.

If no notable patterns, trends, or anomalies are identified, this section will forego such detailed comparison. Therefore, to ensure a full picture of respondents' perspectives, we encourage readers to also view the overall responses for all survey questions provided in Chapter II.

B. Country Comparisons

B.1. Belt and Road Initiative

The ASEAN-China Survey asked respondents from the 10 ASEAN countries their views on the Belt and Road Initiative (BRI) cooperation. When asked whether respondents perceive the BRI as a win-win feature of ASEAN-China cooperation, respondents from Laos are the most confident in comparison with other countries, with 78% of them being in the positive spectrum (very confident, confident, somewhat confident). This is followed by Singapore at 70%, Indonesia at 68%, Cambodia at 67%. On the other hand, prevalent opposing perspective is shared by the rest of the countries, with around 65 of respondents from Vietnam and 60% of respondents from Malaysia and Philippines in the negative spectrum of confidence (not confident at all, not confident, and somewhat not confident), followed by 58% of respondents from Myanmar and 43% respondents from Thailand voting as such.

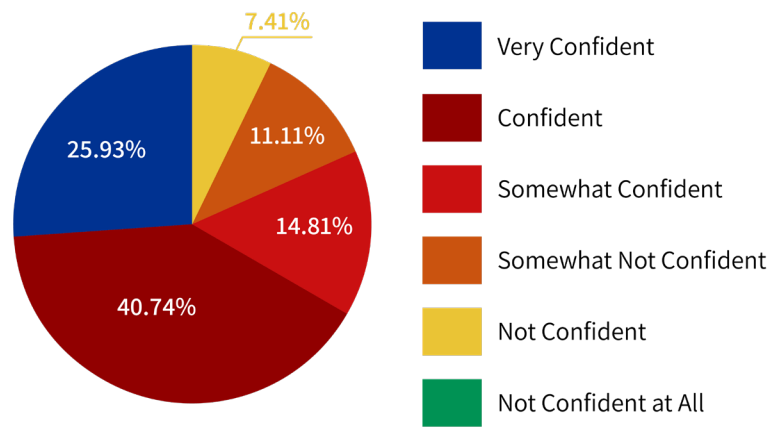


Chart 108. Views on BRI as a key feature of ASEAN-China win win cooperation in Laos

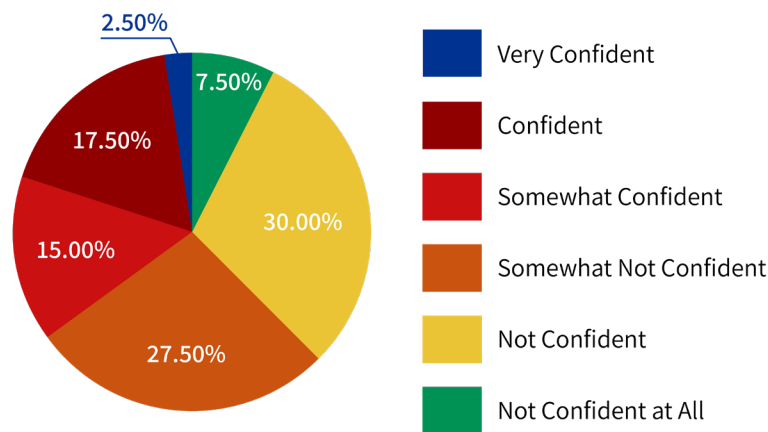


Chart 109. Views on BRI as a key feature of ASEAN-China win win cooperation in Vietnam

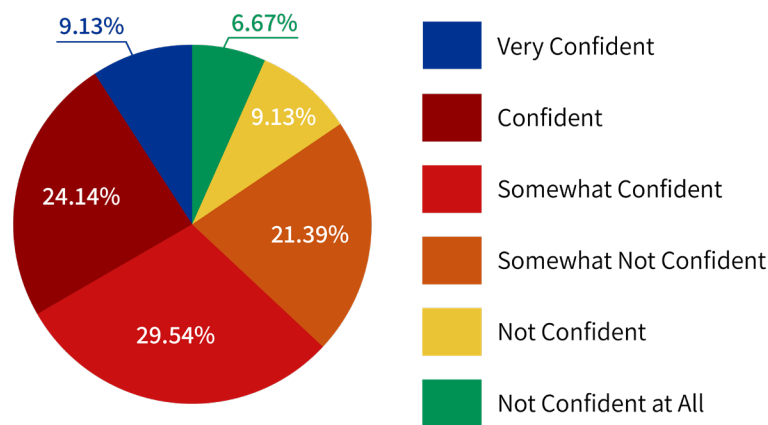


Chart 110. Overall views on BRI as a key feature of ASEAN-China win win cooperation

For BRI to become a win-win feature of cooperation, respondents are also asked their views on which aspects of BRI must be reviewed in the post COVID-19 era to promote ASEAN economic recovery. Majority of respondents from Myanmar (45%), Singapore (around 40%), and the Philippines (around 38%) voted for long-term economic benefit for host country, businesses, and civil society organizations involved. This perspective is even more pronounced in answers from Cambodian respondents (around 60%). However, in the Laos category, almost half of respondents viewed project financing and debt sustainability as the top aspect to be reviewed and Indonesia placed that as the second most voted aspect. Whereas economic and financing aspects occupy the top ranks of aspects to be reviewed in other countries, around 30% of respondents from Singapore think that BRI's impacts toward social, environment, and labor conditions must be reviewed as well – thus, placing it as the second most voted aspect within responses from Singapore.

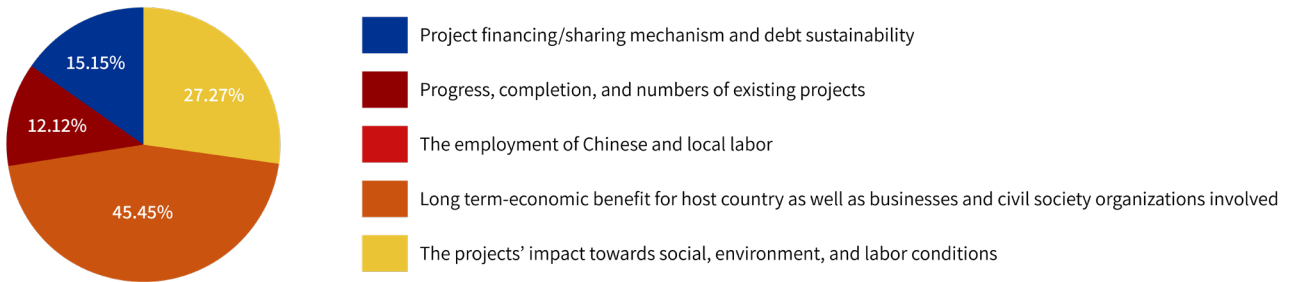


Chart 111. Views on which aspects of the BRI that needs to be reviewed in a post Covid world in Myanmar

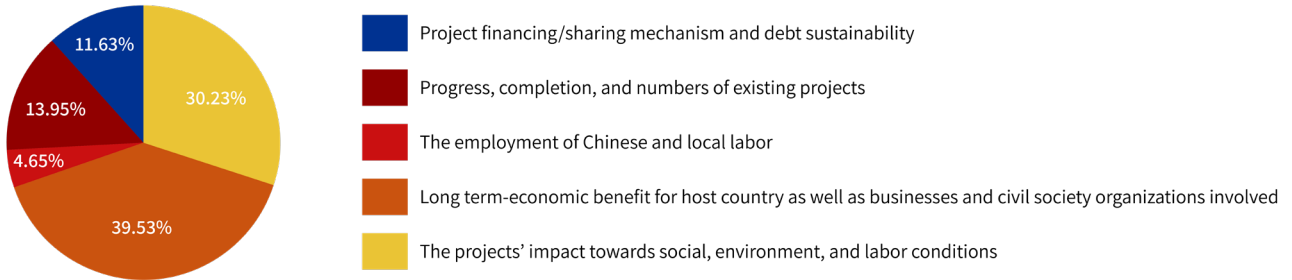


Chart 112. Views on which aspects of the BRI that needs to be reviewed in a post Covid world in Singapore

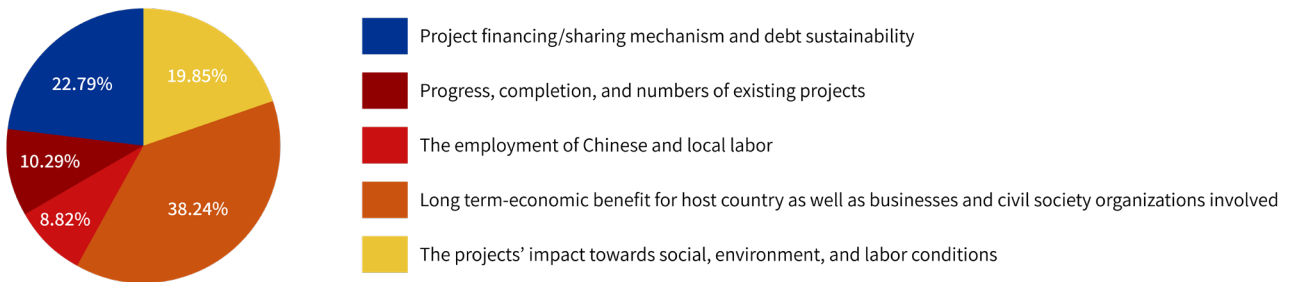


Chart 113. Views on which aspects of the BRI that needs to be reviewed in a post Covid world in Philippines

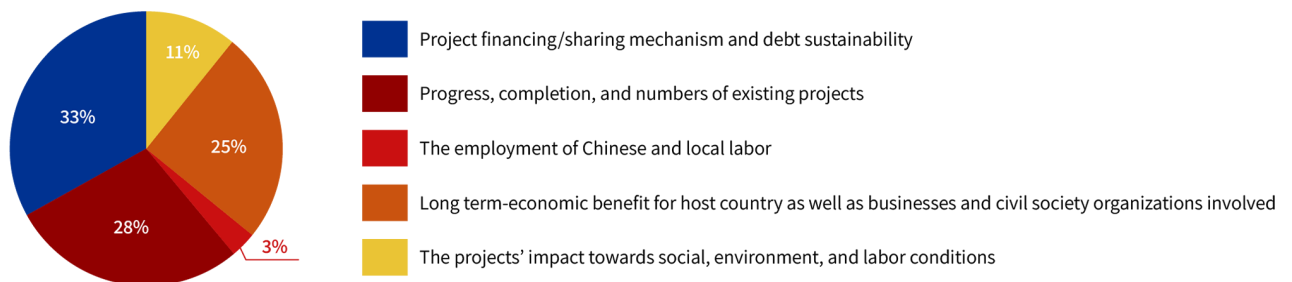


Chart 114. Views on which aspects of the BRI that needs to be reviewed in a post Covid world in Cambodia

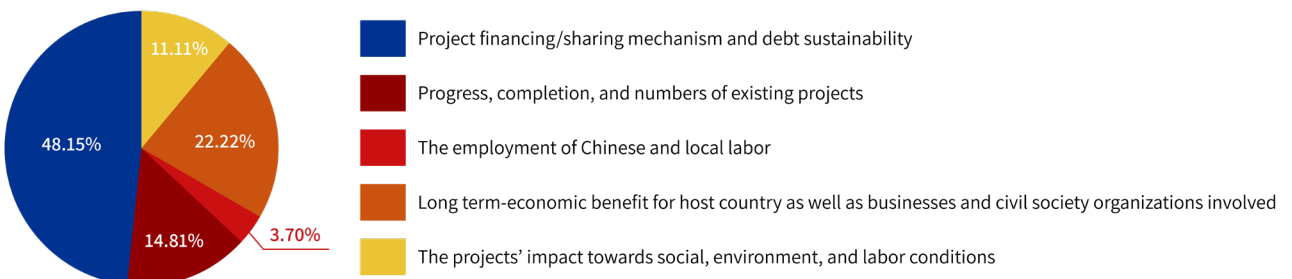


Chart 115. Views on which aspects of the BRI that needs to be reviewed in a post Covid world in Laos

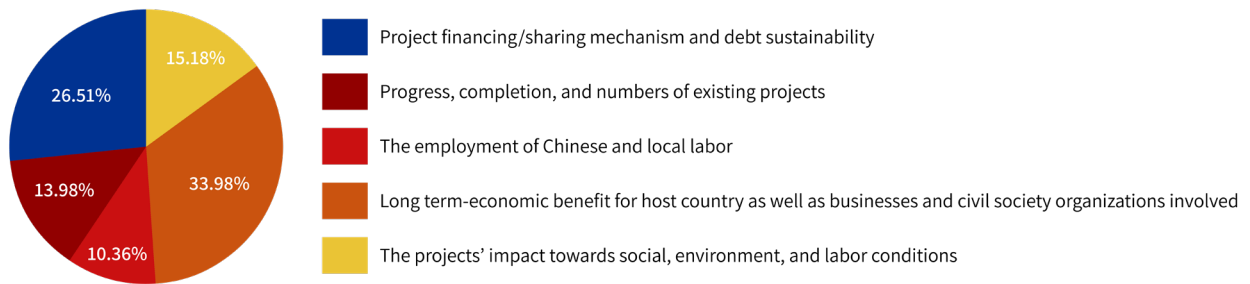


Chart 116. Views on which aspects of the BRI that needs to be reviewed in a post Covid world in Indonesia

B.2. US-China Relations

Overall, the majority of respondents from all countries are in agreement that relations between the United States and China can be described as both rivalry and competition. A notable anomaly is found in views from Laotian respondents whereby around 40% of answers identified the relations as comparable to that of the US – Uni Soviet Cold War. Respondents from Malaysia, however, viewed that the rivalry – competition will instead benefit Southeast Asia in terms of trade, investment, and technology. Indeed, the aforementioned answer received around 32% of votes from Malaysian respondents.

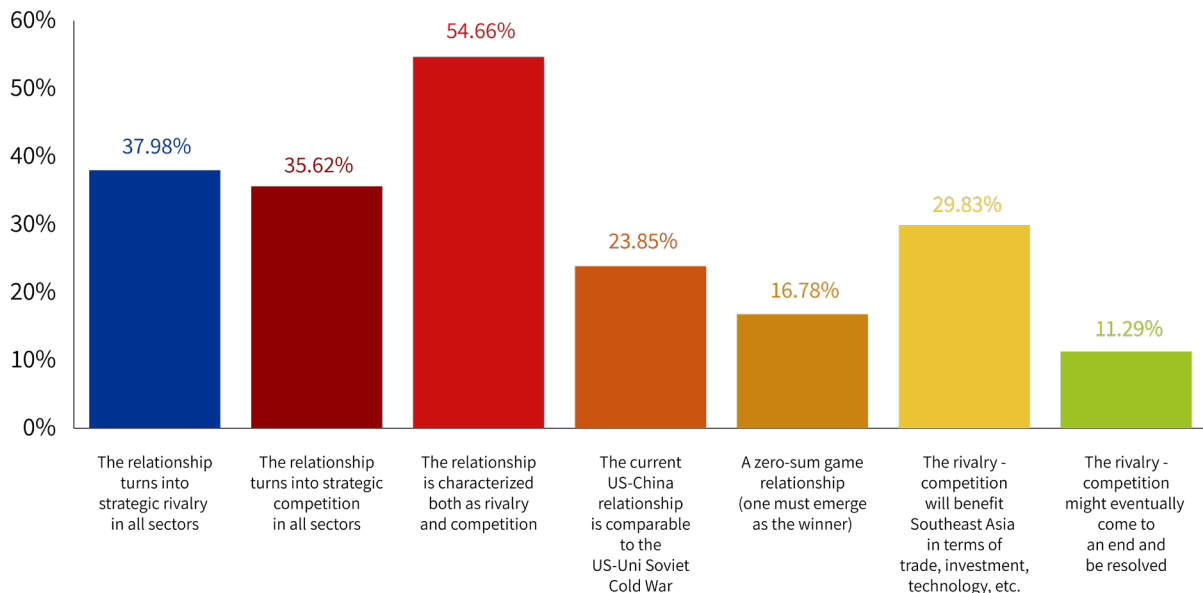


Chart 117. General views on the current US-China relationship

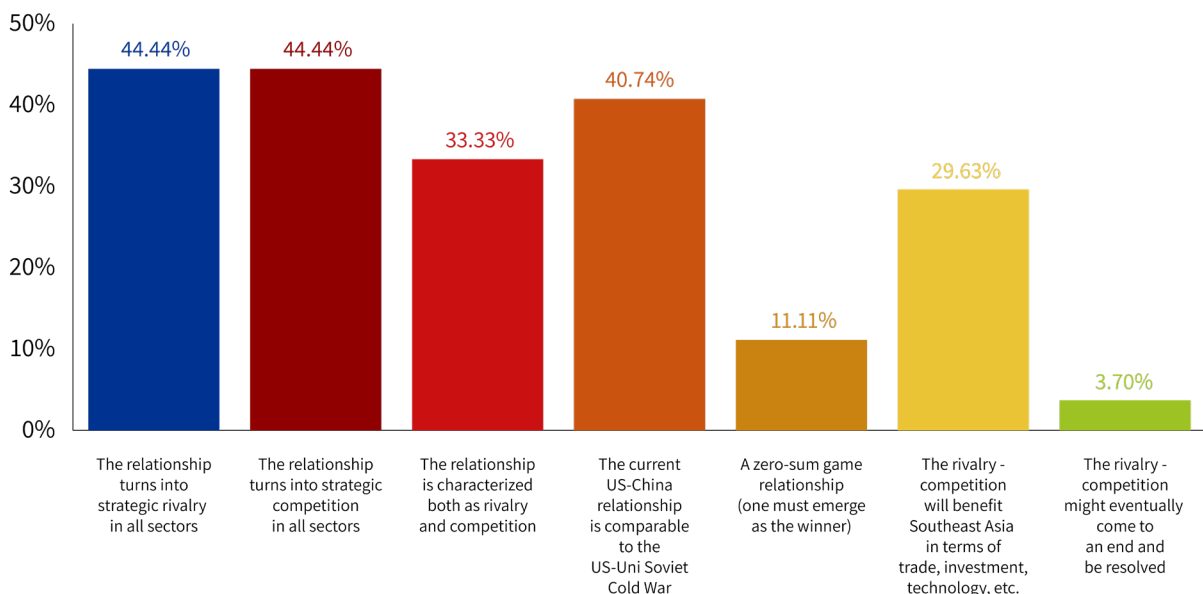


Chart 118. Views on the current US-China relationship in Laos

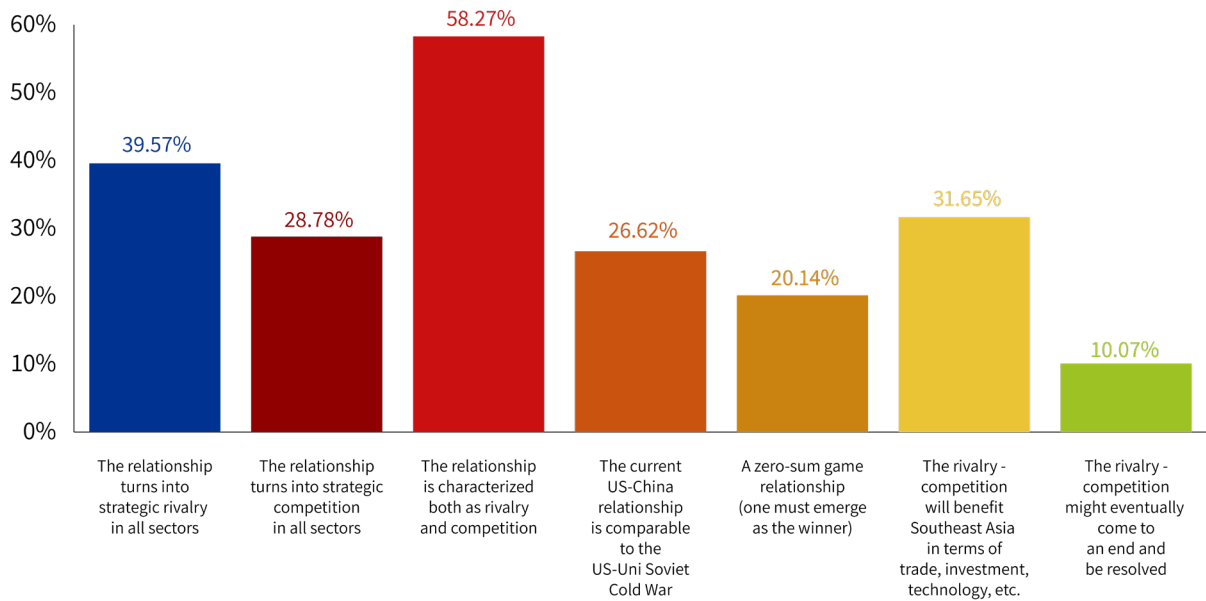


Chart 119. Views on the current US-China relationship in Malaysia

When posed with the question whether there is geopolitical tensions between China and the Quad (Quadrilateral Security Dialogue which comprises of the US, India, Japan, and Australia), the majority of respondents are on the fence on choosing ‘somewhat’ or ‘unclear.’ However, most respondents (around 58%) from Singapore answered ‘absolutely’ on this question – making it the only country from which respondents have clear stance on the issue.

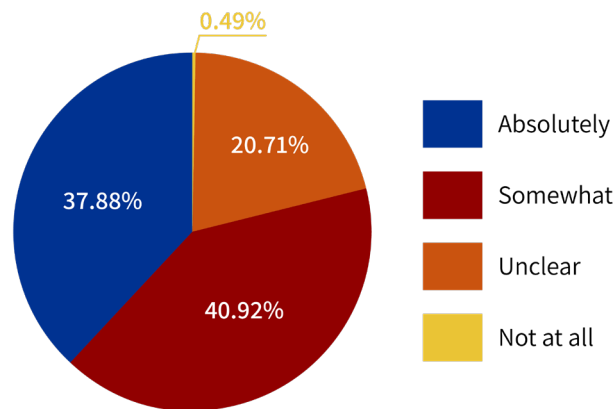


Chart 120. Overall ASEAN views on geopolitical tensions between the Quad and China

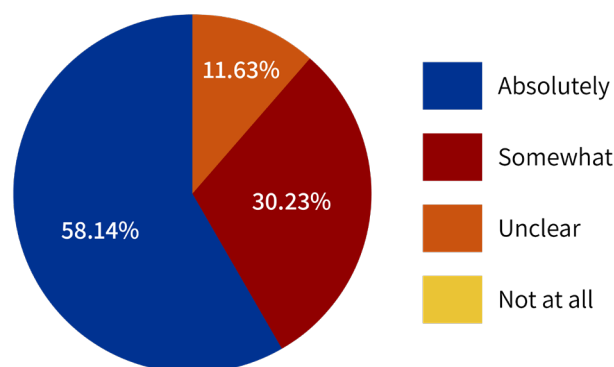


Chart 121. Views on geopolitical tensions between the Quad and China in Singapore

B.3. Post COVID-19 Agenda

In general, respondents from all ASEAN countries are in agreement that post-pandemic economic rebound is the top priority for ASEAN-China relations. An anomaly, however, is found within the answers from Filipino respondents, whereby around 44% of whom views ‘unsettled territorial disputes’ as the top priority instead. Indeed, economic rebound followed after, receiving only votes from 26% of respondents from the Philippines.

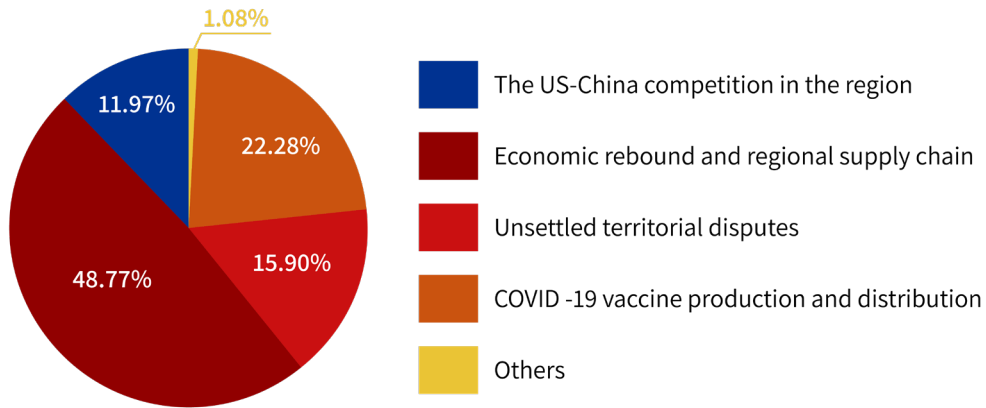


Chart 122. Overall ASEAN Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19

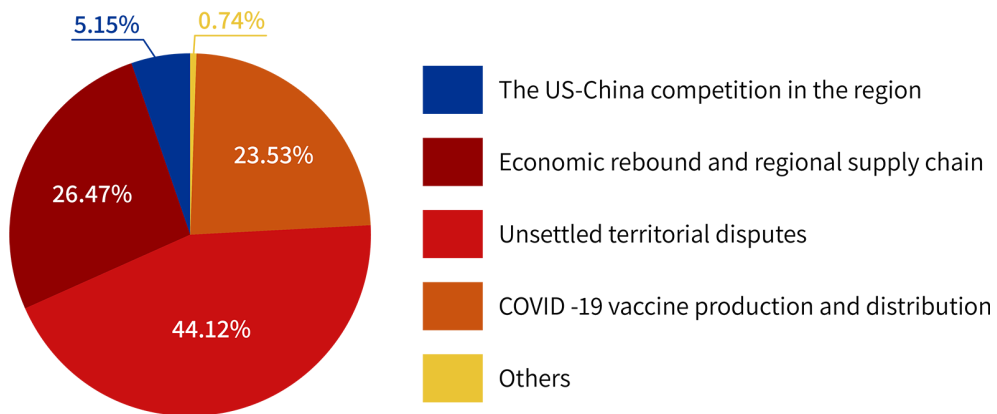


Chart 123. Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19 in the Philippines

Nonetheless, the second most-voted priority differs between countries. For respondents from Cambodia (26%), Laos (33%), Thailand (30%), Indonesia (23%), Myanmar (18%), this choice is the COVID-19 vaccine production and distribution. On the other hand, Singaporean respondents (26%) and Vietnamese respondents (23%) identified the US – China competition in the region as the second top priority.

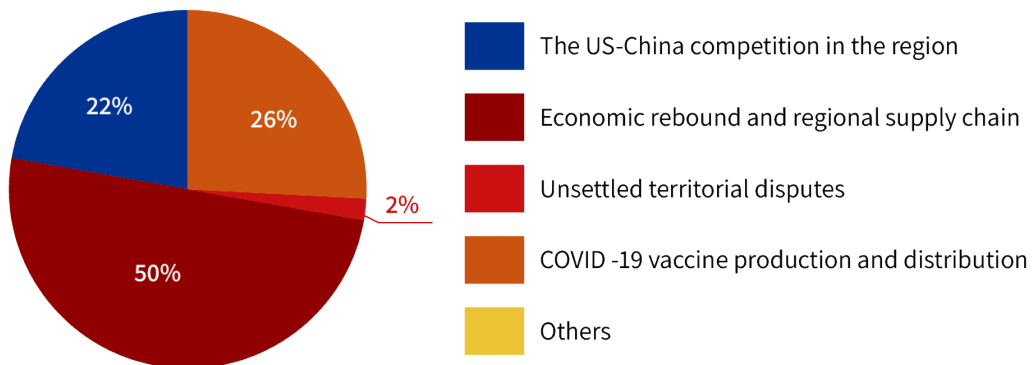


Chart 124. Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19 in the Cambodia

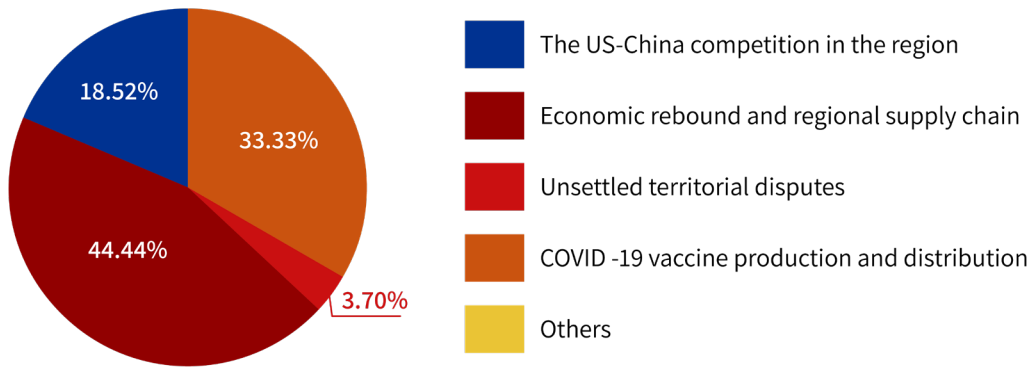


Chart 125. Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19 in the Laos

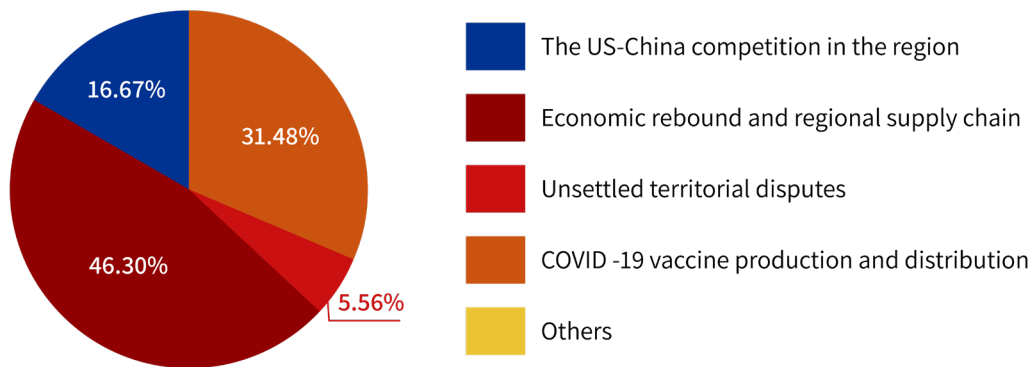


Chart 126. Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19 in the Thailand

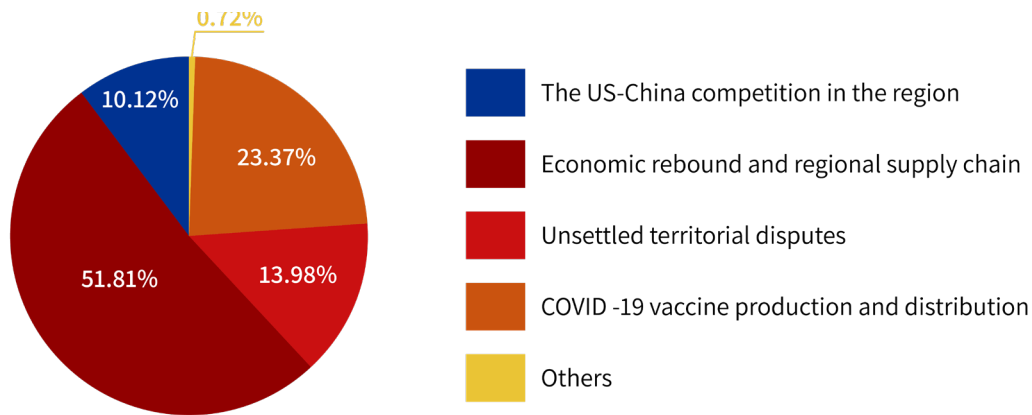


Chart 127. Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19 in the Indonesia

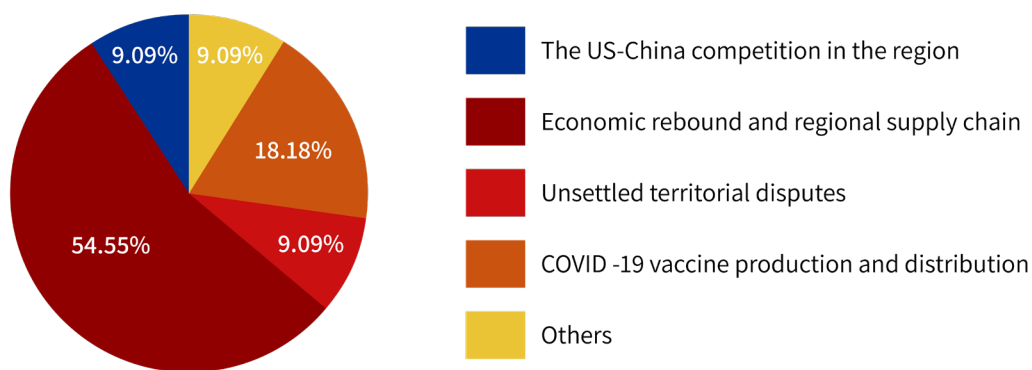


Chart 128. Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19 in the Myanmar

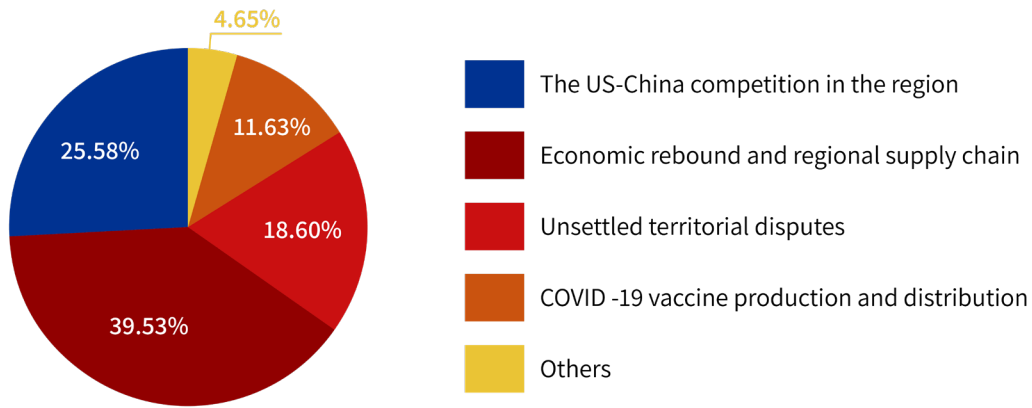


Chart 129. Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19 in the Singapore

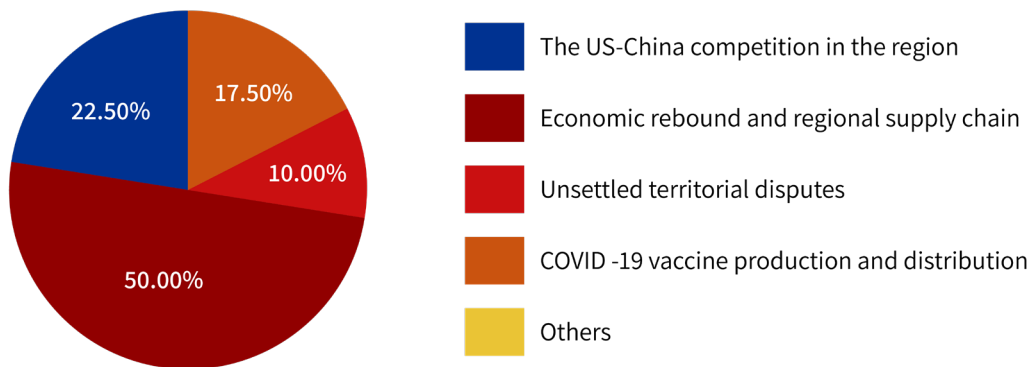


Chart 130. Views on what should be the top priority for ASEAN to heed in its relations with China, Post Covid-19 in the Vietnam

B.4. South China Sea

When asked whether respondents are satisfied with existing cooperation and mechanism between ASEAN and China on the South China Sea issue, namely the consultations on Code of Conduct (CoC), general answers are in the negative spectrum (not satisfied at all, not satisfied, and somewhat not satisfied) as shown by answers from around 60% of respondents from Myanmar, Singapore, Thailand, and Vietnam. Lower level of dissatisfaction is found in Indonesian and Malaysian respondents (around 50%). However, respondents from the Philippines showed the highest negative views, with around 70% of answers being in the dissatisfaction spectrum.

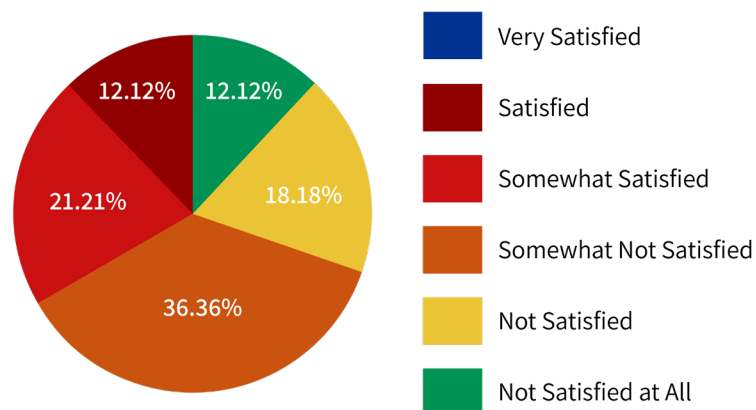


Chart 131. Views on the consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) in Myanmar

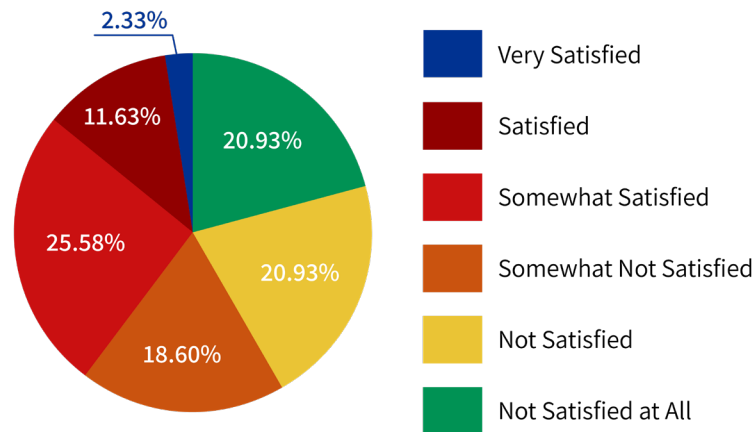


Chart 132. Views on the consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) in Singapore

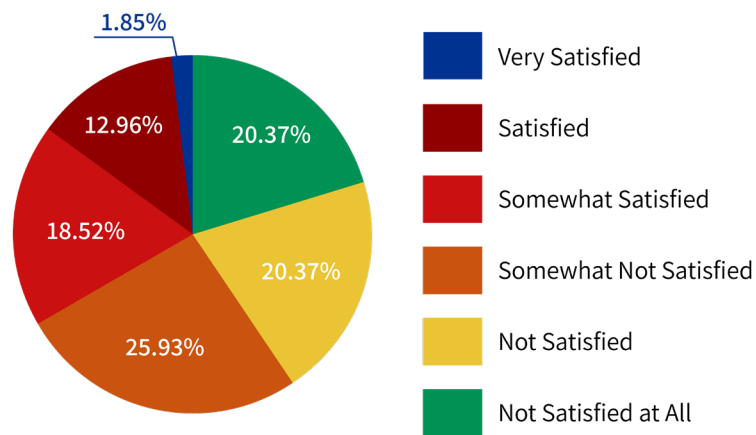


Chart 133. Views on the consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) in Thailand

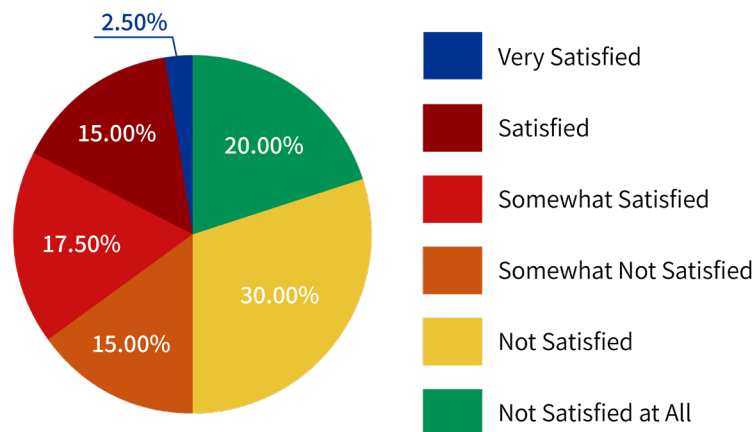


Chart 134. Views on the consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) in Vietnam

On the opposite end, a whopping 88,89% of respondents from Laos are in the positive satisfaction spectrum (very satisfied, satisfied, and somewhat satisfied) on the consultations of the CoC. Such views are mirrored by respondents from Cambodia also, with 83% of its respondents being in the positive spectrum.

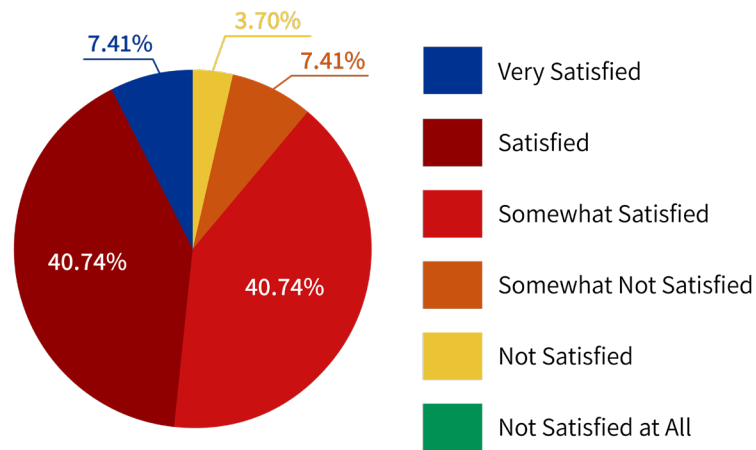


Chart 135. Views on the consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) in Laos

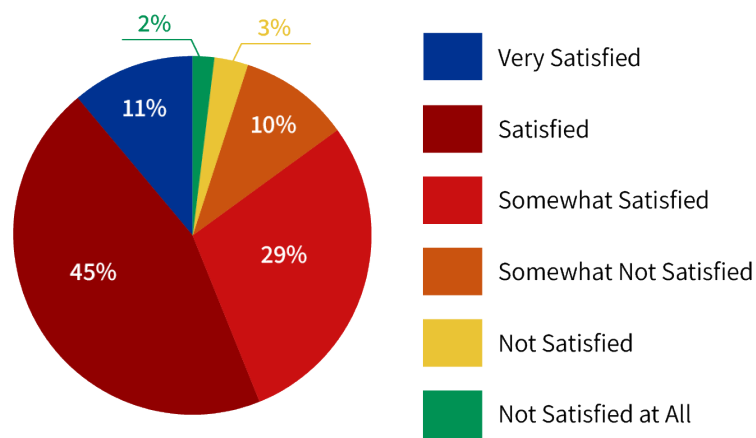


Chart 136. Views on the consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC) in Cambodia

Similarly, on the question of whether China has good intentions in the negotiations of the Code of Conduct, Laotian and Cambodian respondents are the only two countries that are overwhelmingly confident in China's intentions, with respectively 81.49% and 74% of respondents choosing either very confident, confident, and somewhat confident. Strongest vote of no confidence again comes from Filipino respondents with 80% of answers being in the negative spectrum, followed by respondents from Vietnam at 70%, Thailand at around 65%, along with Indonesian and Malaysian answers hovering at around 50%.

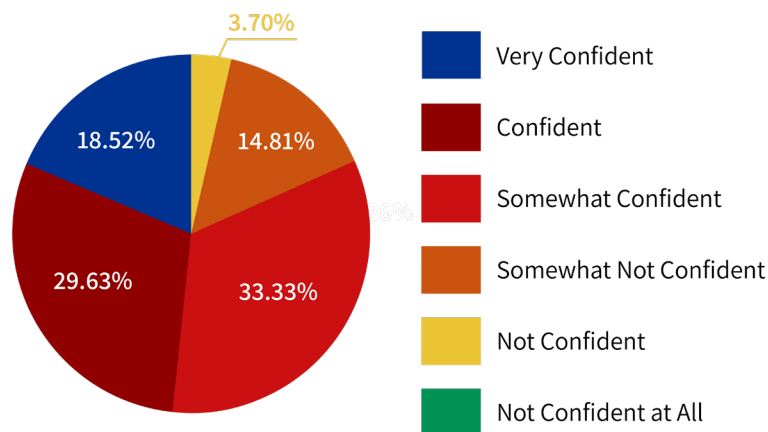


Chart 137. Laotian views on whether China has good intentions in the negotiation of the Code of Conduct

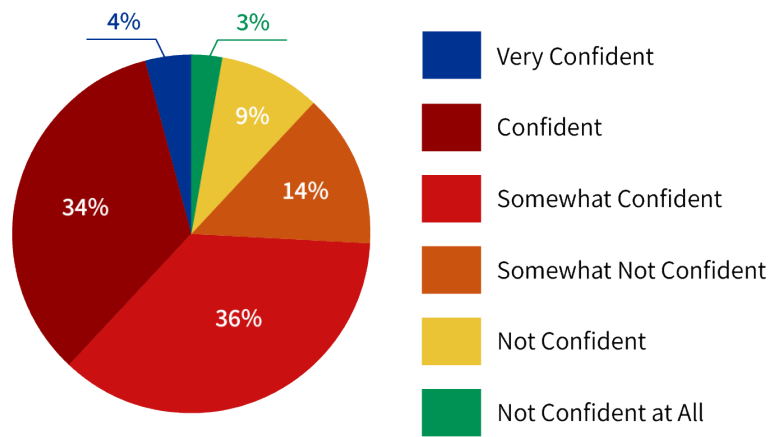


Chart 138. Cambodian views on whether China has good intentions in the negotiation of the Code of Conduct

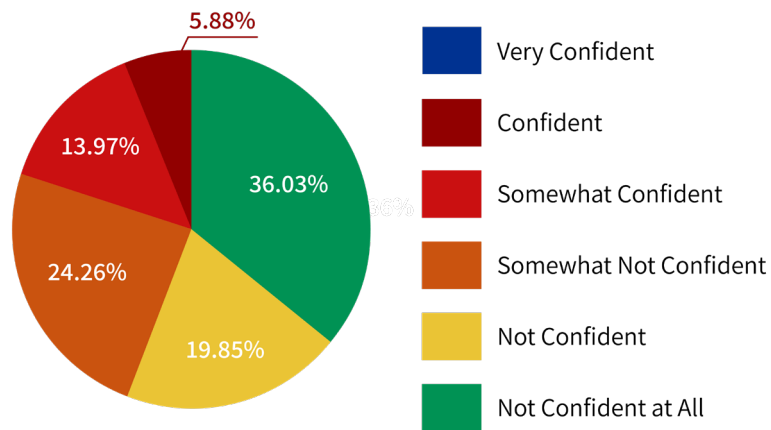


Chart 139. Filipino views on whether China has good intentions in the negotiation of the Code of Conduct

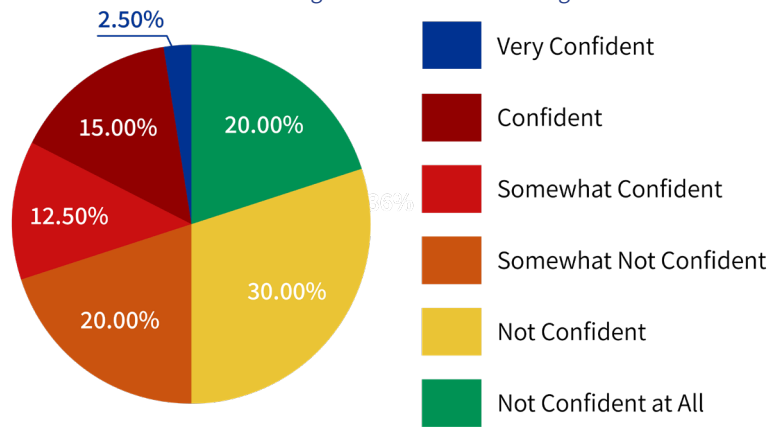


Chart 140. Vietnamese views on whether China has good intentions in the negotiation of the Code of Conduct

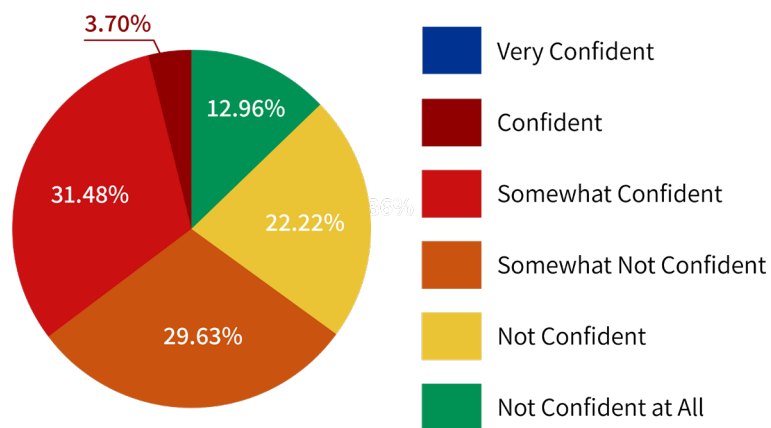


Chart 141. Thai views on whether China has good intentions in the negotiation of the Code of Conduct

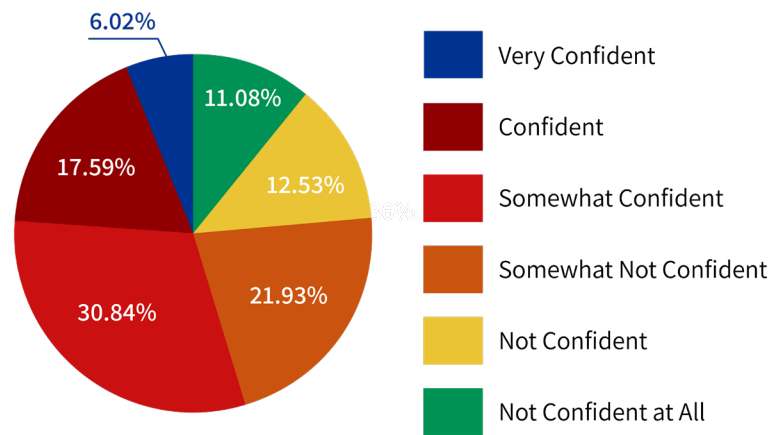


Chart 142. Indonesian views on whether China has good intentions in the negotiation of the Code of Conduct

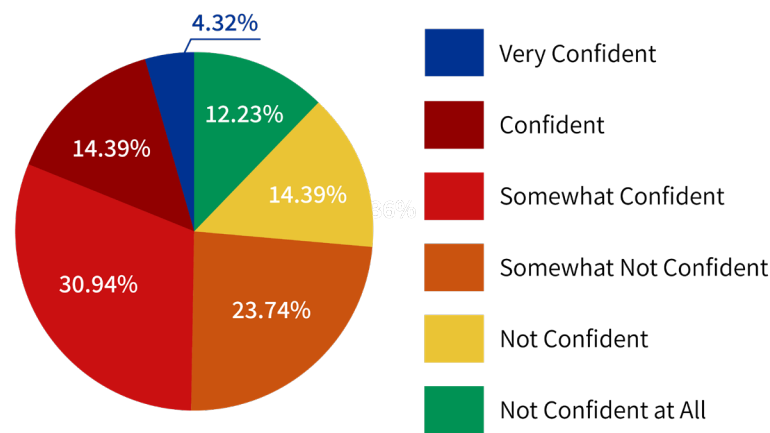


Chart 143. Malaysian views on whether China has good intentions in the negotiation of the Code of Conduct

As such, at least 90% of respondents from each of the 10 ASEAN countries respond within the positive spectrum (very important, fairly important, somewhat important) on the importance of concluding the Code of Conduct on the South China Sea. It should be noted that within this spectrum, respondents from the Philippines showed the most prevalent concern for the issue, scoring almost 70% of national respondents voting 'very important' as opposed to options of lesser value such as 'fairly important' or 'somewhat important.' In comparison, around 50% respondents from Indonesia, Malaysia, and Singapore voted 'very important' on this issue, highlighting stronger nuances of concern on the Code of Conduct from Filipino respondents.

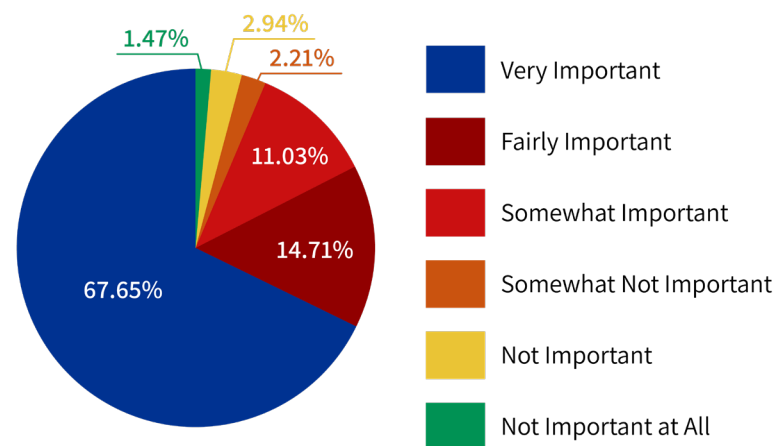


Chart 144. Filipino views on the importance of the conclusion of the Code of Conduct on the South China Sea

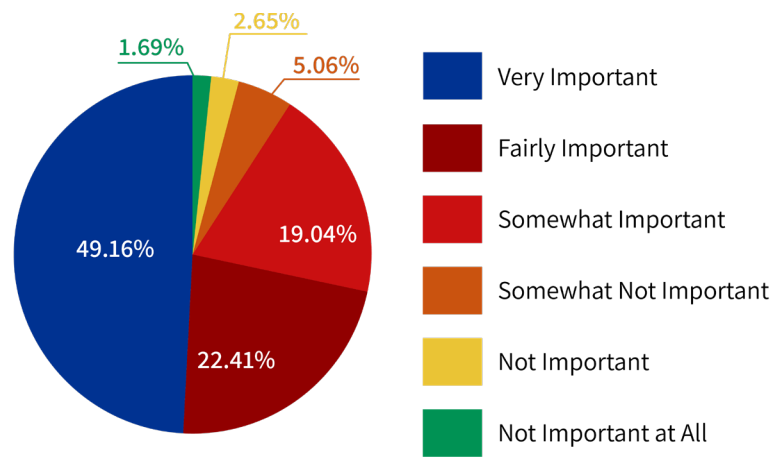


Chart 145. Indonesian views on the importance of the conclusion of the Code of Conduct on the South China Sea

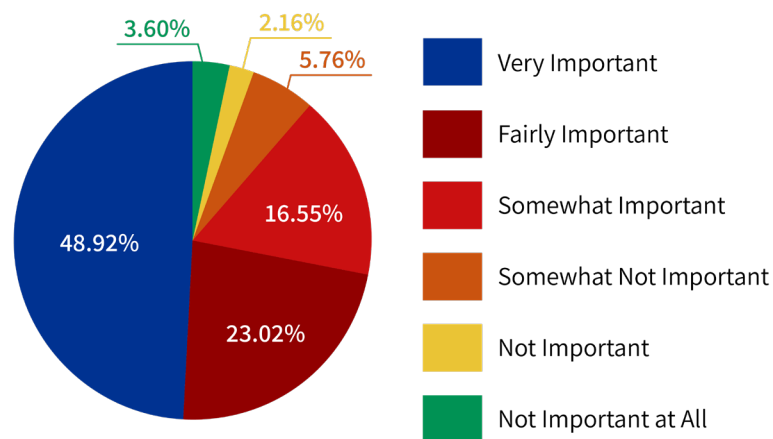


Chart 146. Malaysian views on the importance of the conclusion of the Code of Conduct on the South China Sea

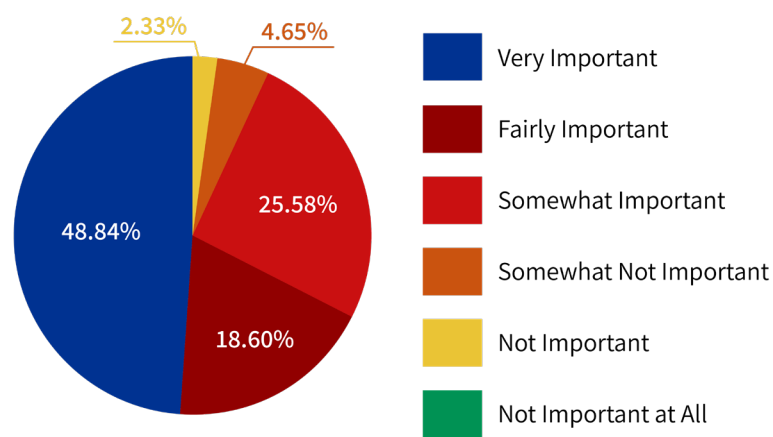


Chart 147. Singaporean views on the importance of the conclusion of the Code of Conduct on the South China Sea

B.5. The Myanmar Political Crisis

ASEAN Member States (AMS) are on the same page when asked how China should act to support in solving the Myanmar political crisis, with the majority of respondents options that China should first and foremost follow ASEAN's steps and, secondly, condemn the Tatmadaw. Although shown in varying degrees, the second highest answer found in answers from each respective AMS respondents is for China to condemn the Tatmadaw and impose targeted sanctions against the military entity. On this however, an anomaly is found in respondents from Cambodia, whereby the second highest option voted is for China to send a Special Envoy to Myanmar.

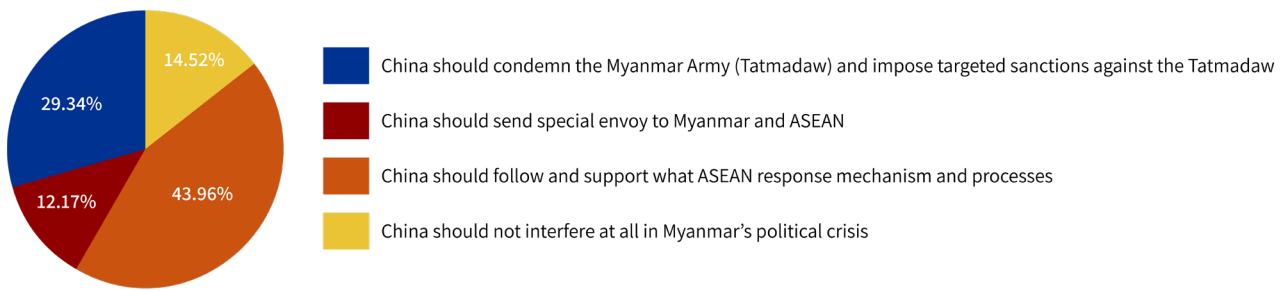


Chart 148. Overall views on how should China act to support solving the Myanmar crisis

Nonetheless, respondents from ASEAN are, at the same time, not quite so sure whether Beijing should play a bigger role in solving the crisis. When posed with this question, responses are somewhat split equally, with significant of votes being in the 'not clear' area. For example, while 62% of Cambodian respondents think that China should play a bigger role, 32% of answers opted for 'not clear' as well – hardly representing a concluding voice for the country. Cases in other country categories are akin to this, being that large portions of respondents are opting for 'not clear': 52% of Laotian respondents, 44% of Filipino respondents, and an almost equally split share of answers between 'not clear,' 'yes,' and 'no' from respondents of Indonesia, Singapore, and Brunei.

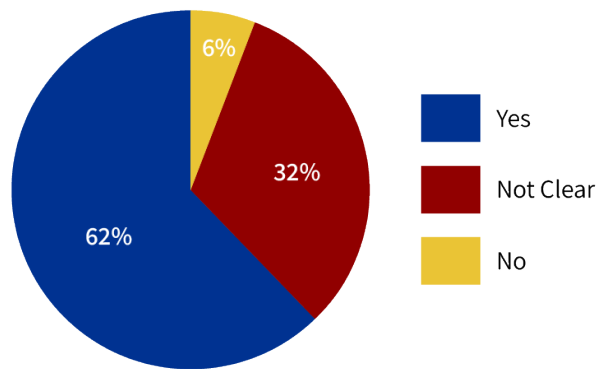


Chart 149. Cambodian views on whether should China play a bigger role in solving the political crisis in Myanmar

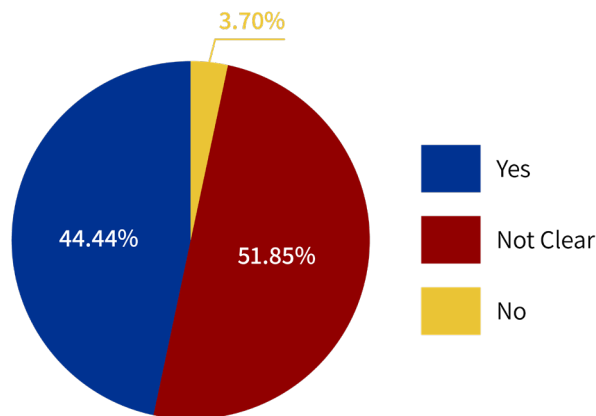


Chart 150. Laotian views on whether should China play a bigger role in solving the political crisis in Myanmar

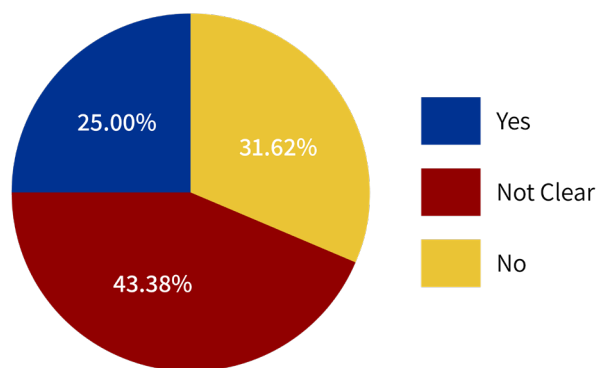


Chart 151. Filipino views on whether should China play a bigger role in solving the political crisis in Myanmar

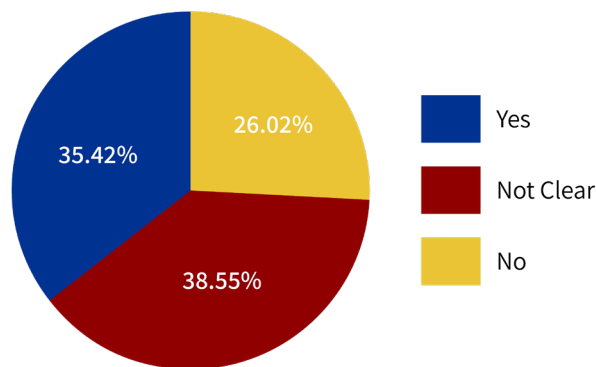


Chart 152. Indonesian views on whether should China play a bigger role in solving the political crisis in Myanmar

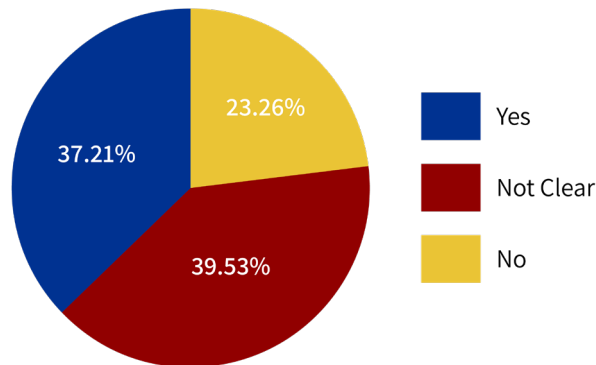


Chart 153. Singaporean views on whether should China play a bigger role in solving the political crisis in Myanmar

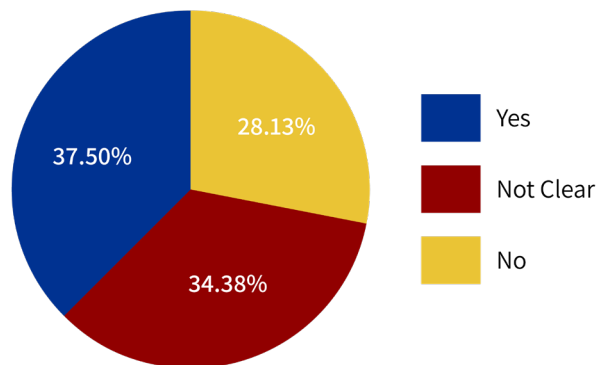


Chart 154. Bruneian views on whether should China play a bigger role in solving the political crisis in Myanmar

Despite the lack of clear and unanimous stance amongst AMS and within each respective country, it is certain that most of the AMS respondents shared negative views on ASEAN efforts to address the Myanmar political crisis. Indeed, only around 11% respondents from Thailand, 14% from Singapore, 15% from Malaysia and Brunei, 18% from the Philippines, and 20% from Indonesia, and on a slightly higher percentage, 27% of Cambodian respondents think that ASEAN is on track with their Myanmar response.

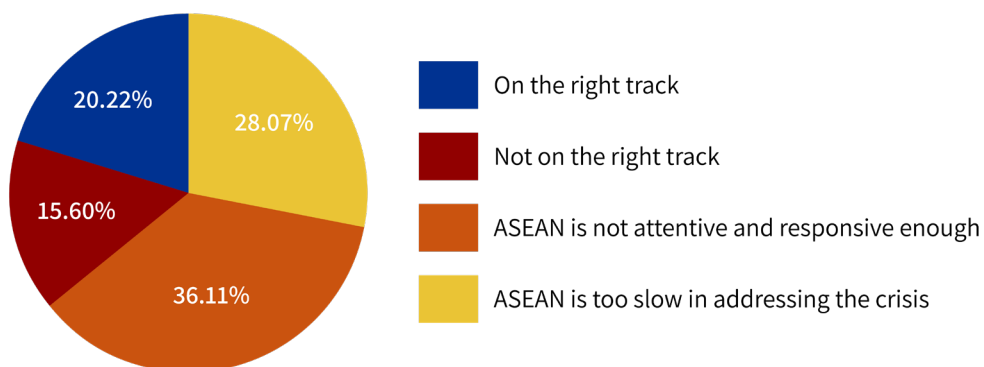


Chart 155. Overall views on whether ASEAN's effort to address Myanmar's political crisis is on the right track?

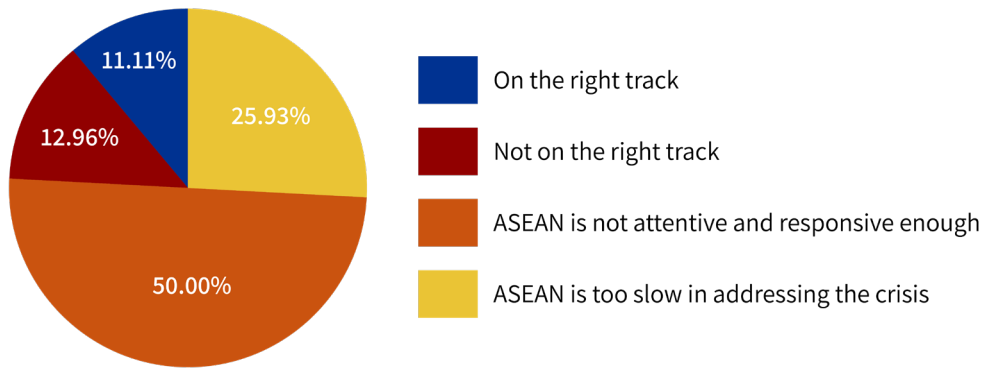


Chart 156. Thai views on whether ASEAN's effort to address Myanmar's political crisis on the right track?

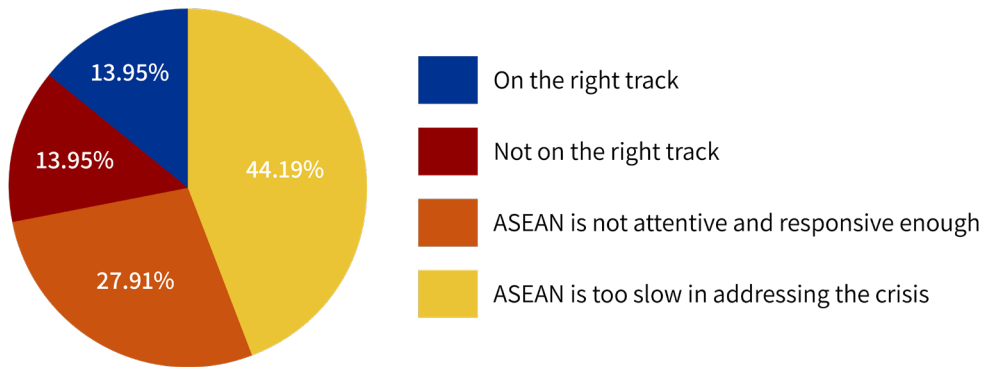


Chart 157. Singaporean views on whether ASEAN's effort to address Myanmar's political crisis on the right track?

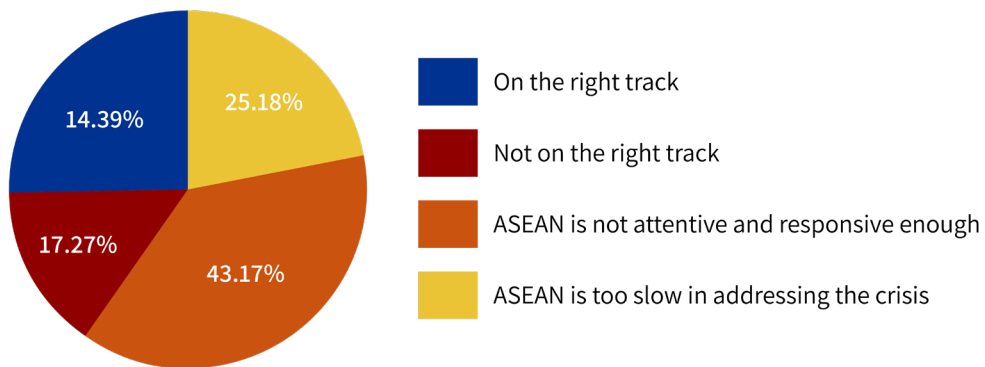


Chart 158. Malaysian views on whether ASEAN's effort to address Myanmar's political crisis on the right track?

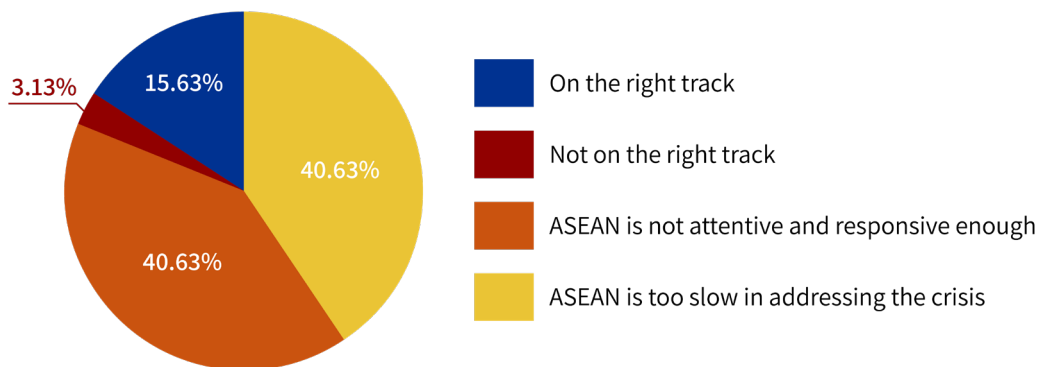


Chart 159. Bruneian views on whether ASEAN's effort to address Myanmar's political crisis on the right track?

Interestingly, as the country of concern in this question, a higher share of respondents from Myanmar (24%) as compared to the aforementioned countries view efforts by ASEAN to be on track. The rest of share of respondents are opting either that efforts are not on the right track, ASEAN is not attentive and responsive enough, or that ASEAN is too slow in responding to the crisis.

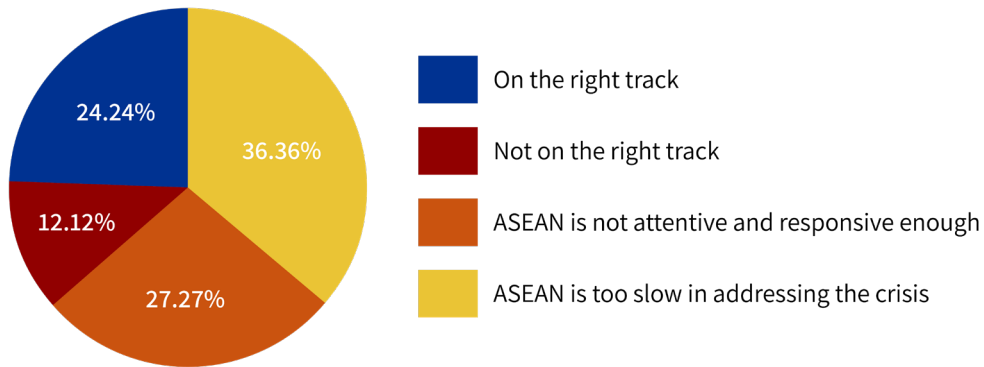


Chart 160. Myanmar People's views on whether ASEAN's effort to address Myanmar's political crisis on the right track?

As previously found, views of respondents from Laos differ largely compared to the rest of the region, with almost half of respondents thinking that ASEAN efforts are going in the right direction. Though it should be noted that respondents' answers must not be concluded as generally representative of that of the whole country.

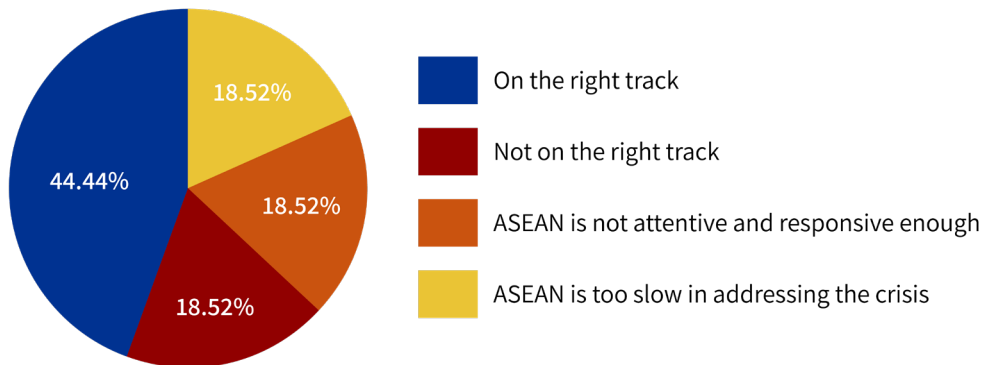


Chart 161. Laotian views on whether ASEAN's effort to address Myanmar's political crisis on the right track?

In light of this discovery, when matched with views on the issue in the context of the region's relations with China, respondents from Cambodia and Laos stand out from the rest of other ASEAN countries with their confidence that China is acting as a responsible partner for ASEAN in defusing the crisis. Highest absence of confidence (answering not confident at all, not confident, and somewhat not confident) comes from respondents of, in the following order: the Philippines and Thailand (around 74%) and Malaysia. Interestingly 55% of Myanmar respondents are confident that China is acting as a responsible partner of ASEAN in solving the crisis in the country. As in previous questions, respondents from Laos and Cambodia have a higher share of the vote of confidence in China in this issue, with an average of 63% respondents' answers being in the positive spectrum.

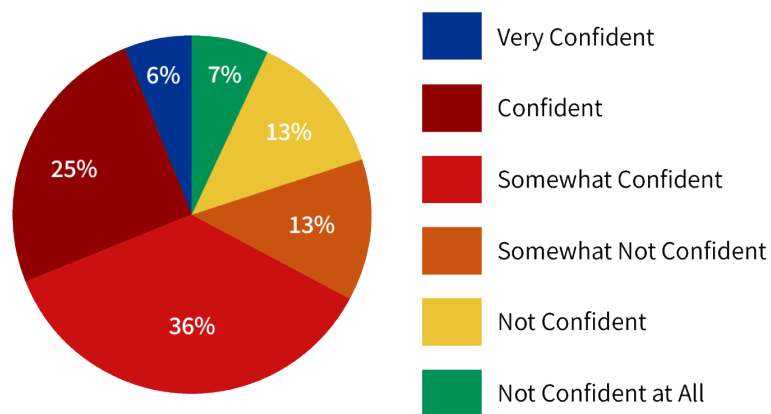


Chart 162. Cambodian views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

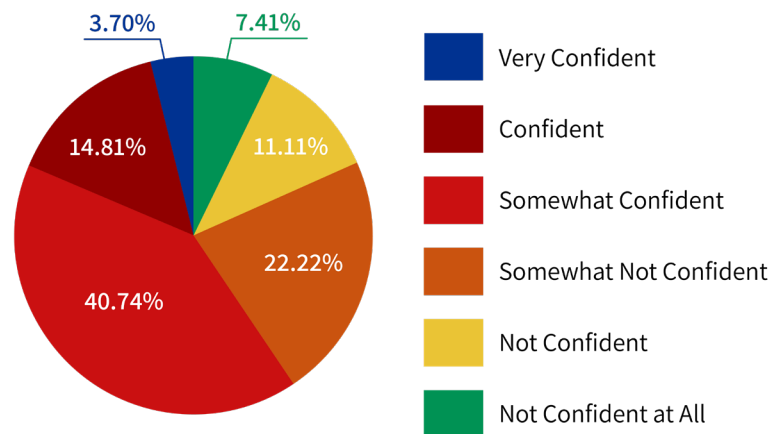


Chart 163. Laotian views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

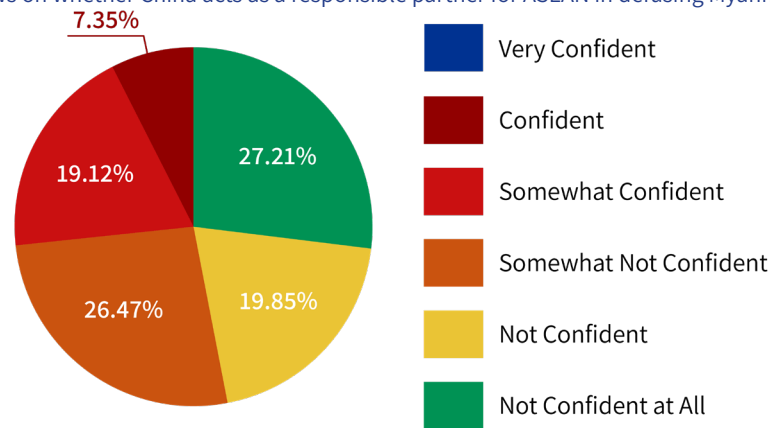


Chart 164. Filipino views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

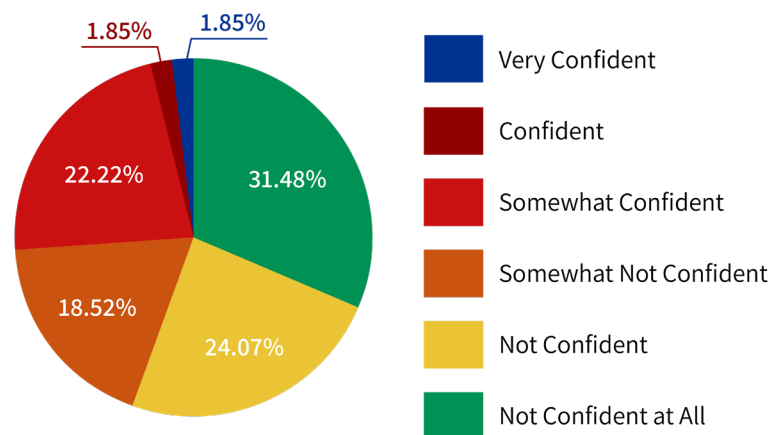


Chart 165. Thai views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

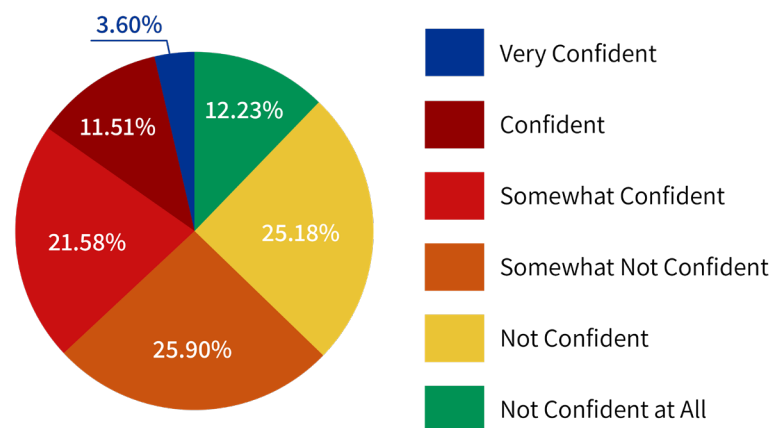


Chart 166. Malaysian views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

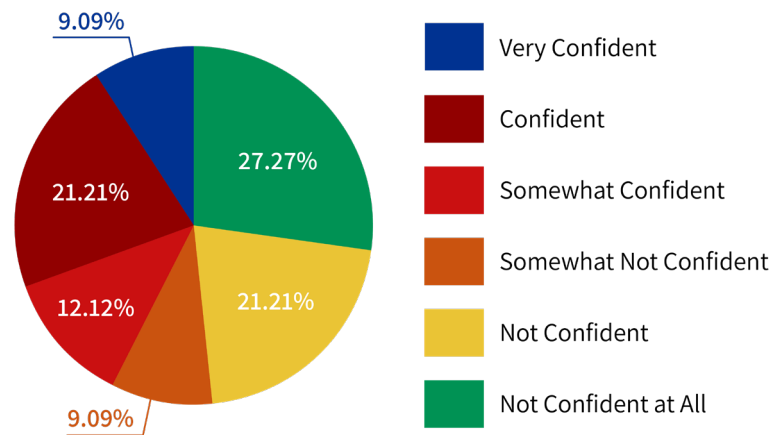


Chart 167. Myanmar People's views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

B.6. Domestic Perceptions on China

Aside from existing cooperation, mechanisms, and views on strategic issues in the region, relations with China can also be assessed through the domestic lens. This includes how respondents perceive existing stereotypes on China from ideology to diaspora relations along with how respective AMS governments relationships with China is viewed, and responses it elicits from such perceived relations.

Above all else, China is primarily seen as an economic influencer by respondents from ASEAN, as vouched by the majority of respondents from Brunei (65.63%), Malaysia (51.80%), Indonesia (46.02%), and Laos (48.15%). However, most respondents from Myanmar (72.73%), Cambodia (63.63%), Thailand (59.26%), Singapore (53.49%), Vietnam (52.5%), and the Philippines (52.21%) note that China is not only an economic influencer, but also a political influencer in their countries. A probable rationale behind this perception is each country's domestic relations with China. For the Filipino respondents, such issues might refer to the South China Sea and for Myanmar respondents, it might allude to the ongoing political crisis in the country.

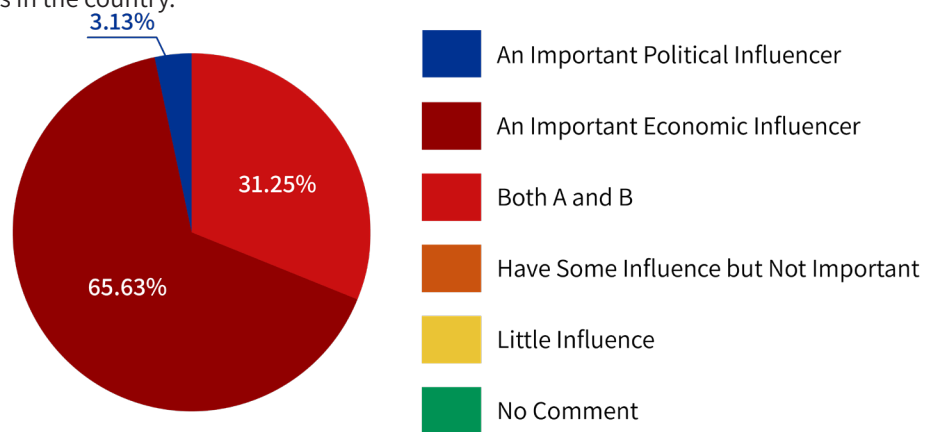


Chart 168. Bruneian views on how they see China's influence in their country

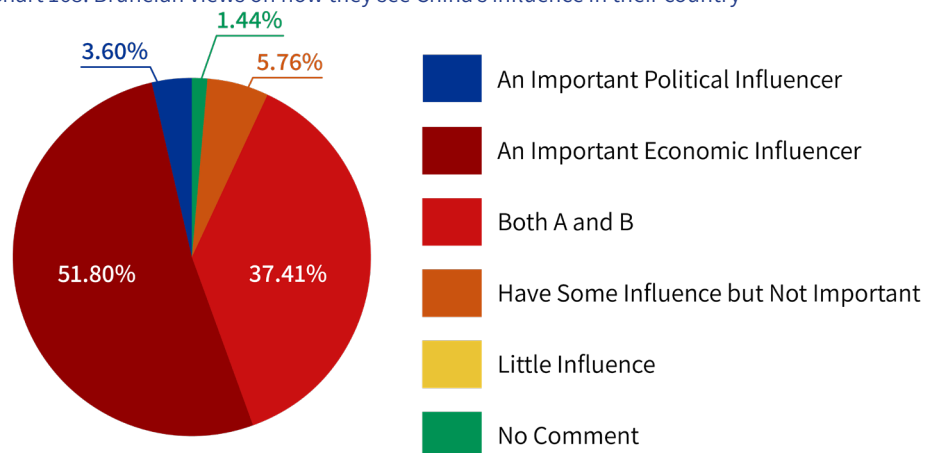


Chart 169. Malaysian views on how they see China's influence in their country

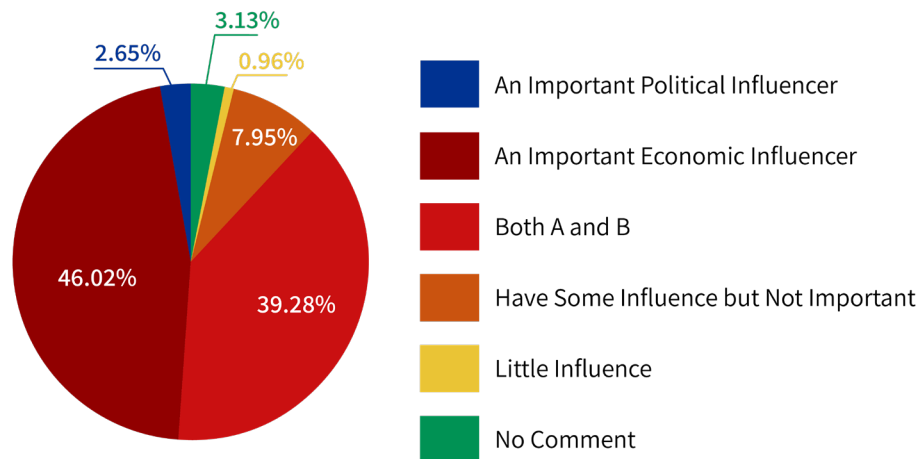


Chart 170. Indonesian views on how they see China's influence in their country

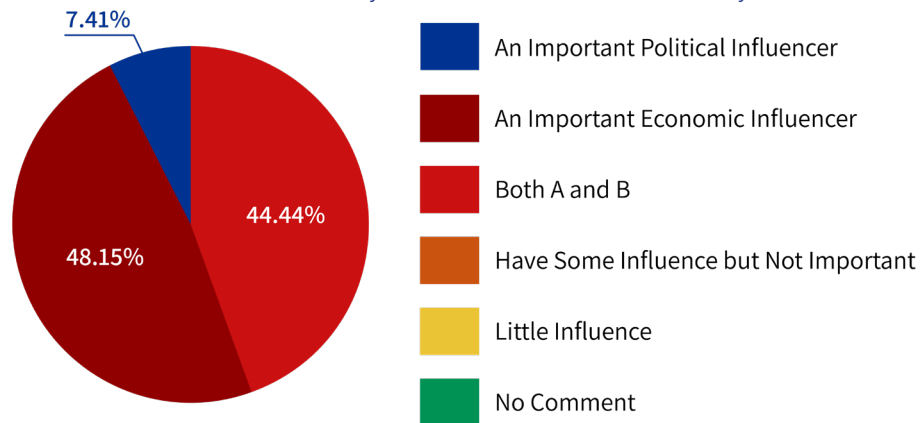


Chart 171. Laotian views on how they see China's influence in their country

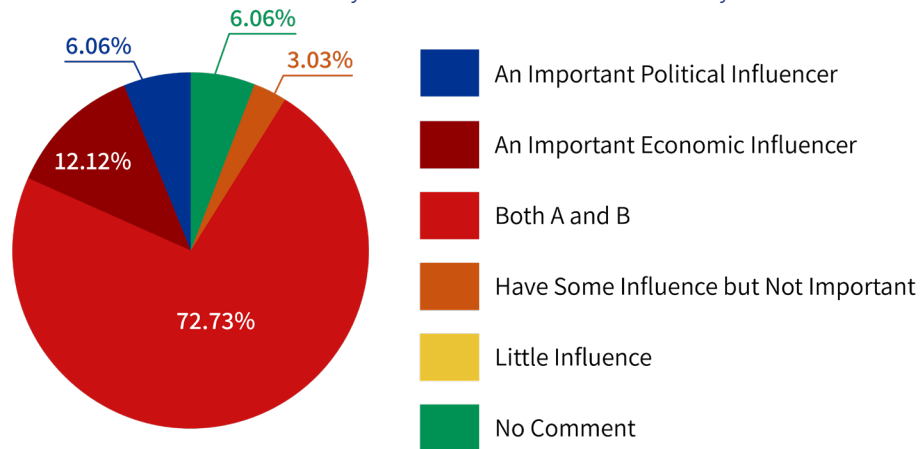


Chart 172. Myanmar People's views on how they see China's influence in their country

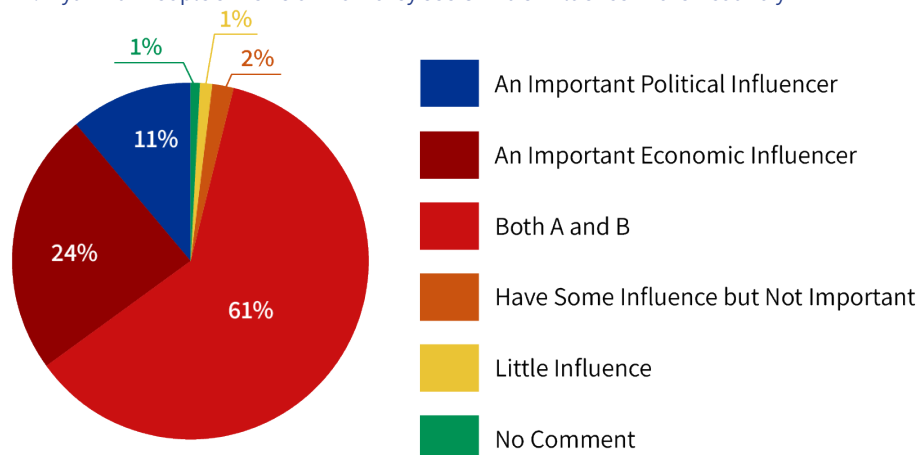


Chart 173. Cambodian views on how they see China's influence in their country

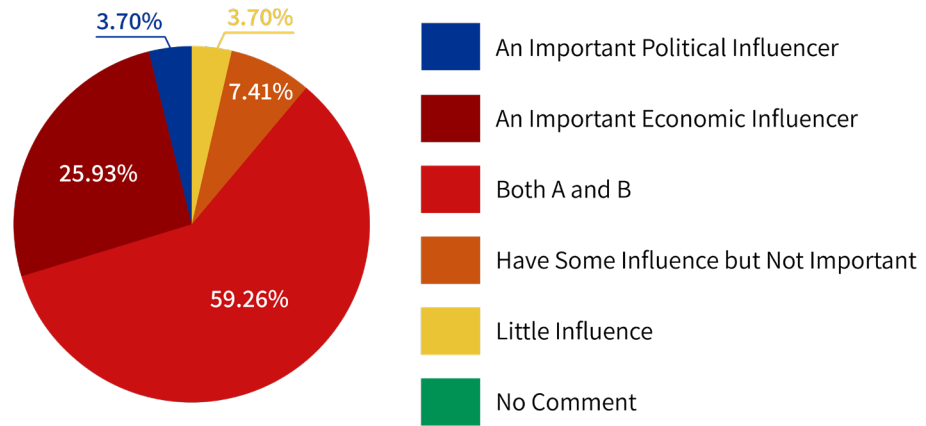


Chart 174. Thai views on how they see China's influence in their country

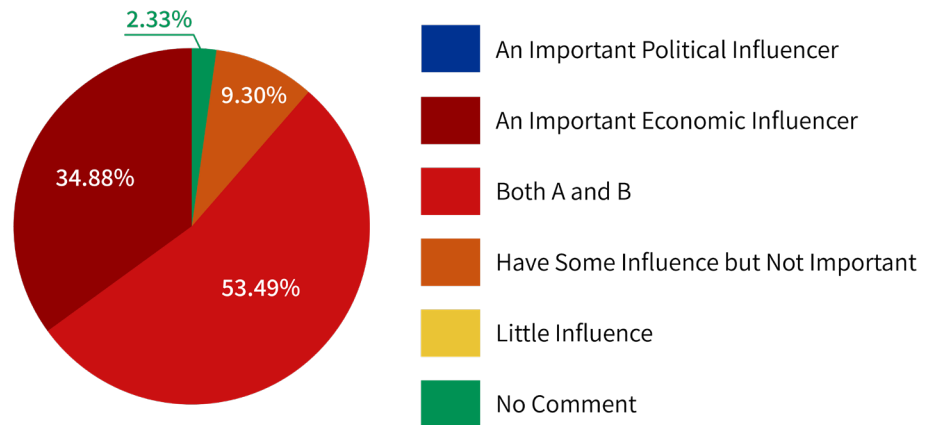


Chart 175. Singaporean views on how they see China's influence in their country

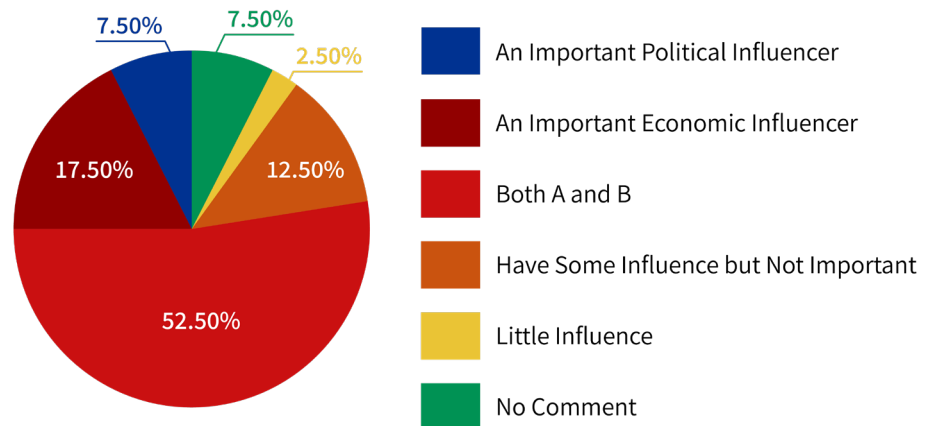


Chart 176. Vietnamese views on how they see China's influence in their country

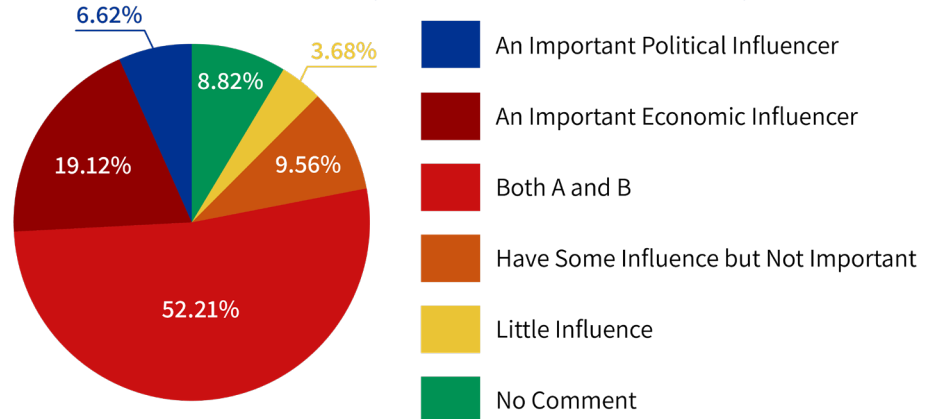


Chart 177. Filipino views on how they see China's influence in their country

The existing perception of China as a primarily economic influence is further endorsed by results from Question 41 which revealed that generally, respondents from AMS find China’s robust economic growth despite the pandemic appealing. This answer is followed by progress in science and technology as the most appealing. An exception is made for respondents from Singapore (around 40%), which ranks China’s elimination of extreme poverty to be the most appealing aspect – while voting economic growth despite the pandemic at second place receiving votes from around 26% of respondents.



Chart 178. Overall views on which aspects of China appeal to them the most



Chart 179. Singaporean views on which aspects of China appeal to them the most

One of the probable interpretations on China’s political influence can be assessed through Question 38 which asked respondents their views on whether their respective countries have been influenced by China’s communist ideology. For Laos (around 67%), Vietnam (around 58%), and Cambodia (around 47%) country categories, most of the respondents from these countries answered affirmatively that China’s communism has indeed influenced their country.

The rest of the ASEAN respondents of other nationalities, however, disagreed: 61% of Singaporean respondents voted no on China’s communist influence in their country, followed by Malaysian respondents at around 59% and Indonesian respondents at 50%.

Nonetheless, it should be noted that despite a majority of respondents from these countries disagreeing that Chinese communist ideology influences their country, a significant portion of respondents from each of the ASEAN nationalities resides in the ‘neutral’ option, unable to completely reject nor deny the given perception. A case in point is showcased by respondents from the Philippines – 36.76% of whom answered affirmatively on China’s communist influence while at the same time 35.29% of respondents being neutral on the issue.

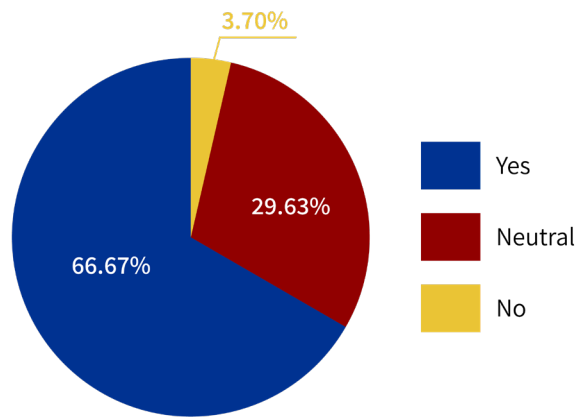


Chart 180. Laotian views on how they think their country has been influenced by China's communist ideology

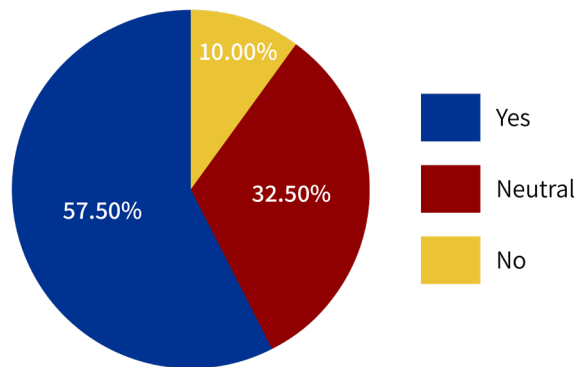


Chart 181. Vietnamese views on how they think their country has been influenced by China's communist ideology

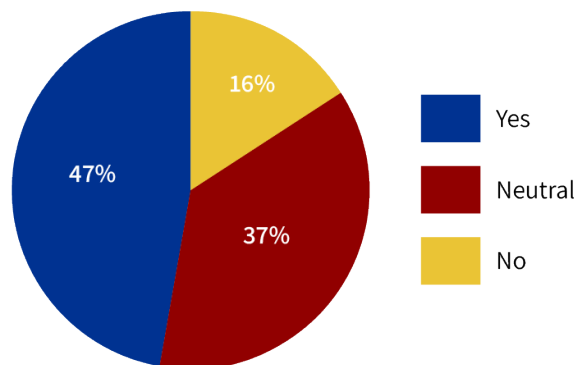


Chart 182. Cambodian views on how they think their country has been influenced by China's communist ideology

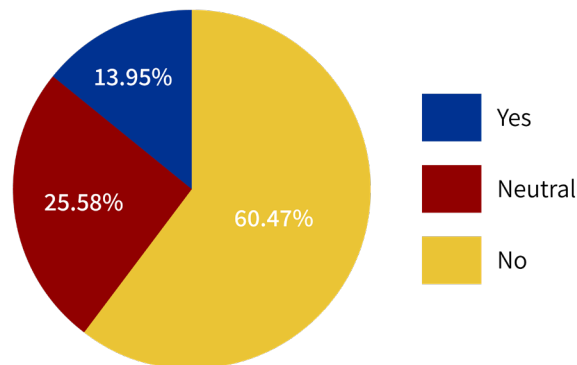


Chart 183. Singaporean views on how they think their country has been influenced by China's communist ideology

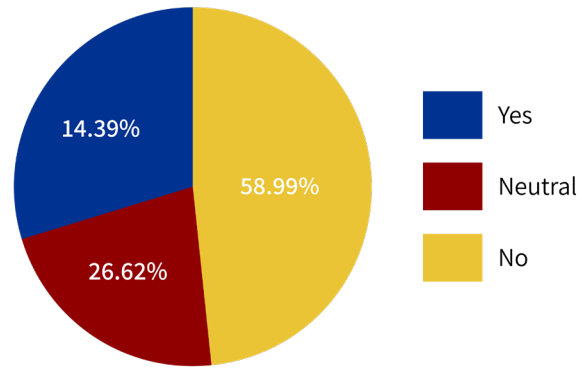


Chart 184. Malaysian views on how they think their country has been influenced by China's communist ideology

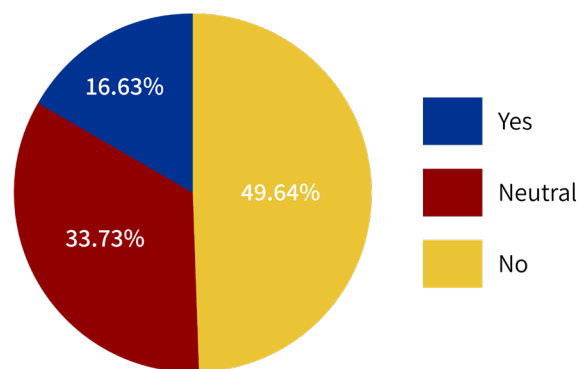


Chart 185. Indonesian views on how they think their country has been influenced by China's communist ideology

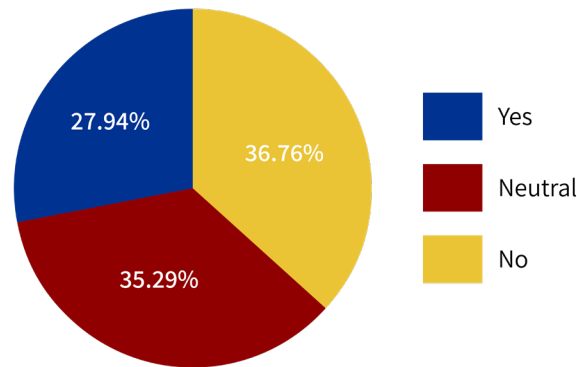


Chart 186. Filipino views on how they think their country has been influenced by China's communist ideology

When asked their thoughts on whether China still holds a big influence over the Chinese diaspora in their respective countries, most respondents from AMS answered affirmatively ('yes'): from Laos at around 63%, Vietnam at 60%, Thailand and Cambodia at 58%, Myanmar at 52%, the Philippines at 50%, Malaysia at 47%, and Indonesia at 42%. As noted previously, however, similar cases of significant neutrality portion is found within other answers as well. For example, around 41% respondents from Cambodia chose to be neutral on this question, and only around 1% responded negatively that China holds influence over diaspora in the country. 41% of respondents from Malaysia also remained neutral, while around 12% of them denied the posed question.

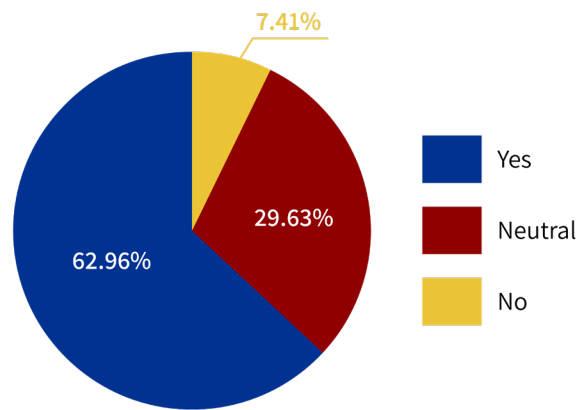


Chart 187. Laotian views on whether China still has a big influence over its diaspora in their country

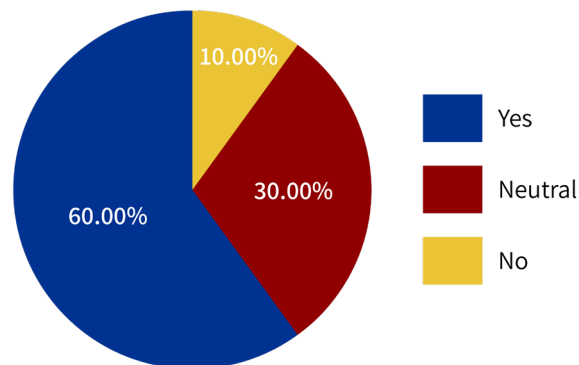


Chart 188. Vietnamese views on whether China still has a big influence over its diaspora in their country

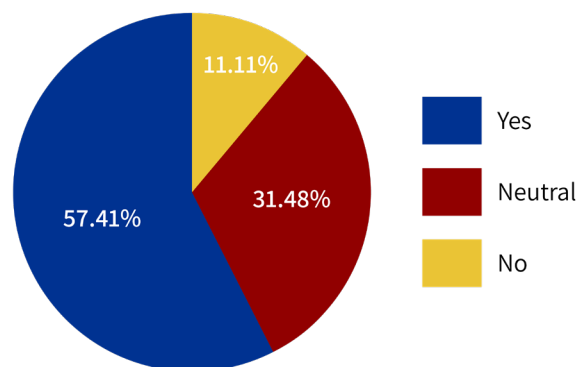


Chart 189. Thai views on whether China still has a big influence over its diaspora in their country

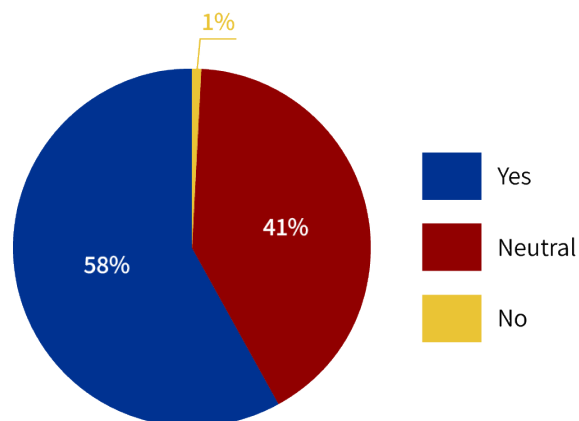


Chart 190. Cambodian views on whether China still has a big influence over its diaspora in their country

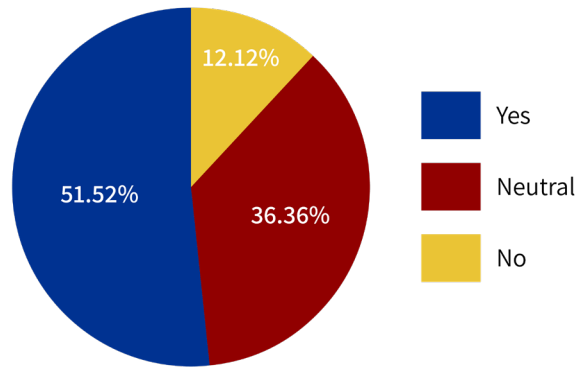


Chart 191. Myanmar People's views on whether China still has a big influence over its diaspora in their country

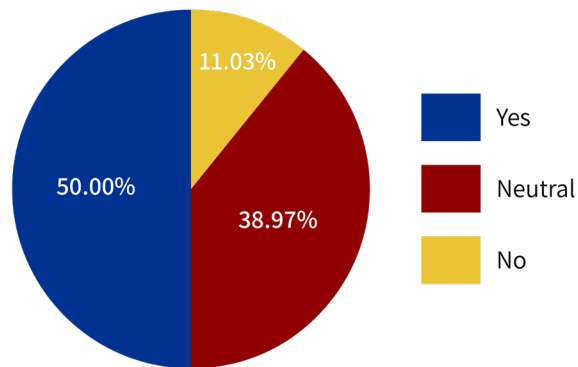


Chart 192. Filipino views on whether China still has a big influence over its diaspora in their country

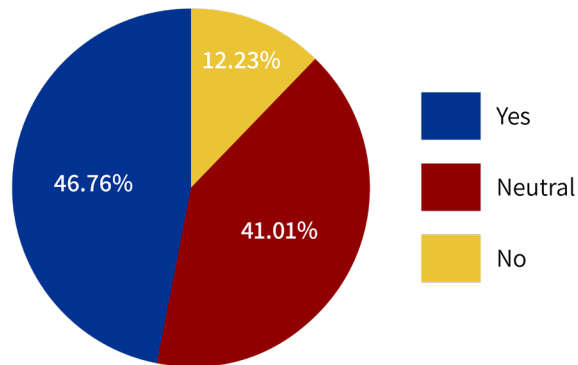


Chart 193. Malaysian views on whether China still has a big influence over its diaspora in their country

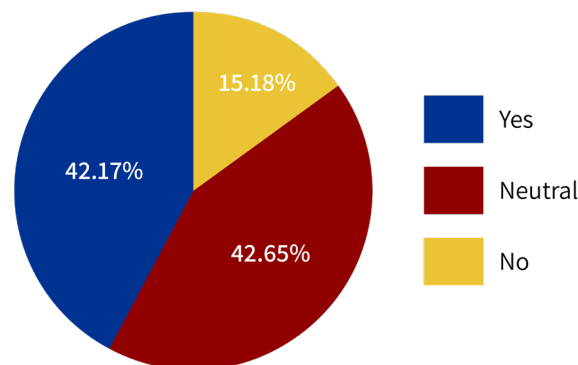


Chart 194. Indonesian views on whether China still has a big influence over its diaspora in their country

Such answers may be traced to the persisting domestic perception that the Chinese diaspora in ASEAN countries still maintain close relations with China. To provide, most respondents from Indonesia, Malaysia, Brunei, the Philippines, and Singapore stated that Chinese diasporas in their countries maintain primarily economic relations with China. Whereas the rest of AMS in general views the relations between the diaspora as not only being economic in nature, but also in all aspects (politically and culturally).

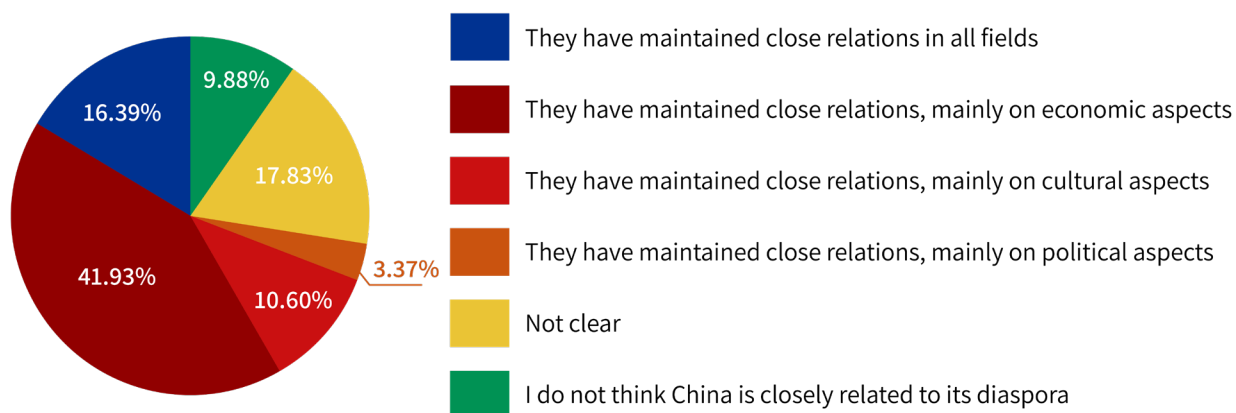


Chart 195. Indonesian views on what they think of China's relationship with its diaspora in their country

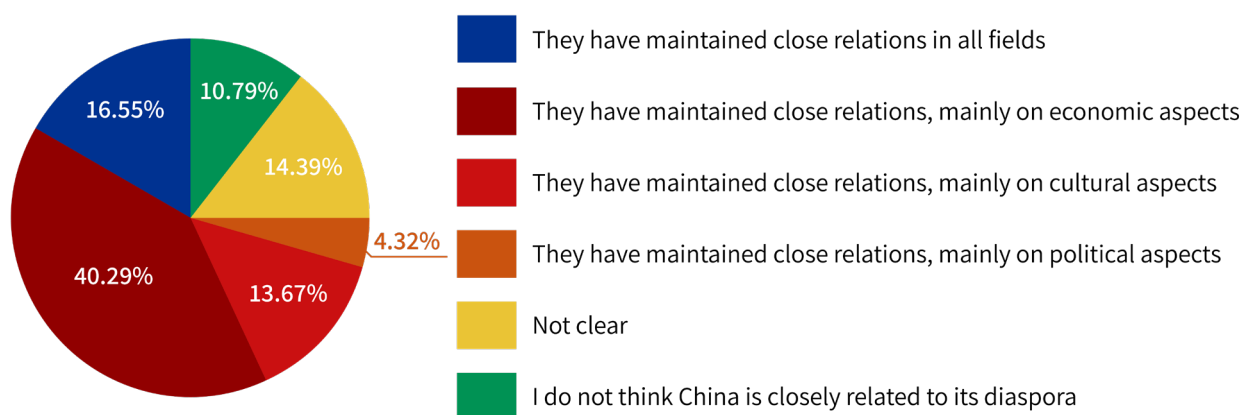


Chart 196. Malaysian views on what they think of China's relationship with its diaspora in their country

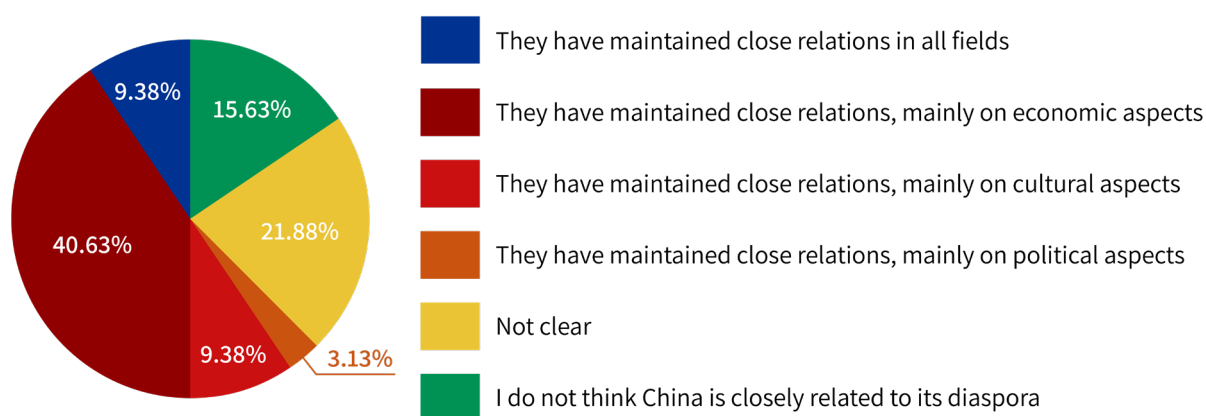


Chart 197. Bruneian views on what they think of China's relationship with its diaspora in their country



Chart 198. Filipino views on what they think of China's relationship with its diaspora in their country

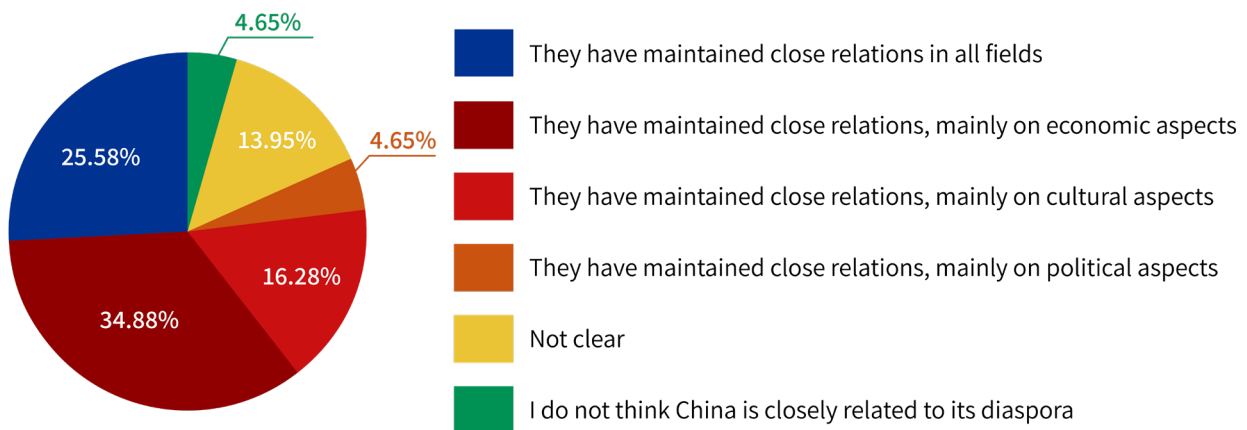


Chart 199. Singaporean views on what they think of China's relationship with its diaspora in their country



Chart 200. Overall views on what they think of China's relationship with its diaspora in their country

B.7. Domestic Relations with China

In assessing ASEAN relations with China, respondents were also asked to opine on their countries' domestic relations with China. To begin with, when asked whether the respondents' governments are close with China, all respondents from ASEAN Member States regardless of country category responded in the positive spectrum (very close, close, somewhat close). Indeed, even if broken down per country, a steady number of more than around 92% of respondents in each AMS answered positively. Furthermore, for respondents from Myanmar, Laos, and Brunei, 100% of respondents reside within this spectrum. As the spectrum consists of options such as very close, close, and somewhat close, such level of intensity or degree of expression in the responses must be noted also. For example, a whopping 80% of Cambodian respondents feel that their government is very close with China. Such a high level of affirmation is less pronounced in the rest of ASEAN countries.

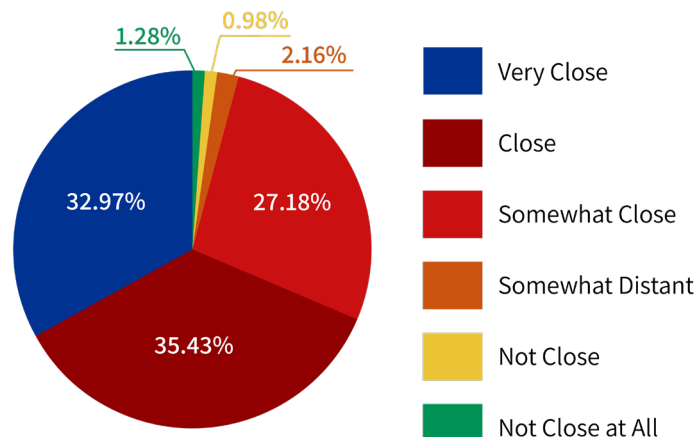


Chart 201. Overall views on how close they think their government is with China

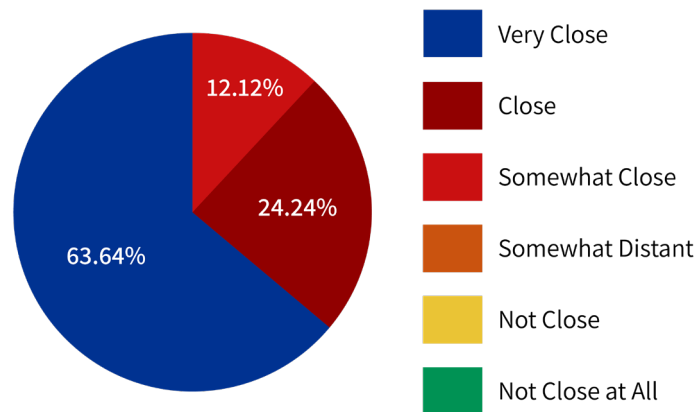


Chart 202. Myanmar people's views on how close they think their government is with China

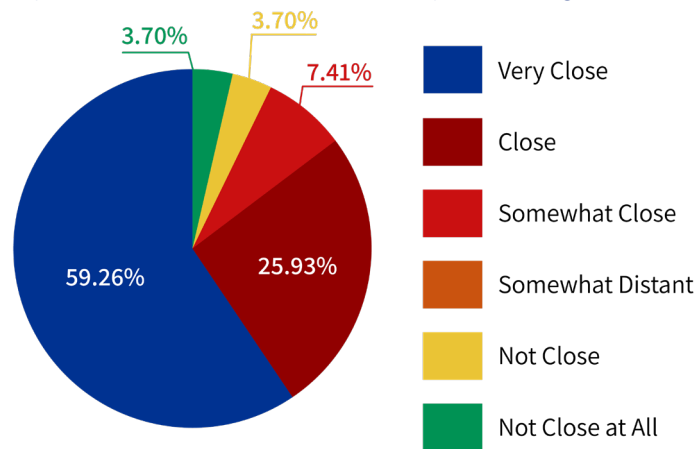


Chart 203. Laotian views on how close they think their government is with China

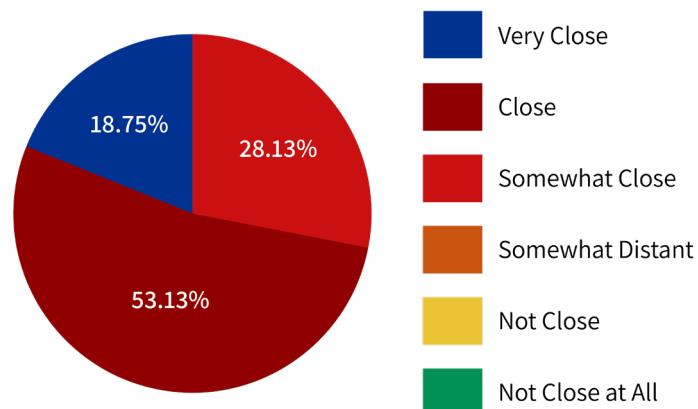


Chart 204. Bruneian views on how close they think their government is with China

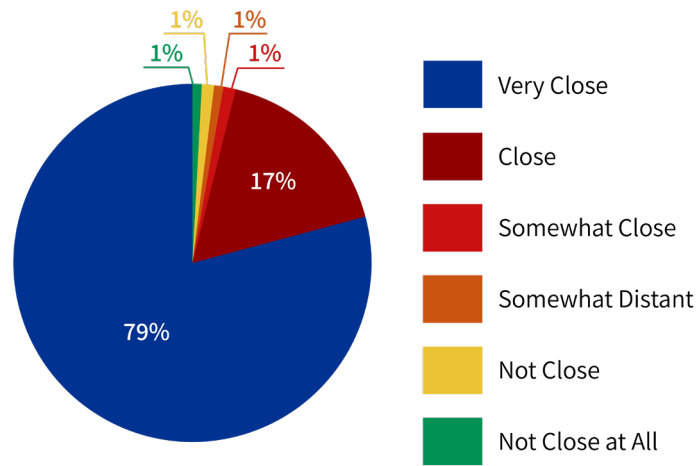


Chart 205. Cambodian views on how close they think their government is with China

Whether these various assessed distances were welcomed or rejected differs between respondents based on their country. High number of respondents from Myanmar (around 76%), the Philippines (around 71%), and Vietnam (around 70%) are worried over China's influence. On the other spectrum, respondents from Laos (around 52%) and Cambodia (around 53%) welcome this influence. Although, a caveat stands that an average of 30% of respondents from the two countries followed suit in expressing their worry over China's influence in their country. Respondents from Malaysia, however, are equally split and have a somewhat equal share of respondents who worry (around 34%), welcome (around 32%), and are neutral (32%) over China's influence.

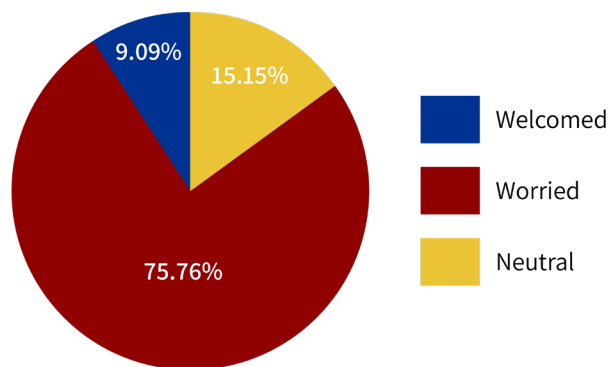


Chart 206. Myanmar People's views on China's influence in their country

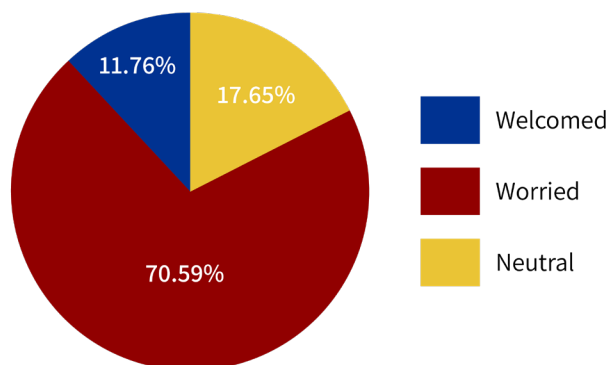


Chart 207. Filipino views on China's influence in their country

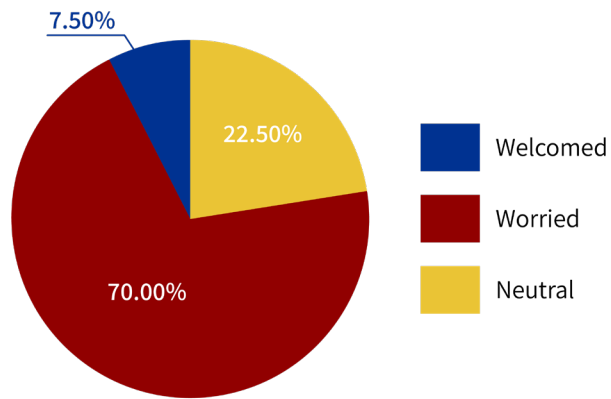


Chart 208. Vietnamese views on China's influence in their country

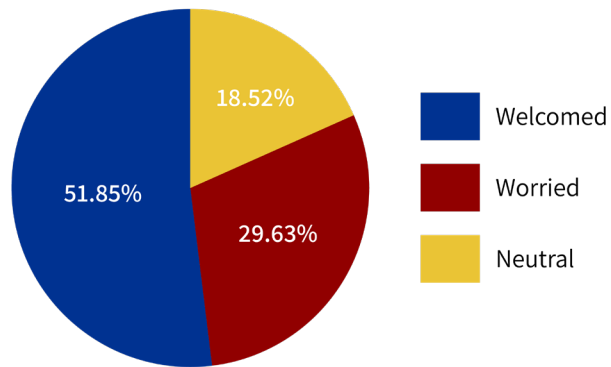


Chart 209. Laotian views on China's influence in their country

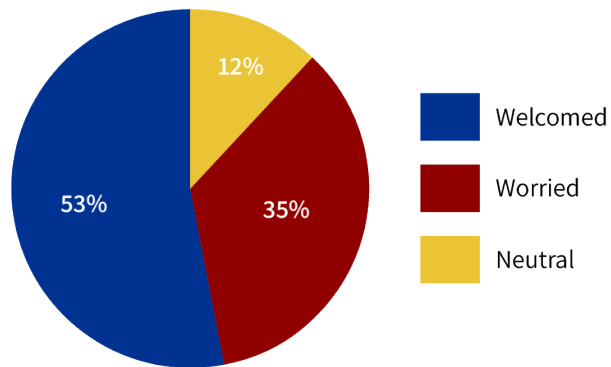


Chart 210. Cambodian views on China's influence in their country

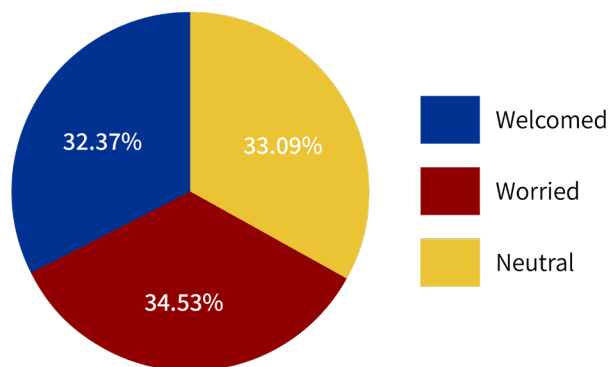


Chart 211. Malaysian views on China's influence in their country

On a slightly different angle, China's influence among ASEAN Member States is perceived to differ between countries. Most notably, China's influence, majority-wise, is welcomed or invites impartiality on a somewhat balanced portion, from respondents from Brunei, Cambodia, and Laos. On the other hand, respondents from Vietnam (70%), the Philippines (66%) Myanmar (65%), and Singapore (58%) are worried over this influence. Nonetheless, concerns from respondents are less pronounced albeit only by around 5% less.

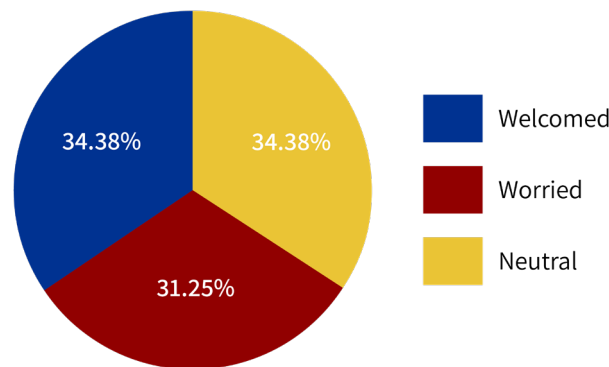


Chart 212. Bruneian views of China's influence among ASEAN member states

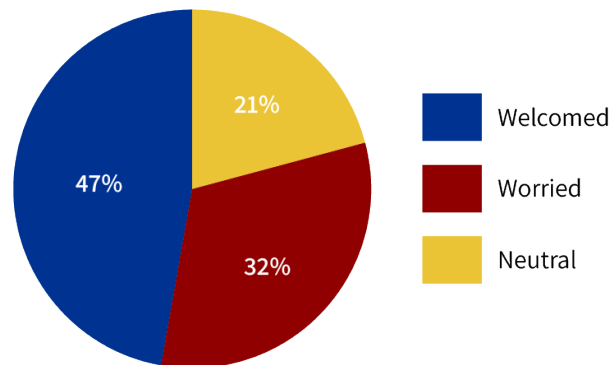


Chart 213. Cambodian views of China's influence among ASEAN member states

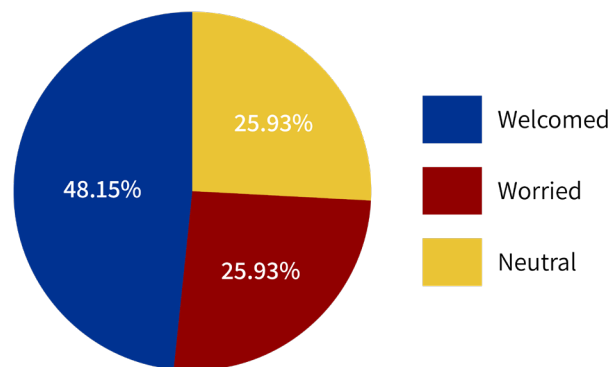


Chart 214. Laotian views of China's influence among ASEAN member states

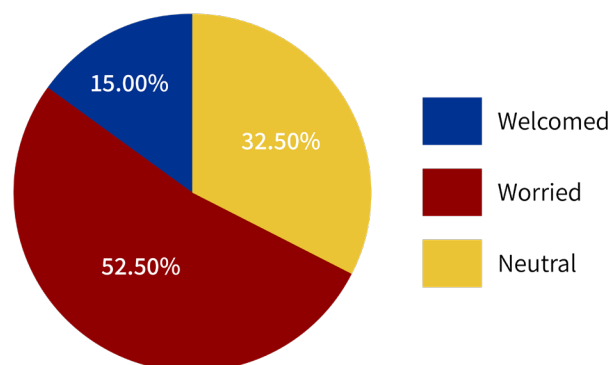


Chart 215. Vietnamese views of China's influence among ASEAN member states

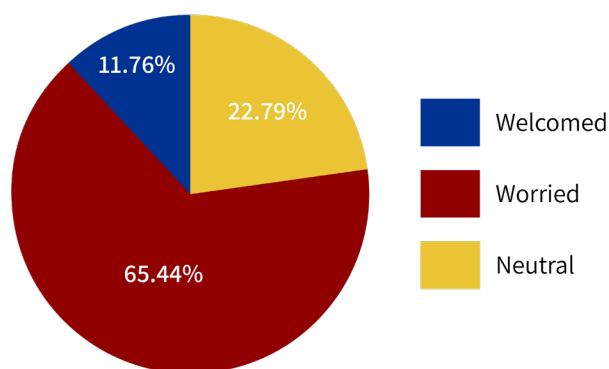


Chart 216. Filipino views of China's influence among ASEAN member states

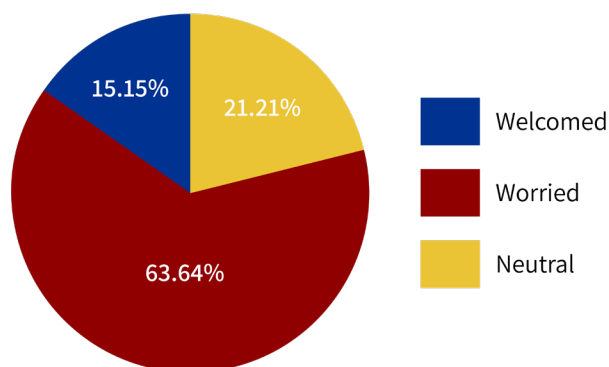


Chart 217. Myanmar People's views of China's influence among ASEAN member states

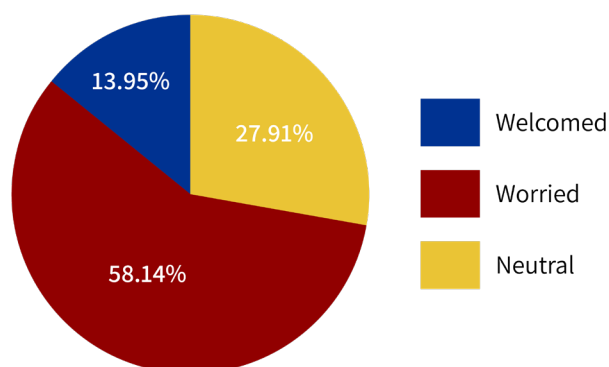


Chart 218. Singaporean views of China's influence among ASEAN member states

B.8. Overall

In terms of economic and sociocultural cooperation, most people in all AMS view the relationship between ASEAN and China in a positive light. However, there are some patterns of different stances on strategic issues, or on bilateral views on or relations with China.

On strategic issues, perceptions on China leans toward the negative spectrum if we look at the answers from respondents in the Philippines and Malaysia. This is most prevalent on political security issues such as motives on regional affairs and unsettled territorial disputes. Laos and Cambodia, on the other hand, seem the most open or welcoming of relations with China and the perceived influence it has with both countries.

C. Specific Country Analysis

C.1. Philippines

Respondents from the Philippines seem to have the least positive perspectives on ASEAN-China relations. Beginning with the overall relationship between ASEAN and China, a notable portion of Filipino respondents chose to be neutral when posed with various identified perceptions on ASEAN-China relations, be it be on ASEAN-China Strategic Partnership, economic ties during the pandemic, or whether relations are on the right track. In other words, it cannot be concluded whether Filipino respondents lean more to one choice or another due to the almost-equally split share of answers between the negative spectrum, neutrality, and positive spectrum.

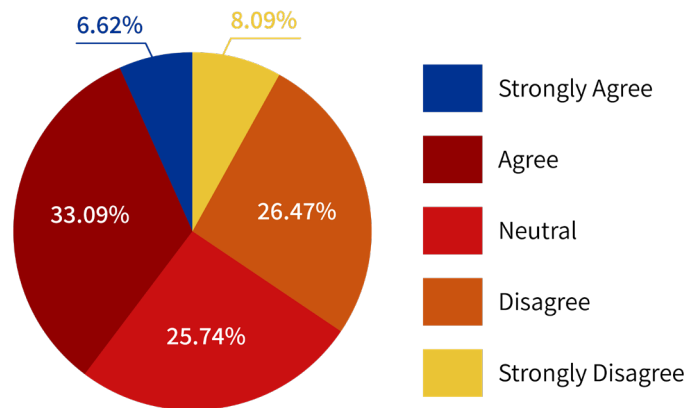


Chart 219. Filipino views on ASEAN-China Strategic Partnership and if it contributes to regional peace, stability, development, and prosperity

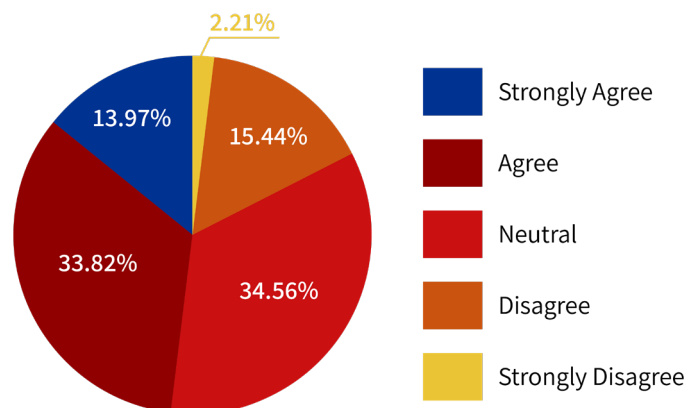


Chart 220. Filipino views on whether close cooperation between ASEAN-China helps alleviate the pandemic

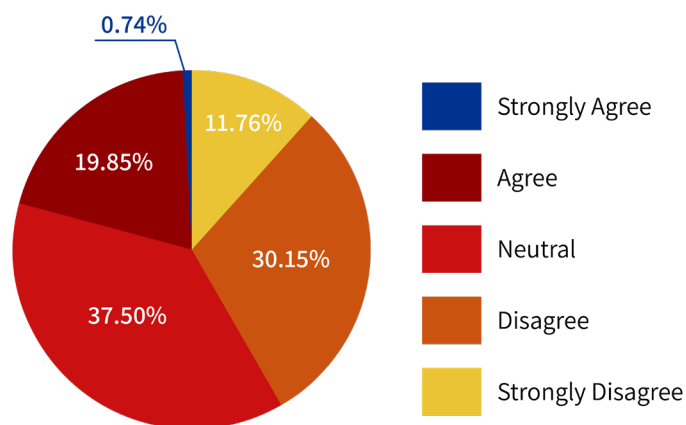


Chart 221. Filipino views on whether the relationship between ASEAN and China is on the right track

Similar sentiments on neutrality are reflected in respondents' satisfaction on existing cooperation and mechanisms between ASEAN and China such as the ASEAN-China Free Trade Area, the RCEP, the ASEAN-China Young Leaders Scholarship, among others. A notable anomaly from neutrality is identified in Question 18 which asked respondent's satisfaction rate on the Consultations between ASEAN Member States and China on the Code of Conduct (CoC) in the South China Sea – whereby almost 70% of respondents are in the negative range (not satisfied at all, not satisfied, and somewhat not satisfied). Whether respondents are from the Elite sector or are Students, a similar dissatisfaction rate is echoed.

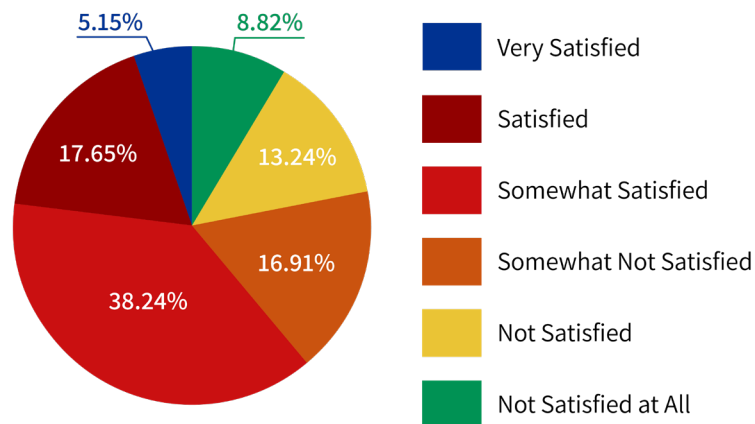


Chart 222. Filipino views on ASEAN-China Free Trade Area

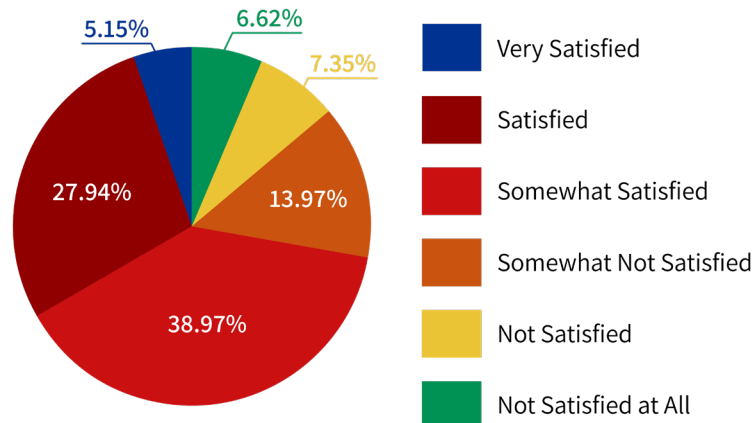


Chart 223. Filipino views on ASEAN-China Young Leaders Scholarship

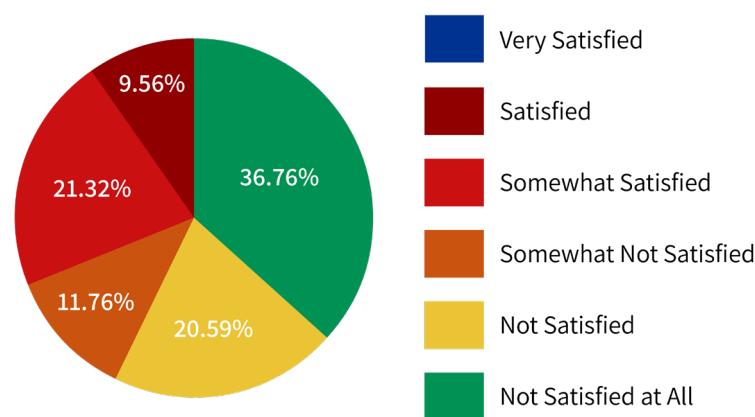


Chart 224. Filipino views on the Consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC)

Concerns over China's influence in the region are also palpable in the answers of respondents from the Philippines. When posed with Question 25 on their confidence that China respects the national unity, sovereignty, and territorial integrity of ASEAN countries, 80.88% of respondents are in the negative spectrum (not confident at all, not confident, somewhat not confident). Students are more confident overall, with 71.93% of them in the negative spectrum, in comparison with the 87.34% of the Elite sector within that range.

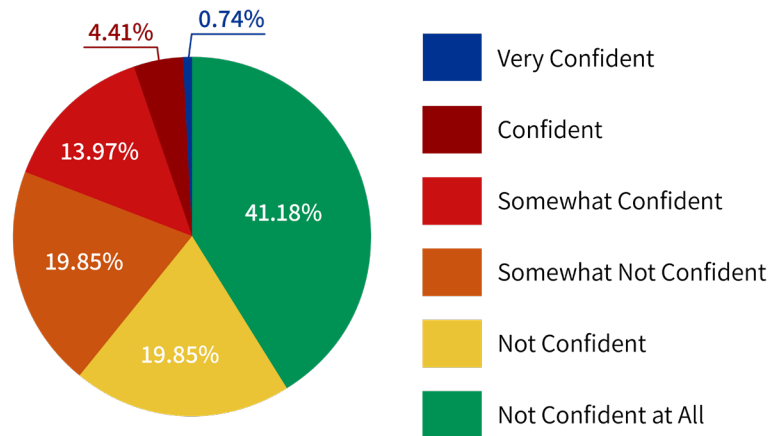


Chart 225. Filipino (general) views on if China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

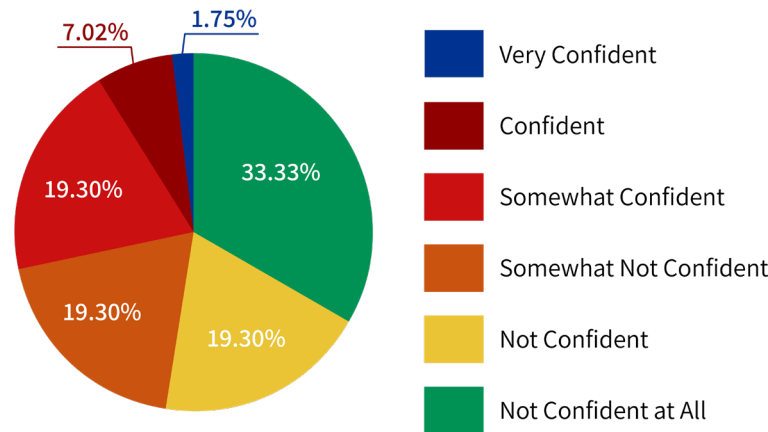


Chart 226. Filipino students' views on if China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

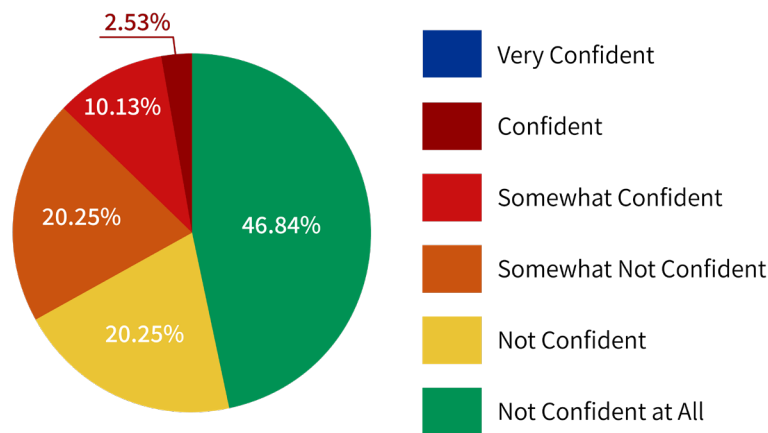


Chart 227. Filipino elites' views on if China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

Similar sentiments are echoed in the statements that China treats ASEAN as equal partners, with 88% of the Elite respondents and 85% students being in the negative spectrum of confidence. Likewise, lack of confidence is found within Filipino respondents on the statement that China has good intentions in the negotiation of the Code of Conduct. Indeed, 84.81% of Elite respondents are either not confident at all, not confident, or somewhat not confident when responding to this statement. On the other hand, 73.68% of Students answered as such.

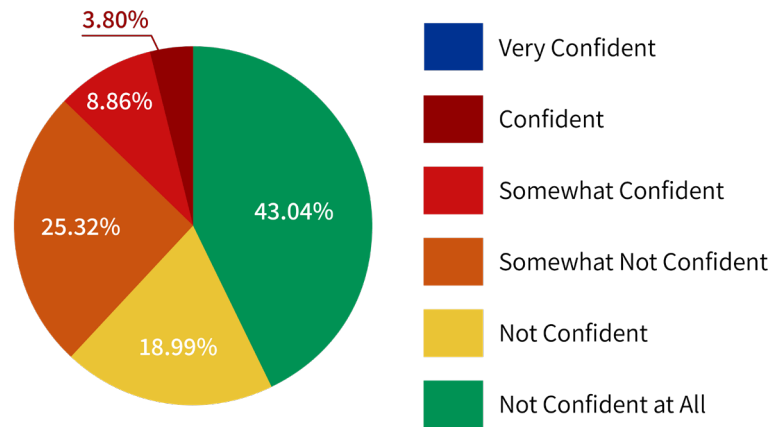


Chart 228. Filipino elites' views on if China treats ASEAN as equal partners

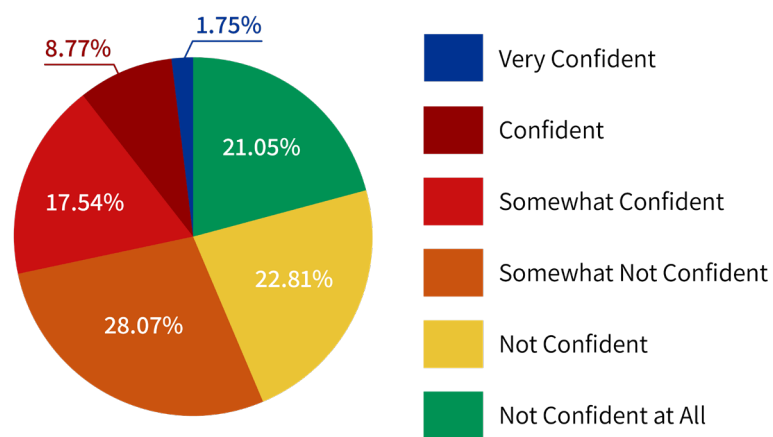


Chart 229. Filipino students' views on if China treats ASEAN as equal partners

These responses further reflect how respondents from the Philippines perceive China's influence in their own country. Overall, around 71% of respondents are worried, while respectively 74% of Elites and 67% of Students voted as such. Compared to perception on China's influence in ASEAN Member States collectively, however, respondents are less worried overall (65.44%) and even lesser level of Students are concerned (50.88%). Interestingly, however, the Elite respondents maintain a similar level of concern (75.95%) over China's influence in ASEAN as they did over their own country.

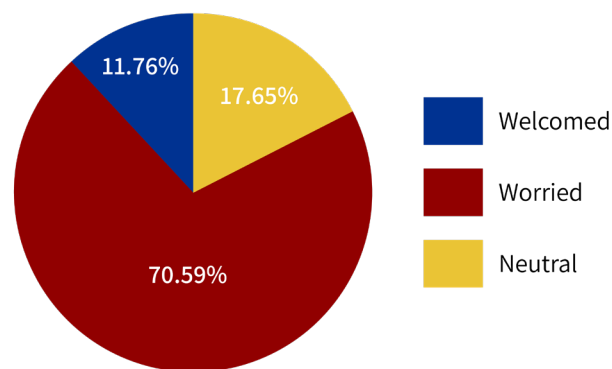


Chart 230. Filipino (general) views on China's influence in their country

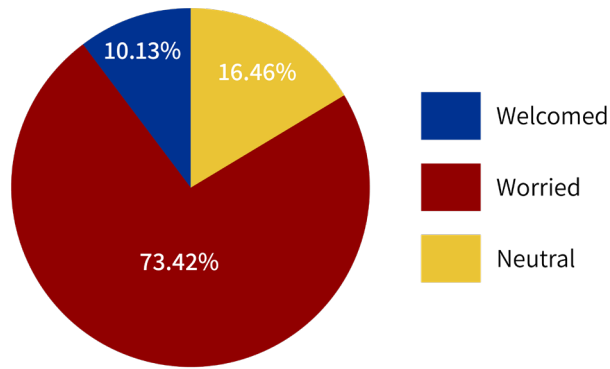


Chart 231. Filipino elites' views on China's influence in their country

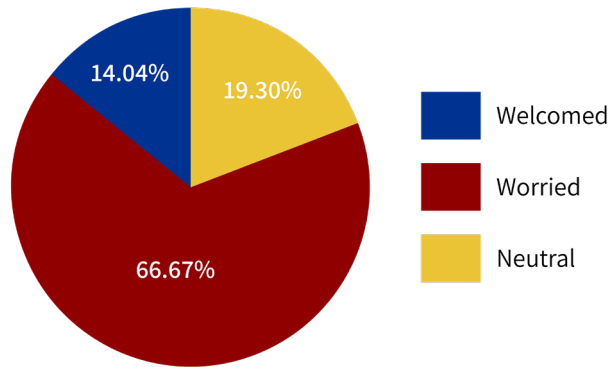


Chart 232. Filipino students' views on China's influence in their country

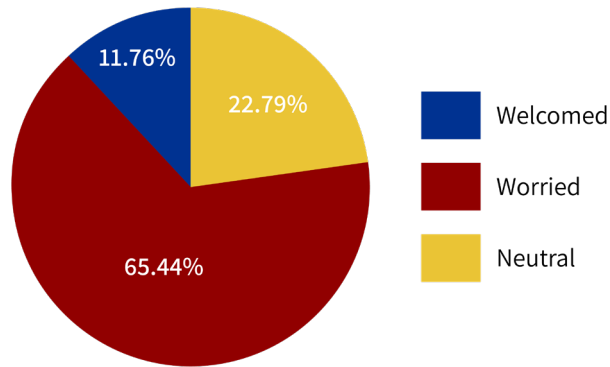


Chart 233. Filipino (general) views on China's influence among ASEAN member states?

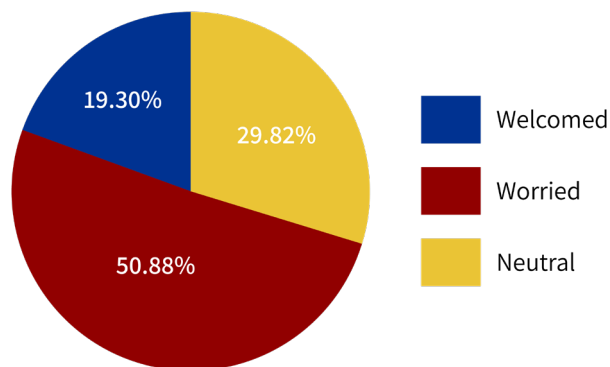


Chart 234. Filipino students' views on China's influence among ASEAN member states?

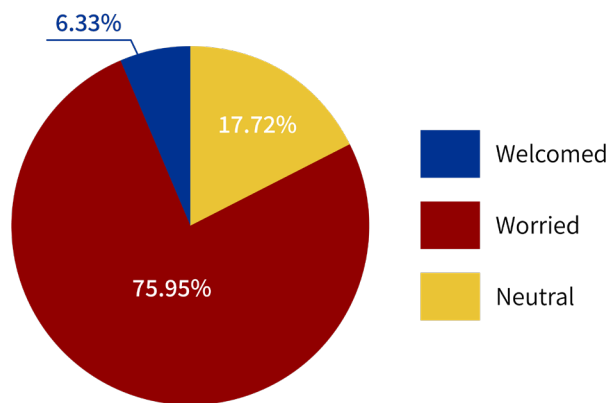


Chart 235. Filipino elites' views on China's influence among ASEAN member states?

Most notable pattern from respondents from the Philippines is on territorial disputes over the South China Sea. There is an emphasis on concluding the Code of Conduct (CoC) on South China Sea, with 67.65% respondents ranking it as very important. Both Elite and Students respondents also echo same sentiments, respectively 67.09% and 68.42% choosing very important. These views are mirrored as well on respondent's answers when asked what the top priority of ASEAN in its relations with China should be, post COVID-19. Surpassing COVID-19 vaccine production and distribution (26.32%), and economic rebound and regional supply chain (24.56%), unsettled territorial disputes was voted by the majority (43.86%) as the top priority agenda. Regardless of respondents' affiliation category, both Elites and Students responses' hovered on the same percentage on unsettled territorial disputes.

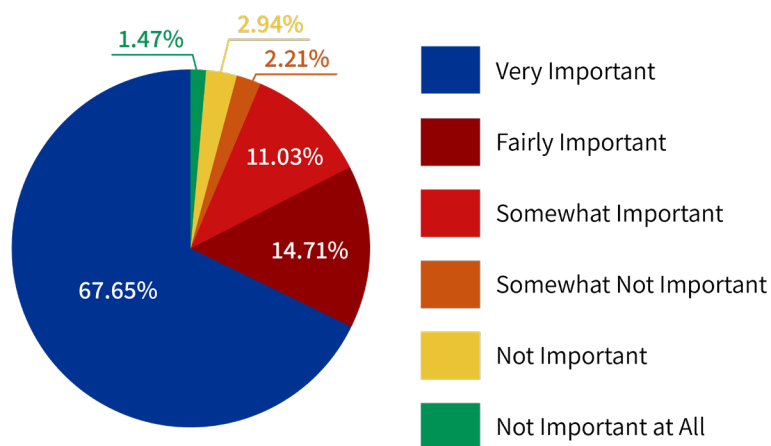


Chart 236. Filipino (general) views on the importance of the conclusion of the Code of Conduct on the South China Sea

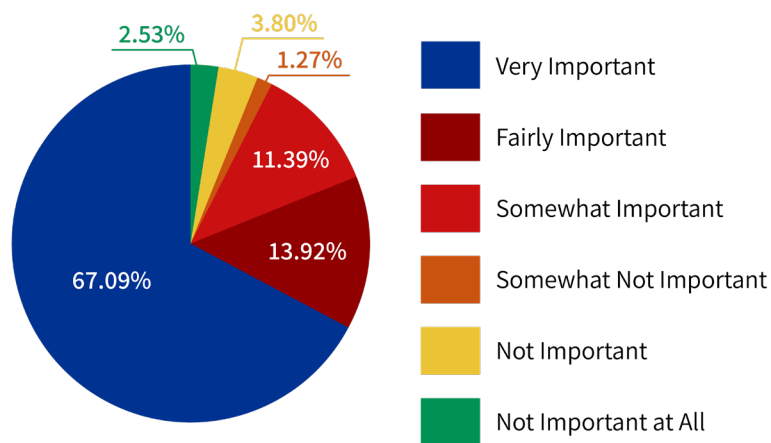


Chart 237. Filipino elites views on the importance of the conclusion of the Code of Conduct on the South China Sea

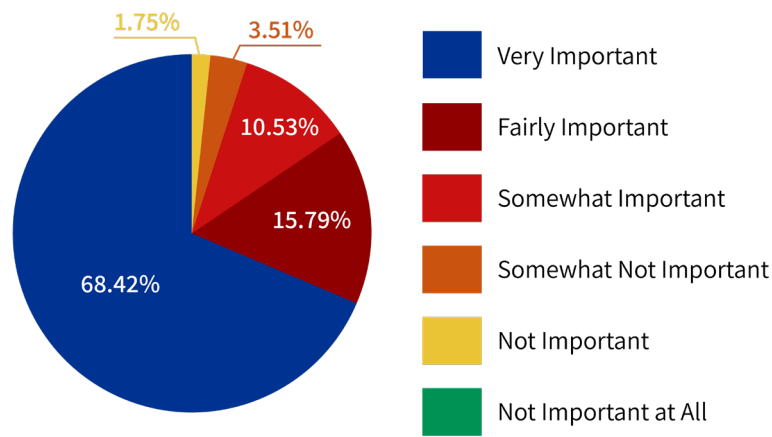


Chart 238. Filipino students views on the importance of the conclusion of the Code of Conduct on the South China Sea

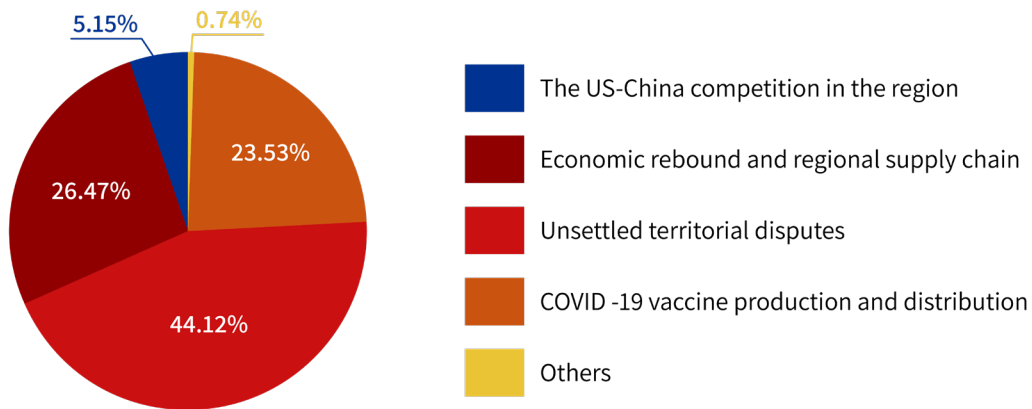


Chart 239. Filipino (general) views on what would be the top priority for ASEAN to heed in its relations with China, post COVID-19

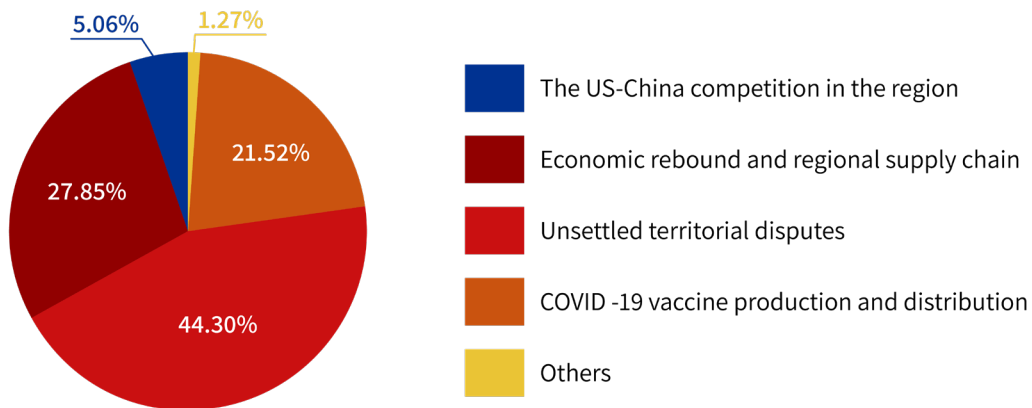


Chart 240. Filipino elites views on what would be the top priority for ASEAN to heed in its relations with China, post COVID-19

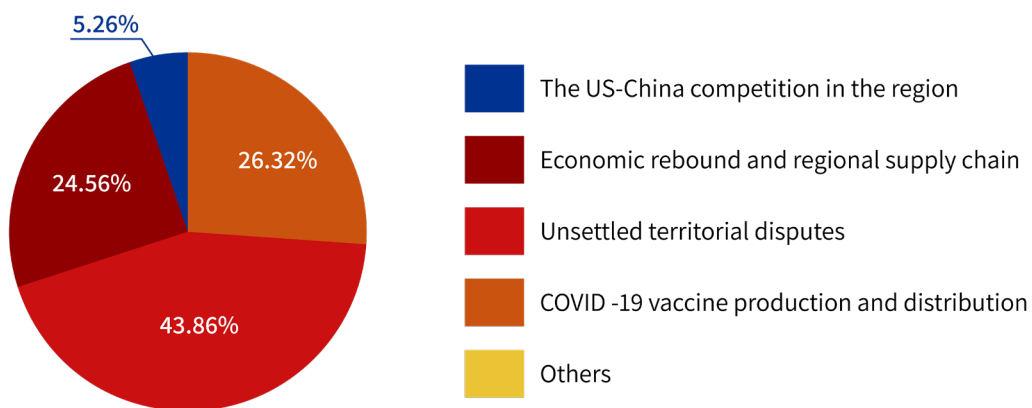


Chart 241. Filipino students views on what would be the top priority for ASEAN to heed in its relations with China, post COVID-19

Most respondents (73.53%) from the Philippines is also in the negative spectrum of confidence (not confident at all, not confident, and somewhat not confident) that China is a responsible partner for ASEAN in defusing Myanmar’s political crisis. However, when posed with the question on whether China should play a bigger role in the solving the crisis, 43.38% of respondents chose not clear, whereas 31.62% respondents are affirmative that China should play a bigger role and 25% are against. Nonetheless, it is clear that respondents, whether coming from the Elites or Students categories, do not think that ASEAN efforts in addressing Myanmar’s political crisis is on the right track, with only 18% of them voting that ASEAN efforts are on the right track.

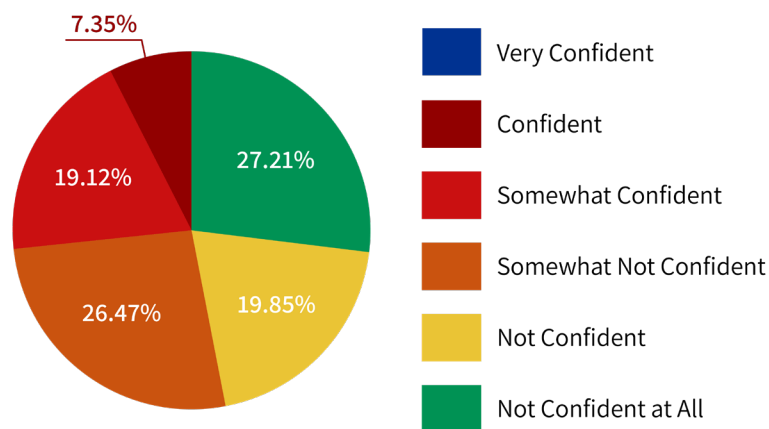


Chart 242. Filipino (general) views on if China acts as a responsible partner for ASEAN in defusing Myanmar’s political crisis

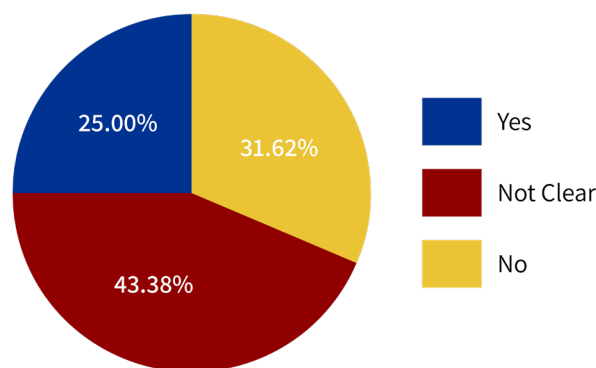


Chart 243. Filipino (general) views on should China play a bigger role in solving the problem of Myanmar’s political crisis

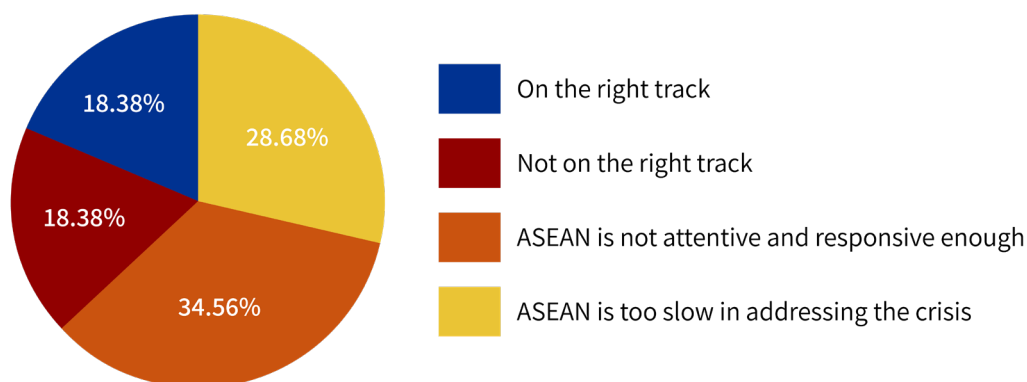


Chart 244. Filipino (general) views on if ASEAN’s effort to address Myanmar’s political crisis on the right track

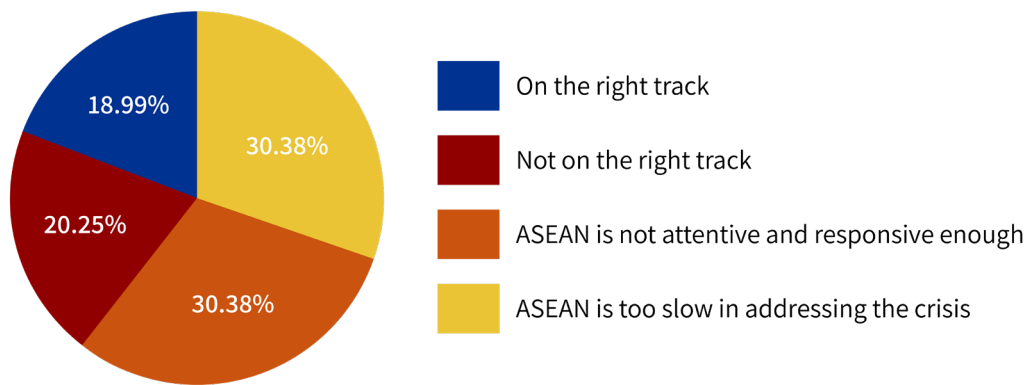


Chart 245. Filipino elites' views of if ASEAN's effort to address Myanmar's political crisis on the right track

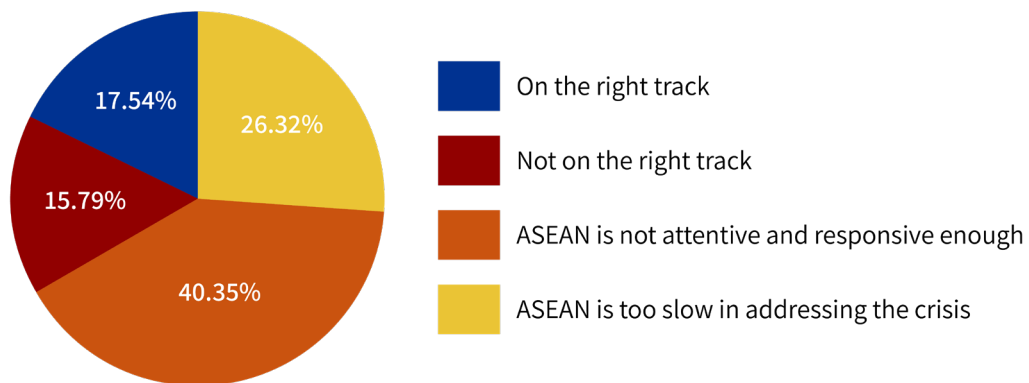


Chart 246. Filipino students' views of if ASEAN's effort to address Myanmar's political crisis on the right track

C.2. Indonesia

On the overall relationship with China, more than 65% of respondents from Indonesia thinks positively (strongly agree and agree) that the current relationship between ASEAN and China benefits both parties. An even higher number of respondents at around 70% opined positively that close cooperation between ASEAN and China helps alleviate the current pandemic. Closely linked with the COVID-19 issue, China's support of vaccines for ASEAN pandemic response has thus been rated to be positively well-intentioned by almost 65% of all respondents from Indonesia. Nonetheless, on existing cooperation mechanisms such as the ASEAN-China Free Trade Area, the Lancang-Mekong Cooperation, and the RCEP, a significant portion of Indonesian respondents at an average of 30% are neither fully satisfied or dissatisfied and instead reside in the 'somewhat' spectrum.

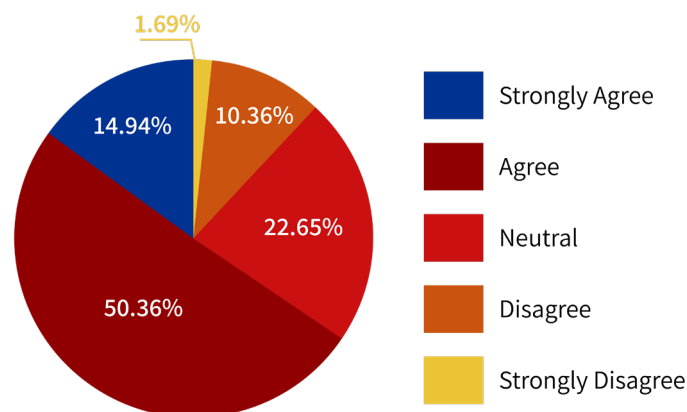


Chart 247. Indonesian views on the current relationship between ASEAN and China and if it benefits both ASEAN and China

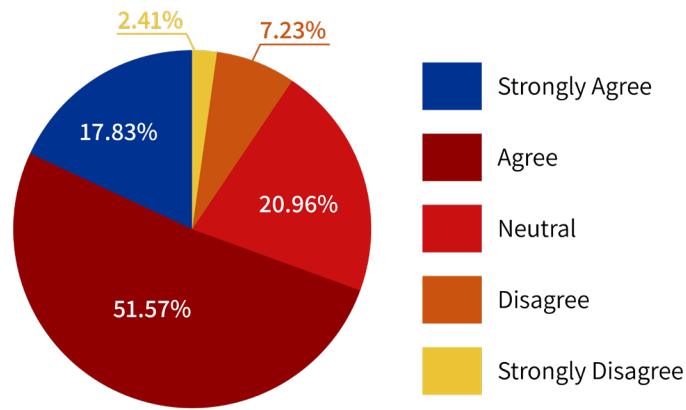


Chart 248. Indonesian views on if close cooperation between ASEAN and China helps alleviate the pandemic

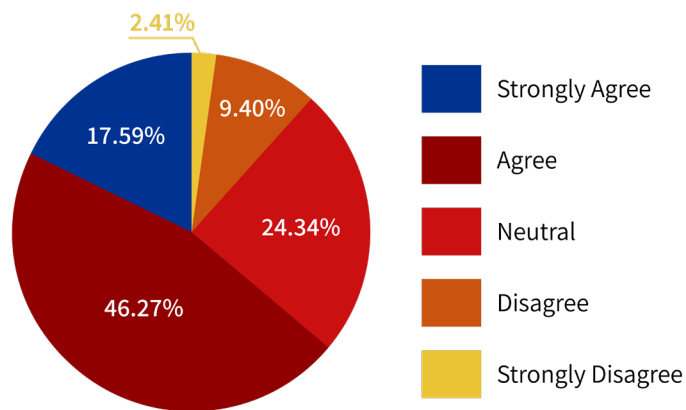


Chart 249. Indonesian views on whether China's support of vaccines for ASEAN COVID-19 response is well-intentioned

A notable diversion from this pattern is found in the consultation mechanism for the South China Sea issue as facilitated by the Code of Conduct (CoC) negotiations. Respondents' answers are equally split between the positive spectrum (50% choosing very satisfied, satisfied, and somewhat satisfied) and the negative spectrum (50% choosing not satisfied at all, not satisfied, and somewhat not satisfied). Similar splitting perspectives on positive and negative spectrum are echoed in the Indonesian respondents' vote of confidence on whether China respects the national unity, sovereignty, and territorial integrity of ASEAN countries.

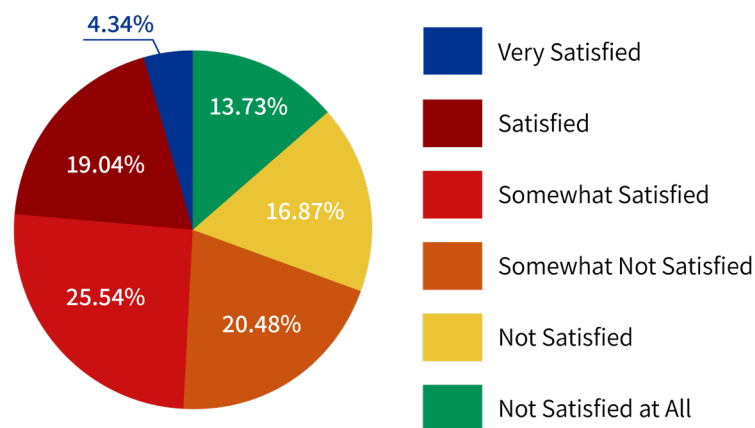


Chart 250. Indonesian views on the consultations between ASEAN Member States and China on the Code of Conduct in the South China Sea (COC)

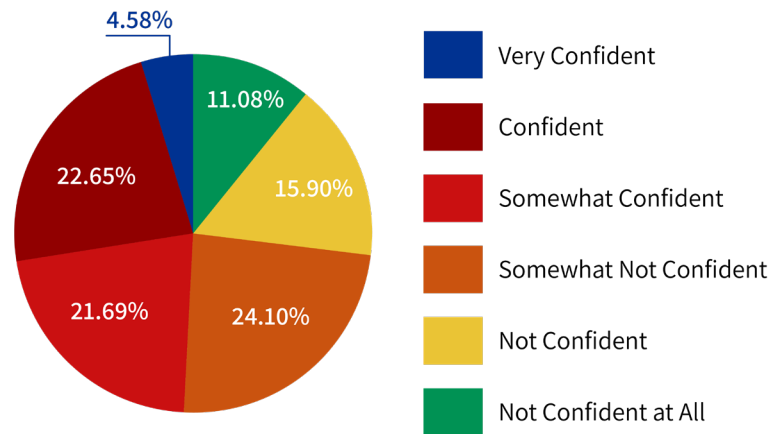


Chart 251. Indonesian views on whether China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

Besides political-security issues such as territorial disputes, answers from Indonesian respondents on the Myanmar Political Crisis are also telling of divided voices from the country. When posed with the statement that China acts as a responsible partner of ASEAN in defusing Myanmar’s political crisis, around 50% of Indonesian respondents are in the negative spectrum (not confident at all, not confident, somewhat not confident) and shy of 50% of them are in the positive spectrum (very confident, confident, somewhat confident).

However, respondents from Indonesia are not sure whether China should play a bigger role or not. While 35.42% of respondents think that China should do so, 38.55% of respondents chose to answer ‘not clear’ – thus showcasing lack of cohesive voice on the issue. Nonetheless, more than 45% of Indonesian respondents opined that if any, China should follow and support ASEAN-led mechanisms and processes.

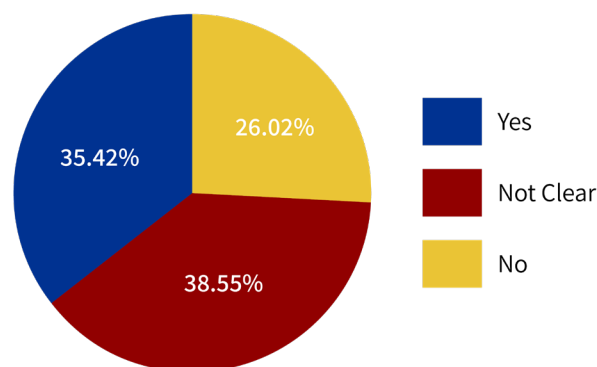


Chart 252. Indonesian views on whether should China play a bigger role in solving the political crisis in Myanmar

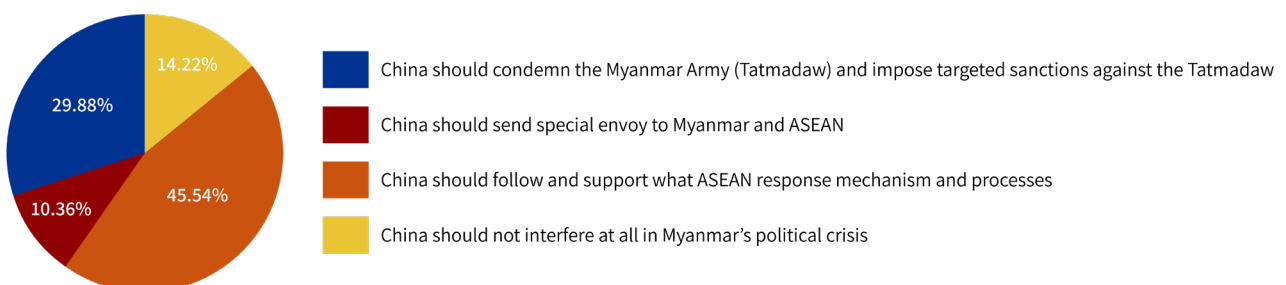


Chart 253. Indonesian views on how China should act to support solving the conflict in Myanmar?

There is an emphasis on the importance of economic relations with China from Indonesian respondents. They are attuned to the development of economic cooperation with China during the pandemic. A whopping 76% of respondents responded in the positive spectrum (strongly agree and agree) that economic ties between the region and China have become more important during the pandemic. In fact, in the post COVID-19 era, more than 50% of respondents view economic rebound to be the top priority for ASEAN-China relations.

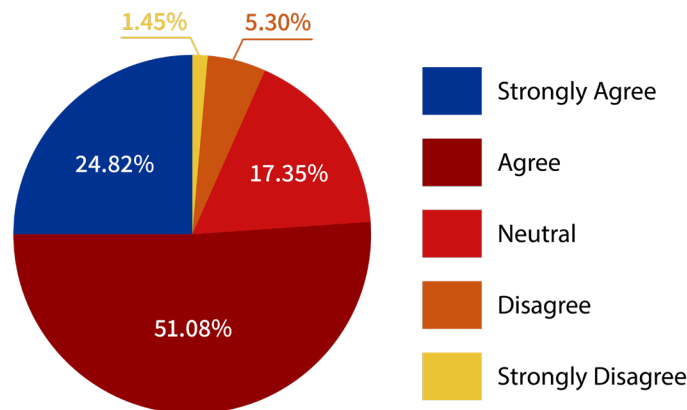


Chart 254. Indonesian views on whether Economic ties between ASEAN and China become more important especially amid the COVID-19 pandemic

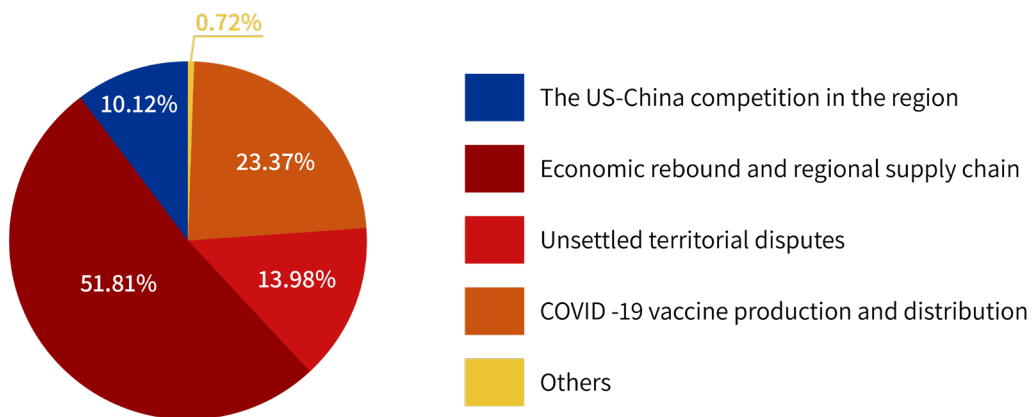


Chart 255. Indonesian views on what would be the top priority for ASEAN to heed in its relations with China, post COVID-19

Indeed, such notions are also reflected by the fact that for respondents from this country, China is seen primarily as an economic influencer (46%), rather than a purely political one. Following suit, 39% of respondents consider China as an influencer of both economic and political nature. Indeed, this sentiment is vouched by the majority of respondents (50%) as they reject the notion that China’s communist ideology has influenced their country. China’s influence in the country is not necessarily fully rejected or accepted. To provide, while 43.61% of respondents from Indonesia are worried over said influence, 30.60% of respondents also welcomed it.

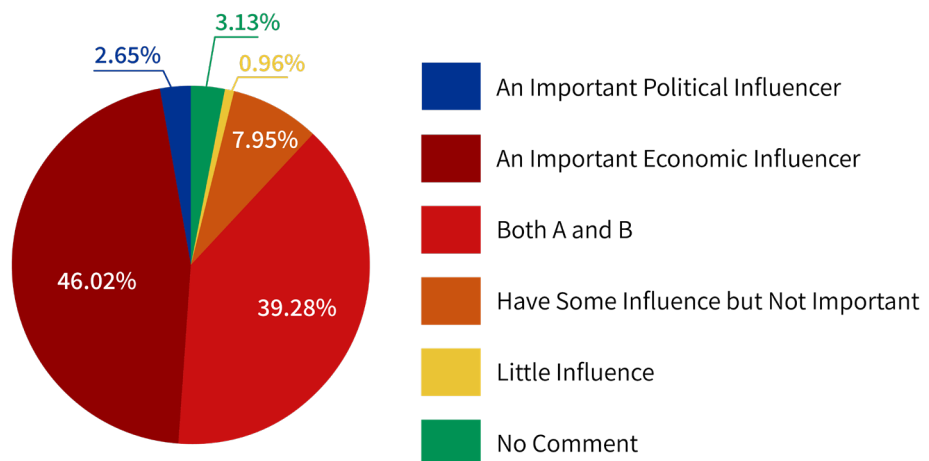


Chart 256. Indonesian views on China’s influence in their country

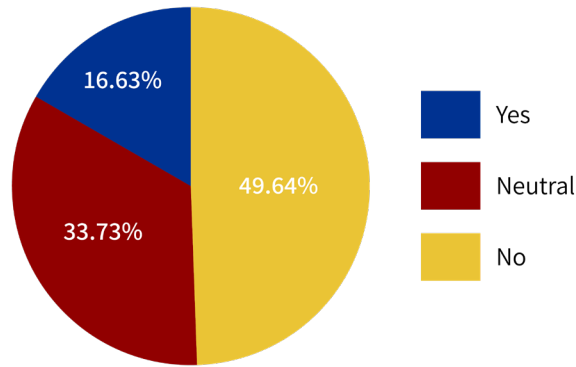


Chart 257. Indonesian views on whether their country has been influenced by China's communist ideology

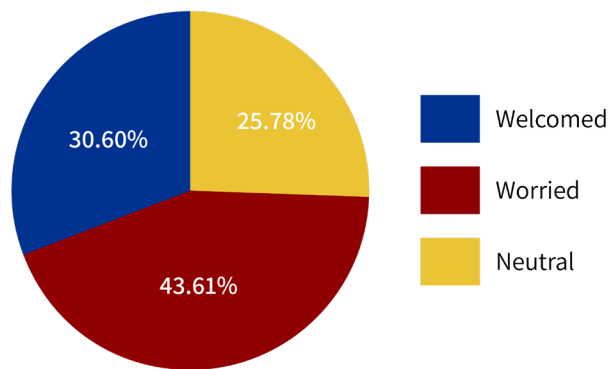


Chart 258. Indonesian views on China's influence in their country

C.3. Malaysia

Respondents from Malaysia share diversified views and stances on ASEAN-China relations. To begin with, respondents see China first and foremost as an economic influencer (52.80%) and also a political one second (37.41%). Hence it is of no surprise that when asked whether their country is influenced by China's communist ideology, a majority of almost 60% of respondents denied this notion. This answer is followed by 26.62% of respondents being neutral and only a minority of 14.39% who thinks affirmatively.

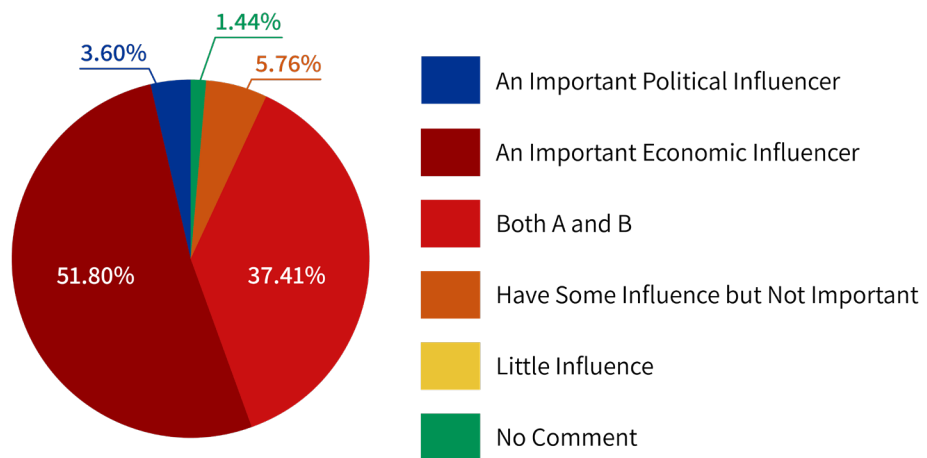


Chart 259. Malaysian views on how they see China's influence in their country

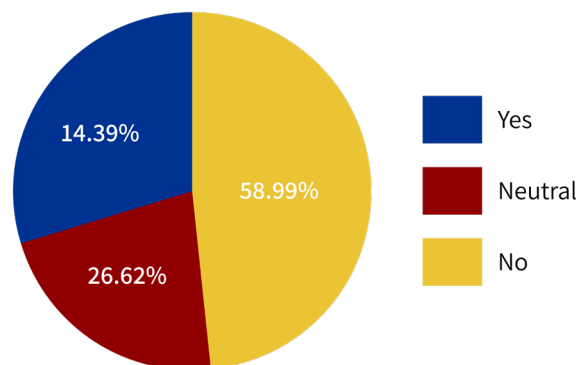


Chart 260. Malaysian views on if they think their country has been influenced by China's communist ideology

The majority of respondents (around 75%) from this country largely opine that the Chinese diaspora maintains close relations with China, 40.29% of whom answered that it is of economic nature. A significant portion of respondents (46.76%) also think that China still wields big influence over the diaspora residing in their country. It should be noted, however, that almost 41% of respondents do not have an assessment on this issue at the same time. When asked to share their views on China's influence in their countries, Malaysian respondents are split: 34.53% are worried, 33.09% are neutral, and 32.37% are welcoming. Although respondents were also asked about their opinions on China's influence amongst ASEAN Member States, minute differences are found in the answers which closely mirrors views on domestic influence.

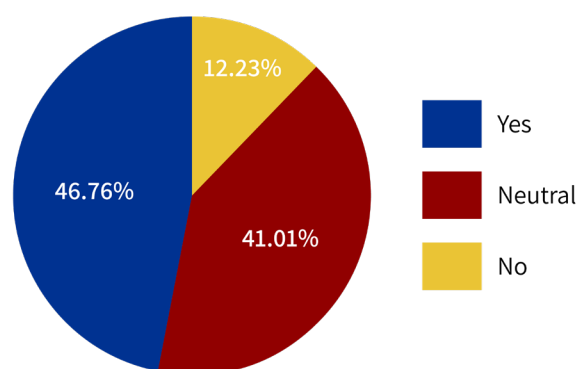


Chart 261. Malaysian views on whether they think China still has a big influence over its diaspora in their country

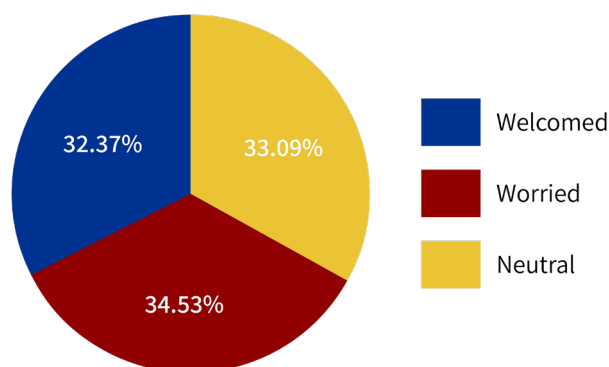


Chart 262. Malaysian views on China's influence on their country

On strategic issues such as the Myanmar Political Crisis, respondents from Malaysia showcased their lack of confidence that China is acting as a responsible dialogue partner of ASEAN in defusing the issue with almost 64% of respondents in the negative spectrum (not confident at all, not confident, somewhat not confident). A diversion from patterns found in other countries, the majority of Malaysian respondents (around 45%) opined that thus, China should play a bigger role in solving the issue.

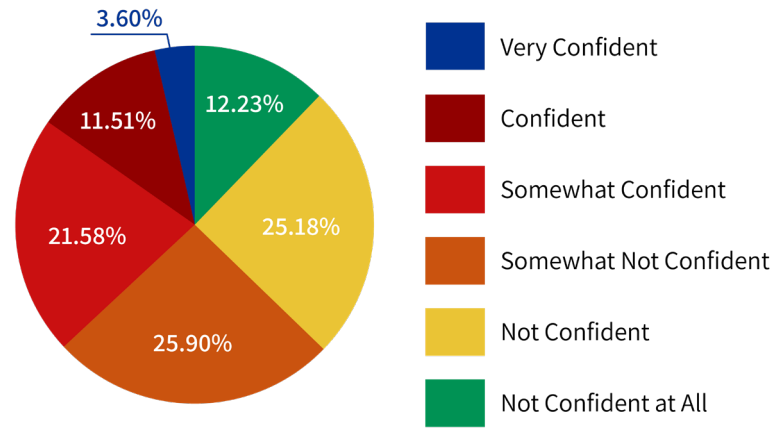


Chart 263. Malaysian views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

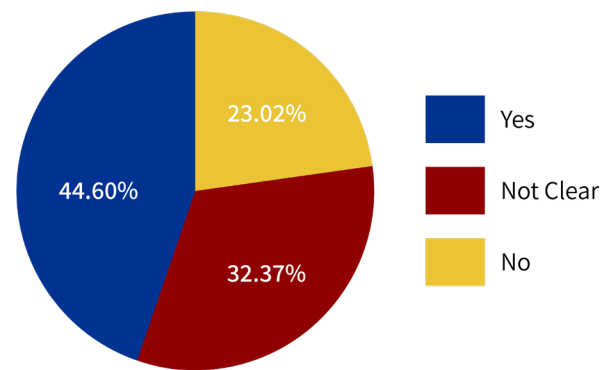


Chart 264. Malaysian views on whether should China play a bigger role in solving Myanmar's political crisis

Despite a significant chunk (32.37%) of respondents not having a view on this issue (opting 'not clear'), these answers show that there is an actionable point that China should do in the perspectives of Malaysians who participated in this survey. Such an action might be aligned with responses received that denote an almost equal portion that China should follow ASEAN mechanisms and processes (38.85%) but also to condemn the Tatmadaw and impose targeted sanctions against them (33.81%).

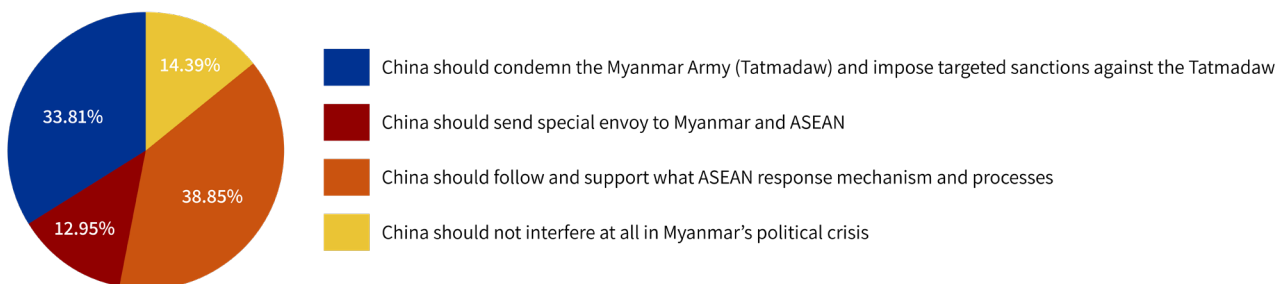


Chart 265. Malaysian views on how should China act to support solving the conflict in Myanmar

Another strategic issue of attention for Malaysian respondents is the South China Sea. Although respondents do not rank unsettled territorial disputes as the top priority agenda for ASEAN and China in the post COVID-19 era, almost 90% of them view that the conclusion of the Code of Conduct on South China Sea is within the important range. This range constituted 48.92% of responses as very important, 23.02% as fairly important, 16.55% as somewhat important.

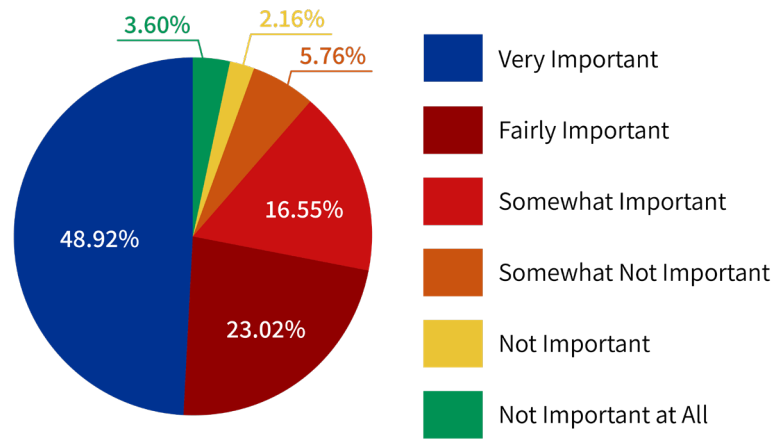


Chart 266. Malaysian views on the conclusion of the Code of Conduct in the South China Sea

As most respondents (almost 60%) from this country ranked economic rebound and regional supply chain as top priority for ASEAN-China relations in the wake of global pandemic, they also viewed the need for Belt and Road Initiative projects to be reviewed afterwards to promote economic recovery. Aspects of concern (34.54%) is primarily long-term economic benefit of the BRI project for the host country along with businesses and civil society organizations that are involved. Indeed, stronger enthusiasm is shown by Malaysian participants in comparison with other ASEAN countries for BRI projects to be continued, enhanced, and completed – despite the pandemic. Around 95% of respondents vouched for the importance of this issue, answering either very important, important, and fairly important.

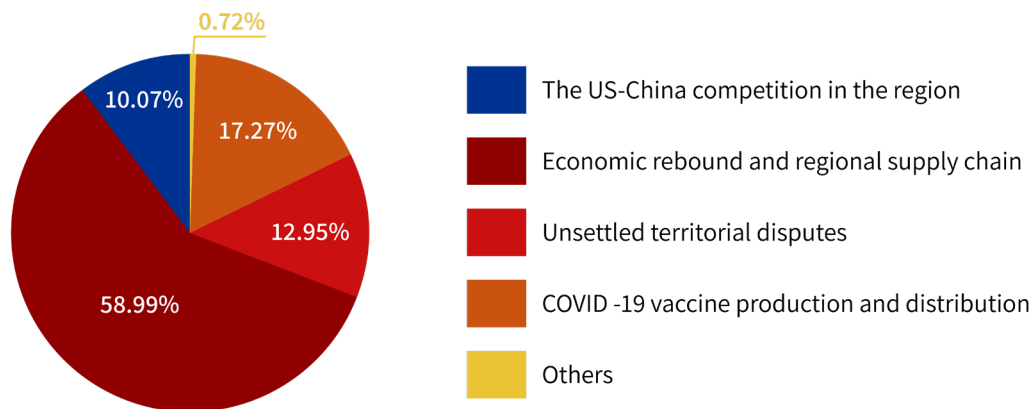


Chart 267. Malaysian views on what should be the top priority for ASEAN to heed in its relations with China, post COVID-19

C.4. Cambodia

Cambodian respondents generally have a positive point of view towards China. In the view that China respects ASEAN centrality. 47% of Cambodian respondents were confident to that statement and 38% were somewhat confident. 8% were somewhat not confident and the rest of 7% were not confident.

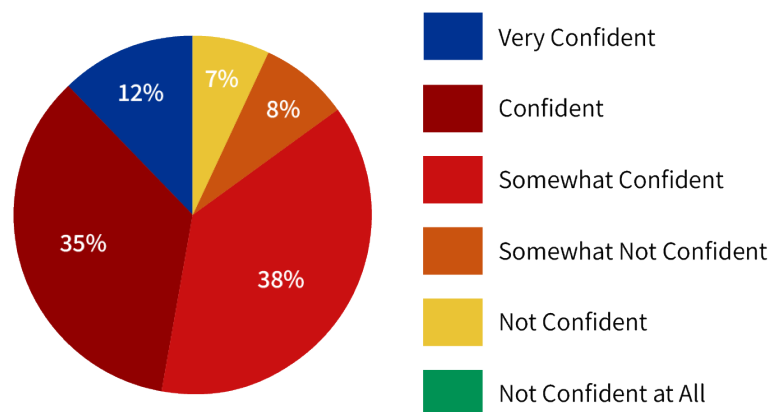


Chart 268. Cambodian views on whether China respects ASEAN centrality

Regarding the view that China respects the national unity, sovereignty, and territorial integrity of ASEAN countries. Cambodian respondents have a different point of views compared to the other countries. 52% of Cambodian respondents were confident with China while 27% were somewhat confident. 9% were somewhat not confident and the rest of 12% were not confident.

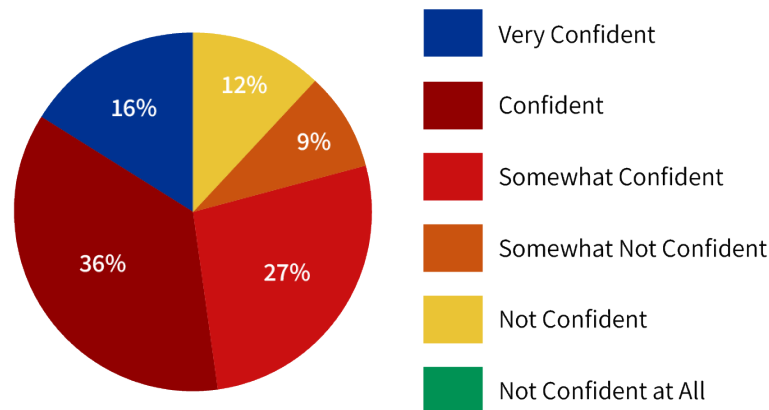


Chart 269. Cambodian views on if China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

Respondents in Cambodia were generally confident that China applies the principle of non-intervention regarding the political development of ASEAN countries. 58% of Cambodian respondents were confident with China and 28% were somewhat confident. The rest of 8% were somewhat not confident and 5% were not confident.

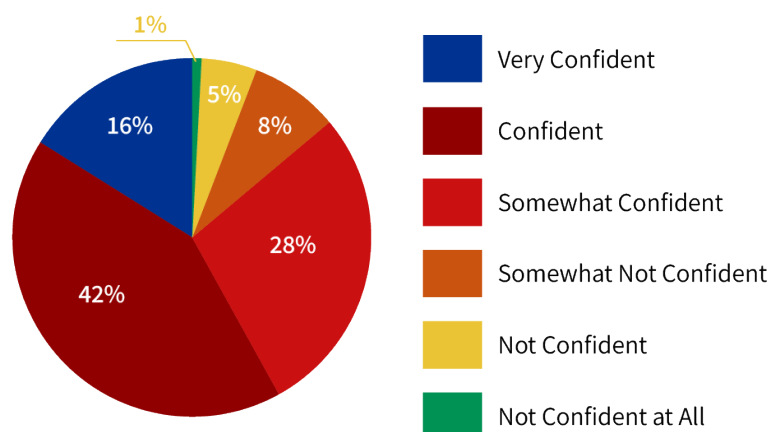


Chart 270. Cambodian views on whether China applies the principle of non-intervention regarding the political development of ASEAN countries

Cambodian respondents also have confidence in the view that China treats ASEAN as equal partners. 47% of Cambodian respondents were confident with China and 31% were somewhat confident. The rest of 10% were somewhat not confident and 10% were not confident.

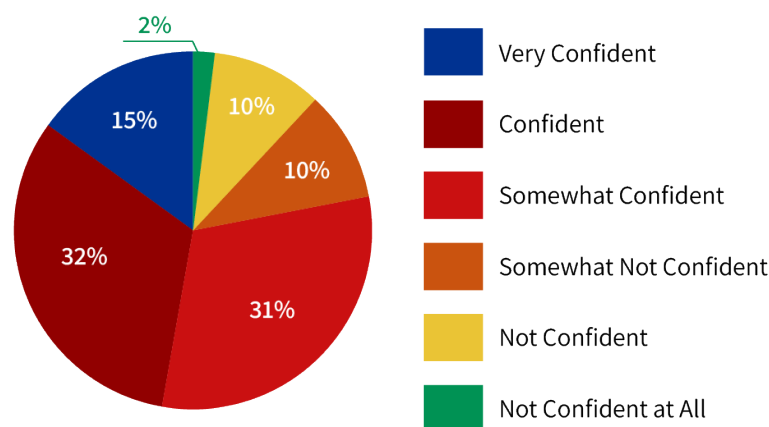


Chart 271. Cambodian views on whether China treats ASEAN as equal partners

Continue on the discussion of Cambodian perspective to China. Cambodia saw China more positively compared to other countries in the region. 79% of Cambodian respondents saw their government very close with China.

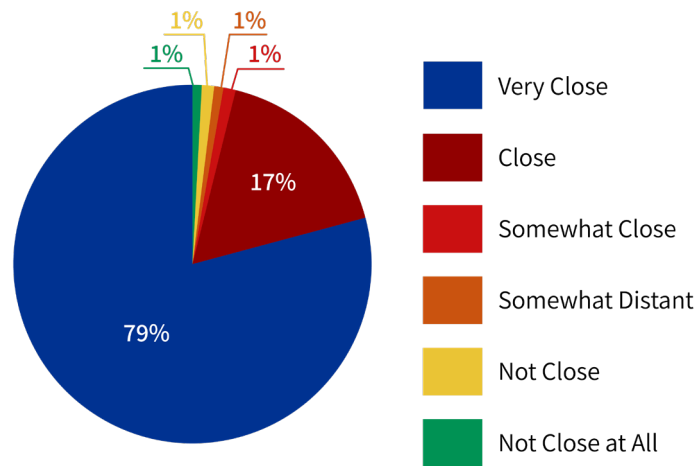


Chart 272. Cambodian views on how close is your government with China

In the view of China's influence in ASEAN countries, 53% of respondents in Cambodia welcomed it. Only 35% were worried about China's influence in Cambodia and the rest of 12% were neutral to the statement. 62% of Cambodian respondents also saw China as a reliable partner for ASEAN countries in the field of development assistance and aid.

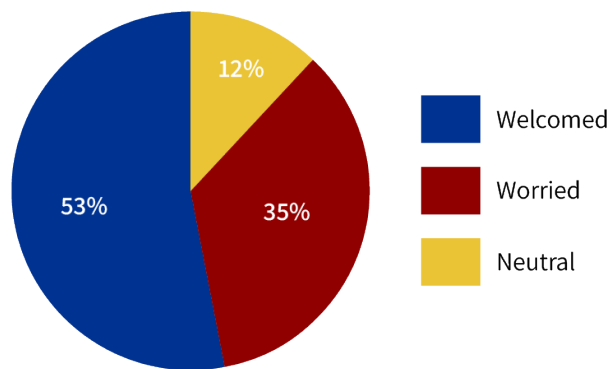


Chart 273. Cambodian views on China's influence in their country

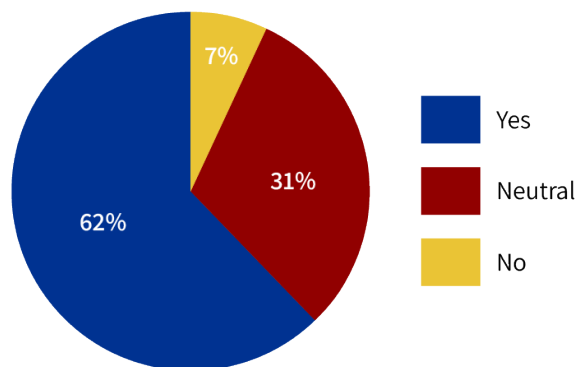


Chart 274. Cambodian views on if they think China is a reliable partner for ASEAN countries in the field of development assistance and aid

Furthermore, to China's influence in Cambodia, 61% of Cambodian respondents saw China as an important economic and political influencer. Another 24% saw it more as an economic influencer and 11% saw it as a political influencer.

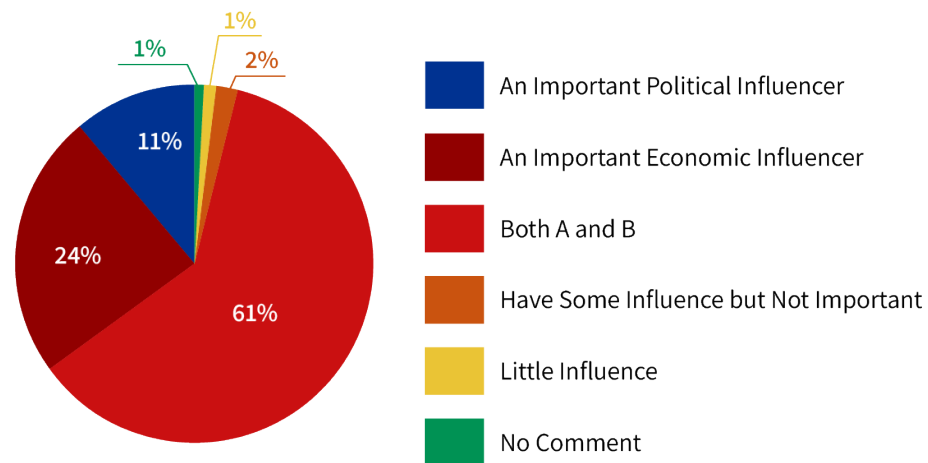


Chart 275. Cambodian views on how they see China's influence in their country

Talking about China's influence in the region, Cambodians were the most welcomed compared to other countries. Majority of 47% Cambodian respondents welcomed China's influence in the region. 32% were worried and 21% were neutral. Same with the role of China's influence in Cambodia, 56% of Cambodians in the regional level saw China as an important economic and political influencer. 25% saw it as economic influencer and 10% as political influencer.

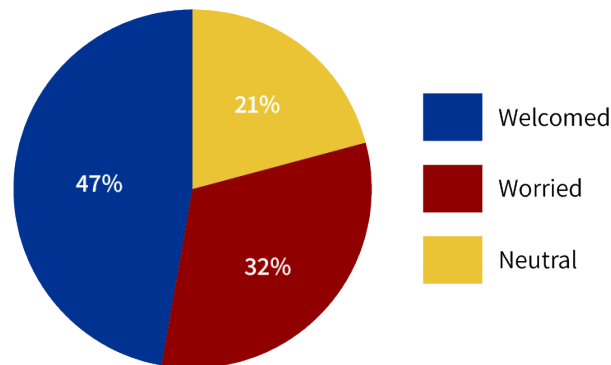


Chart 276. Cambodian views on China's influence in their country

Moving to the perception of China's communist ideology influence in Cambodia. 47% of Cambodian respondents have that perception. 37% were neutral to the perception and 16% do not have that perception.

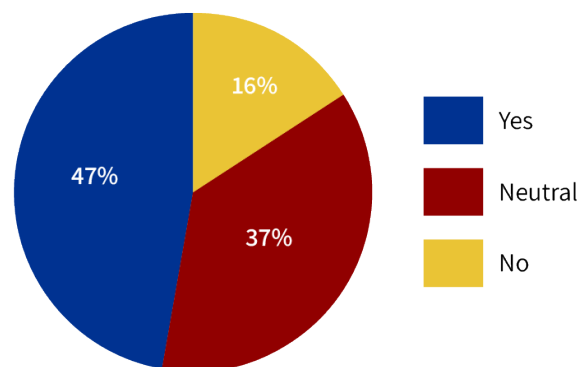


Chart 277. Cambodian views on if they think their country has been influenced by China's communist ideology

Cambodians also think that China has a big influence on its diaspora in Cambodia. 58% of Cambodian respondents have that perception, 41% were neutral, and only 1% do not have it. 39% of Cambodian respondents saw that China maintains close relations with its diaspora in all fields. 33% saw it mainly on economic affairs, 13% saw it as being unclear, 7% saw it on political aspects, 3% saw it on cultural aspects, and the rest, only 5% do not think China is closely related to its diaspora.

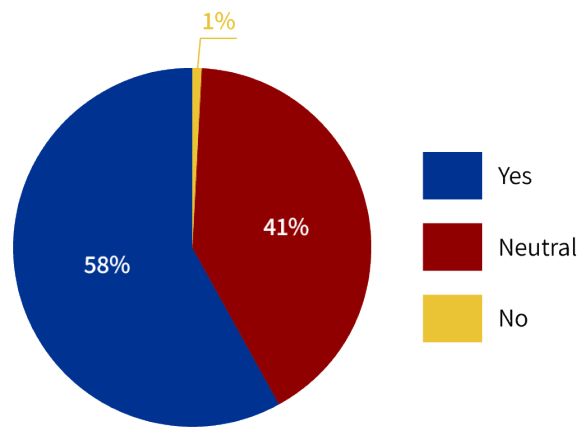


Chart 278. Cambodian on whether they think China still has a big influence over its diaspora in their country



Chart 279. Cambodian views of China's relationship with its diaspora in your country?

In the question about which aspects of China appeal to Cambodians the most. 55% of respondents in Cambodia appealed with robust economic growth of China despite the pandemic and the second majority of Cambodian respondents appealed with China's progress in science and technology.



Chart 280. Cambodian views on which aspects of China appeals to them the most

Regarding Myanmar's political and humanitarian crisis, 36% of Cambodian respondents were feeling somewhat confident in the view that China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis and 31% were confident with China. 13% were somewhat not confident and the rest of 20% were not confident.

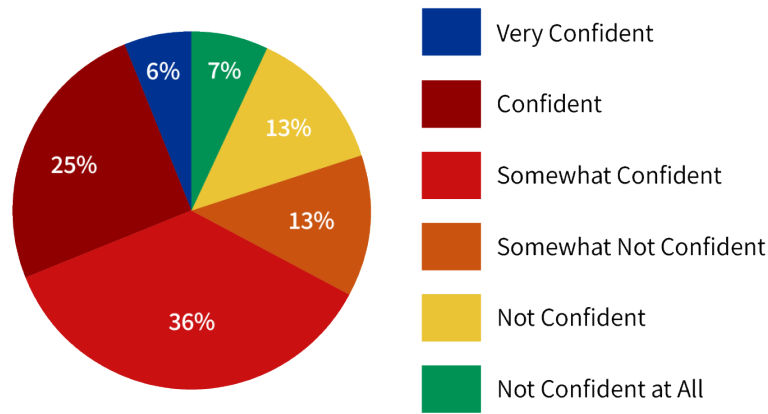


Chart 281. Cambodian views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

However, 62% of respondents in Cambodia believe that China should play a bigger role in handling Myanmar's political crisis. 50% of Cambodian respondents suggest China should play its role by following and supporting ASEAN's response mechanism and process.

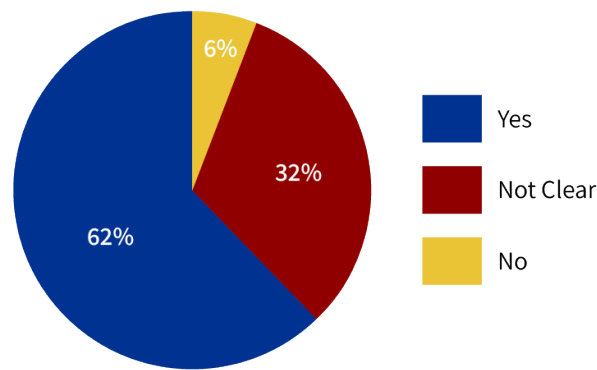


Chart 282. Cambodian views on should China play a bigger role in solving Myanmar's Political Crisis

Regarding the geopolitical rivalry and competition between the US and China, Cambodian has the same response with other countries. However, interestingly, Cambodians show a more positive perspective in the impact of the rivalry and competition to the region. Majority of 40% Cambodian respondents saw this will benefit ASEAN economically and in investment. Follows with a split view of 21% that it will spark faster ASEAN regional integration and it will be ASEAN regional integration's bottleneck.

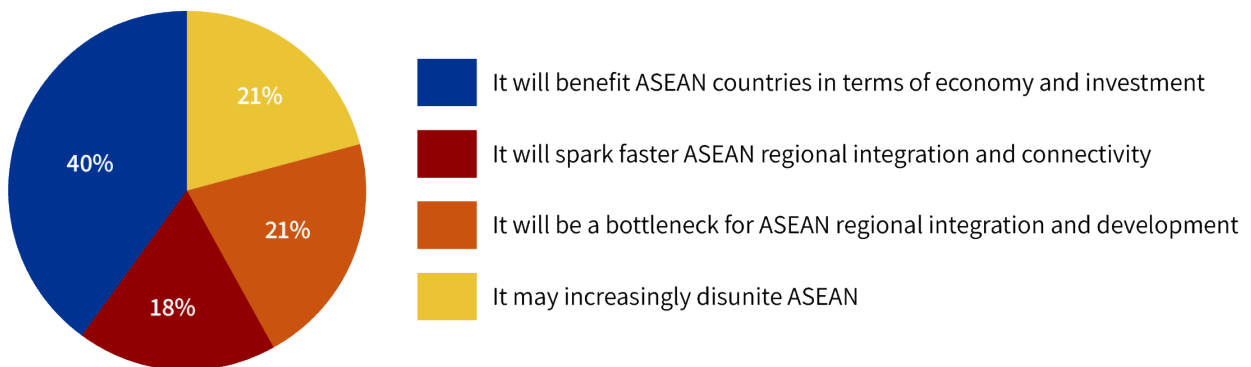


Chart 283. Cambodian views on How they see see the state of US-China relationship impacting ASEAN regionalism in the COVID-19 world

C.5. Vietnam

Vietnamese respondents generally express their concern and anxiety towards China. 35% of Vietnamese respondents were somewhat not confident in the view that China respects ASEAN centrality. In general, the majority of 55% of respondents in Vietnam stand in the negative spectrum in regards to the statement. Conversely, 25% of Vietnamese respondents were somewhat confident with China and the rest 20% were confident.

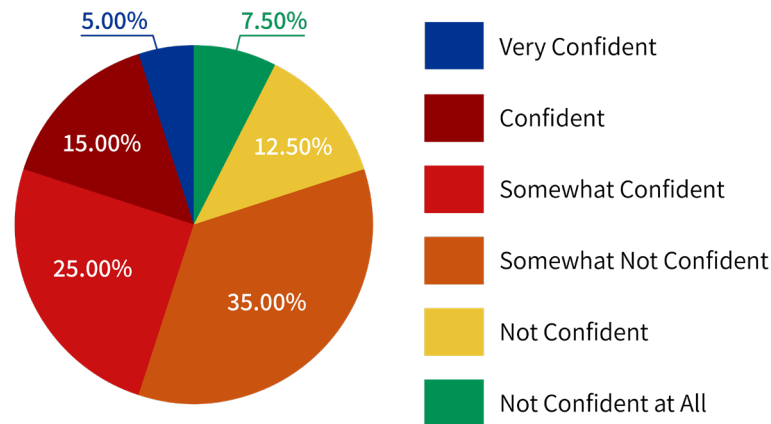


Chart 284. Vietnamese views on whether China respects ASEAN centrality

Responding to the view that China respects the national unity, sovereignty, and territorial integrity of ASEAN countries, Vietnam is one of countries that has the fewest positive answers on it. 67,50% of respondents in Vietnam were in the negative spectrum with China. Only 32,50% of respondents stand in the positive spectrum to the statement.

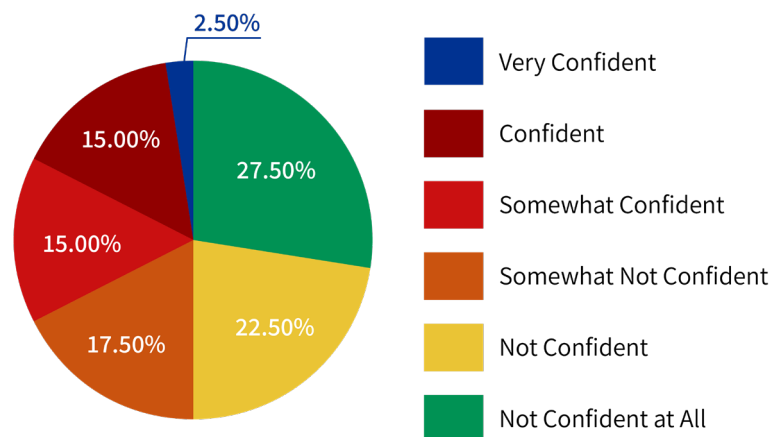


Chart 285. Vietnamese views on whether China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

A consistent point of view is shown by Vietnamese respondents to the view that China applies the principle of non-intervention regarding the political development of ASEAN countries. 35% of Vietnamese respondents were somewhat confident with China in that regard and 37,50% were not confident. Only 12,50% were somewhat confident and the rest of 15% were confident with China.

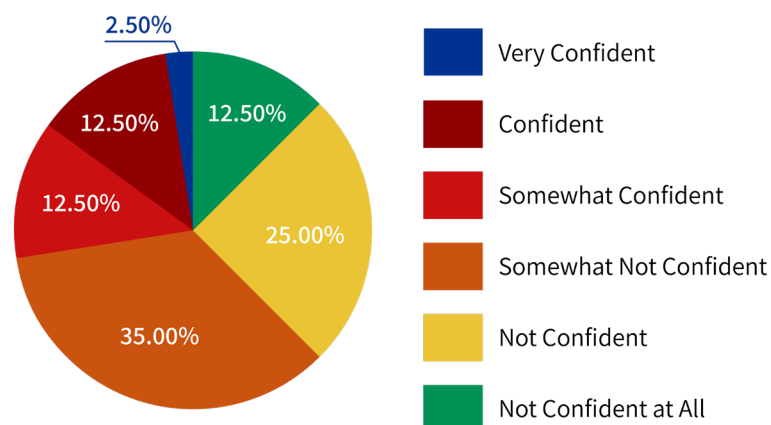


Chart 286. Vietnamese views on whether China applies the principle of non-intervention regarding the political development of ASEAN countries

Still not confident, 62,20% of Vietnamese respondents stand in the negative spectrum in the view that China treats ASEAN as equal partners. To be precise, 27,50% of respondents in Vietnam were somewhat not confident and 34,70% were not confident with China. Only 37,50% were confident with China.

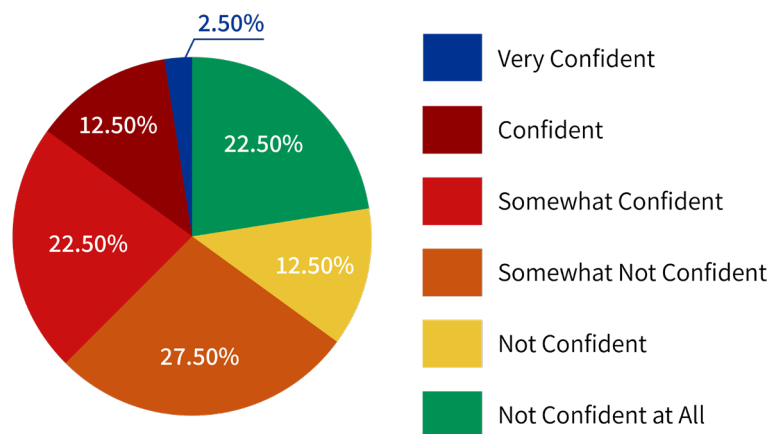


Chart 287. Vietnamese views on whether China treats ASEAN as equal partners

Even though negative trends were found in the above discussion, 52,50% of Vietnamese respondents saw their government as being somewhat close with China and 32,50% saw it as having a close relationship. Only 7,50% saw a distant and 7,50% saw it not close.

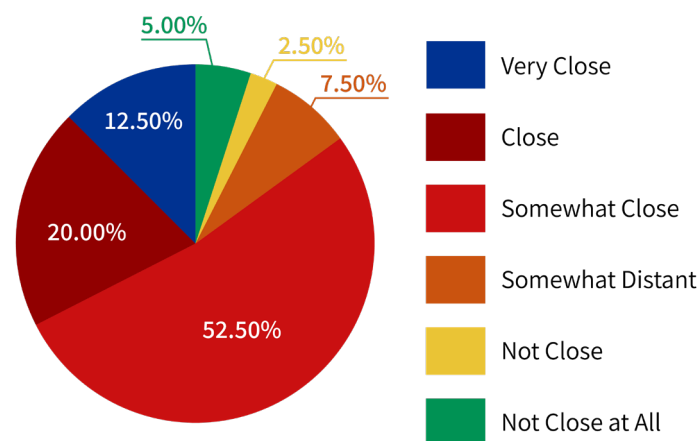


Chart 288. Vietnamese views on how close is their government with China

Moving in the discussion about perception in China. 70% of Vietnamese respondents were worried with China's influence in Vietnam. 52,20% Vietnamese respondents saw China as a political and economic influencer. The same pattern of wariness is shown in the question about China's influence in the regional level. 52,50% of respondents in Vietnam in regard to China at the regional level, 32,50% were neutral and only 15% welcomed it. 55% of Vietnamese respondents also saw China as a political and economic influencer in the region.

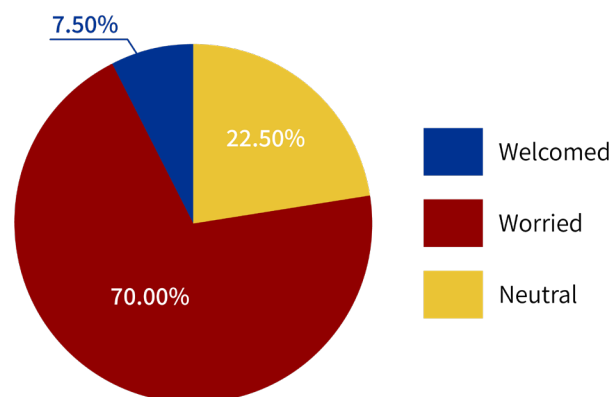


Chart 289. Vietnamese views on China's influence in their country

57,50% of Vietnamese respondents still have a perception that Vietnam has been influenced by China's communist ideology. 32,50% were neutral to the perception and 10% said no. Another strong perception is also found in the question about China still having a big influence over its diaspora in Vietnam. 60% of Vietnamese respondents still have that perception. Regarding the extent of the relationship that China has with its diaspora, the majority of 35% were not clear, however, 30% saw it in all fields, 15% saw it in economic aspects, 15% saw it in cultural aspects, and the rest with a small portion of percentage in political and others.

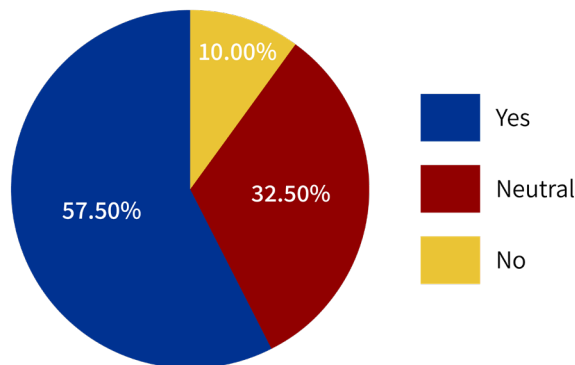


Chart 290. Vietnamese views on whether they think their country has been influenced by China's communist ideology



Chart 291. Vietnamese views on what they think of China's relationship with its diaspora in their country

Despite Vietnamese were not that confident with China, 45% of Vietnamese respondents appealed to China's progress in science and technology, 22,50% appealed to China's robust economic growth despite the pandemic, 12,50% appealed with China's success in domestic pandemic control, and small percentage in elimination of extreme poverty, and others.



Chart 292. Vietnamese views on which aspects of China appeal to them the most

In the perception that China is a reliable partner for ASEAN countries in the field of development assistance and aid, 60% of Vietnamese respondents were neutral to that perception and only 17,50% have that perception and 22,50% do not have that perception.

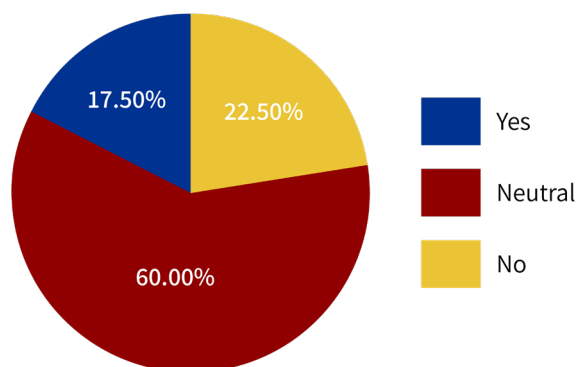


Chart 293. Vietnamese views on whether they think China is a reliable partner for ASEAN countries in the field of development assistance and aid

Moving on Myanmar political and humanitarian crisis, the majority of 55% Vietnamese respondents were in the negative spectrum on the view that China acts a responsible partner for ASEAN in defusing the Myanmar crisis. Conversely, 45% were in the positive spectrum with China. Half of Vietnamese respondents were also not clear on the view that China should play a bigger role in solving the problem. 37,50% concurred with the view and 12,50% disagreed with the view. 57,50% of Vietnamese respondents also suggest that China should follow and support ASEAN response mechanisms and processes.

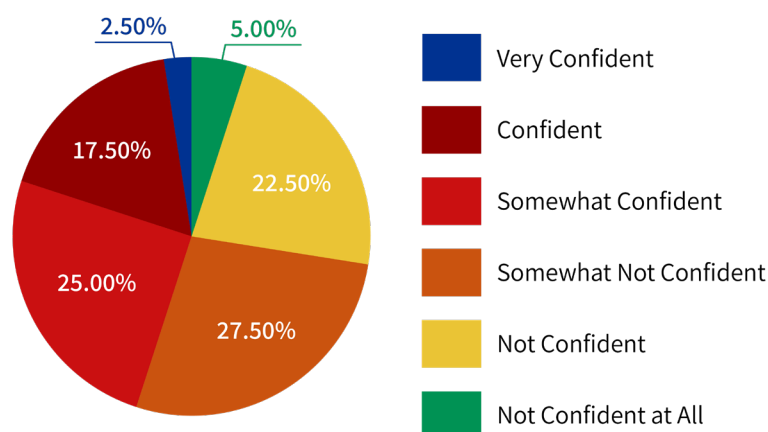


Chart 294. Vietnamese views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

Interestingly, regarding the implication of US – China strategic rivalry and competition to ASEAN, majority of Vietnamese respondents saw it will bring benefit to ASEAN countries economically and in investment.

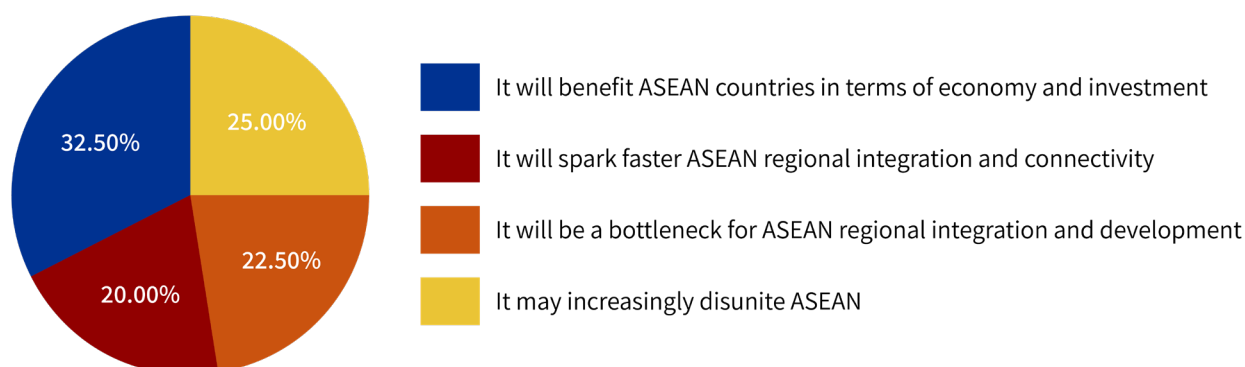


Chart 295. Vietnamese views on how they see the state of US-China relationship impacting ASEAN regionalism in the COVID-19 world

C.6. Thailand

Thai respondents are generally worried and concerned with China. Majority of respondents in Thailand sit on the negative spectrum in the view that China respects ASEAN Centrality. 37,03% of Thai respondents were not confident in the statement and 18,52% were somewhat confident. Conversely, 25,93% of Thai respondents were still somewhat confident and the rest of 18,52% were confident with China.

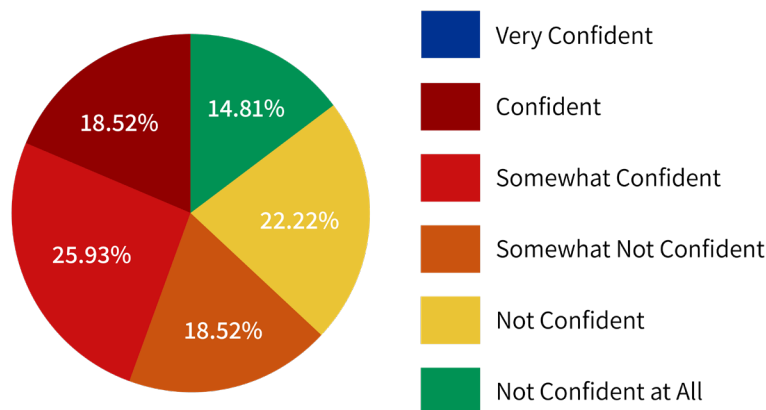


Chart 296. Thai views on whether China respects ASEAN centrality

Thai respondents also do not have confidence in China's respect for the national unity, sovereignty, and territorial integrity of ASEAN countries. 66,66% of Thai respondents stood in the negative spectrum. Only 44,44% of Thai respondents were in the positive spectrum to that statement.

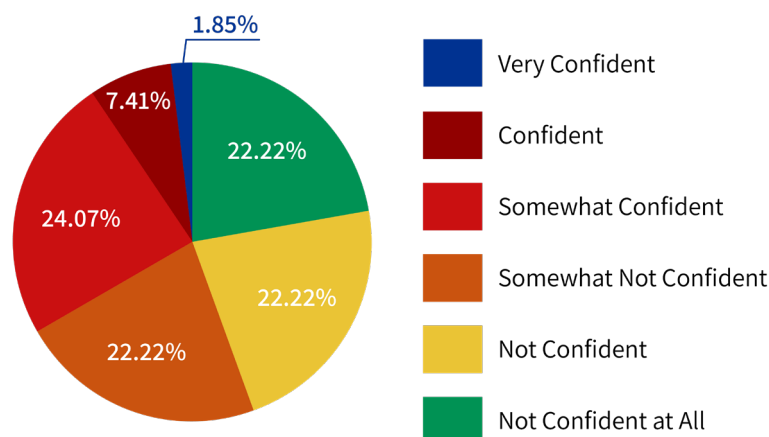


Chart 297. Thai views on whether China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

Thai respondents were also not confident in the view that China applies the principle of non-intervention regarding the political development of ASEAN countries. 22,22% of Thai respondents felt somewhat not confident in the statement and 35,18 of Thai respondents were not confident with China. There were still 18,52% of Thai respondents somewhat confident with China and 24,07% felt confident.

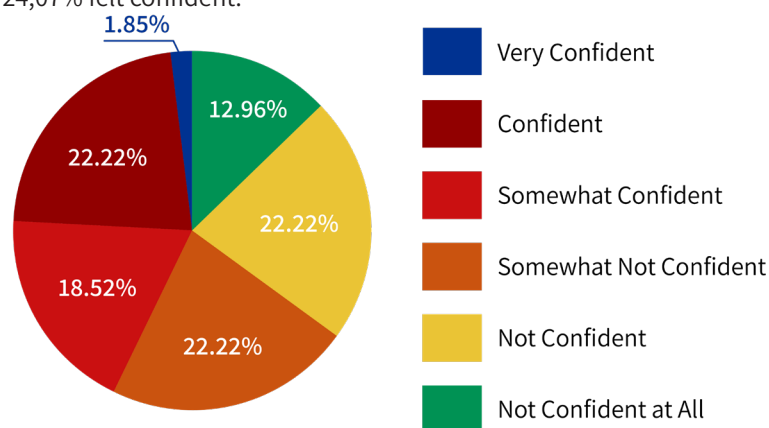


Chart 298. Thai views on whether China applies the principle of non-intervention regarding the political development of ASEAN countries

The survey also observes a high number in the negative spectrum for Thai respondents' point of view on whether China treats ASEAN as an equal partner. 31,48% of Thai respondents were somewhat not confident and 38,89% were not confident. Only a small number of Thai respondents saw it in the positive spectrum whereby 20,37% were somewhat confident and 9,26% were confident.

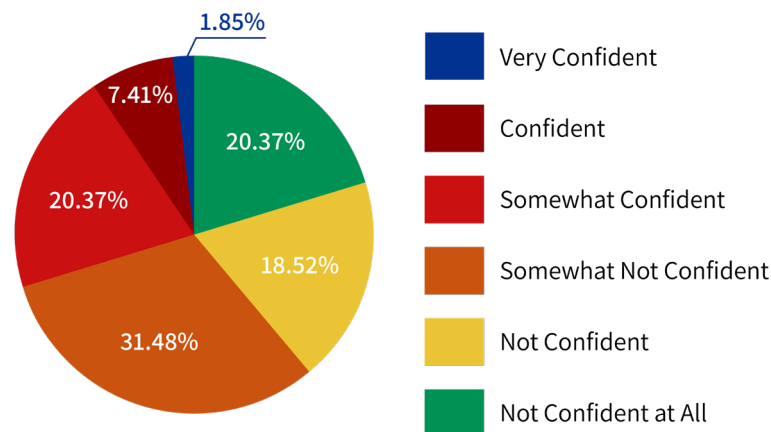


Chart 299. Thai views on whether China treats ASEAN as an equal partner

Despite a high number of negative spectrums in many issues, the majority of Thai respondents with 56,67% saw the Thai government as being close to the Chinese government.

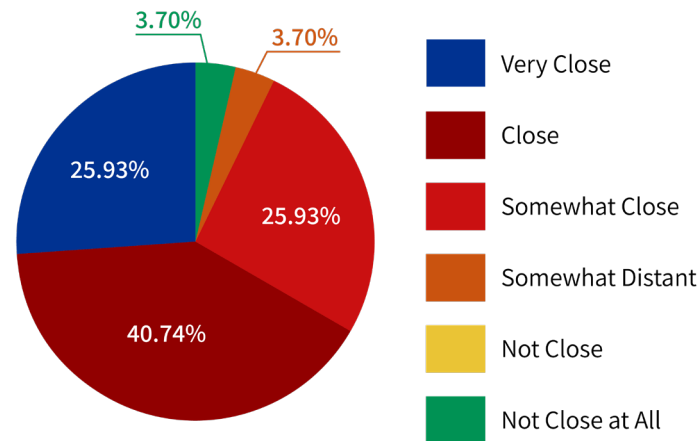


Chart 300. Thai views on how close is their government to China

Continue to the discussion about Thai respondents' perception in China. The survey starts with the question about respondents' views on China's influence in Thailand. 48,15% of Thai respondents were worried about the influence. A split view of 25% appeared between welcomed and neutral. Majority of 59,26% of Thai respondents saw China as an important political and economic influencer in Thailand. Another 25,93% of Thai respondents saw it more as an economic influencer.

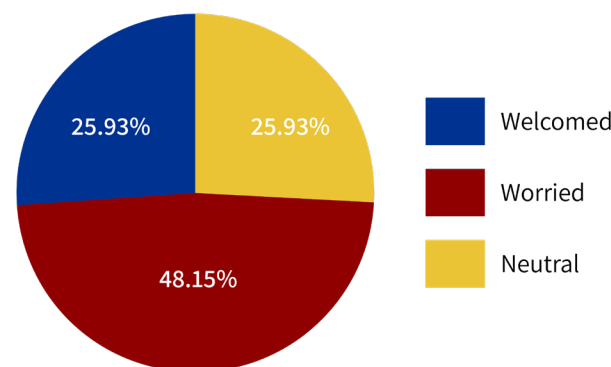


Chart 301. Thai views on China's influence in their country

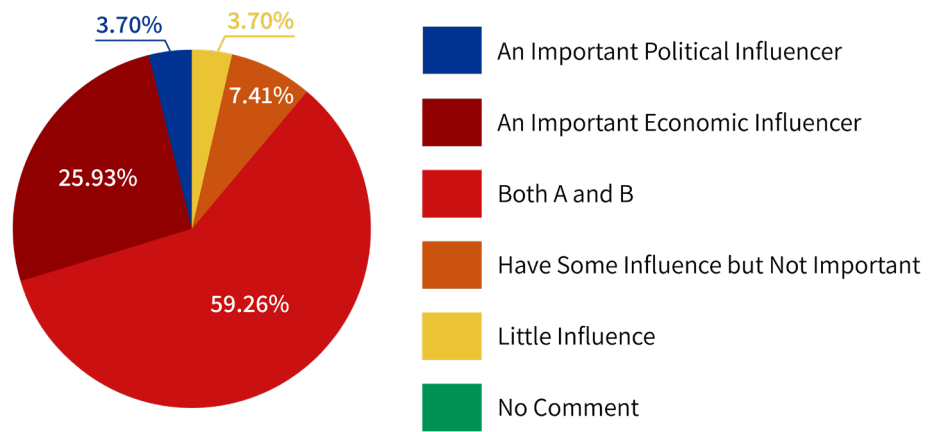


Chart 302. Thai views on how they see China's influence in their country

Looking into Thai respondents' opinion about China's influence in the regional level. Half of the Thai respondents were worried about the influence. 27,78% were neutral and 22,22% welcomed the influence. Same point of view with the national level, 61,11% of Thai respondents saw China as an important political and economic influencer in the region.

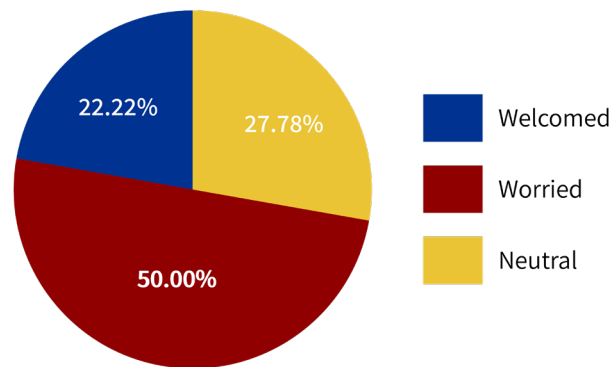


Chart 303. Thai views on China's influence among ASEAN member states

Regarding the question about respondents' think that China's communist ideology has been influencing Thailand. Majority of Thai respondents with 42,59% said no, 18,52% said yes, and the rest of 38,89% said neutral to the question. Meanwhile, 57,41% of Thai respondents saw China as still having a big influence over its diaspora in Thailand. Then how do Thai respondents see the relationship of the Chinese diaspora with China? Majority of Thai respondents with 37,04% saw China has mainly maintained their relationship with the Chinese diaspora in economic aspects and the second majority of 22,22% saw it in all aspects which includes politics, economics, and cultures.

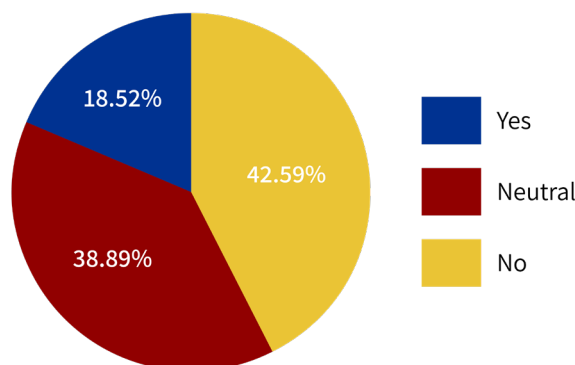


Chart 304. Thai views on what whether they think their country has been influenced by China's communist ideology

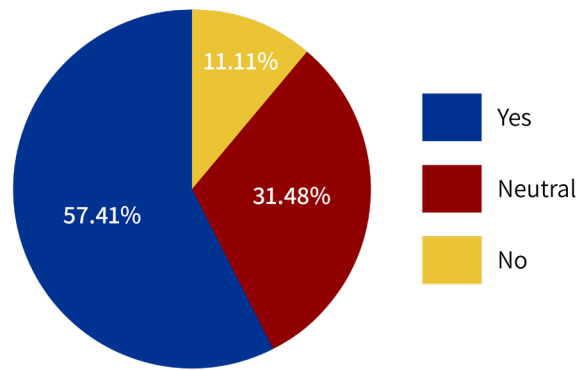


Chart 305. Thai views on whether they think China still has a big influence over its diaspora in their country



Chart 306. Thai views on what do you think of China's relationship with its diaspora in their country

Same to the other Southeast Asian countries, Thai respondents saw China's progress in science and technology as the most appealing from China. Another aspect that appealed most to Thai respondents is China's economic growth despite the pandemic.

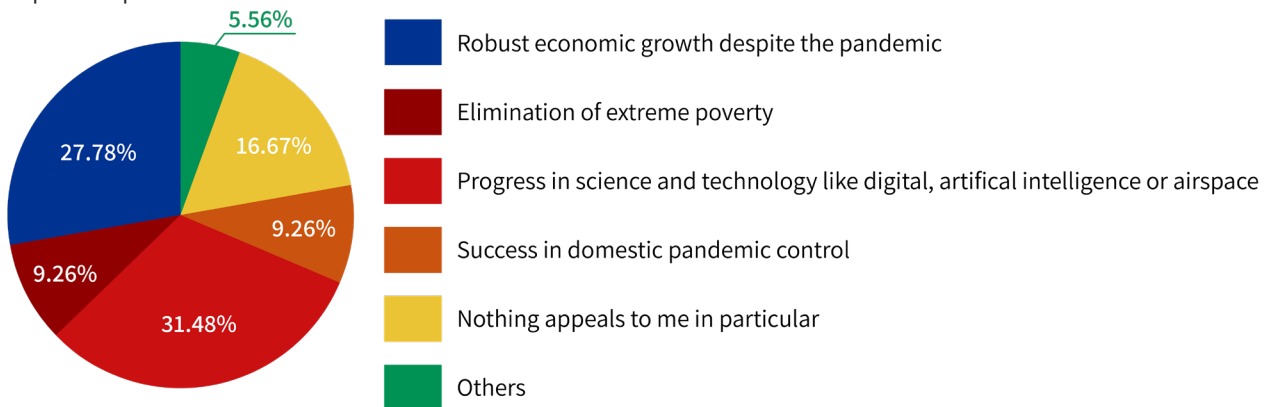


Chart 307. Thai views on which aspects of China appeal to them the most

Still majority of Thai respondents with 44,44% neutral on the view that China is a reliable partner for ASEAN countries in the field of development assistance and aid. Only 33,33% said yes to this view and 22,22% said no.

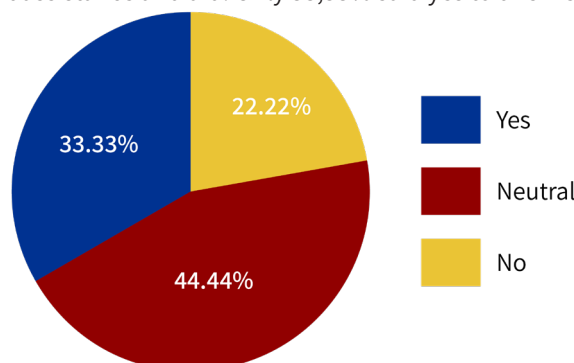


Chart 308. Thai views on whether they think China is a reliable partner for ASEAN countries in the field of development assistance and aid

In the Myanmar political and humanitarian crisis, 74,07 of Thai respondents were in the negative spectrum in the view that China acts as a responsible partner for ASEAN in defusing Myanmar's Crisis. Specifically, 55,55% were not confident with China and 18,52% were still somewhat not confident with China. China is also expected by Thai respondents to play a bigger role in the crisis. On how should China play its role? Majority of Thai respondents with 42,59% suggest China should follow and support ASEAN's response mechanisms and processes.

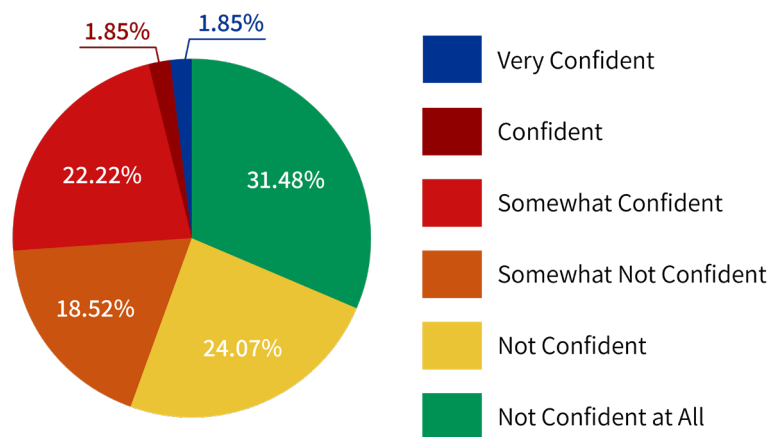


Chart 309. Thai views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

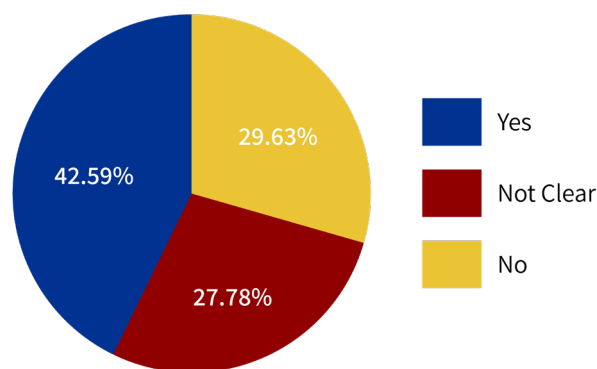


Chart 310. Thai views on whether should China play a bigger role in solving Myanmar's Political Crisis

C.7. Myanmar

Myanmar respondents present different responses depending on the issues asked. In the view that China respects ASEAN centrality, Myanmar respondents were relatively split on their views, 48,48% of Myanmar respondents sit in the positive spectrum and 51,52% sit in the negative spectrum. Another split of point of view was also seen in the view that China respects the national unity, sovereignty, and territorial integrity of ASEAN countries.

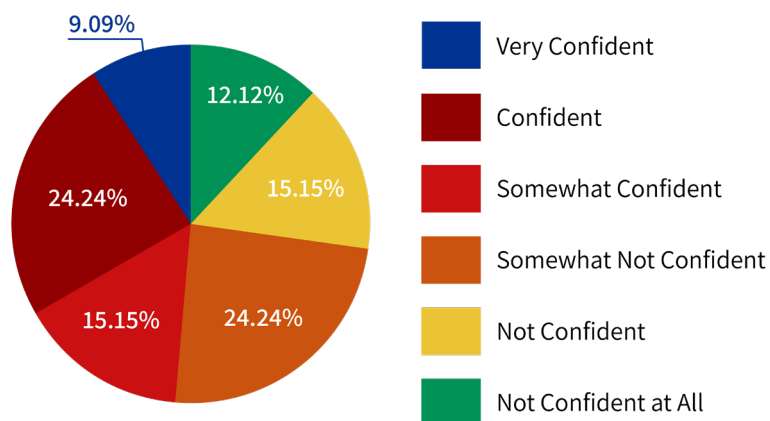


Chart 311. Myanmar peoples views on whether China respects ASEAN centrality

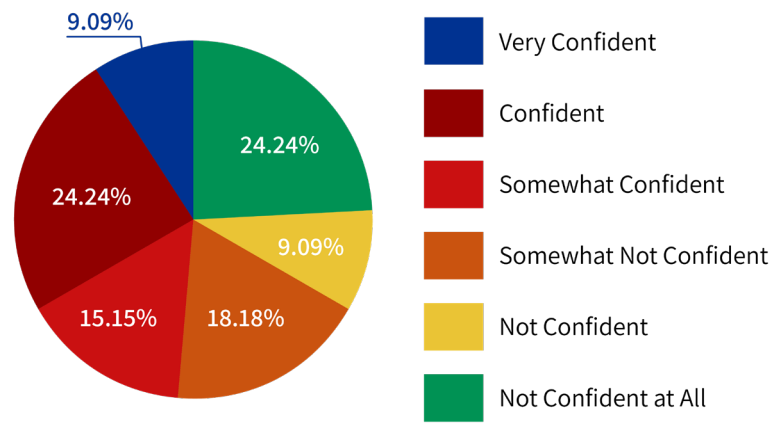


Chart 312. Myanmar peoples view on whether China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

Majority of respondents in Myanmar saw positively in the view that China applies the principle of non-intervention regarding the political development of ASEAN countries. 42,42% of Myanmar respondents were confident with China and 12,12% were somewhat confident. Conversely, 54,54% of Myanmar respondents sit in the negative spectrum in the view that China treats ASEAN as equal partners.

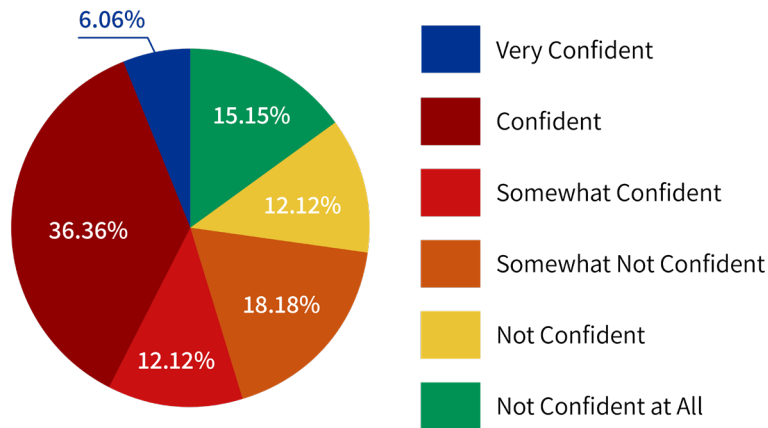


Chart 313. Myanmar peoples views on whether China applies the principle of non-intervention regarding the political development of ASEAN countries

In the discussion of Myanmar respondents' perception in China. 75,76% of respondents in Myanmar were worried about the influence of China, 15,15% were neutral, and 9,09% welcomed it. Majority of 72,73% of the respondents also saw China as a political and economic influencer for Myanmar. Despite the wariness, 63,64% of Myanmar respondents saw their government as being very close to China.

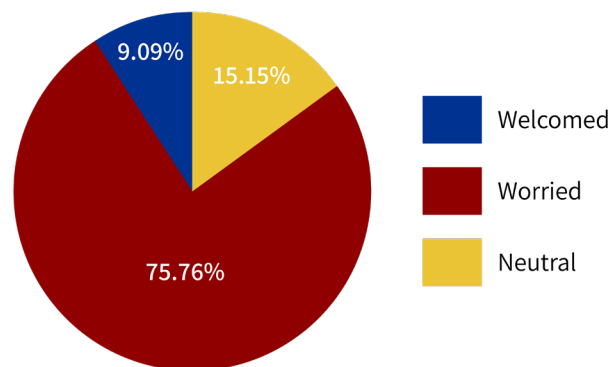


Chart 314. Myanmar peoples views on China's influence in their country

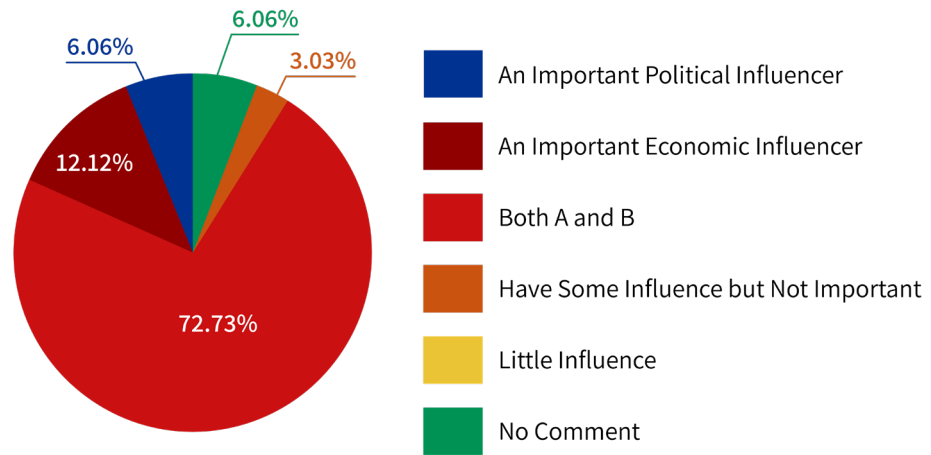


Chart 315. Myanmar people's views on China's influence in their country

Regarding, the views on whether China's communist ideology has influenced ASEAN countries particularly in Myanmar. 42,42% said no, 33,33% said yes, and 24,24% said no.

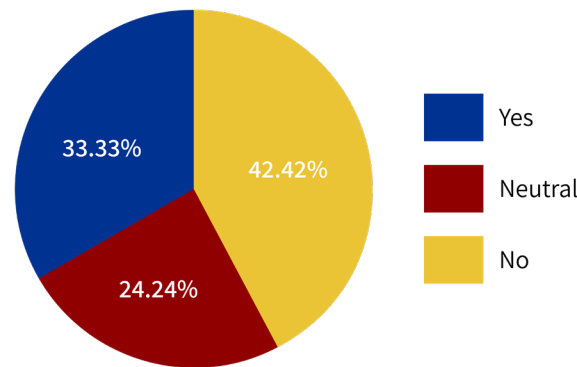


Chart 316. Myanmar people's views on whether they think their country has been influenced by China's communist ideology

For China's influence on a regional level, 63,64% of respondents in Myanmar were also worried about China. 51,52% of Myanmar respondents also saw China as a political and economic influencer on the regional level. 30,30% of Myanmar respondents were inclined to see China's influence on ASEAN on a more economical aspect.

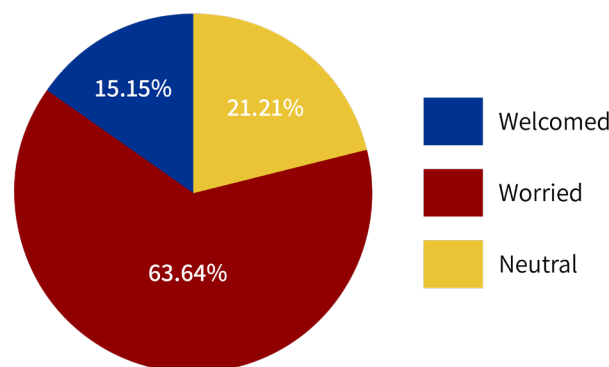


Chart 317. Myanmar people's views on China's influence among ASEAN member states

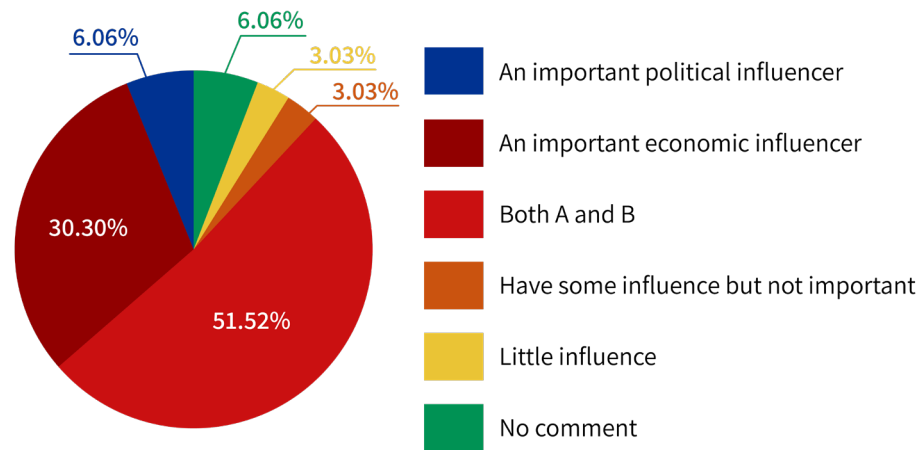


Chart 318. Myanmar peoples views on how do they see China's influence among ASEAN member states

51,52% of Myanmar respondents also saw that China still has a big influence over its diaspora in Myanmar. The rest of 36,36% were neutral to this view and 12,12% did not perceive it. Majority of Myanmar respondents with 27,27% saw that China maintained close relations in all fields with its diaspora. The second majority of respondents with 24,24% saw it more on an economical aspect. Another 21,21% were not clear and the remaining small shares of respondents saw it on political and cultural aspects.

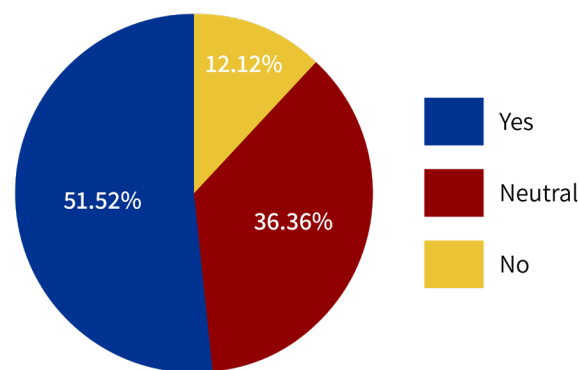


Chart 319. Myanmar peoples view on whether they think China still has a big influence over its diaspora in their country



Chart 320. Myanmar peoples view on what they think of China's relationship with its diaspora in their country

What aspects of China appeal to Myanmar respondents most? 24,24% chose the robust economic growth of China, another 24,24% do not see anything from China appealing, 18,18% chose China's strategy in eliminating of extreme poverty, 15,15% chose China's progress in science and technology and the rest with a small shares chose China's pandemic control.



Chart 321. Myanmar peoples views on which aspects of China appeal to you the most

Myanmar respondents were also equally divided on the question of “do you think China is a reliable partner for ASEAN countries in the field of development assistance and aid?” 33,33% of Myanmar respondents said yes, 36,36% said neutral, and 30,30% said yes.

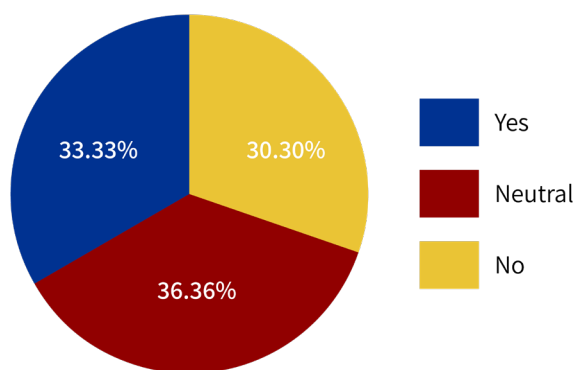


Chart 322. Myanmar peoples views on whether they think China is a reliable partner for ASEAN countries in the field of development assistance and aid

In Myanmar’s political and humanitarian crisis, 48,48% of Myanmar respondents were not confident that China acts as a responsible partner for ASEAN in defusing Myanmar’s political crisis and 9,09% were still somewhat not confident. 42,42% of Myanmar respondents also disagreed with the view that China should play a bigger role in solving the problem, the rest of 30,30% said yes and 27,27% were neutral. If we asked, how should China act to support in solving the conflict in Myanmar? 39,39% suggested that China should condemn the Tatmadaw and impose sanctions on them. 30,30% suggested supporting and following ASEAN response mechanisms and processes. The rest of 30,30% suggested either to send China’s special envoy or China should not interfere.

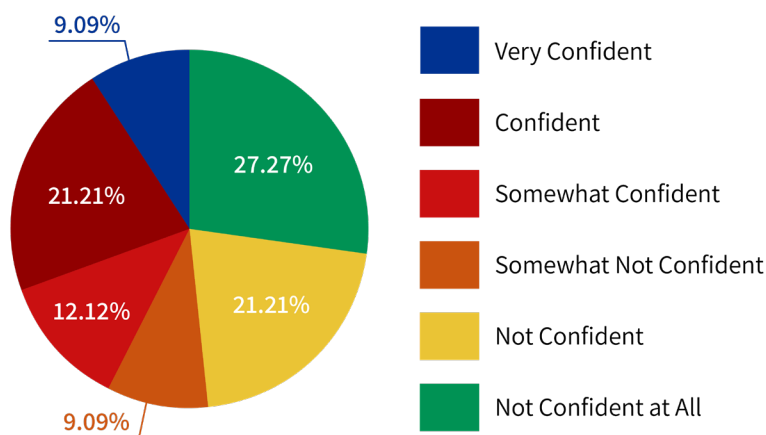


Chart 323. Myanmar peoples views on whether China acts as a responsible partner for ASEAN in defusing Myanmar’s political crisis

C.8. Singapore

There is a degree of hesitancy and doubt in respondents from Singapore when asked about their sentiments on China's attitude and position. The majority of Singaporeans answered 'somewhat confident' when posed with various perceptions such as China respects ASEAN centrality, ASEAN countries national unity, sovereignty, and territorial integrity.

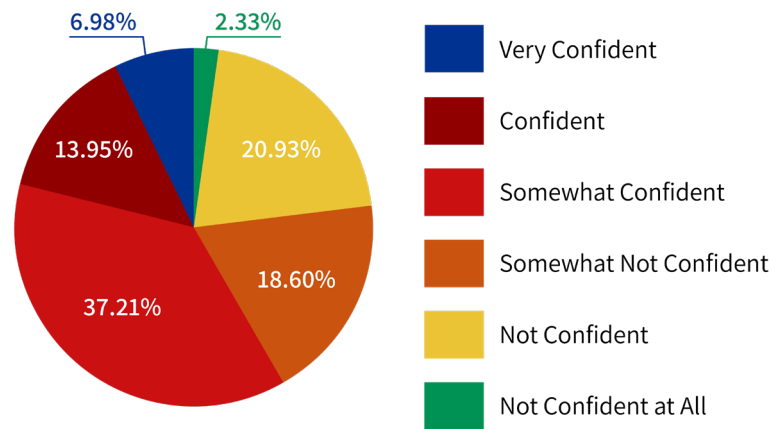


Chart 324. Singaporean views on whether China respects ASEAN centrality

Singaporeans are also split in their view on whether China interferes in the political development of ASEAN member states. The majority answers of 25,58% are in both 'confident' and 'somewhat confident' options. 13,95% are 'not confident' and another 13,95% are 'not confident at all'.

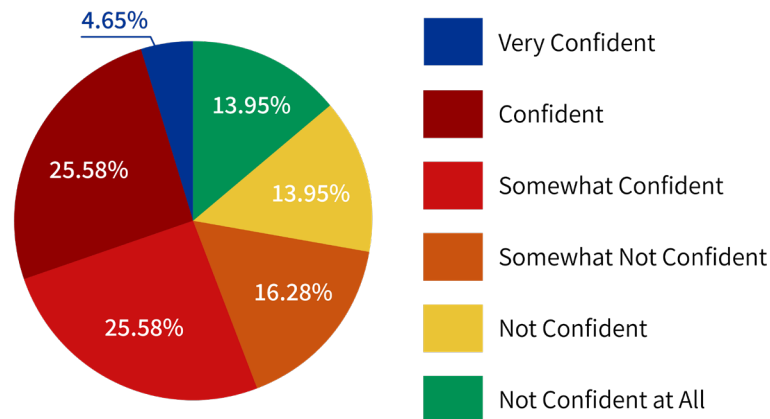


Chart 325. Singaporean views on whether China applies the principle of non-intervention regarding the political development of ASEAN countries

Whether China treats ASEAN as equal partners, 67,45% of Singaporean answers are within the negative spectrum with the majority saying that they are 'somewhat not confident' (32,56%). The same doubt is also expressed in the question whether China has good intentions in the negotiation of the Code of Conduct. More than half of the respondents (60,46%) responses are in the negative range with the most answers in the 'somewhat not confident' option.

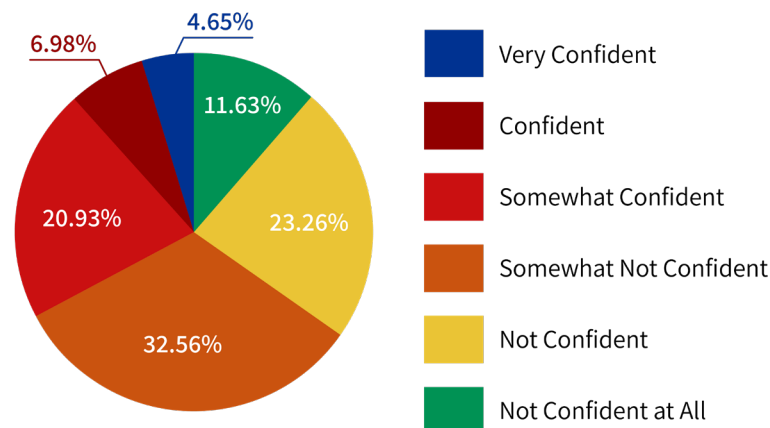


Chart 326. Singaporean views on whether China treats ASEAN as an equal partner

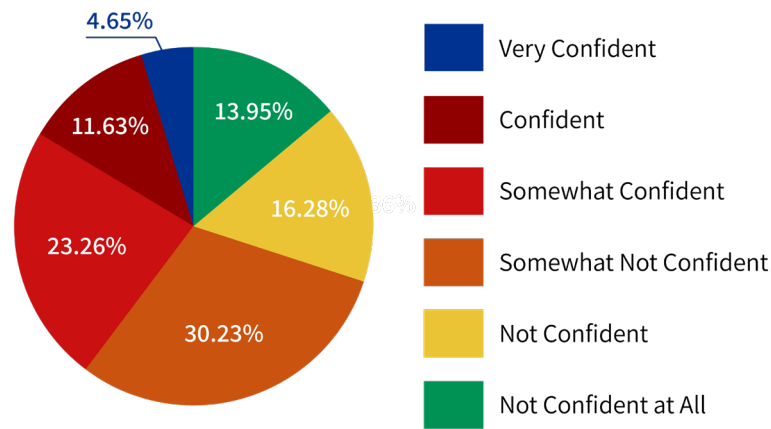


Chart 327. Singaporean views on whether China has good intentions in the negotiation of the Code of Conduct

Nevertheless, Singaporean respondents regard BRI as of high importance, more so than other ASEAN member states. 95,35% of Singaporeans are within the positive range (very important, fairly important, somewhat important) regarding the continuation, enhancement, and completion of BRI projects.

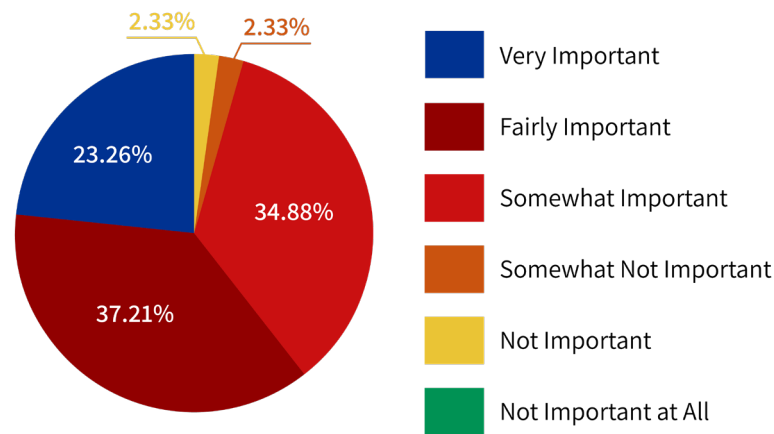


Chart 328. Singaporean views on the continuation, enhancement, and completion of Belt and Road Initiative (BRI) projects

Furthermore, Singapore is also the only country who seems to be the most confident that BRI has become a win-win feature of ASEAN-China cooperation compared to its neighbors with 69,76% are within the positive spectrum (very confident, confident, somewhat confident).

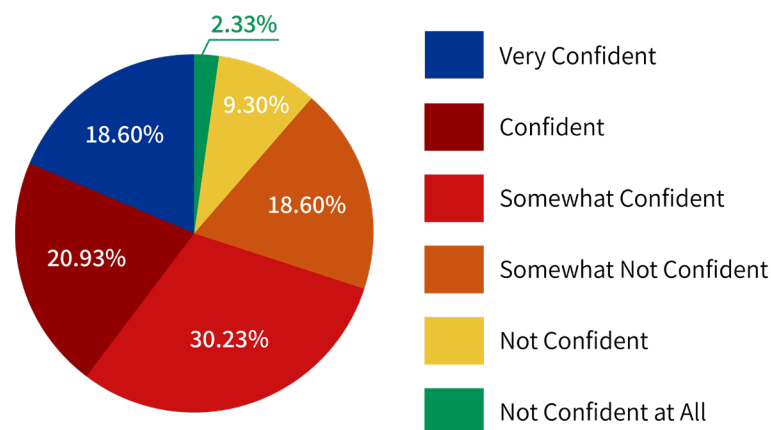


Chart 329. Singaporean views on whether the Belt and Road Initiative (BRI) has become a key feature of ASEAN-China win – win cooperation

Like other countries, Singaporeans also acknowledge China as both a major economic and political influencer (79,07%) in the region and within Singapore (53,49%) as well.

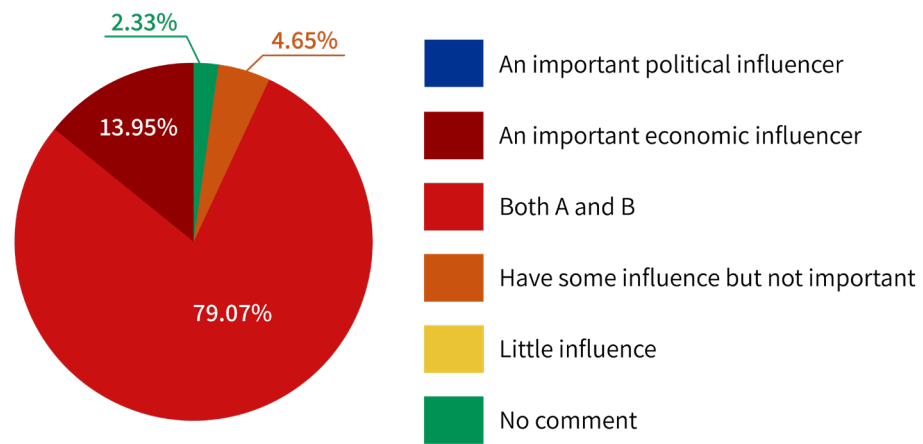


Chart 330. Singaporean views on how they see China's influence among ASEAN member states

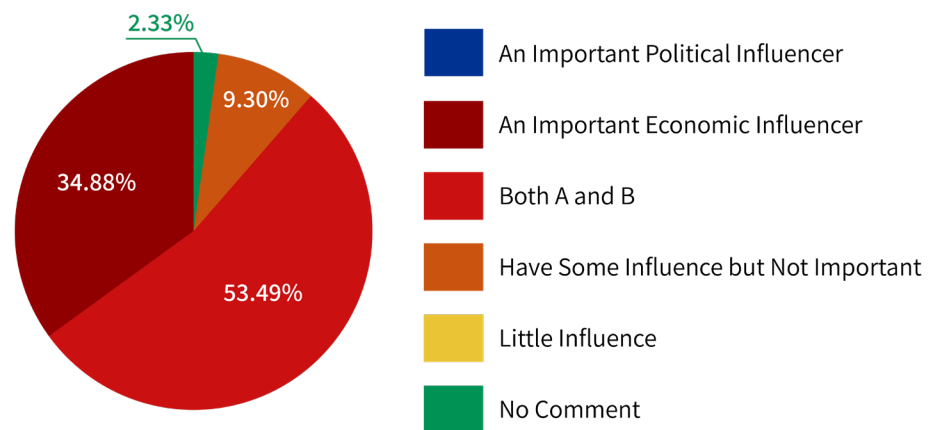


Chart 331. Singaporean views on China's influence in their country?

Yet, it is important to note that more than half of Singaporeans (58,14%) are concerned about China's influence in the region and almost half of Singaporeans (48,84%) are worried about China's influence in their country. Nevertheless, 9.30% said China's influence is insignificant in their country and 4.65% also answered that Chinese influence is not important in the region.

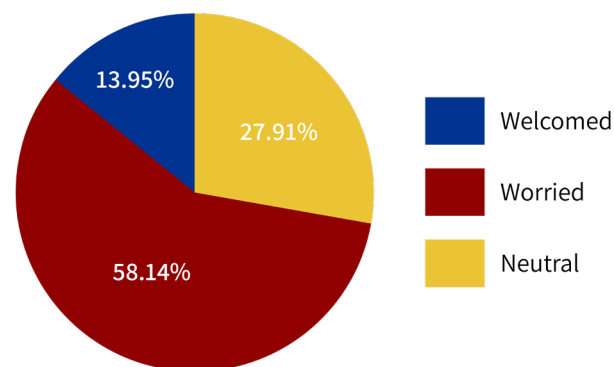


Chart 332. Singaporean views on what is their view on China's influence among ASEAN member states?

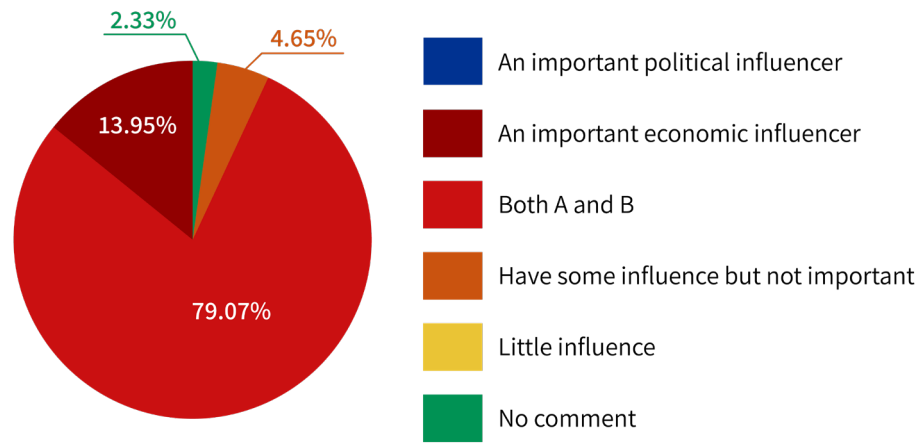


Chart 333. Singaporean views on how they see China's influence among ASEAN member states

Most Singaporean respondents (39,53%) are impressed with China's elimination of extreme poverty, whereas others are impressed by China's robust economic growth amid the pandemic and its success in domestic pandemic control.



Chart 334. Singaporean views on which aspects of China appeal to them the most

On which new areas have the biggest potential for the furthering of ASEAN-China relationship, a majority answered post-pandemic recovery (44,19%) followed by climate change and renewable energy (18,60%). This is quite different from other countries' responses, where others usually picked post pandemic recovery followed by vaccine cooperation.

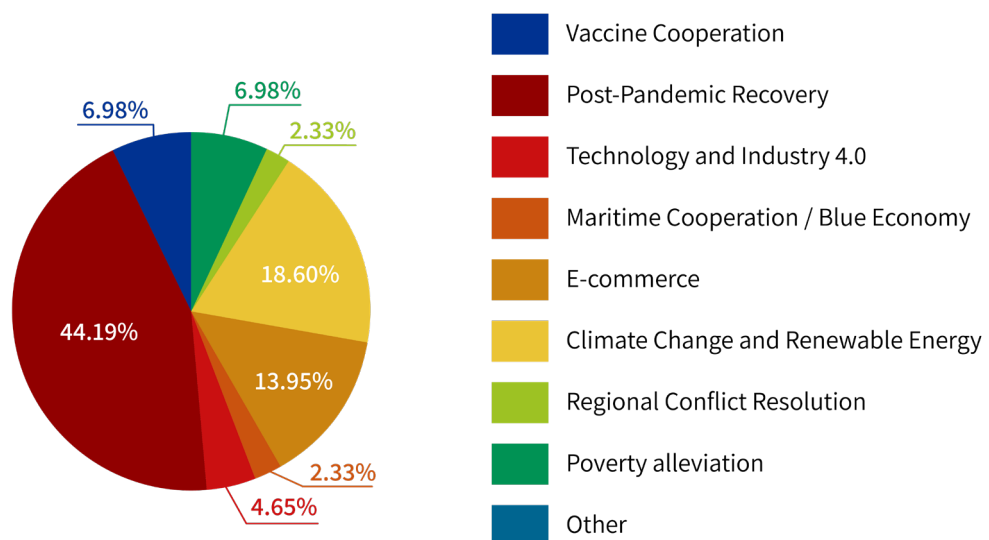


Chart 335. Singaporean views on what newest aspect of the ASEAN-China relationship do they think has the biggest potential

Regarding whether there is a geopolitical tension or not between the Quad and China, more than half of Singaporean respondents (58.14%) answered 'absolutely' and 30.23% chose 'somewhat' option.

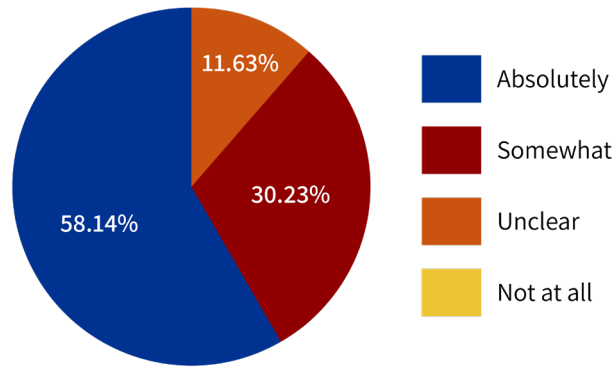


Chart 336. Singaporean views on whether they think there is geopolitical tension(s) between the Quad and China?

When asked how the tension could affect ASEAN, the majority of Singaporeans said it could undermine ASEAN centrality and its mechanisms (46,51%) while the second majority feared that the tension may force ASEAN to choose a side (23,26%).

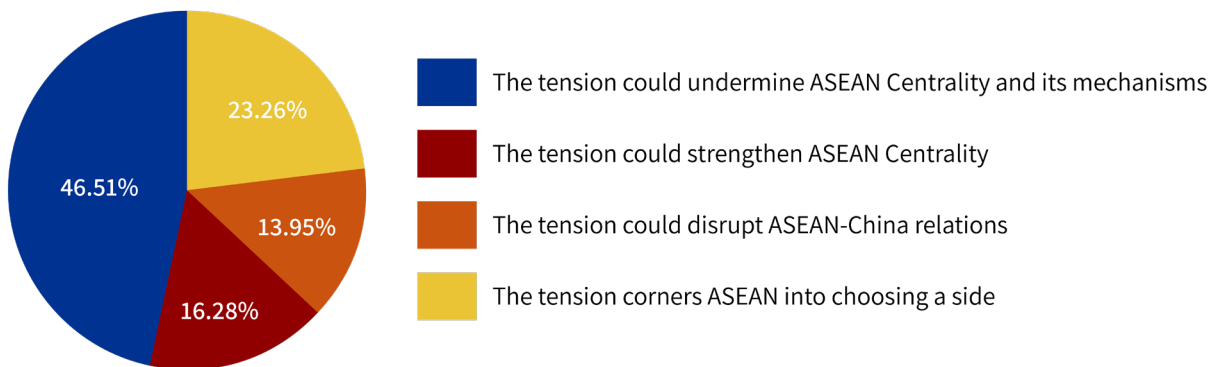


Chart 337. Singaporean views on how they think the Quad-China geopolitical tension(s) will affect ASEAN

Singapore respondents also feel uncertain whether China is proactively trying to defuse the geopolitical rivalry and tension in the region. 65,11% of Singaporeans answers are somewhat not confident or not confident or not confident at all.

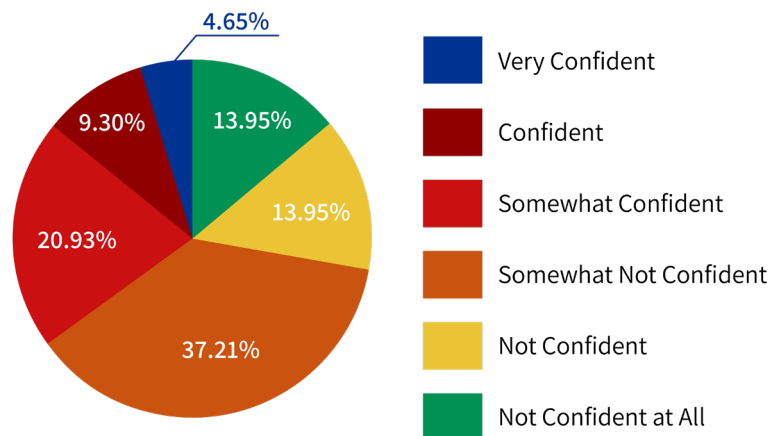


Chart 338. Singaporean views on whether China proactively tries to defuse geopolitical rivalry and tension in the region

Singaporean respondents are divided when posed a question whether China should play a bigger role in solving Myanmar's political crisis. 37,21% answered 'yes', 39,53% answered 'not clear' and 23,26% answered 'no'.

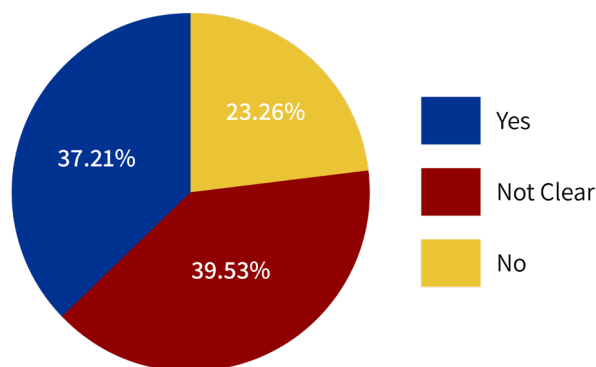


Chart 339. Singaporean views on whether should China play a bigger role in solving Myanmar's Political Crisis

A similar division in responses is also reflected when posed with a question whether China is a responsible partner for ASEAN in defusing Myanmar's political crisis. 25,58% are 'somewhat not confident', 23,36% are 'somewhat confident' and a notable number of 20,93% are 'not confident at all'.

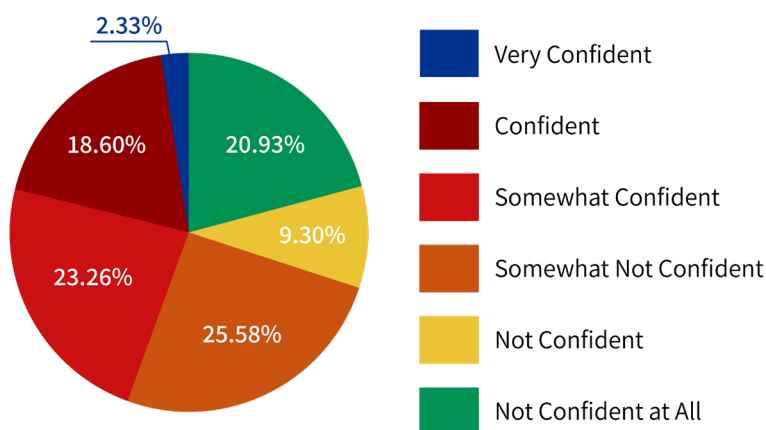


Chart 340. Singaporean views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

C.9. Brunei Darussalam

Most Bruneian respondents chose their answers within the somewhat range (somewhat confident or somewhat not confident) regarding questions relating to China's attitude and position towards the region. Whether China respects ASEAN centrality, the national unity, sovereignty, and territorial integrity of ASEAN countries, most Bruneians are somewhat confident.

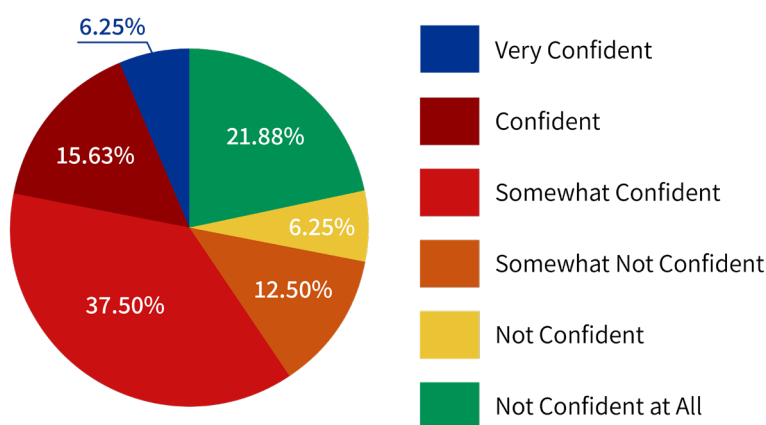


Chart 341. Bruneian views on whether China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

34,38% of Bruneians are somewhat confident that China will not interfere in the political development of ASEAN countries. But there is also an equal divide between Bruneians where 15,63% are very confident, confident, and somewhat not confident

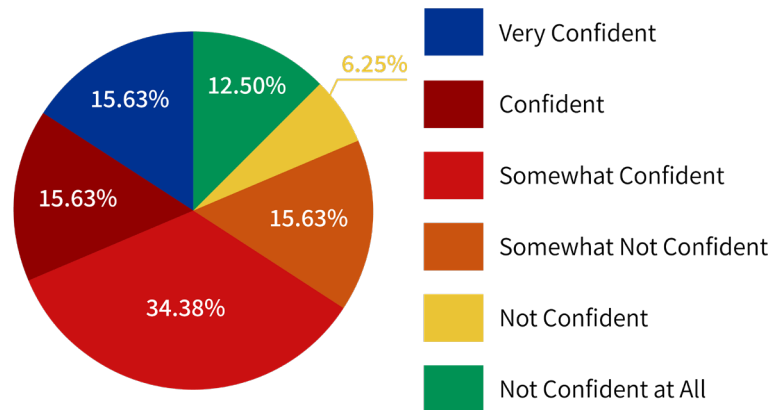


Chart 342. Bruneian views on whether China applies the principle of non-intervention regarding the political development of ASEAN countries

Regarding their confidence that BRI has become a mutually beneficial feature of ASEAN-China cooperation, a majority of Bruneian respondents (31,25%) are both confident and somewhat confident.

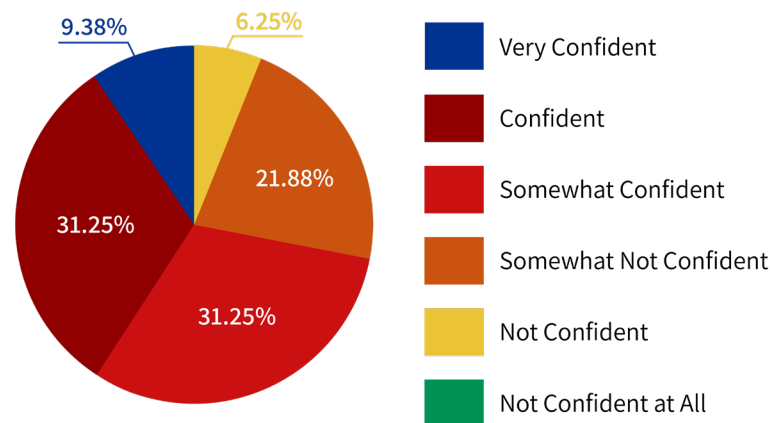


Chart 343. Bruneian views on whether The Belt and Road Initiative (BRI) has become a key feature of ASEAN-China win-win cooperation

Regarding China's intentions in the negotiation of the Code of Conduct, the majority of Bruneians answers (53,14%) are within the positive spectrum with a majority of 34,38% Bruneians answered somewhat confident.

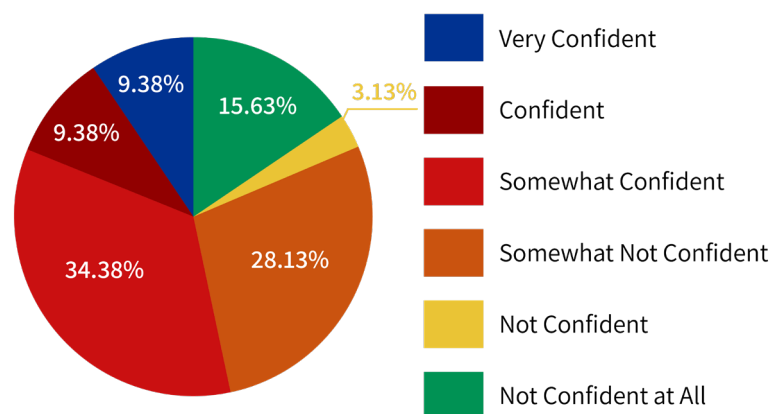


Chart 344. Bruneian views on whether China has good intentions in the negotiation of the Code of Conduct

Respondents from Brunei are divided in their confidence rate on whether China treats ASEAN as equal partners. 25% of Bruneians rate their confidence as ‘confident’, ‘somewhat confident’, and ‘somewhat not confident’.

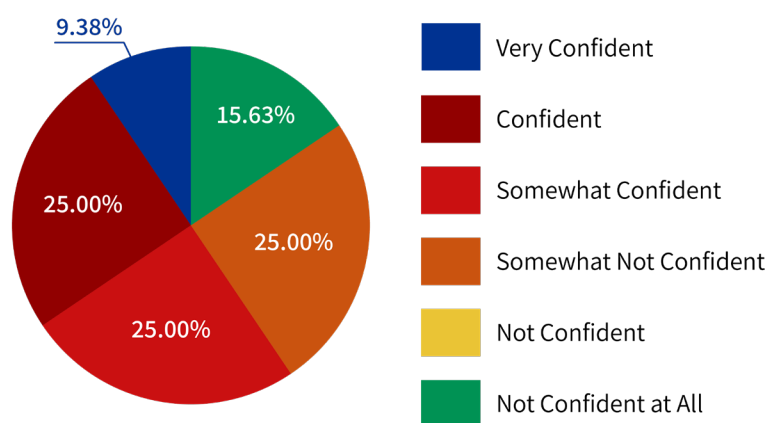


Chart 345. Bruneian views on whether China treats ASEAN as equal partners

All Brunei respondents agree that their government is close with China although their answers vary in degree. More than half (53,13%) answered ‘close’, 28,13% described it as ‘somewhat close’, and 18,75% ‘very close’.

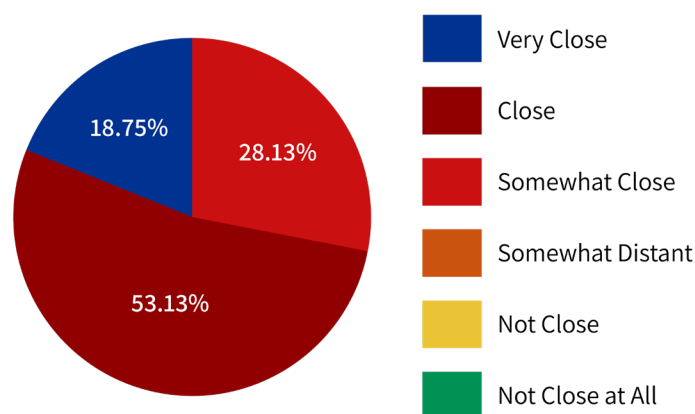


Chart 346. Bruneian views on how close their government is with China

Bruneians are almost equally divided on their views on China’s influence in their country in which 37,50% welcome China’s influence, 31,25% are worried, and 31,25% are neutral. A similar sentiment is also reflected on China’s influence in the region in which 34,38% welcomed it, 31,25% worried about it, and 34,38% remained neutral.

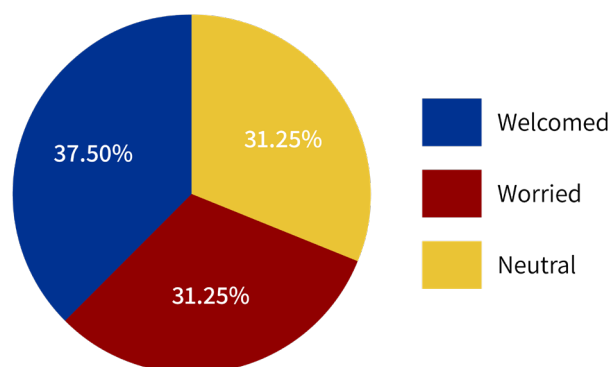


Chart 347. Bruneian views on China’s influence in their country

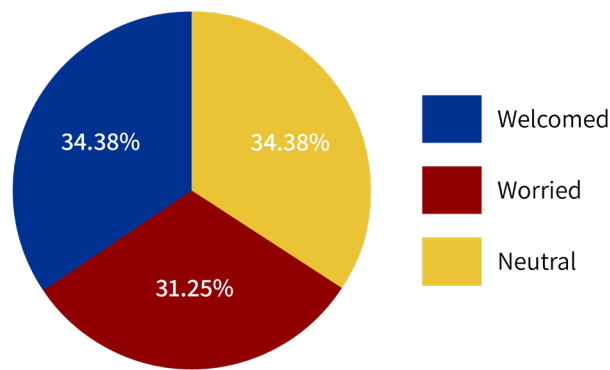


Chart 348. Bruneian views on China's influence among ASEAN member states

Bruneians also show a slightly different answer in which more than half (65,63%) of Brunei respondents perceive China as an important economic influencer in their country. This result is in contrast with other countries who usually see China as both an economic and important influencer within their country.

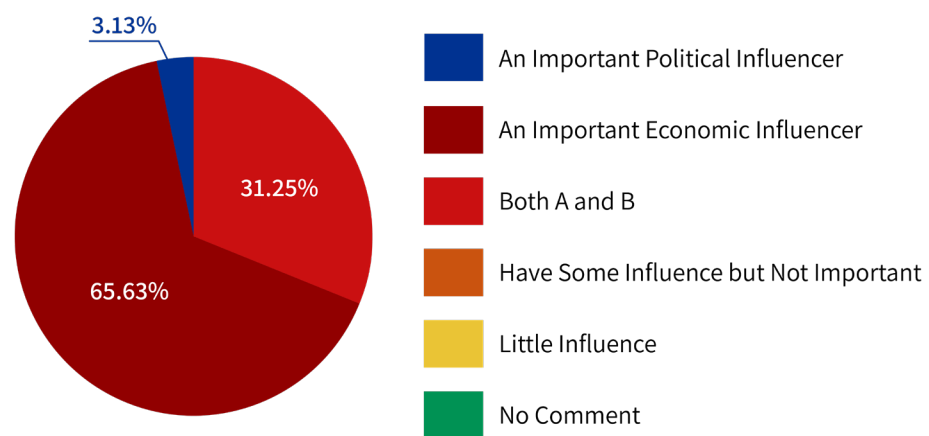


Chart 349. Bruneian views on how you see China's influence in your country

However, it is interesting to note that the majority of Bruneians (56,25%) view China as both an important economic and political influencer in the region.

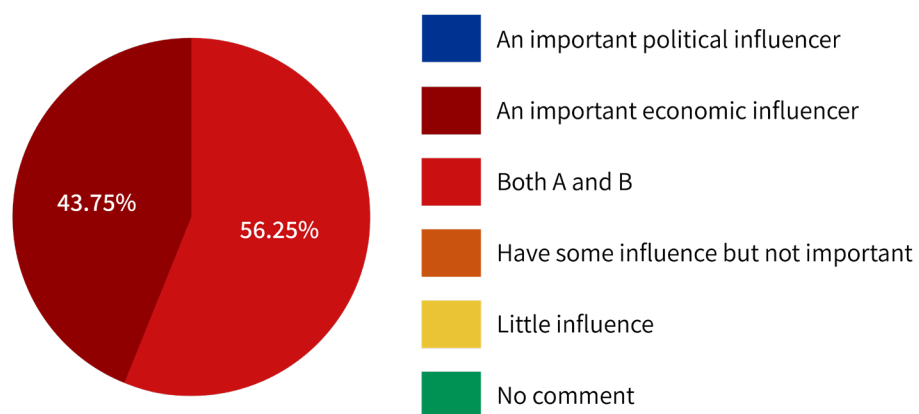


Chart 350. Bruneian views on how they see China's influence among ASEAN member states

Brunei was faced with a tough challenge when the Tatmadaw held a coup in Myanmar. Even though Brunei holds responsibility as an ASEAN Chair this year, most Bruneians feel that ASEAN's efforts are not sufficient to address the crisis. 40,63% think that ASEAN is not attentive and responsive enough and another 40,63% believe ASEAN is too slow in addressing the crisis.

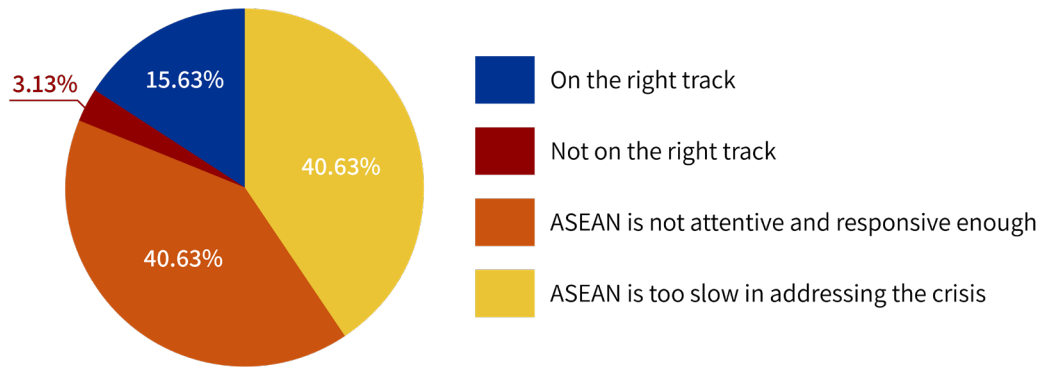


Chart 351. Bruneian views on whether ASEAN's effort to address Myanmar's political crisis is on the right track

There are dividing answers in regard to China's role in solving Myanmar's political crisis. 37,50% said China should play a bigger role, 34,38% answered they are not clear and 28,13% thought that China should not play a bigger role. A similar hesitation on the issue is also shown when the respondents of Brunei are asked whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis. 25% are 'somewhat confident' and another 25% are 'somewhat not confident'. 12,50% are 'confident' while 18,75% are 'not confident at all'.

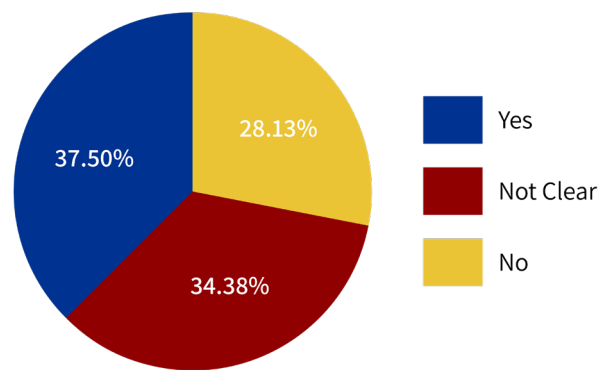


Chart 352. Bruneian views on whether should China play a bigger role in solving Myanmar's Political Crisis

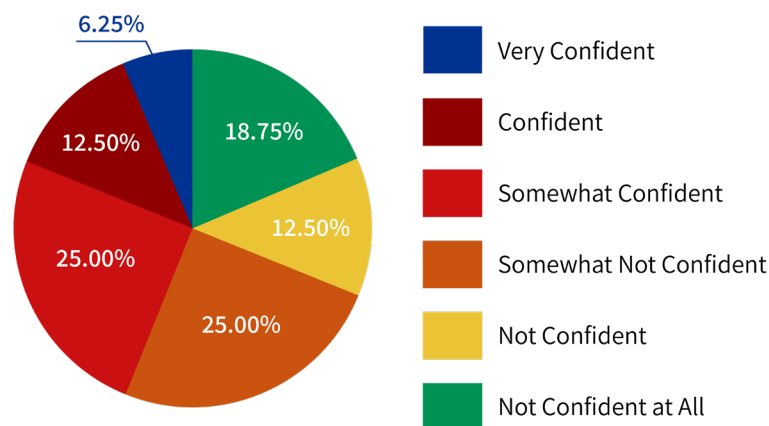


Chart 353. Bruneian views on whether China acts as a responsible partner for ASEAN in defusing Myanmar's political crisis

C.10. Laos

Respondents from Laos seem to be the most open or welcoming on its relations with China and the perceived influence China has on Laos. More than half of Laotian respondents (51,85%) welcome China's influence in their country and most

of them (48,15%) see China as an important economic influencer in their country. Yet, the second majority (44,44%) also think that China's influence in their country is both economic and political.

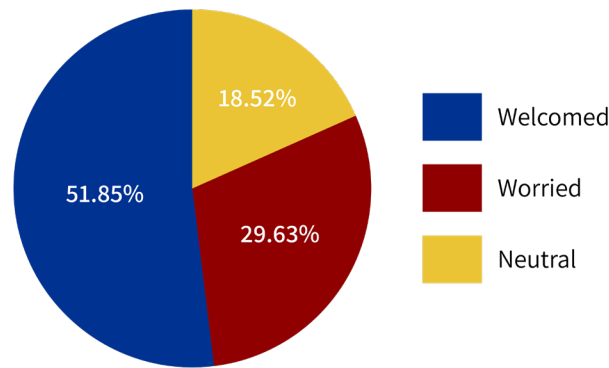


Chart 354. Laotian views on China's influence in your country

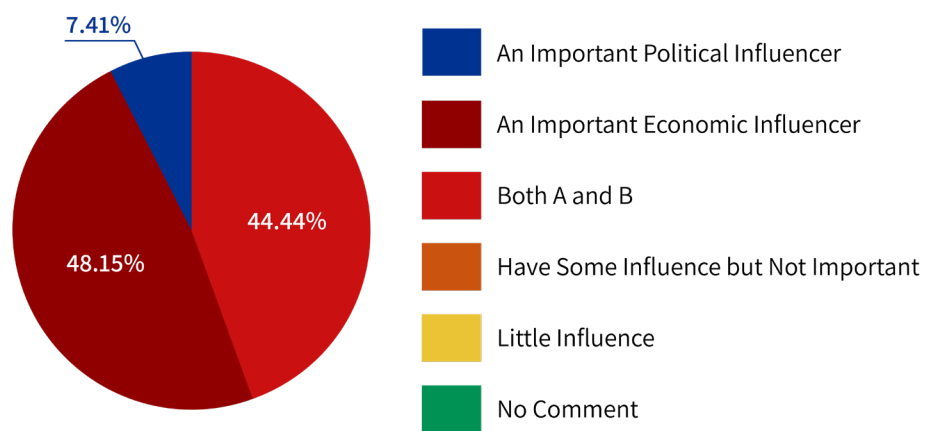


Chart 355. Laotian views on how they see China's influence in their country

62,96% of Laotian respondents also believe that China still has a big influence over its diaspora in their country. It is also interesting to know that more than half of the respondents from Laos (66,67%) think that China's communist ideology has influenced their country.

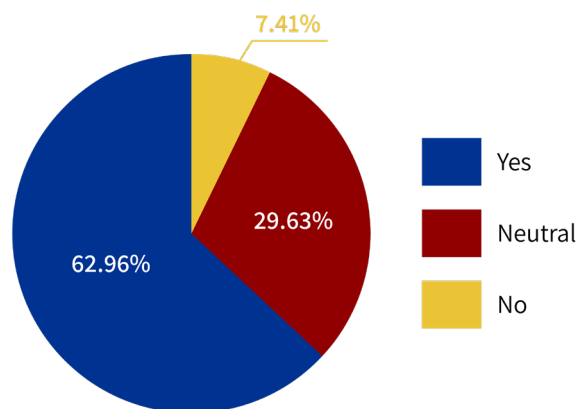


Chart 356. Laotian views on do you think China still has a big influence over its diaspora in their country

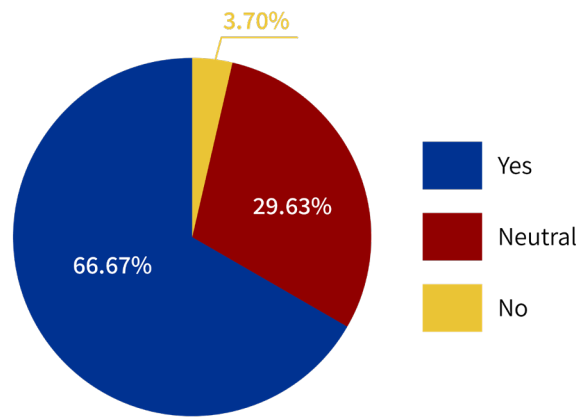


Chart 357. Laotian views on whether they think their country has been influenced by China's communist ideology

All Laotian respondents agree that their government is close with China although their answers vary in degree. More than half (59,26%) answered 'very close', 25,93% described it as 'close', and 7,41% viewed it as 'somewhat close'.

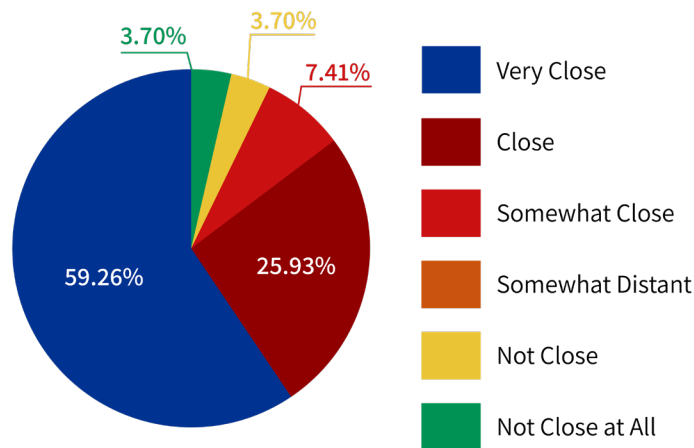


Chart 358. Laotian views on how close is their government with China

Furthermore, most Laotian (48,15%) respondents are welcomed towards China's influence in the region. Consistent in their view regarding Chinese influence in their country, most Laotians (51,85%) also view China as an important economic influencer in the region.

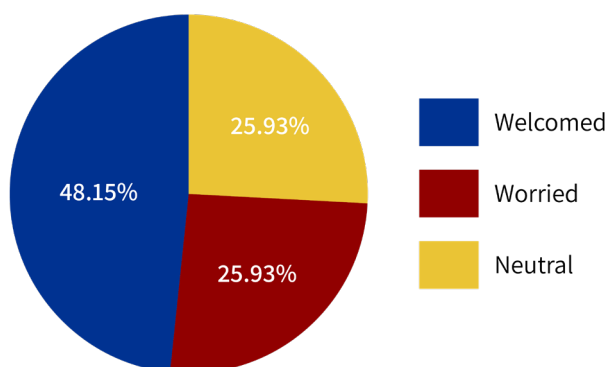


Chart 359. Laotian views on what is their view on China's influence among ASEAN member states

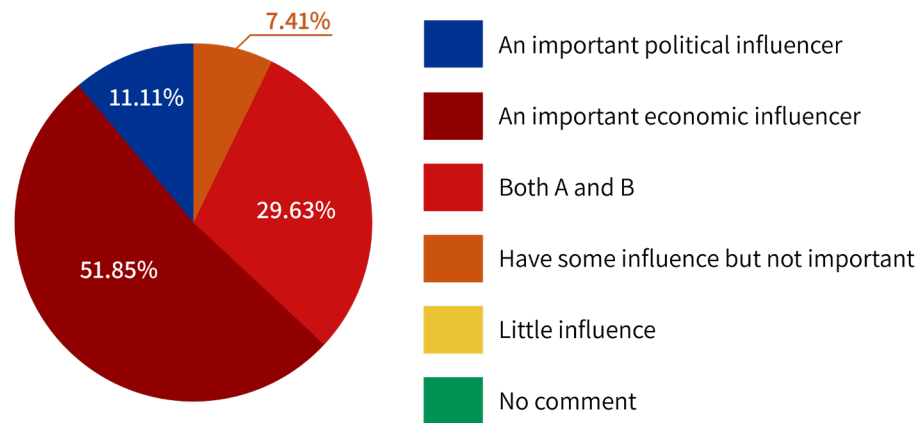


Chart 360. Laotian views on how they see China's influence among ASEAN member states

In addition, more than half of Laotian respondents (59,26%) also think that China is a reliable partner for ASEAN countries in regard to development assistance and aid. Although a whopping number of 33,33% stay neutral about it.

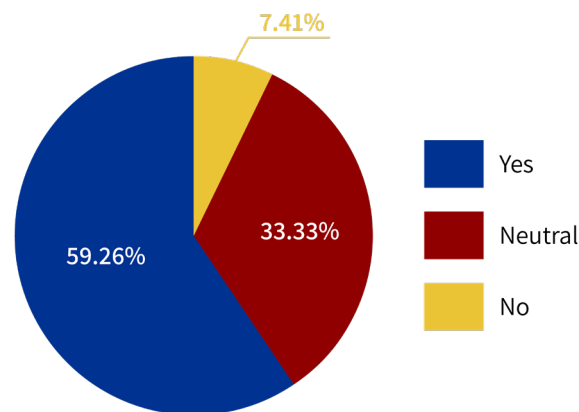


Chart 361. Laotian views on whether they think China is a reliable partner for ASEAN countries in the field of development assistance and aid

On the question of whether China has good intentions in the negotiations of the Code of Conduct, Laos is overwhelmingly confident in China's intention as 81,48% are within the positive spectrum.

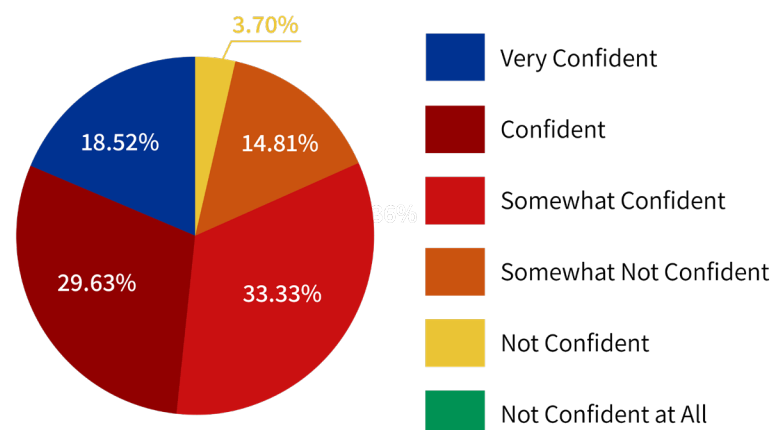


Chart 362. Laotian views on whether China has good intentions in the negotiation of the Code of Conduct

Respondents of Laos are mainly positive regarding China's respect towards ASEAN centrality and the national unity, sovereignty, territorial integrity of ASEAN countries with a small degree of doubt. No Laotian respondents answered 'not confident at all' instead 81,48% are in the positive spectrum concerning China respecting ASEAN centrality and 85,18% are in the positive range for China's respect towards ASEAN member countries.

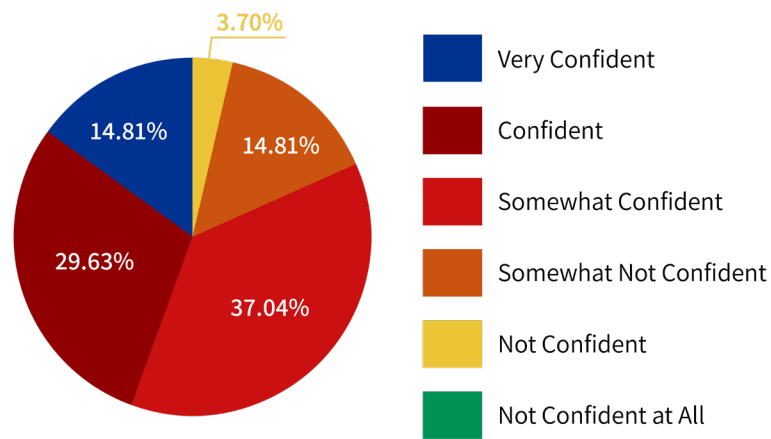


Chart 363. China respects ASEAN centrality

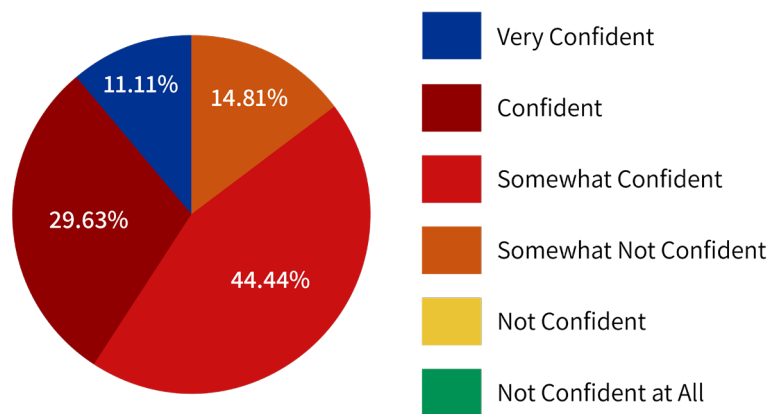


Chart 364. Laotian views on whether China respects the national unity, sovereignty, and territorial integrity of ASEAN countries

Majority of Laotians (48,15%) also feel confident that China will not interfere in ASEAN countries' domestic affairs including that of Laos. Moreover, 81,48% of Laotian respondents are in the positive range that China treats ASEAN as equal partners. Only 14,81% are somewhat not confident that China will treat ASEAN as equal. Laotians also primarily viewed BRI as a win-win cooperation between ASEAN and China in a positive manner (81,48%) with only 7,41% of Laotians not confident about it.

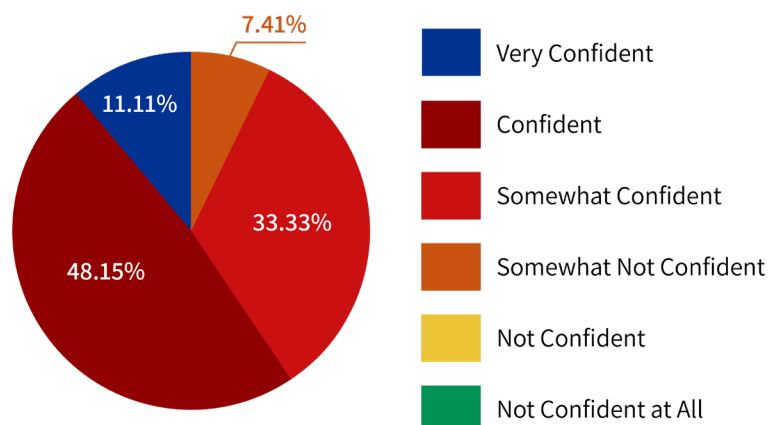


Chart 365. Laotian views on whether China applies the principle of non-intervention regarding the political development of ASEAN countries

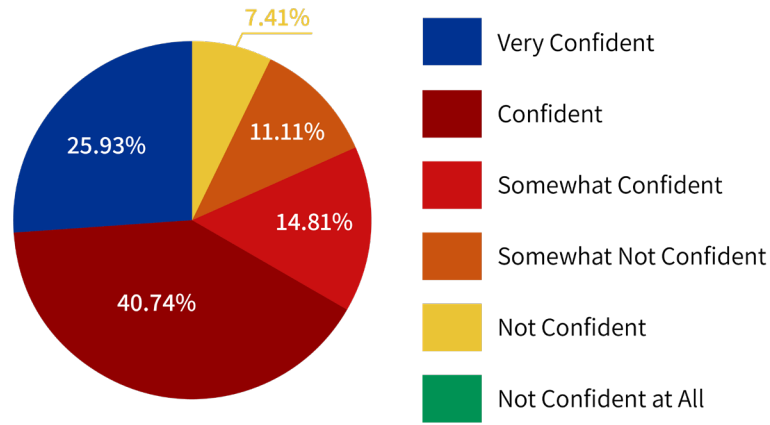


Chart 366. The Belt and Road Initiative (BRI) has become a key feature of ASEAN-China win – win cooperation

Laos is also different from other countries in that the majority of Laotians (44,44%) think that ASEAN is on the right track in addressing Myanmar’s political crisis.

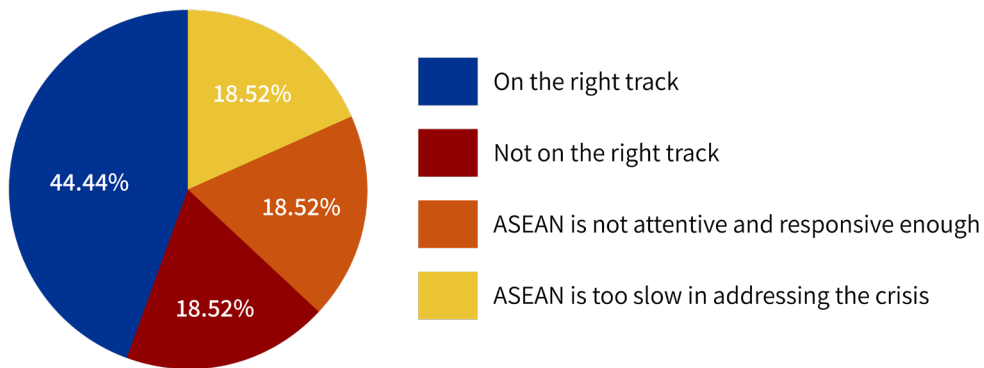


Chart 367. Laotian views on whether ASEAN’s effort to address Myanmar’s political crisis on the right track

On whether China should play a bigger role in managing the crisis, the majority of Laotian respondents (51,85%) are unclear and the second majority of Lao (44,44%) think that China should. By the same token, most Laotian respondents (51,85%) believe that China should follow and support ASEAN response mechanisms and processes.

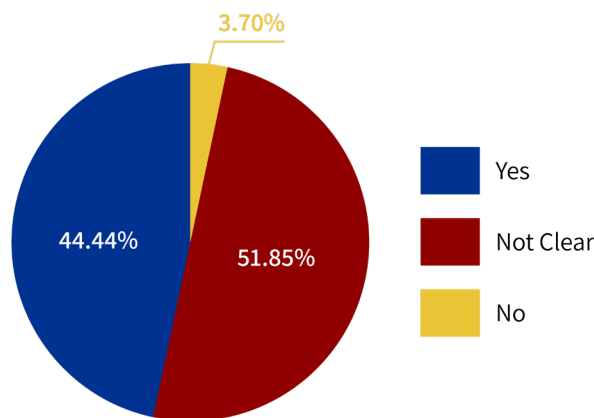


Chart 368. Laotian views on whether should China play a bigger role in solving Myanmar’s Political Crisis

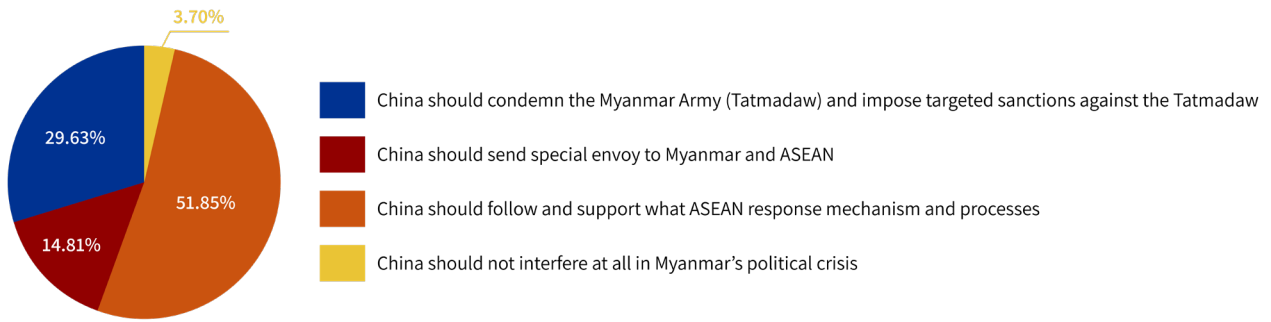


Chart 369. Laotian views on how should China act to support solving the conflict in Myanmar

IV. CONCLUSION

A. Better Understanding, Remaining Anxieties, New Opportunities

The year 2021 is a significant milestone in ASEAN-China relationship. Not only that this year marks three decades of the relationship, 2021 is also increasingly becoming a year that might define ASEAN-China relationship for many years to come. On one hand, the regional strategic landscape is increasingly shaped by geopolitical tensions between the Great Powers. On the other hand, the COVID-19 pandemic from 2020 creates stronger demand for cooperation between countries. Will centrifugal forces of Great Power politics prevail over the centripetal forces of cooperation? Will the cooperation between ASEAN and China become stronger, or the opposite? Since both parties are rising as global engines of growth, the answer to these questions will have repercussions beyond the region.

Our ASEAN-China survey confirmed that ASEAN people see that cooperation with China as generally beneficial for ASEAN. Although the respondents acknowledge that there are risks and concerns, the benefits outweigh the negative implications, at least for now. The cooperation during COVID-19 pandemic enhanced such a view since the respondents positively evaluated cooperation in vaccine and in pandemic recovery. This is consistent with the message expressed by ASEAN high-ranking officials such as Secretary-General Dato' Lim Jock Hoi, who frequently mentioned that ASEAN and China had worked together very well in the face of COVID-19 challenges.

With that development, the perceptions towards China are also evolving in the last 30 years. While in the past China was often seen in the lens of the Cold War, currently most of the respondents see China as an important dialogue and cooperation partner. While the respondents consistently argue that ASEAN member countries' autonomy and sovereignty is non-negotiable, they also expect China to play a more active and positive role in the region. Many see China as a solution provider of multiple challenges faced by ASEAN (51,52% of respondents believed it is important to see China increasingly become one of the solution providers to challenges faced by ASEAN), as well as reliable partner for development assistance and aid (46,22%). However, the respondents also demand China to respect the norms and principles in the region, such as non-intervention and treating ASEAN member states as equal partners, while playing a more active and positive role in the region.

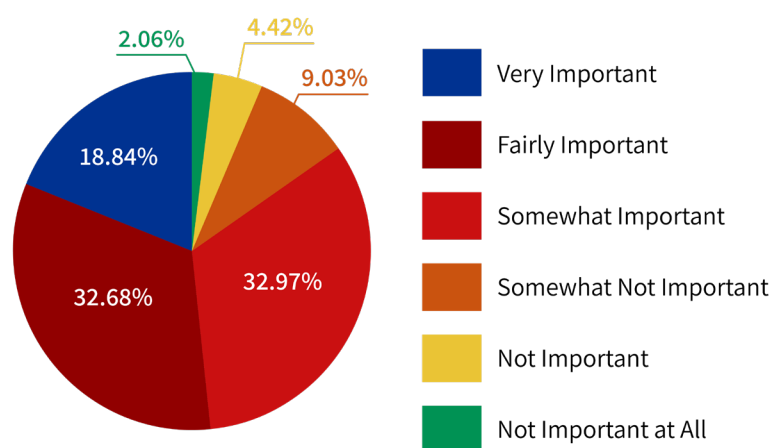


Chart 370. ASEAN's views on China increasingly becoming one of the solution providers to challenges faced by ASEAN

Consistent with the 2020 Survey, the political-security issue is the issue where anxieties and hesitance still prevail. The survey shows that there is concern on China's adherence and respect to ASEAN Centrality. Another visible concern is on the quite popular worries that China is not always respecting the national unity, sovereignty, and territorial integrity of ASEAN Countries. Such perception could be explained by the continuing tensions in the South China Sea and the prolonged process of Code of Conduct negotiation.

These anxieties are further complicated by the growing geopolitical tension between China and the US, as well as with the Quad. In the questions of geopolitical dynamics, the survey found that 54,66% of respondents define the US-China relationship as being at the state of strategic rivalry and competition. In this context, most respondents believe that ASEAN and ASEAN member countries must not be sucked into the rivalry and maintain good and balanced cooperation with all great powers.

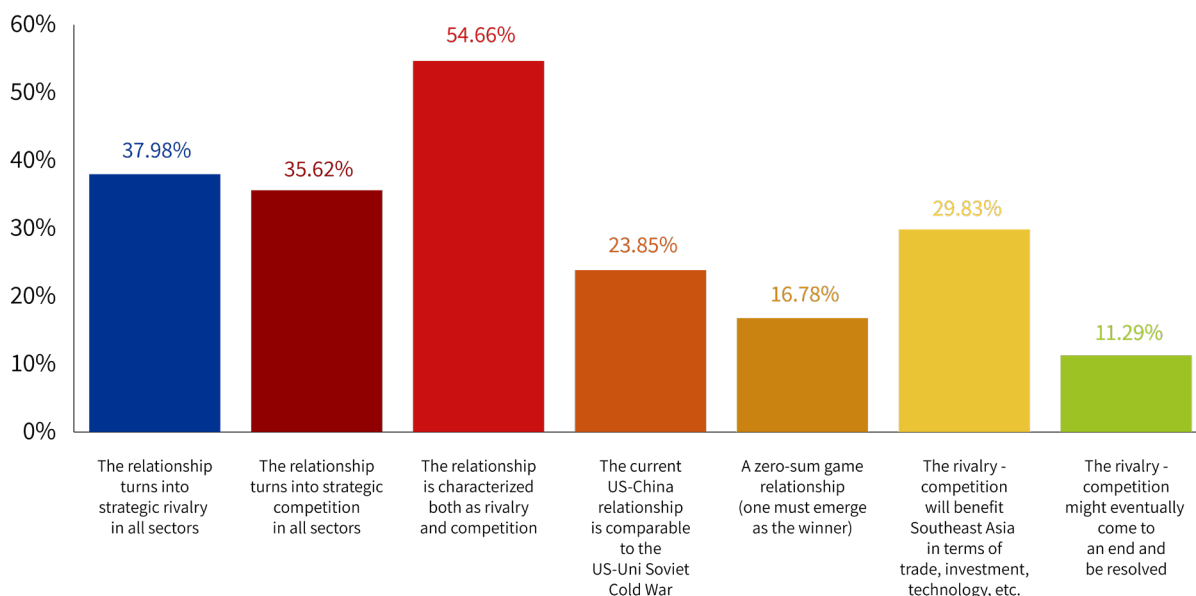


Chart 371. ASEAN's views on the current US-China relationship

It is interesting to note that there is an interesting diversity if we look deeper at country level. While on economic and socio-cultural issues the perceptions at regional and at national level generally align on the positive spectrum, there are visible differences on political-security issues. On political-security issues, perceptions on China lean toward the negative spectrum if we look at the answers from respondents in the Philippines and Malaysia. This is most prevalent on political security issues such as motives on regional affairs and unsettled territorial disputes. Laos and Cambodia, on the other hand, seem the most open or welcoming of relations with China and the perceived influence it has with both countries. These differences could be explained by the differences in historical relationship between each respective country and China, as well as other aspects of national particularities. This diversity highlights the challenges faced by ASEAN member countries to develop a collective action among them, especially in sensitive strategic and security issues.

Despite those challenges, there are also new opportunities in developing the relationship further. The BRI and RCEP are seen positively, but the respondents are still not seeing the optimum results of those initiatives. Ensuring that the benefits of BRI and RCEP are felt by the people of ASEAN is an important task for creating a better partnership.

The pandemic also opens a new opportunity for deeper cooperation. An overwhelming 67,12% of the total respondents agree that the cooperation does help to alleviate the pandemic and 58,48% of the total respondents agree that the support was well-intentioned. The survey also confirmed that 73,50% of the total respondents see ASEAN-China economic ties become more important especially during the pandemic. No wonder, ASEAN-China cooperation for post-pandemic economic recovery and COVID-19 vaccine cooperation are topping the list of the cooperation with the most potential to be further developed. In the longer term, cooperation in the economic sector and in the science and technology are the ones prioritized by the respondents.

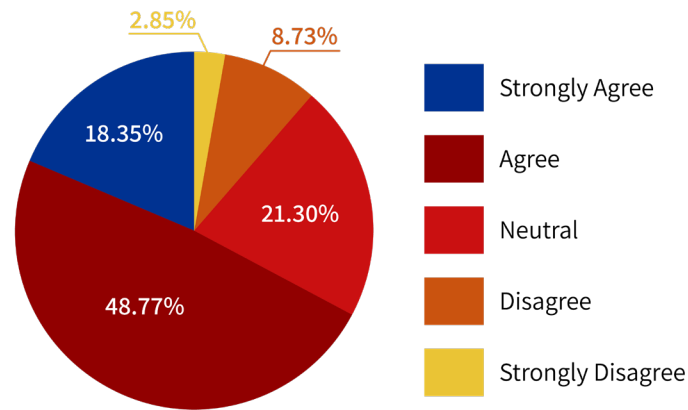


Chart 372. ASEAN's overall views on whether Close cooperation between ASEAN and China helps alleviate the pandemic

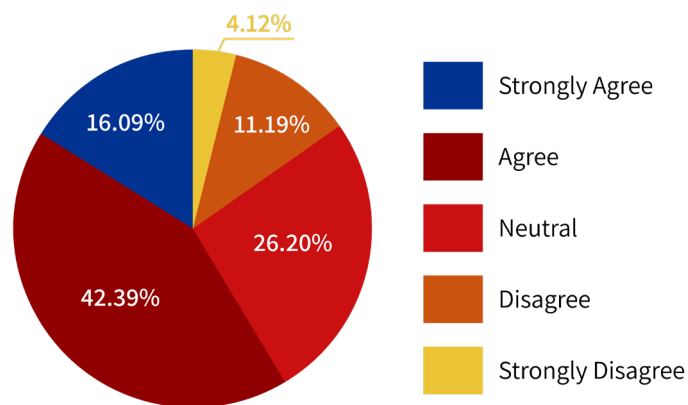


Chart 373. ASEAN's overall views on whether China's support of vaccines for ASEAN COVID-19 response is well-intentioned

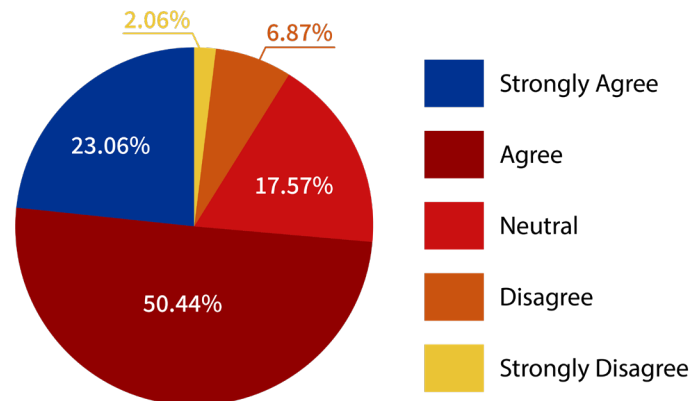


Chart 374. ASEAN's overall views on whether economic ties between ASEAN and China become more important especially amid the COVID-19 pandemic

B. Recommendations

Based on the survey results, we can see that the people of ASEAN have been moving on from the Cold War framework in seeing their relationship with China. In this context, rather than seeing the relationship between ASEAN and China as an “undivided package” seen through a single geopolitical lens, the respondents tend to see ASEAN-China relationship as consisting of different and compartmentalized dimensions. While connections between different dimensions of cooperation are acknowledged, there is a strong tendency to evaluate and develop cooperation in a compartmentalized manner. When evaluating the cooperation in the economic or socio-cultural fields, for example, the people of ASEAN

tend to not put it in the same framework. This explains the divergence in the perceptions on socio-cultural and economic cooperation and on political-security issues. Acknowledging and maintaining this compartmentalization, or at least avoiding the simplification of the relationship between ASEAN and China into a single lens, is crucial to develop more effective collaboration for the future.

Based on this understanding, we develop our recommendations by looking at the perceptions in different “compartments.” While perceptions should not be the only consideration for designing cooperation, taking into account perceptions in developing the cooperation is imperative if we want the initiatives to be successful. There are several recommendations to strengthen the cooperation between ASEAN-China:

- 1. Amidst the COVID-19 pandemic, cooperation on pandemic control and post-pandemic economic recovery must be one of the priorities in the ASEAN-China relations.** Not only that the pandemic continues to take public health tolls in ASEAN member countries and China (see graph IV.1), the economic impact of the pandemic is also significantly affecting ASEAN member countries economy (Menon and Suvannaphakdy, 2021). Based on the results of the survey, this objective urgency is also resonating in public perceptions. There are positive responses towards existing cooperation on pandemic control and on post-pandemic recovery, as well as strong expectations to develop the cooperation further to ensure that ASEAN and China back on the right track.

Daily New Confirmed Cases of COVID-19 in ASEAN + China (weekly average)										
	Jan 1	Feb 1	Mar 1	Apr 1	May 1	Jun 1	Jul 1	Aug 1	Sep 1	Oct 1
Brunei	0.71	0.71	0.14	1.00	0.57	1.14	0.71	2.29	99.86	195.14
Cambodia	2.29	0.86	35.86	86.43	633.00	625.86	859.71	713.00	425.00	777.43
Indonesia	7,310.43	12,864.57	7,497.29	5,042.14	5,155.43	5,762.86	21,301.86	39,127.29	10,471	1,801.71
Laos	0.00	0.00	0.00	0.00	82.00	7.29	9.14	257.71	197	461.43
Malaysia	1,930.43	4,617.71	2,402.71	1,215.71	3,048.86	7,653.29	6,017.14	16,712.00	21,253.14	1,549.71
Myanmar	642.29	342.43	22.14	21.57	18.14	65.00	1,233.29	4,734.29	3,108.71	1,549.71
Philippines	1,174.14	1,753.71	2,132.14	9,021.57	8,181.86	6,685.00	5,725.29	6,990.57	17,266.71	16,022.71
Singapore	17.14	30.43	9.86	22.00	30.43	25.57	13.71	131.86	141.14	2,131.43
Thailand	194.14	829.71	75.29	63.71	2,003.14	3,797.57	4,56.71	16,858.86	15,940	11,131.29
Vietnam	5.00	43.00	8.00	5.43	15.57	242.00	486.29	8,047.71	13,166.71	8,677.14
China	22.29	56.71	10.14	11.29	14.00	18.14	16.86	71.14	27.57	31.86

* above numbers are calculated based on weekly average number of new cases, and numbers in bold represent the highest numbers of new weekly cases

Table 08. Daily New Confirmed Cases of COVID-19 in ASEAN + China. Source: Our World in Data (2021)⁵

- 2. ASEAN and China can and must strengthen their collaboration in vaccine production and distribution, as well as in developing stronger and more resilient public health systems.** No one is safe until everyone is safe. Cooperation in production and distribution of vaccines received positive evaluation by ASEAN public, illustrating the general support to ensure that the region will be more prepared for future pandemic or other public health crises.
- 3. In the economic dimension, grand initiatives such as Belt and Road Initiatives (BRI) and Regional Comprehensive Economic Partnership (RCEP) received strong attention and generally positive expectation by the public.** However, since many of these initiatives are still in an early phase, the public need to know more and to be convinced that these projects will not only benefit some segments but also benefit the people of ASEAN. While small, there are some concerns in some corners about how these projects can really be transformed into opportunities for jobs for the people of ASEAN.

⁵Our World in Data, “Daily new confirmed COVID-19 cases”, <https://ourworldindata.org/explorers/coronavirus-data-explorer?zoomToSelection=true&time=2020-03-01..latest&facet=none&pickerSort=asc&pickerMetric=location&Metric=Confirmed+cases&Interval=7-day+rolling+average&Relative+to+Population=false&Align+outbreaks=false&country=CHN~IDN~BRN~KHM~LAO~MMR~MYS~SGP~VNM~PHL~THA>, accessed on 15 October 2021.

4. **The cooperation, especially in the economic and infrastructure development, must take into account the environmental impacts.** While economic cooperation and infrastructure development are generally perceived positively, there is also a significant concern about their environmental impacts. The survey put the environment as one of the least satisfactory cooperation between ASEAN and China, showing that there are significant rooms for improvement in this aspect.
5. **In the political-security dimension, ASEAN and China must continue to show their respect to existing norms and principles, such as ASEAN Centrality, non-intervention, and respect to sovereignty and territorial integrity.** The survey results show that these are the arena where anxiety remains. The increasing geopolitical tension also contributes to this anxiety. To manage this anxiety, ASEAN and China need to continue to reiterate their commitments for existing ASEAN norms and principles and to develop trust between them. The completion of the Code of Conduct in the South China Sea will be an important platform to show this.
6. **The increasing importance of the digital economy for ASEAN member countries and the global economy necessitates stronger collaboration in cyber security.** The survey result put cooperation in cyber security among the least satisfactory cooperation between ASEAN and China. Both parties need to discuss ways to address this situation by developing stronger data governance.
7. **ASEAN itself must show that it has the capacity and integrity to be at the center of the regional architecture.** While relatively weaker than Great Powers such as China and the US, ASEAN has long been regarded and accepted by the stronger powers as the driver and center of regional cooperation. Such a situation is changing if ASEAN could not maintain that it has the capacity and integrity, as indicated by the ability of ASEAN to develop meaningful collective actions among its members, especially in difficult issues such as Myanmar.
8. **ASEAN must maintain a positive and balanced relationship with major powers and avoid being sucked in by the increasing geopolitical tension.** As the geopolitical tensions grow within and beyond the region, there is an increasing tendency among the Great Powers to see the region in a narrow Cold War-like framework. It is important for ASEAN to resist this trend and continue to stress that the relationship between ASEAN and external partners are multilayered and balanced.
9. **ASEAN and China must invest in cooperation in science and technology, especially in frontier technologies such as AI or 5G/6G.** Technological development is one of the most attractive aspects of China for most ASEAN member countries, which need it to accelerate their own development in this fast-changing world.
10. **ASEAN and China must “bring the people back” by developing more people participation in the cooperation.** While there is significant progress on the cooperation between ASEAN and China, many of them are conducted through G-to-G mechanisms. It is important to stress that the heart of the relationship should be with the people. Thus, people-to-people cooperation must be the priority and people should be involved in the design and process of the cooperation. Universities, Think-Tanks, and youth groups could be at the forefront of these people-to-people initiatives. Only when the people of ASEAN and China understand each other better can we manage the remaining anxieties better.

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