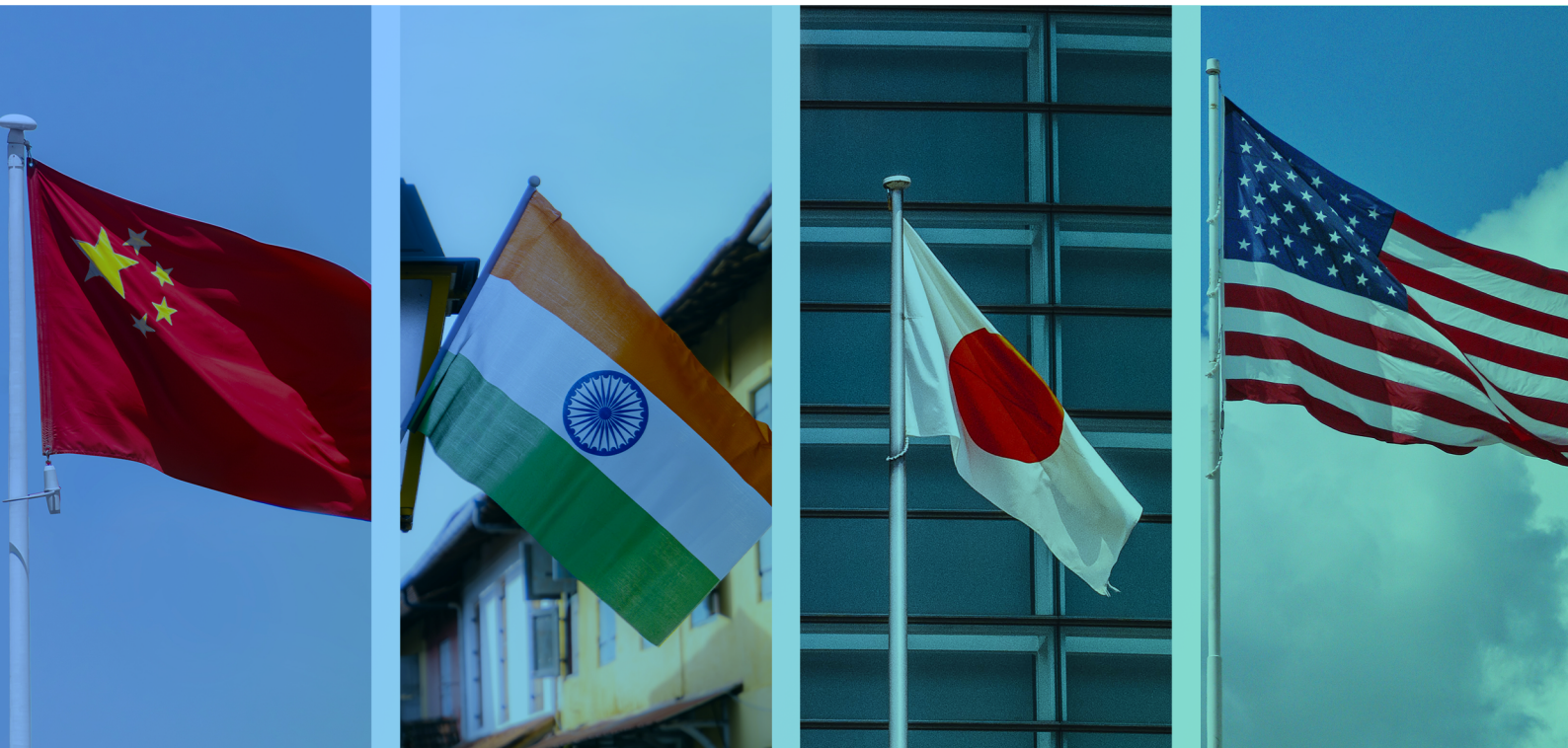




FOREIGN POLICY
COMMUNITY
OF INDONESIA



Foreign Policy Community of Indonesia (FPCI),
in collaboration with Economic Research Institute for
ASEAN and East Asia (ERIA) presents



Survey of ASEAN Peoples' Perceptions
on China, India, Japan, and the USA

2023 Survey Report



**Survey of ASEAN Peoples' Perceptions
on China, India, Japan, and the USA**

**2023
SURVEY REPORT**

FPCI

FOREIGN POLICY
COMMUNITY
OF INDONESIA



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Acronyms

ASEAN = Association of Southeast Asian Nations

EAS = East Asia Summit

ARF = ASEAN Regional Forum

AOIP = ASEAN Outlook on Indo-Pacific

RCEP = Regional Comprehensive Economic Partnership

BRI = Belt and Road Initiative

ODA = Official Development Assistance

JAIF = Japan–ASEAN Integration Fund

US IPS = United States Indo-Pacific Strategy

IPEF = Indo-Pacific Economic Framework

GCI = Global Civilization Initiative

GDI = Global Development Initiative

GSI = Global Security Initiative

NATO = North Atlantic Treaty Organization

IPO = Indo-Pacific Oceans Initiative

AEP = Act East Policy

ITEC = Indian Technical and Economic Cooperation

IMT = India-Myanmar-Thailand Trilateral Highway

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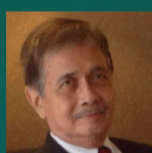
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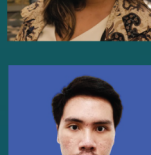
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Publisher: Foreign Policy Community of Indonesia

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Foreign Policy Community of Indonesia (FPCI) is an independent, non-partisan foreign policy organization based in Jakarta, Indonesia. FPCI's aim is "to promote and shape positive Indonesian internationalism throughout the nation and to the world". FPCI is distinct from its foreign policy peer groups owing to its special emphasis and strong outreach to the grassroots, especially the youth.

Since its founding by Dr. Dino Patti Djalal in 2015, FPCI has become a dynamic platform which serves as a meeting point for relevant stakeholders in foreign policy: world leaders, ministers, ambassadors, diplomats, government officials, politicians, military officers, activists, researchers, policy experts, corporate figures, celebrities, opinion leaders, lecturers, students and the general public.

FPCI has grown to be the largest grassroots foreign policy group in Indonesia, Southeast Asia and the Indo-Pacific, with over 100,000 people in our network. FPCI's annual conference -- Conference on Indonesian Foreign Policy (CIFP) -- has been hailed as "the world's largest foreign policy conference", attended by some 11,000 people in 2019. Since 2020, FPCI has also been the convenor of Global Town Hall, an online North-South East-West marathon discussions which in 2023 engaged 111 civil society groups and 42 universities and more than 23,000 registrants from 131 countries.

Since 2020, the FPCI's Research and Analysis Unit has also published an annual regional survey that we believe helps policymakers and the public better understand the perceptions of ASEAN people on selected key issues.

The Economic Research Institute for ASEAN and East Asia (ERIA) is an international organization established by a formal agreement among 16 Heads of Government at the 3rd East Asia Summit in Singapore on 21 November 2007. It works closely with the ASEAN Secretariat, researchers and research institutes from East Asia to provide intellectual and analytical research and policy recommendations.

These research and policy recommendations are expected to help in the deliberation of the leaders and ministers during their meetings (e.g., ASEAN Economic Ministers Meeting) and the East Asia and ASEAN Summits. The ERIA Headquarters is based in Jakarta, Indonesia.

The objectives of ERIA are:

- to facilitate ASEAN Economic Community building
- to contribute to the narrowing of development gaps in the region
- to support ASEAN's role as driver of the deepening of economic integration in East Asia

About Survey of ASEAN Peoples' Perceptions On China, India, Japan, and the USA



Since 2020, the FPCI Research and Analysis Unit has published an annual ASEAN-China Survey that provides key findings on the state of ASEAN-China relations.

This year, we became aware of a need for a new survey that focuses on China, Japan, India and the USA as partner states that have key political, economic, and strategic significance for ASEAN (Association of Southeast Asian Nations).

Without the support and participation of China, Japan, India and the USA, it would be futile to expect success for ASEAN-led regional mechanisms, such as at the East Asia Summit or the ASEAN Regional Forum, which would lack relevance without the presence of the four. The same applies to the ASEAN Outlook on the Indo-Pacific (AOIP), as well as the Regional Comprehensive Economic Partnership (RCEP), which provides a special mechanism for India to rejoin the framework. Furthermore, based on the ASEAN-China Survey 2022, these four countries are the most contributive and influential for the region.

However, the FPCI has frequently found that the four countries have little information on what Southeast Asians really think about them and ASEAN's relations with them. Learning from FPCI's experience with the "ASEAN-China Survey" and the significance of that survey's findings for foreign policy communities in Indonesia and abroad, the FPCI Research and Analysis Unit determined to conduct a new survey known as the "ASEAN Peoples' Perceptions Survey 2023," which was aimed at providing a candid snapshot of Southeast Asians' views on China, India, Japan, and the USA.

Thank you to Our Partners



ศูนย์อาเซียนศึกษา
ASEAN STUDIES CENTER
Chulalongkorn University



I. Introduction

A. Background

After a long period of stability and peace, Southeast Asia is now once again becoming restless. Located between the Indian and Pacific Oceans, which are set to be the epicenters of global politics in the 21st century, the region will be unable to isolate itself from the ripples and eddies of changing geopolitical dynamics. The Great Powers and aspiring ones - look to the region as an arena in which to project influence. Some observers believe that a geopolitical storm is brewing, and Southeast Asia will inevitably fall victim to Great Power politics, rendering obsolete the region's main regional institution, the Association of Southeast Asian Nations (ASEAN). Others are more optimistic, suggesting that ASEAN can play a crucial role in helping to manage Great Power rivalries and, indeed, convert them into opportunities.

Many studies have been conducted to understand the policy directions that the region has taken. However, there are very few studies that seriously take into account the people's voices and perspectives. Hence, this survey aims to capture the views and attitudes of peoples from different walks of life in ASEAN towards four important partner countries: China, India, Japan, and the United States of America. It hopes to gauge people's opinions on their respective country's and ASEAN's relationships with these four countries in the economic, social-cultural, and political-security sectors. It also seeks to unveil the response of the people of ASEAN to multiple cooperation initiatives proposed by these external partners.

B. Methodology

To achieve the above mentioned objectives, a rigorous process to design and distribute the questionnaire was conducted. This involved a panel of experts, and testing through an initial pilot survey to a limited number of respondents. The final version of the questionnaire that was distributed to respondents consisted of 35 questions (excluding three questions on respondent identity). Based on the results of testing, it was expected that the survey would take around 10-20 minutes to complete.

The survey targeted five categories of respondents that were deemed important in shaping public discourse as well as policymaking in 11 ASEAN countries. (Timor-Leste, not yet officially an ASEAN Member State, was treated as one in this survey.) The five categories of respondents were (1) Government Officials; (2) Academicians and Think Tank Fellows; (3) Business Community Members; (4) Civil Society Representatives; and (5) Students. Categories (1), (2), (3) and (4) were collectively categorized as "Elites."

It should be noted that the survey is not a public opinion survey that requires a strict sample of respondents which reflects the precise demographic composition of the population, and thus should not be treated as such. Since the aim of the survey is to capture ASEAN peoples' perceptions and attitudes towards the selected four powers, it focused more on ensuring that each category in each country was adequately represented rather than on reflecting overall demographic composition.

Based on this methodological construction, the survey team identified potential respondents in Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor Leste and Vietnam. After the respondents were identified, the data was collected through an online survey which was fielded electronically from 28 August-17 September 2023. Through this period, the team successfully retrieved 1,722 completed responses, with each country and category being adequately represented.

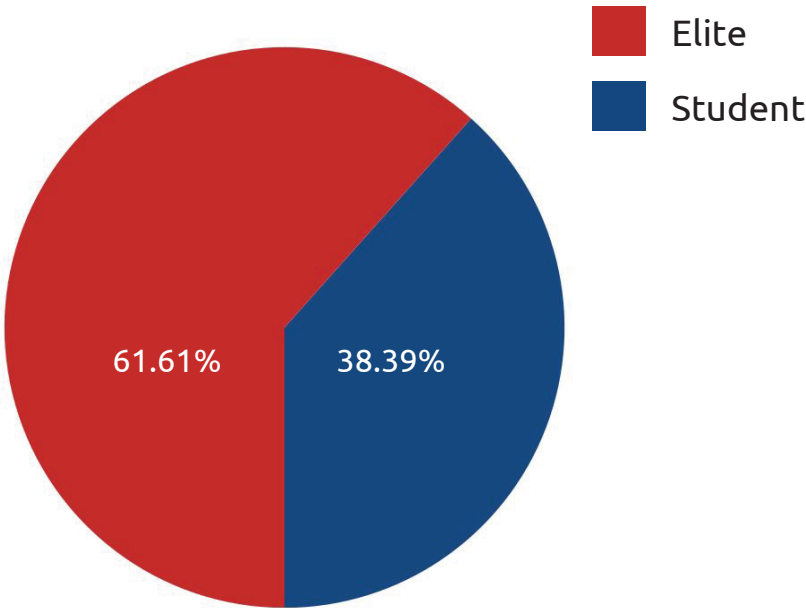
C. Respondents Profile

The largest proportion of respondents by nationality were Indonesian, making up 29.56% of total respondents. We believe this is justified as Indonesia is the ASEAN country with the largest population. Other countries with large populations, the Philippines and Malaysia, accounted for the second and third largest proportions of respondents.

	RESPONSES	TOTAL
Indonesia	29.56%	509
Philippines	14.34%	247
Malaysia	11.03%	190
Cambodia	8.89%	153
Laos	7.14%	123
Thailand	6.04%	104
Brunei Darussalam	5.69%	98
Singapore	5.28%	91
Myanmar	4.59%	79
Vietnam	4.30%	74
Timor Leste	3.14%	54
		1,722

0.1. Respondents Distribution Based on Nationalities

In terms of categories, the composition was quite well-balanced. The combined four elite categories comprised around 61% of respondents, while the student category made up the rest. The distribution within the elite category was also quite representative, with an 11-21% range for each subcategory.



0.2. Respondents' Distribution Based on Categories - Student vs Elite

	RESPONSES	TOTAL
Student (International Relations, Law, Politics, International Business, Regional Studies, Security Studies, etc.)	38.39%	661
Academia	20.96%	361
Civil Society (Media / Press and CSOs/NGOs)	15.91%	274
Business Community(State Owned Enterprises /Multinational Companies / SME / Private Sector)	12.95%	223
Officials (Diplomatic Corps/Government Officials/International and Regional Organizations/Intergovernmental Organizations)	11.79%	203
		1.722

0.3. Respondent Distribution by Category

II. Survey Findings: Highlights and Patterns

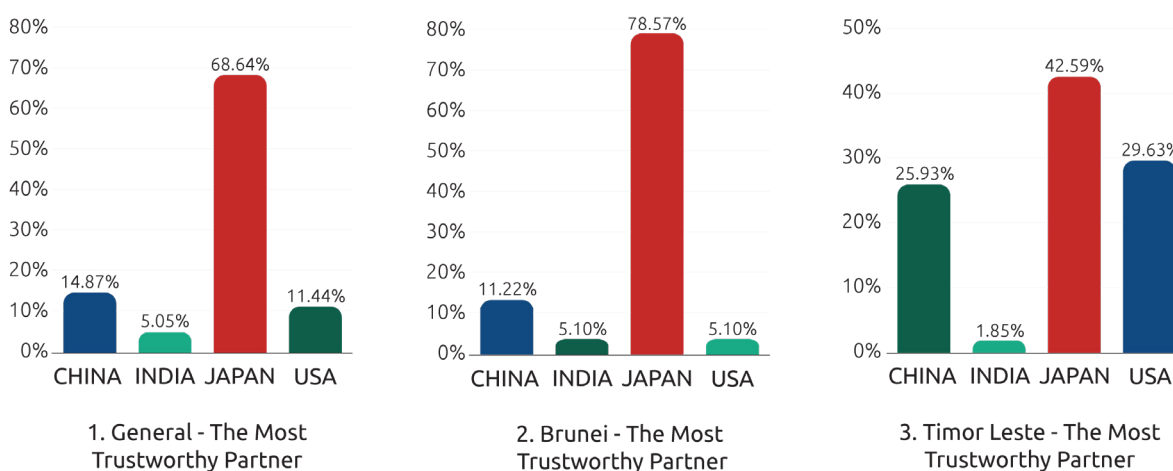
A. Views on Countries

The survey found that Japan is generally perceived as the most favorable partner for ASEAN. Japan tops the list of responses to the questions on which countries are the “most trustworthy”, “most dependable”, “most respectable and credible partner”, “most compliant with international law”, “most consistent supporter of ASEAN centrality”, “most loyal partner in supporting ASEAN’s initiatives and mechanisms”, and “most aligned with ASEAN’s principles.”

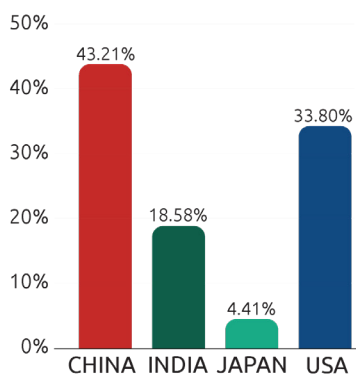
Interestingly, while Japan is considered the most trusted and favorable partner, many respondents see China as the most relevant partner for ASEAN’s future, especially China is viewed as the most reliable partner for economic cooperation. At the same time, China is also identified as the country that elicits the most concern. It tops the list of responses to the questions on which countries are the “most reluctant to cooperate”, “biggest hegemonic ambitions”, “most detrimental strategic ambition to Southeast Asia”, “most likely to use economic tools for political objectives in its relations with ASEAN member states”, and “most likely to use coercive measures towards Southeast Asia countries in meeting their strategic interest.” Thus, the respondents see China as an increasingly important partner that they need to cooperate with, but at the same time are also concerned about how this powerful neighbour can affect them negatively. This is complemented by the recognition of the US as “the most reliable security partner” (although not by a majority at 44.72%). India, on the other hand, continues to have limited visibility in the perceptions of Southeast Asian people.

Below is the specific breakdown of the survey findings people’s perceptions of the four countries:

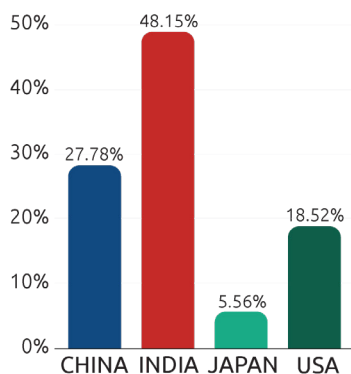
A.1. Who is most trusted and the least trusted?



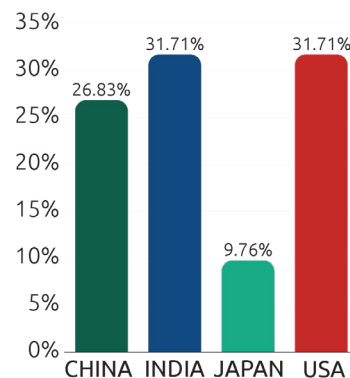
The majority of respondents chose Japan as the most trustworthy partner (68.64%), followed by China (14.87%), the USA (11.44%), and India (5.05%). Bruneian respondents are the most trusting of Japan on 78.57%, while the least trusting of Japan are the Timorese at 42.59%, although, compared with the other three, Japan remains in first place.



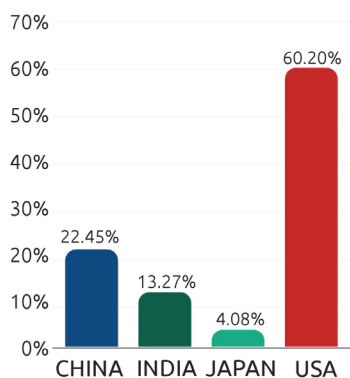
4. General - The Least Trustworthy Partner



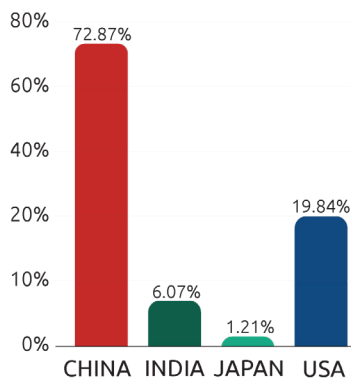
5. Timor Leste - The Least Trustworthy Partner



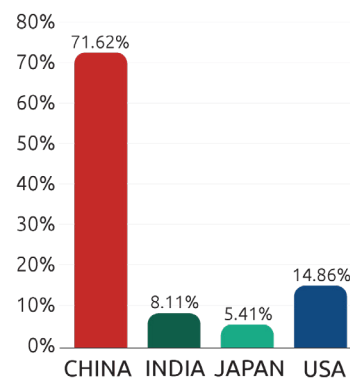
6. Laos - The Least Trustworthy Partner



7. Brunei - The Least Trustworthy Partner



8. Philippines - The Least Trustworthy Partner

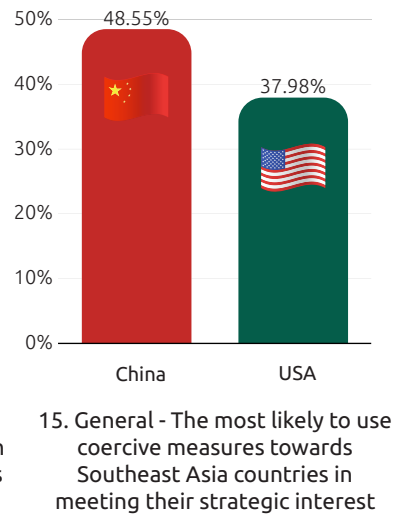
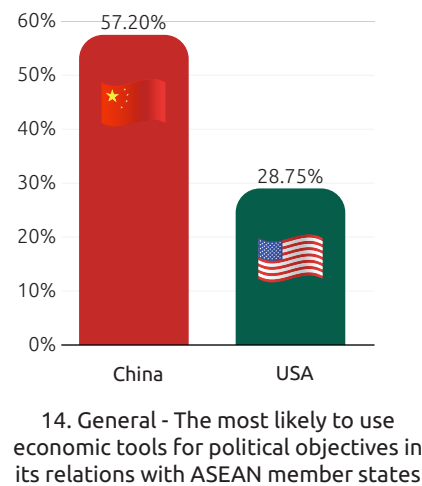
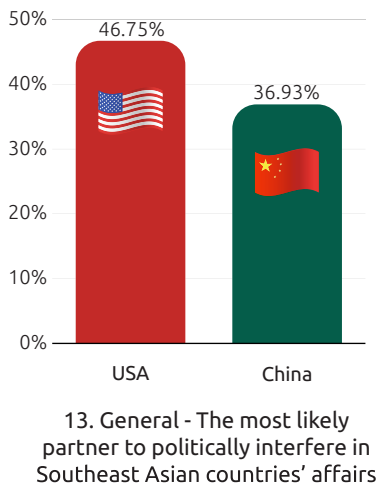
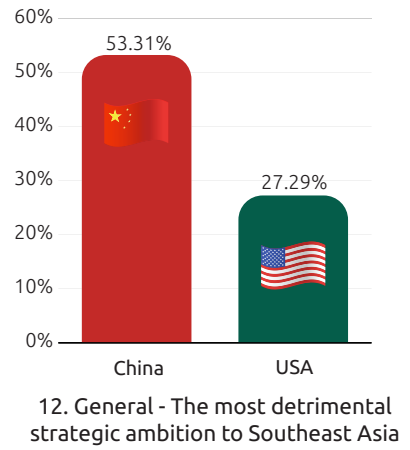
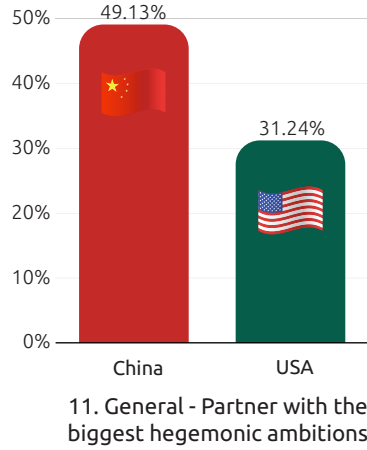
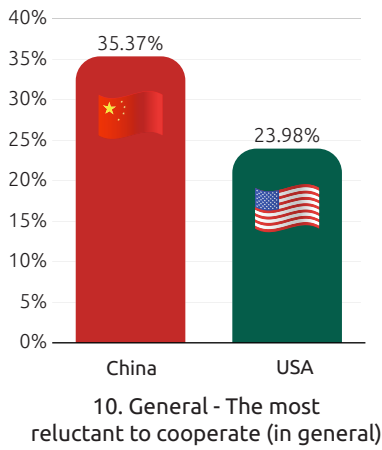


9. Vietnam - The Least Trustworthy Partner

The survey also asked which partner is the least trustworthy. The majority of respondents selected China (43.21%) followed by the USA (33.8%). Country-based responses to this question are more diverse compared to the general responses. The survey found that a relative majority of Timorese respondents (48.15%) viewed India as the least trustworthy. In Laos, respondents were split between India and the USA as to which is the most untrustworthy. Bruneian respondents were found to be the least trusting of the USA at 60.20% compared to respondents from other Southeast Asian countries. Filipino (72.87%) and Vietnamese (71.62%) respondents were the least trusting of China.

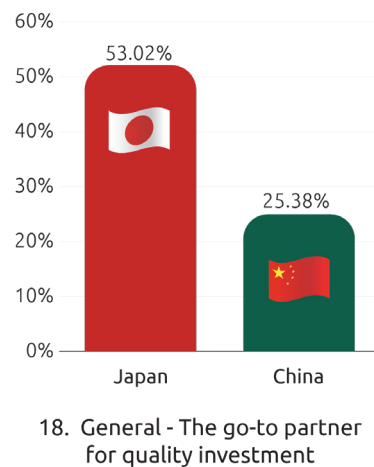
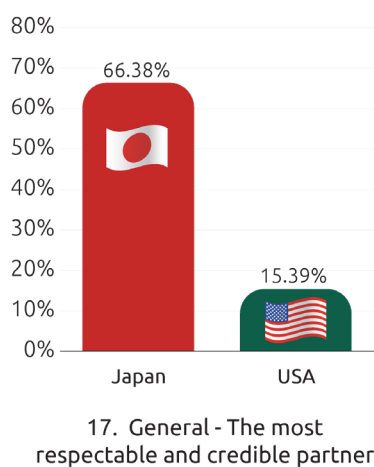
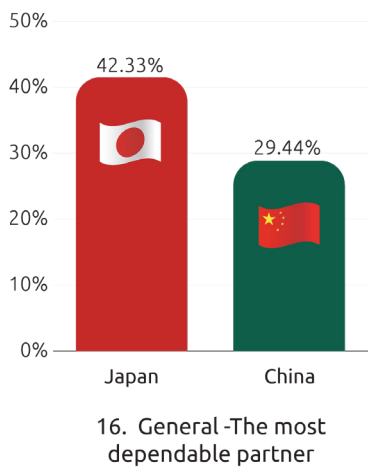
A.2. Who causes the most concerns?

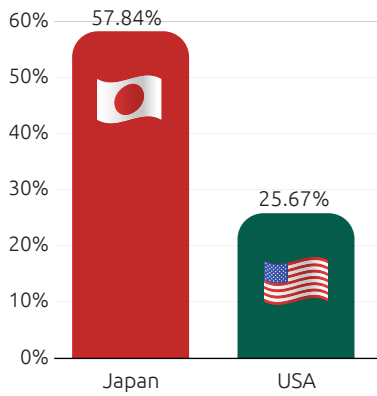
The survey asked four questions to identify Southeast Asian's concerns in regards to relationships with the four powers. Of the four, China and the USA were identified as the greatest sources of concern for respondents'.



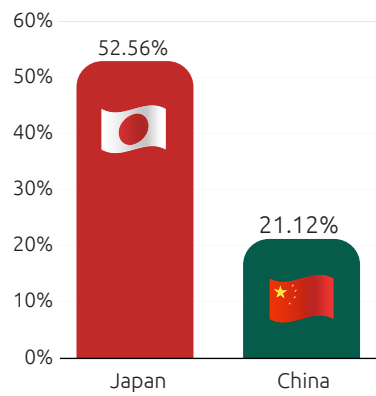
A.3. Who is the most comfortable partner?

By “comfortable” means a relationship that is driven by trust and confidence. While we also asked a question on the most trustworthy partner, where Japan emerged the winner, the survey attempted to delve more deeply into this aspect by asking the following additional questions:

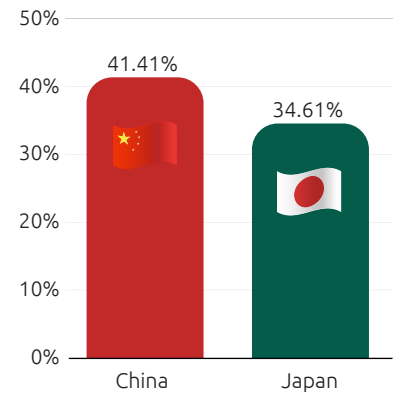




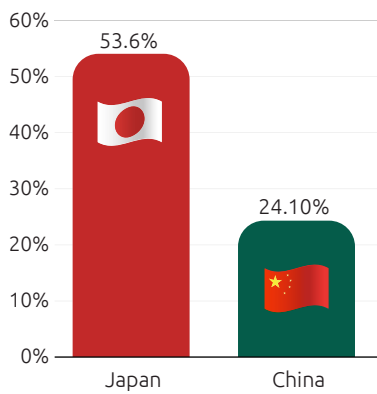
19. General - The most compliance with international law



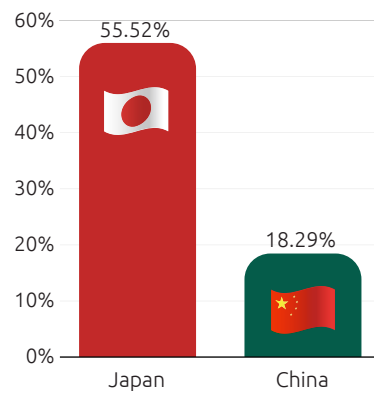
20. General - The most consistent supporter of ASEAN centrality



21. General - The most relevant partner for ASEAN's future



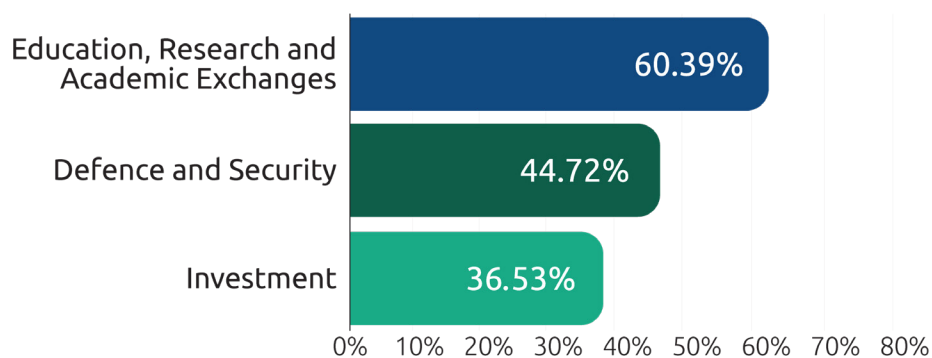
22. General - The most loyal partner in supporting ASEAN's initiative and mechanism



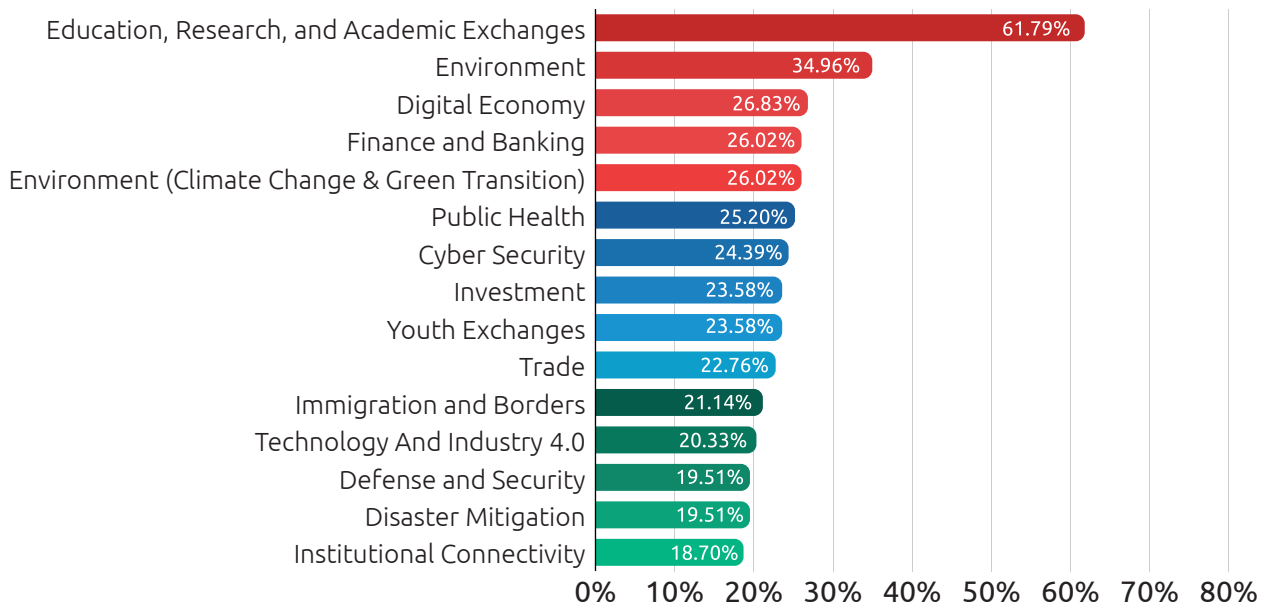
23. General - The most aligned with ASEAN's principles

China is the future for the region, according to the 41.41% of respondents that identify it as the most relevant partner for ASEAN's future. This contrasts with other questions, where China often places second after behind Japan. As for India, it mostly finds itself in last place.

A.4. Who is the most reliable security partner?



24. General - Top three areas of ASEAN-USA cooperation that are most satisfactory



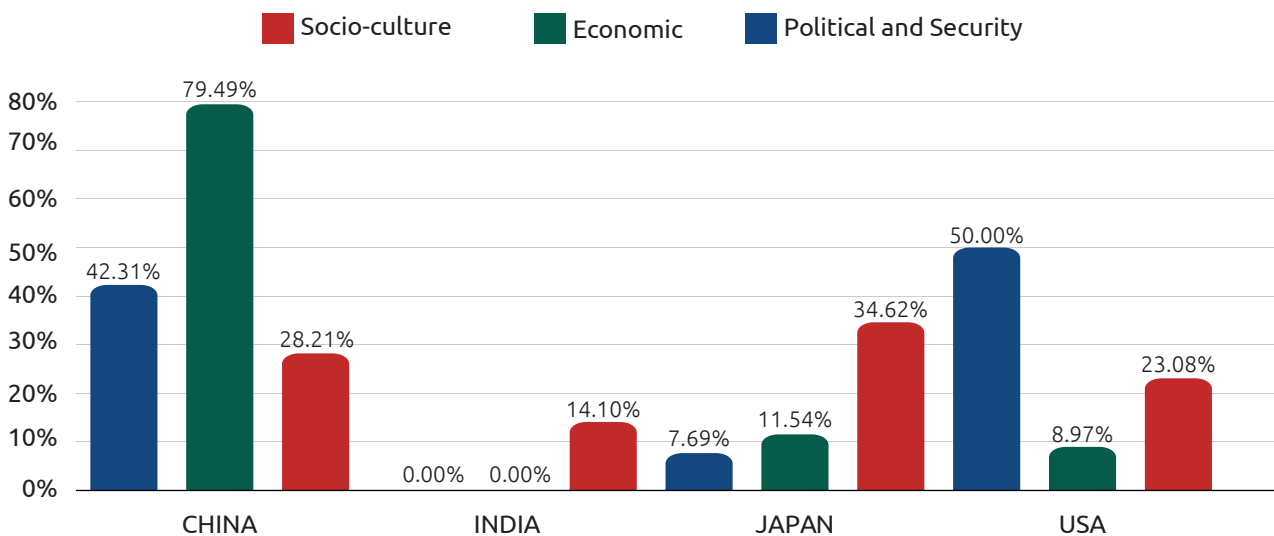
25. Laos - Top 15 areas of ASEAN-USA cooperation that are most satisfactory

The United States is undoubtedly the most reliable security partner, according to a relative majority of 44.72% of respondents. However, the USA is not the most reliable security partner for Laos, where respondents placed security cooperation with the USA as the 13th most satisfactory aspect (19.51%), unlike other Southeast Asian countries.

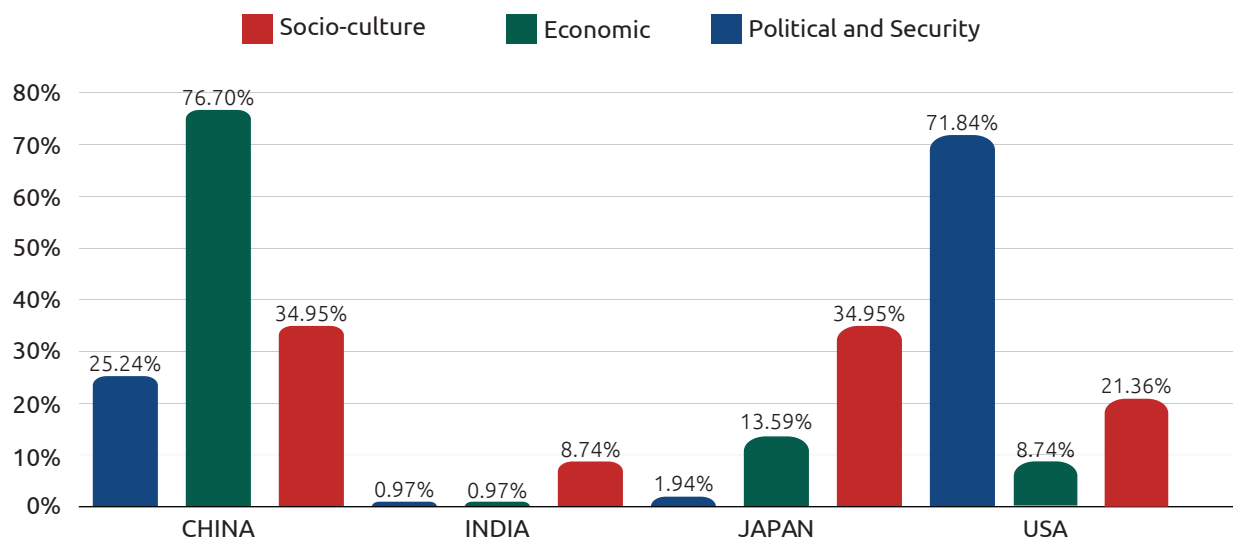
	CHINA	INDIA	JAPAN	USA
Political and Security	32.13%	1.63%	10.15%	56.09%
Economic	71.61%	2.04%	14.19%	12.15%
Socio-culture	27.74%	11.19%	43.53%	17.54%

26. General - Three aspects, countries influence to ASEAN

A majority of respondents (56.09%) also agree that the USA is the country with more influence on political and security in ASEAN, followed by China (32.13%), Japan (10.15%), and India (1.63%).



27. Myanmar -Three aspects, countries influence to ASEAN



28. Thailand - Three aspects, countries influence to ASEAN

The survey findings reveal a paradox in regards the relationship between India and Southeast Asia. In the question on the four countries' influence on the region, India is ranked lowest at 1.63%. Zooming in on the responses from Myanmar and Thailand, both of which are located next to India, the findings for these two countries suggest that less than 1% of respondents in either nation see India as being politically, or economically influential on their countries.

A.5. Who is the most reliable economic partner?

The top-5 most satisfactory areas of cooperation for China, Japan, and India are dominated by economic aspects (such as Trade, Investment, Digital Economy, Tourism, etc.). By contrast, the responses for the USA are focused on security matters (such as Cyber Security, Defense, and Disaster Mitigation).

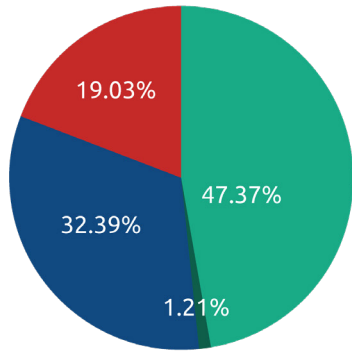
Despite that, the survey concluded that of the four countries, China is the most reliable economic partner, followed by Japan, while India is not included. For the question on influence in the region, India is identified as the least economically influential on Southeast Asia, with only 2.04% of respondents identifying Indian influence.

For China, respondents rated Investment (48.08%), Trade (48.03%), and the Digital Economy (39.78%) as the top three most satisfactory aspects of ASEAN-China cooperation. These three sectors also recorded the highest percentages compared to the other three countries.

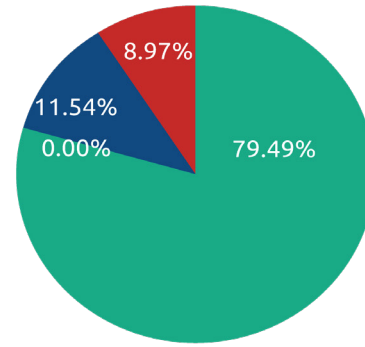
In regards to Japan, respondents rated Investment (40.42%), Infrastructure Development (37.63%), and Trade (28.40%) as the top-three most satisfactory aspects of cooperation, while for India, they pointed to Trade (42.57%) and the Digital Economy (32.81%) as being in the top five, and Investment (36.53%) and Trade (32.17%) as being in the top five for the USA.

Unlike the other 10 Southeast Asian countries, Filipino respondents viewed China (47.37%), Japan (32.39%), and the USA (19.03%) as all being economically influential on their country. Compared with Japan, India and the USA, China is seen as very dominant.

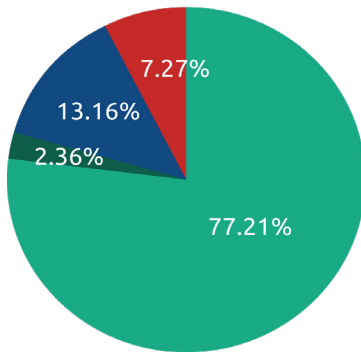
USA JAPAN INDIA CHINA



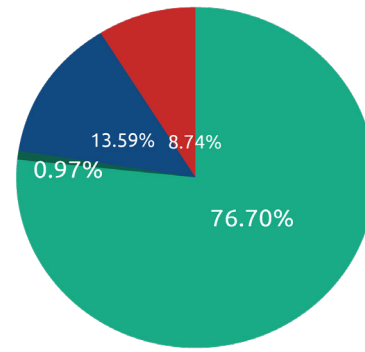
29. Philippines - economics influence from the four countries.



30. Myanmar - economics influence from the four countries.



31. Indonesia - economics influence from the four countries.



32. Thailand - Economics influence from the four countries

B. Assessing Cooperation: Views on Sectors and Initiatives

Perceptions towards countries often tend to be quite compartmentalized, so that a positive perception of a country in a particular sector does not necessarily translate to a positive perception of that same country in another sector. Thus, we also asked how the respondents view various aspects of cooperation between ASEAN and the four countries. We also asked them for their assessments of the different initiatives operated by them.

The responses to these questions reveal a number of interesting patterns:

B.1. Most and least satisfactory aspects of cooperation: Different strengths and weaknesses

Most Satisfactory Cooperation with China

ANSWER CHOICES	RESPONSES
Education, Research, and Academic Exchanges	48.20%
Investment	48.08%
Trade	48.03%
Infrastructure Development	44.31%
Digital Economy	39.78%

33. General - Top five areas of ASEAN-China cooperation that are most satisfactory

Most Satisfactory Cooperation with India

ANSWER CHOICES	RESPONSES
Education, Research, and Academic Exchanges	51.45%
Trade	42.57%
Technology And Industry 4.0	33.28%
Digital Economy	32.81%
Tourism	29.91%

34. General - Top five areas of ASEAN-India cooperation that are most satisfactory

Most Satisfactory Cooperation with Japan

ANSWER CHOICES	RESPONSES
Education, Research, and Academic Exchanges	66.14%
Investment	40.42%
Infrastructure Development	37.63%
Technology And Industry 4.0	33.86%
Trade	28.40%

35. General - Top five areas of ASEAN-Japan cooperation that are most satisfactory

Most Satisfactory Cooperation with USA

ANSWER CHOICES	RESPONSES
Education, Research, and Academic Exchanges	60.39%
Defense And Security	44.72%
Investment	36.53%
Trade	32.17%
Youth Exchanges	29.33%

36. General - Top five areas of ASEAN-USA cooperation that are most satisfactory

Conversely, the least satisfactory aspects for respondents were as follows:

Least Satisfactory Cooperation with China

ANSWER CHOICES	RESPONSES
Defense and Security	44.31%
Cyber Security	41.87%
Maritime Affairs	41.70%
Transnational Crime	35.71%
Immigration And Borders	33.62%

37. General - Top five areas of ASEAN-China cooperation that are least satisfactory

Least Satisfactory Cooperation with India

ANSWER CHOICES	RESPONSES
Environment	30.08%
Cyber Security	28.46%
Public Health	27.76%
Defense And Security	26.95%
Disaster Mitigation	26.66%

38. General - Top five areas of ASEAN-India cooperation that are least satisfactory

Least Satisfactory Cooperation with Japan

ANSWER CHOICES	RESPONSES
Defense and Security	29.09%
Transnational Crime	27.70%
Cyber Security	27.35%
Media And Journalism	27.29%
Immigration And Borders	26.25%

39. General - Top five areas of ASEAN-Japan cooperation that are least satisfactory

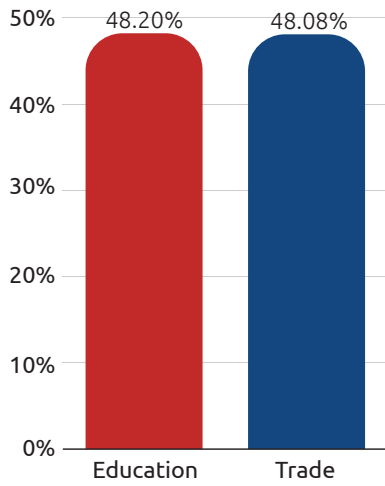
Least Satisfactory Cooperation with USA

ANSWER CHOICES	RESPONSES
Immigration and Borders	33.16%
Transnational Crime	28.98%
Defense and Security	27.41%
Environment (Climate Change & Green Transition)	27.06%
Cyber Security	26.71%

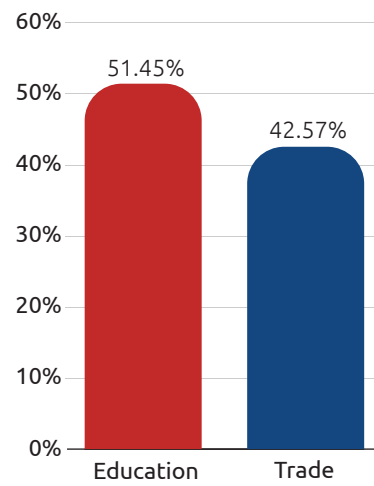
40. General - Top five areas of ASEAN-USA cooperation that are least satisfactory

B.2. Education, Research, and Academic Exchange cooperation is having its moment

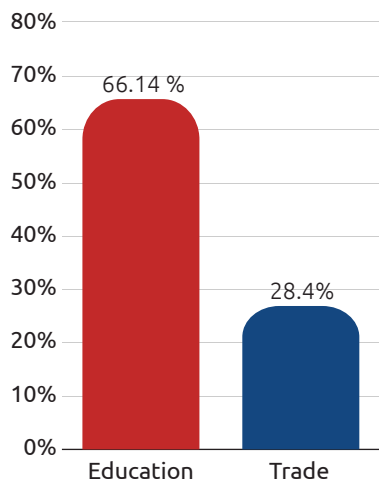
People-to-people cooperation is actualized through either tourism cooperation or academic cooperation, which includes Education, Research, and Academic Exchanges. This year's survey found that Education, Research, and Academic Exchange cooperation is identified by significantly more respondents than trade as being the most satisfactory aspect of cooperation with all four partners.



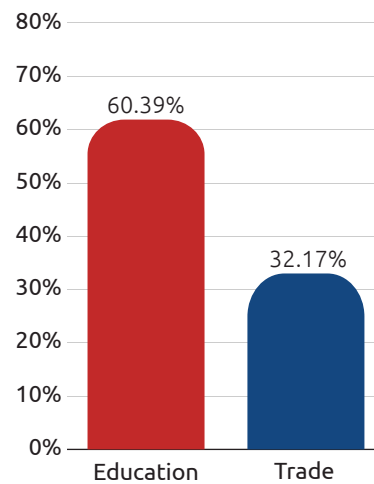
41. China - Education, research and academic exchange



42. India - Education, research and academic exchange



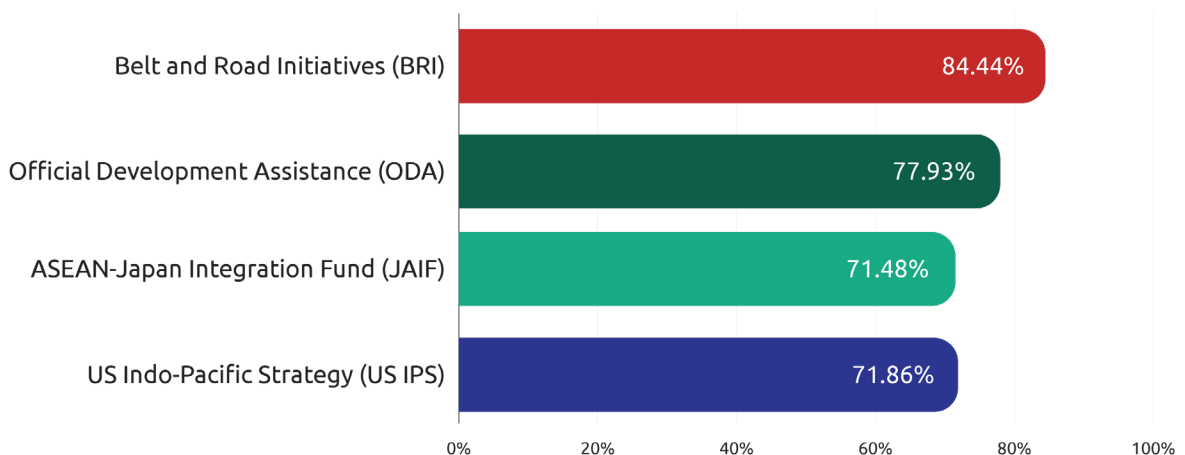
43. Japan - Education, research and academic exchange



44. USA - Education, research and academic exchange

B.3. Which initiatives are the best known?

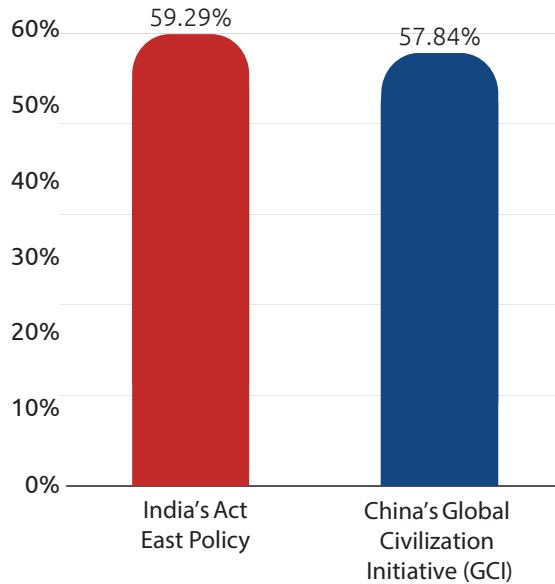
The four partners - China, Japan, India, and the USA – all offer a range of initiatives that benefit Southeast Asian countries. The survey identified 13 strategic, development, and security initiatives operated by the four partners.



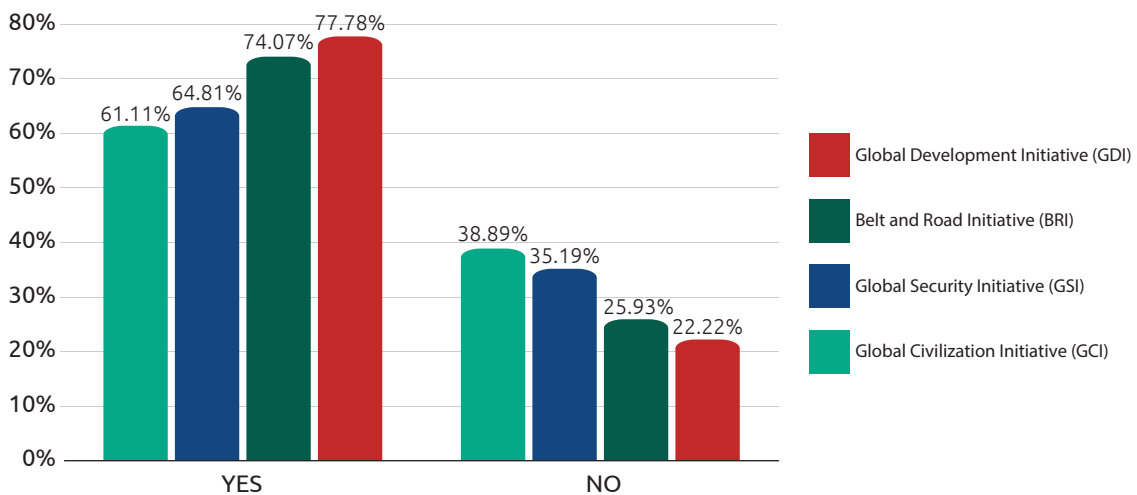
45. Four initiatives that are the most well-known

The Chinese, Japanese, and American initiatives, each with more than 70% awareness ratings, were identified by respondents as being the ones that they are most familiar with. More particularly, 84.44% of respondents were aware of China's Belt and Road Initiative (BRI), 77.93% were aware of Japan's Official Development Assistance (ODA), 71.48% were aware of the ASEAN-Japan Integration Fund, and 71.86% were aware of the US Indo-Pacific Strategy.

Conversely, more than 55% of respondents had never heard of two initiatives, being one each from India and China.



46. Two initiatives from India and China that are the least popular

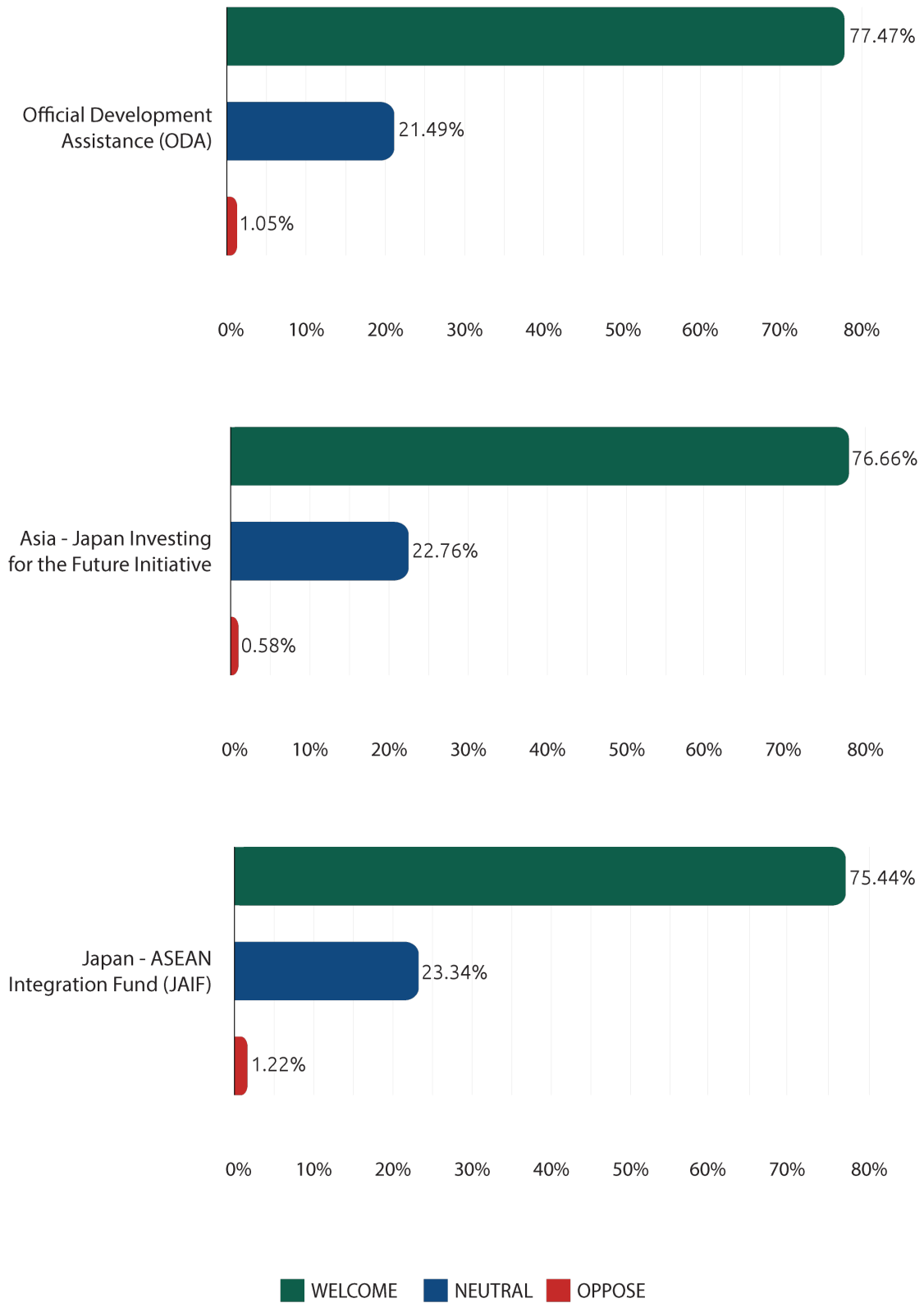


47. Timor Leste - Awareness of initiatives led by China

Contrary to other Southeast Asian countries, in Timor Leste, Chinese GDI, GSI, GCI, and BRI are very popular with more than 60% of respondents admitting they have heard of all initiatives.

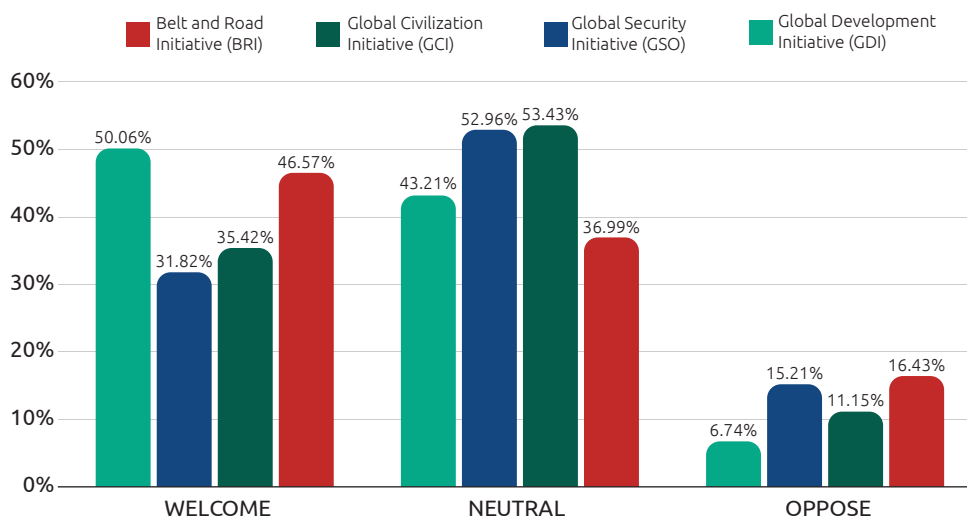
B.4. Which initiatives are viewed most favorably?

The respondents viewed the Japanese initiatives most favorably, with each Japanese initiative being welcomed by more than 70% of respondents.

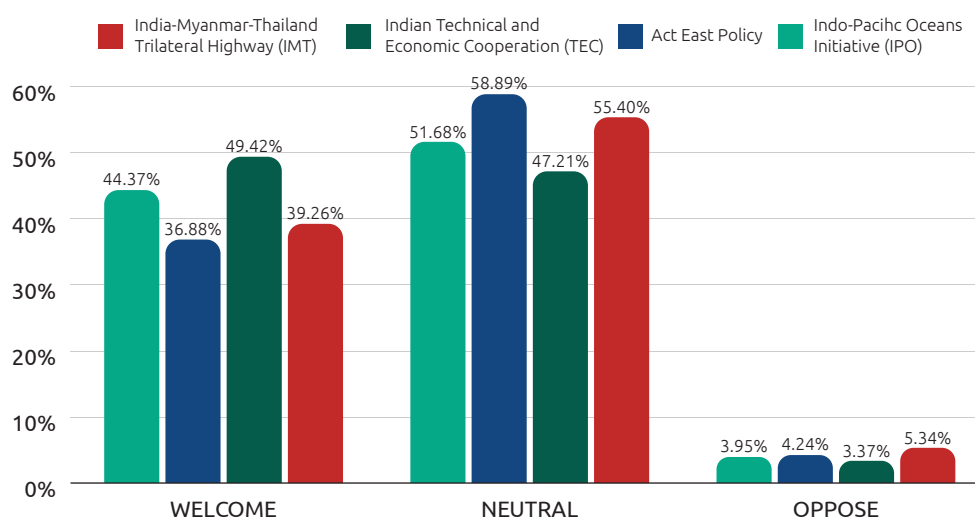


48. General - How do you respond initiatives led by Japan

Compared with the Japanese initiatives, Indian and Chinese initiatives received the highest number of neutral responses.



49. General - Response to initiatives led by China



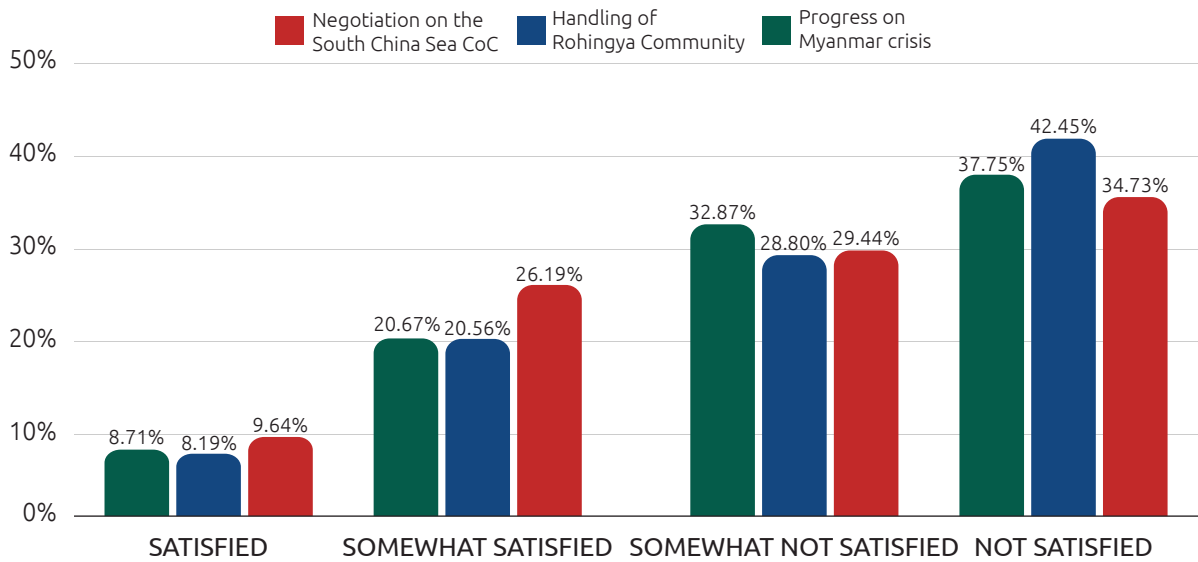
50. General - Response to initiatives led by India

In regards to the India-Myanmar-Thailand Highway project, which has been under construction since 2012, the survey asked respondents in Myanmar and Thailand for their perceptions of it. These responses show that the project is very popular in Myanmar, with 72.15% of respondents welcoming it, but less popular in Thailand, where a simple majority of 55% welcomed it.

C. What do you think of ASEAN's responses and efforts in handling issues?

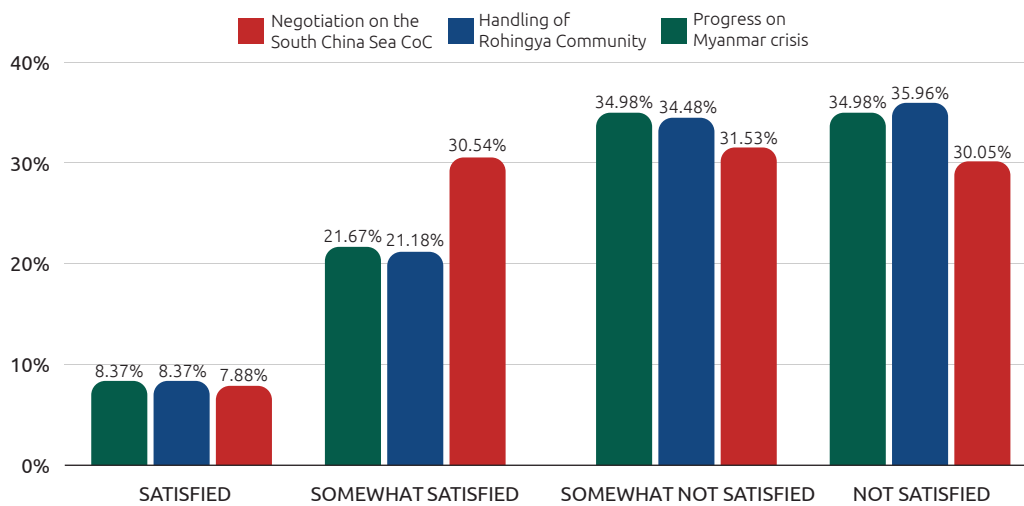
The survey found that respondents are not happy about how ASEAN has been handling three important regional challenges: the Myanmar Crisis, the Rohingya Issue, and the negotiations on the Code of Conduct on the South China Sea.

At the top of the dissatisfaction list, 71.25% respondents said they were "not satisfied" with ASEAN's efforts in handling the Rohingya Issue. Similarly, 70.62% of respondents were not dissatisfied with the organization's response to the Myanmar Crisis, while 64.17% of respondents expressed dissatisfaction with the negotiations on the Code of Conduct on the South China Sea.

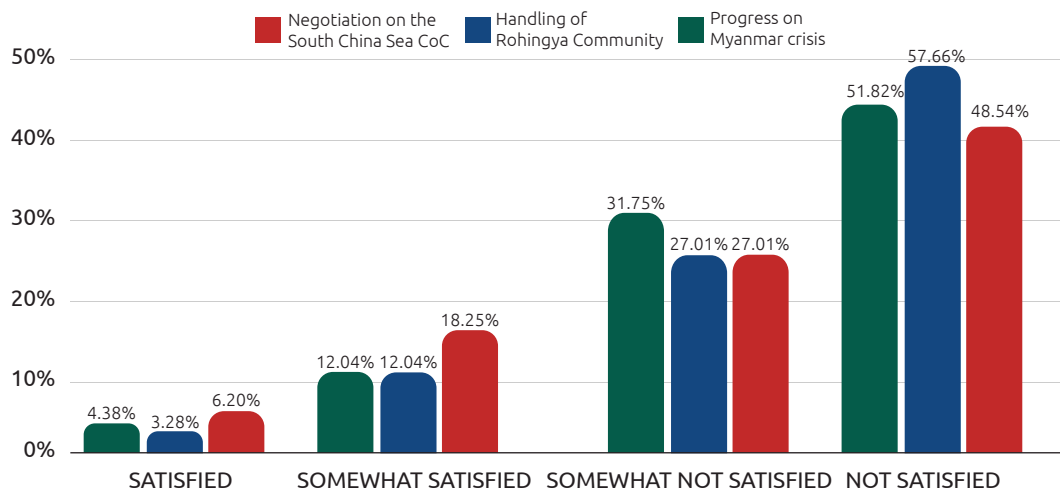


51. General - ASEAN response to strategic issues

If we look more closely at the responses in the different respondent categories, Civil Society was “not satisfied” with any of ASEAN’s efforts related to the three issues. Meanwhile, government officials were more optimistic, but still tend towards the “not satisfied” end of the spectrum.

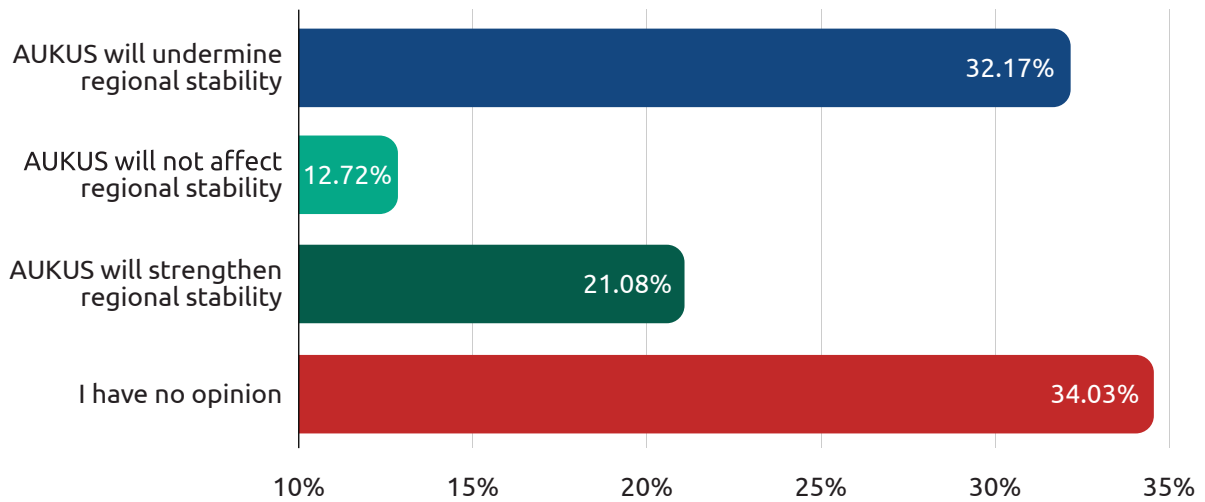


52. Officials - ASEAN response to strategic issues

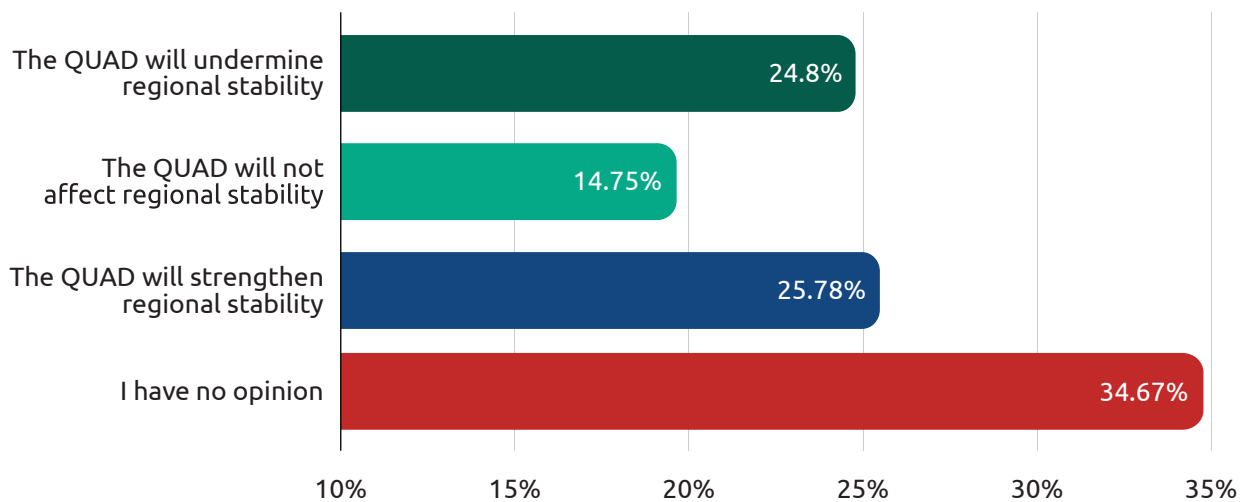


53. Civil Society - ASEAN response to strategic issues

D. On QUAD and AUKUS

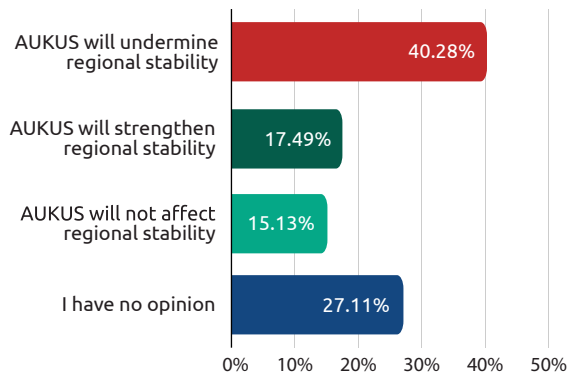


54 General - How AUKUS affect regional stability in Southeast Asia

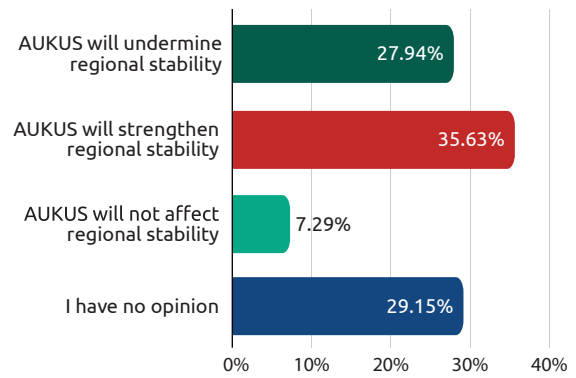


55 General - How Quad affect regional stability in Southeast Asia

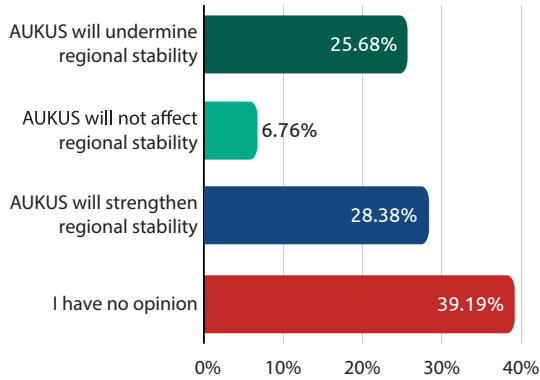
The findings for each country reflect their different perspectives on political-security issues. Indonesian respondents generally see AUKUS as undermining the stability of the region. By contrast, Filipino respondents view it as strengthening security. The largest proportion of both Vietnamese and Cambodian respondents expressed no opinion. Of those who have an opinion, the majority of Vietnamese saw it as strengthening security, while the opposite was the case for Cambodians.



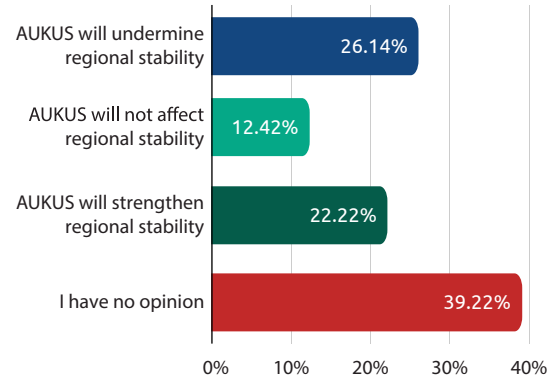
56. Indonesia - How AUKUS affects regional stability in Southeast Asia



57. Philippines - How AUKUS affects regional stability in Southeast Asia

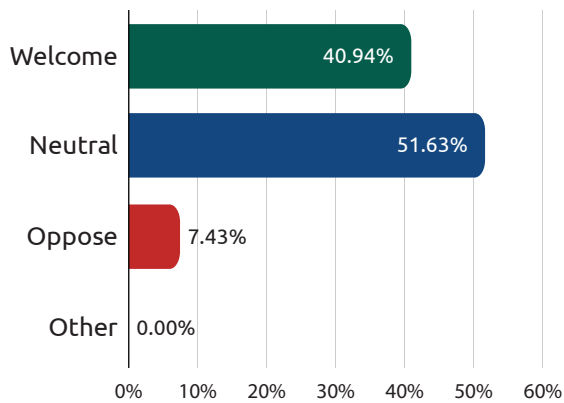


58. Vietnam - How AUKUS affects regional stability in Southeast Asia

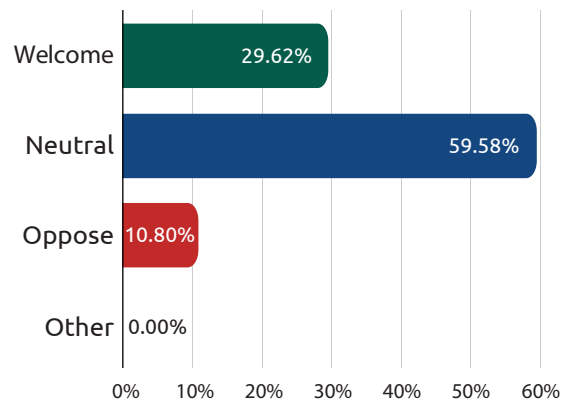


59. Cambodia - How AUKUS affects regional stability in Southeast Asia

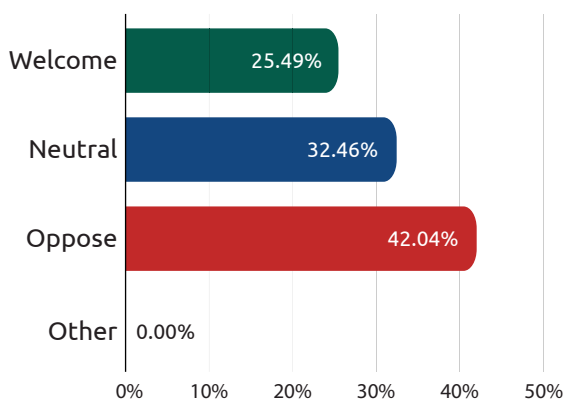
E. How do the respondents see BRICS, SCO, and NATO's aspiration to enter the region?



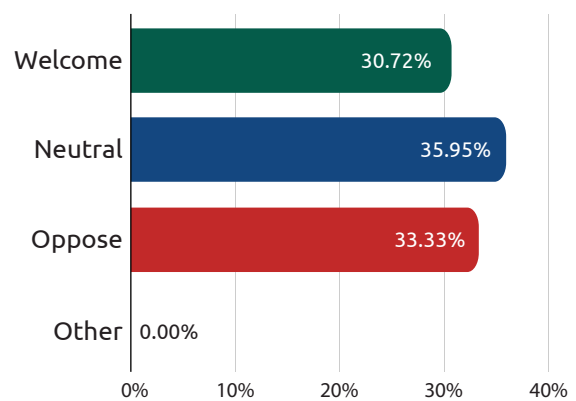
60. General - How respondents see BRICS



61. General - How respondents see SCO

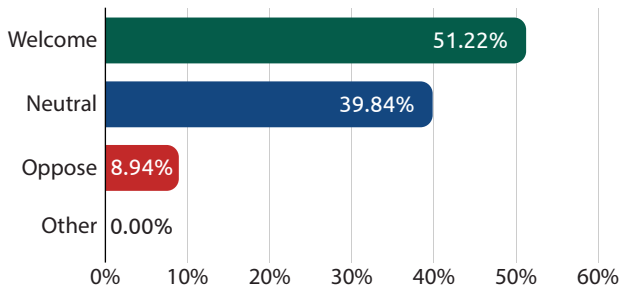


62. General - How respondents see NATO countries' naval operation in the region

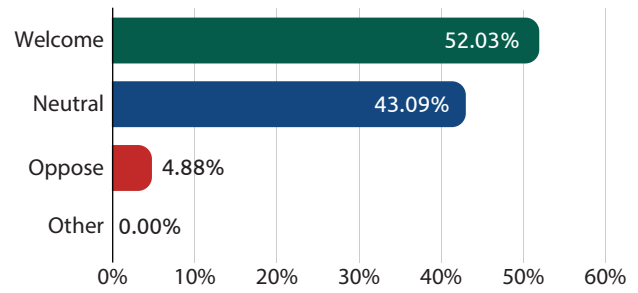


63. General - How respondents see the plan of opening a NATO office in Japan

Lao respondents are the most welcoming BRICS and SCO compared to the rest.

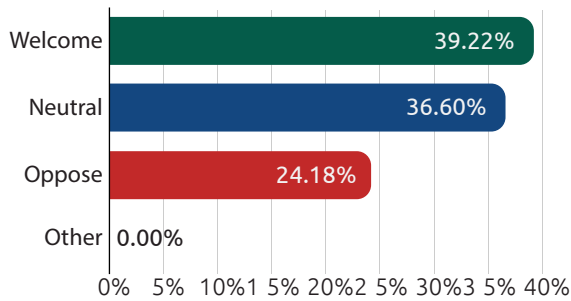


64. Laos - How respondents see BRIC

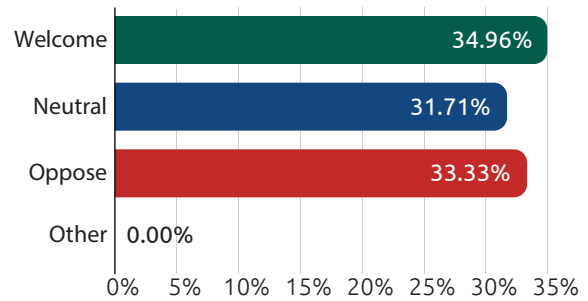


65. Laos - How respondents see the Shanghai Cooperation Organization (SCO)

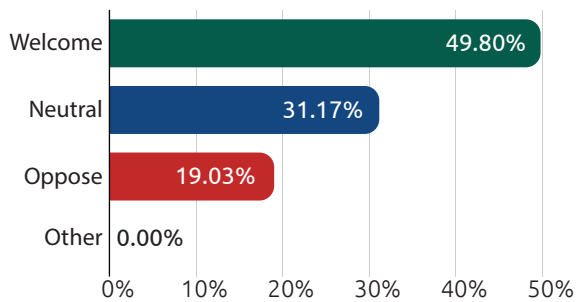
Bruneian, Indonesian, Malaysian, Filipino, Singaporean, Thai, and Vietnamese respondents are clear that they oppose an increase in NATO countries' naval operations in the region. The situation is somewhat different in regards to the proposed opening of a NATO office in Japan, which was clearly opposed by only Malaysian and Indonesian respondents, while the majority of Cambodian, Laotian, Filipino and Timorese respondents welcomed the idea.



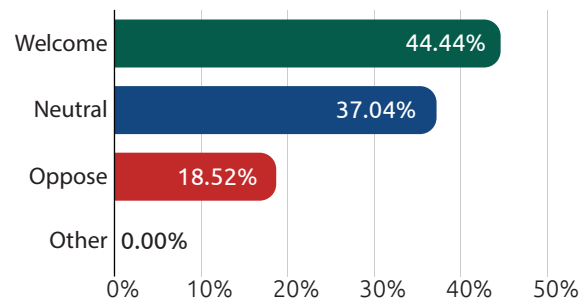
66. Cambodia - How respondents view the plan of opening a NATO office in Japan



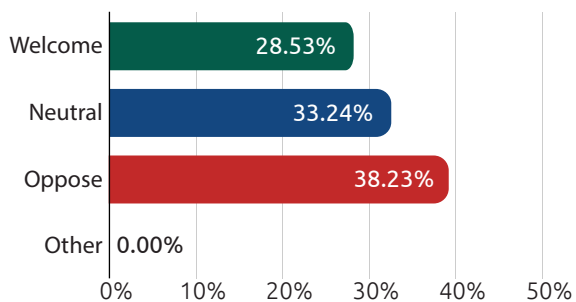
67. Laos - How respondents view the plan of opening a NATO office in Japan



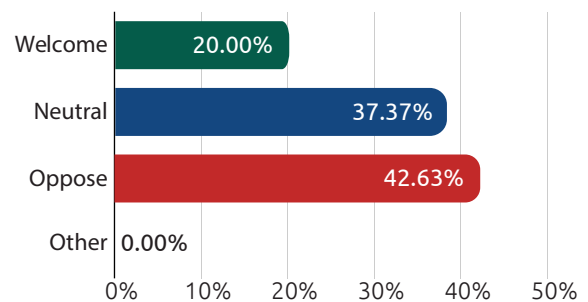
68. Philippines - How respondents view the plan of opening a NATO office in Japan



69. Timor Leste - How respondents view the plan of opening a NATO office in Japan



70. Indonesia - How respondents view the plan of opening a NATO office in Japan



71. Malaysia - How respondents view the plan of opening a NATO office in Japan

III. Survey Findings: Country Analysis

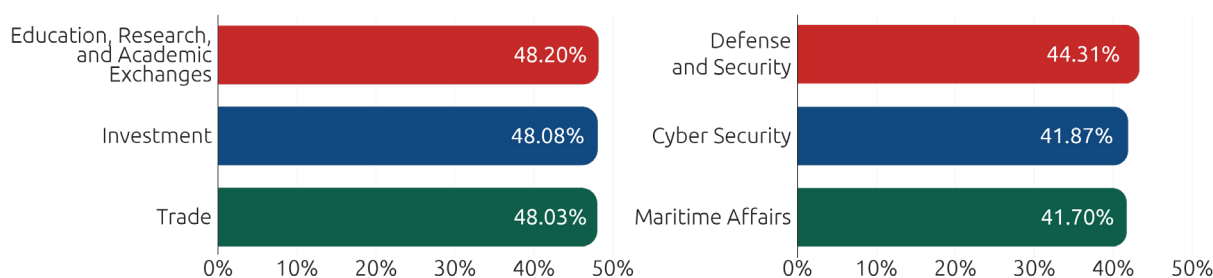
A. CHINA

The survey captures a nuanced perspective on China’s cooperation with ASEAN, reflecting a blend of positive sentiments and concerns. Respondents generally see China’s presence positively in critical areas, but notable divergence emerges in the category of respecting national unity, sovereignty, and territorial integrity.

China’s dominance in economic leverage and its influence across different aspects of cooperation underscore its significance in the region. Familiarity with China-led initiatives is generally high, with the Belt and Road Initiative (BRI) standing out as the most recognized. Respondents, including government officials, generally welcome these initiatives or adopt a neutral stance, with low rejection rates. The detailed findings highlight the multifaceted nature of ASEAN people’s perceptions of China. Despite China’s recognized economic contributions, concerns persist, especially in political and security affairs.

Low-politics issues were considered the most satisfactory sectors of cooperation by respondents, comprising Education, Research, Academic Exchanges (48.20%); Investment (48.08%); and Trade (48.03%). Conversely, high-politics domains were perceived as least satisfactory (Defense and Security (44.31%); Cyber Security (41.87%); and Maritime Affairs (41.70%). This suggests that China’s presence in the region, as one its most preeminent trading partners, also evokes a sense of wariness among respondents and the countries they represent.

There exists a divergence of opinion regarding China’s presence in the region. The only difference lies in the *“Respecting national unity, sovereignty, and territorial integrity”*.



72. Top three most satisfactory and Top three least satisfactory - On China

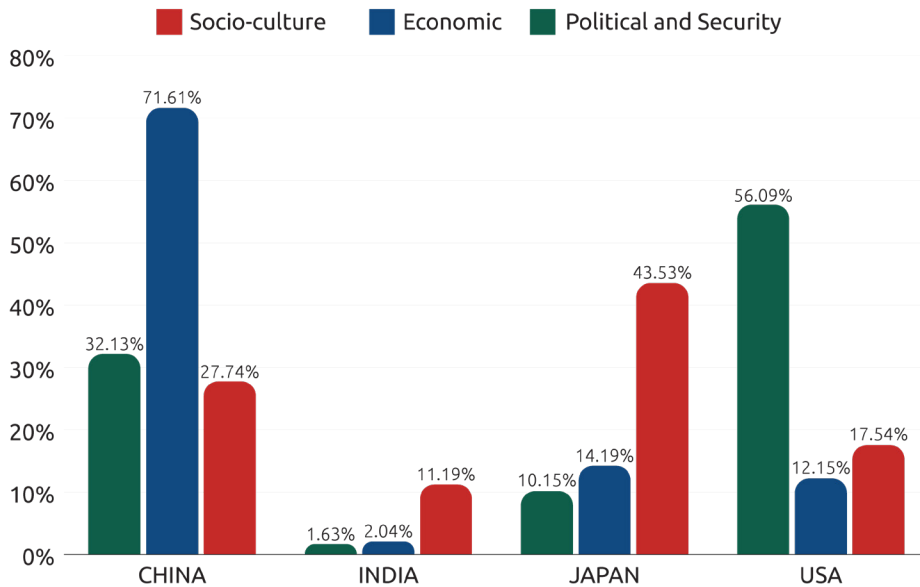
Notably, respondents expressed concerns over several areas when comparing China with the three other countries - Japan, India, and the USA. China was considered to be the least trustworthy partner (43.21%), to have the most detrimental strategic ambition to Southeast Asia (53.31%), and to have the most worrying nationalism (53.19%). Additionally, China ranks highest for having the most significant hegemonic ambitions (49.13%) and being most likely to use coercive measures and economic tools to achieve its interests (48.55%).

Interestingly, respondents also said that China was the most relevant partner for the future of ASEAN (41.41%) and the most reasonable major power for Southeast Asia (40.71%).

	CHINA
The most trustworthy partner	14.87%
The least trustworthy partner	43.21%
The most dependable partner	29.44%
The most reluctant to cooperate	35.37%
The most respectable and credible partner	13.59%
The go-to partner for quality investment	25.38%
The most compliant with international law	9.58%
The most consistent supporter of ASEAN centrality	21.20%
The strongest projection of soft power in the region	34.32%
The most relevant partner for the future of ASEAN	41.41%
The most loyal partner in supporting ASEAN's initiatives and mechanisms	24.10%
The most aligned with ASEAN's principles in the ASEAN Charter, TAC, and SEANWFZ	18.29%
Partner with the biggest hegemonic ambitions	49.13%
The most detrimental strategic ambition to Southeast Asia	53.31%
The most reasonable major power for Southeast Asia	40.71%
The most likely partner to politically interfere in Southeast Asian countries' affairs	36.93%
The most worrying nationalism	53.19%
The most likely to use economic tools for political objectives in its relations with ASEAN member states	57.20%
The most likely to use coercive measures towards Southeast Asia countries in meeting their strategic interest	48.55%

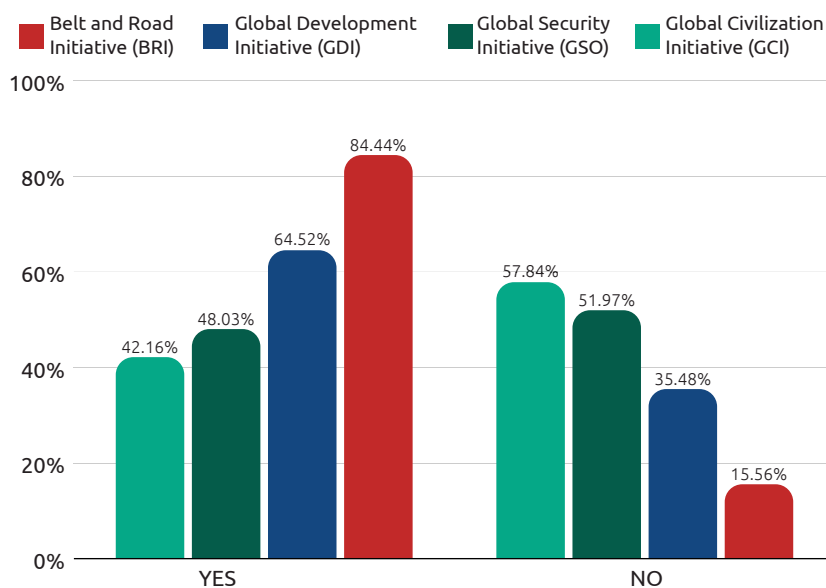
73. Respondents view comparison over China

China consistently scores highly for its influence on ASEAN countries in three main aspects; Political and Security, Economic, and Sociocultural. In regards to economic leverage, China took the top spot (71.61%), accounting for more than half of the total combined percentages of the other three countries (28.38%). Regarding its political and security influence, China placed second behind the USA at 32.13%, while for socio-cultural impact, China was second behind Japan at 27.74%. These figures clearly illustrate China's significant influence across various strategic sectors in ASEAN.



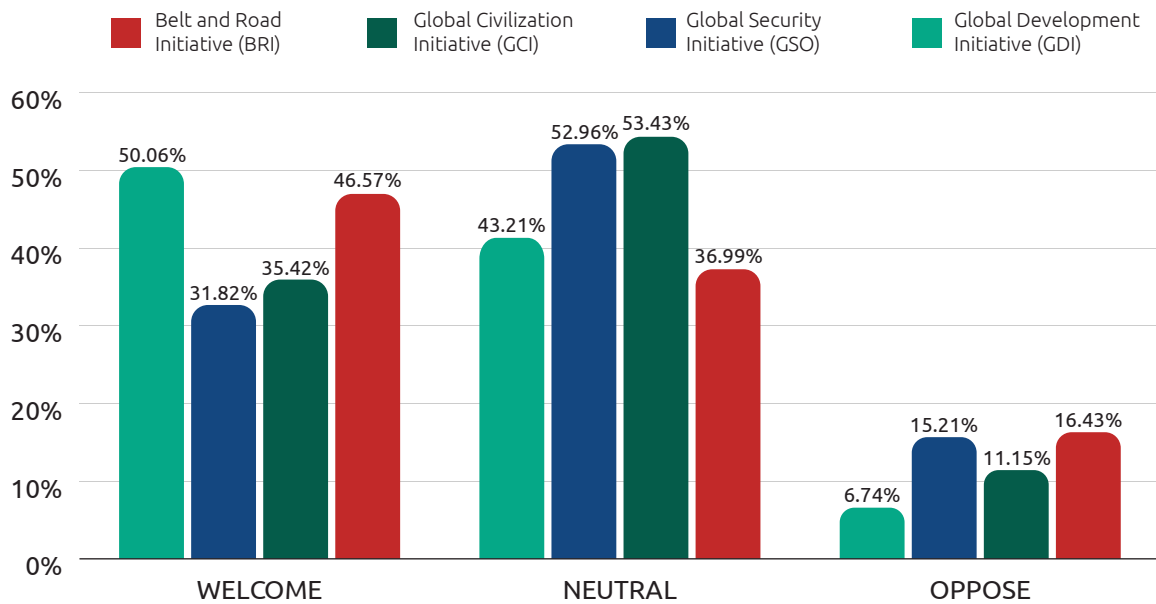
74. General - Three aspects; countries' influence to ASEAN

Familiarity with China-led initiatives, Global Security Initiative (GSI), Global Civilization Initiative (GCI), Global Development Initiative (GDI), and Belt and Road Initiative (BRI) was relatively high among respondents. However, their familiarity with GCI (42.16%) and GSI (48.03%) were slightly lower, with a majority of respondents not being aware of them. However, a huge number of respondents were conversant with the other two initiatives: GDI (64.52%), and BRI, (84.44%), which was also the highest figure among all of the initiatives operated by China in the region.



75. General - Awareness of Initiatives led by China

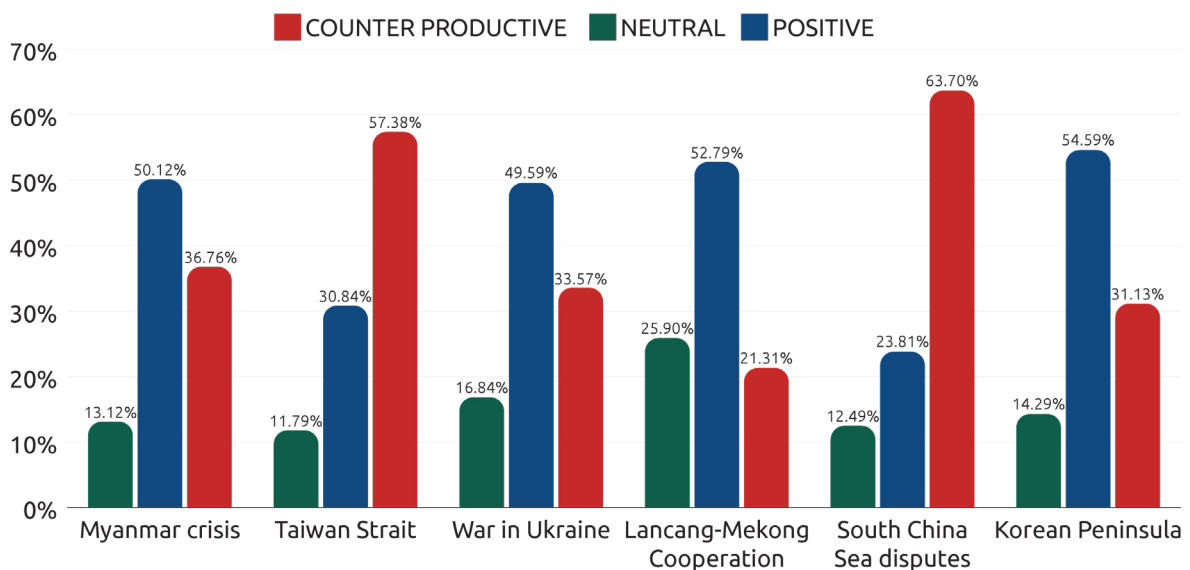
Consistently, all of the initiatives led by China (GSI, GCI, GDI, and BRI) were either welcomed by a majority of respondents or a majority expressed a neutral stance, while a minority expressed opposition. More specifically, on the GDI and BRI, the average percentage of respondents that welcomed them stood at 50.06% and 46.57%, respectively, while 31.82% and 35.42% of respondents expressed a neutral stance. While a majority said they were neutral on both the GSI and GCI, the proportion of respondents opposing the two initiatives was low at less than 16.43%.



76. General - Response to Initiatives led by China

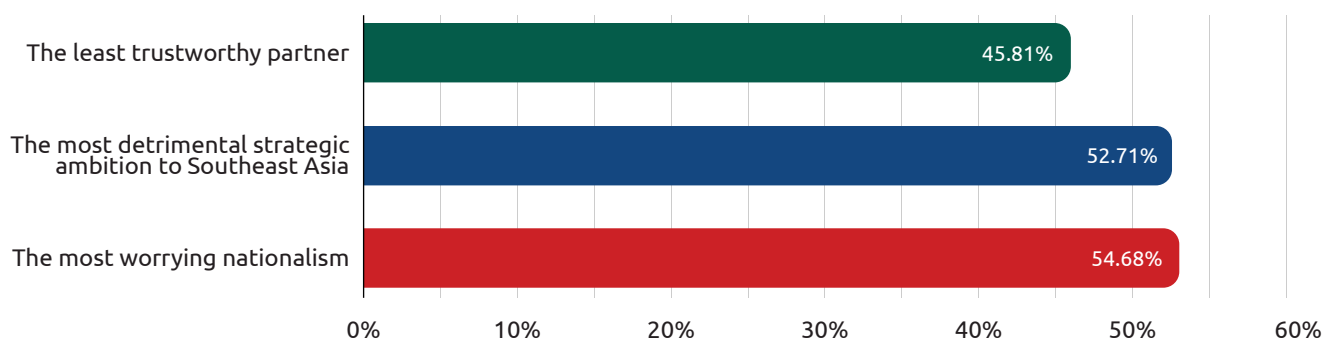
Furthermore, China’s role in geostrategic issues elicited varied responses. Generally, on the six strategic issues discussed (the Myanmar Crisis, Taiwan Strait, War in Ukraine, Lancang-Mekong Cooperation, South China Sea Dispute, and the Korean Peninsula), China’s role was perceived as being more neutral or counterproductive. Only in the Lancang-Mekong issue was China’s role considered somewhat positively (25.90%), with only a 4% margin with counterproductivity (21.31%).

However, for issues directly involving China, such as the Taiwan Strait and the South China Sea Dispute, the country’s role was considered to be more counterproductive at 57.38% and 63.70% respectively, surpassing the percentages of those who viewed China’s role as either neutral or positive. Similarly, respondents said that China’s role was more counterproductive or neutral in relation to other strategic regional issues, such as Myanmar, the War in Ukraine, and the Korean Peninsula.



77. General - China’s role in various issues

Some contradictory yet intriguing findings in regard to China’s perception were reflected in the views expressed by respondents who were Government officials.



78. Officials - China’s presence in ASEAN

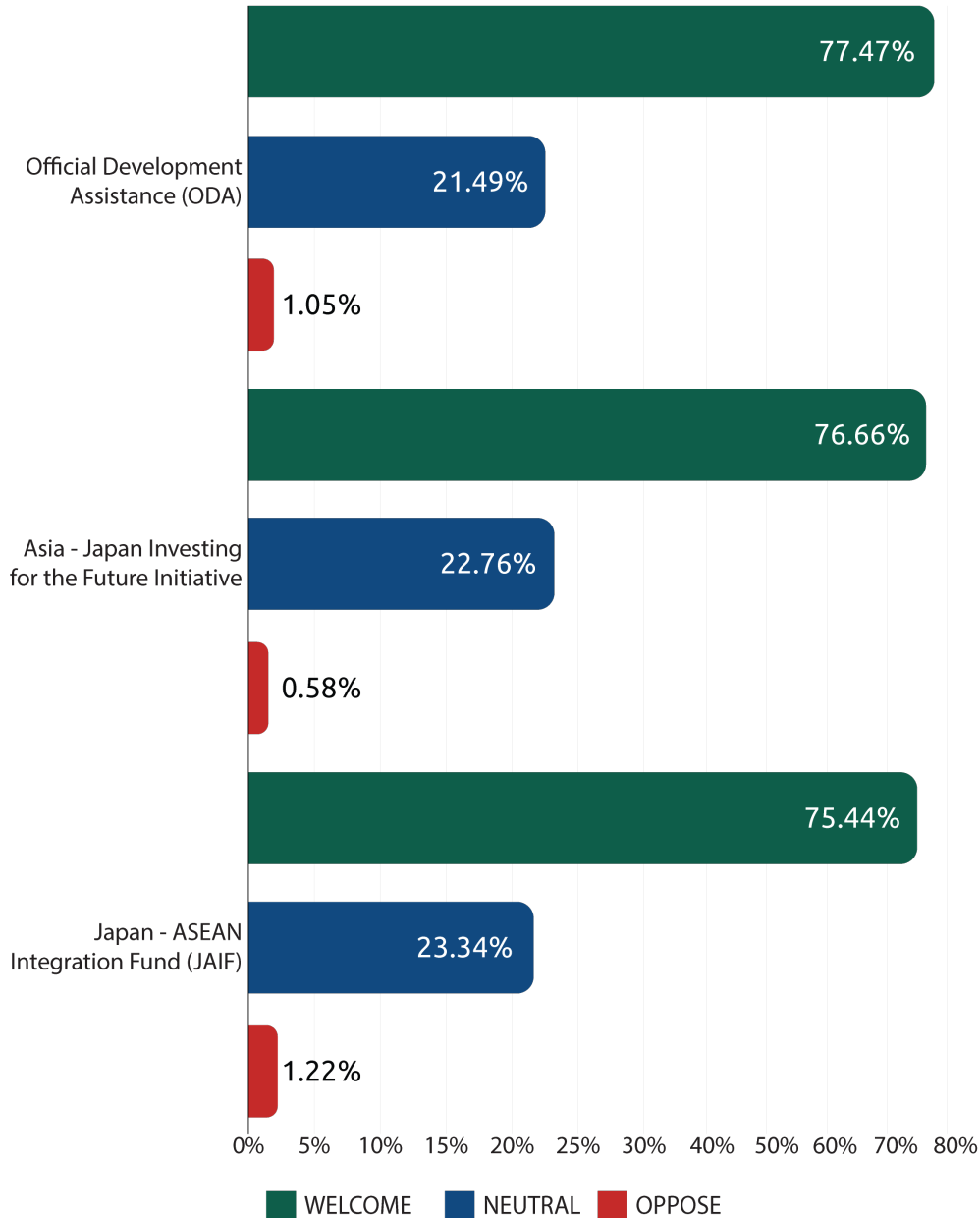
However, despite being considered as one of the most important partners for ASEAN economic cooperation, China was also paradoxically regarded as the least trustworthy, as having the strategic ambition that is most detrimental to the region, and manifest the most worrying nationalism, with all percentages above 40%. Officials deemed that in several strategic issues such as the Myanmar Crisis, the Taiwan Strait, the War in Ukraine, the South China Sea Dispute, and the Korean Peninsula, China’s position was either counterproductive or neutral.

	POSITIVE	NEUTRAL	COUNTER PRODUCTIVE
Myanmar crisis	13.79%	53.20%	33.00%
Taiwan Strait	11.33%	34.48%	54.19%
War in Ukraine	17.24%	52.71%	30.05%
Lancang-Mekong Cooperation	30.54%	50.74%	18.72%
South China Sea disputes	13.30%	27.59%	59.11%
Korean Peninsula	13.79%	60.10%	26.11%

79. Officials - China role in various issues

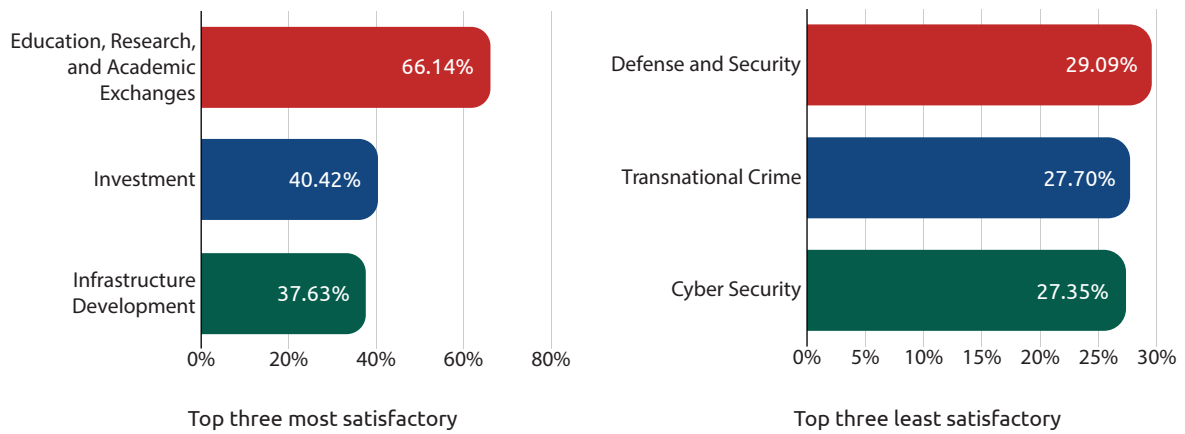
B. JAPAN

The survey presented a positive and impactful image of Japan among the people of ASEAN, with the data revealing a consistent trend of high satisfaction across various collaborative sectors. The constructive initiatives spearheaded by Japan, such as the Japan-ASEAN Integration Fund (JAIF) and Official Development Assistance (ODA), all garnered positive responses.



80. General - Initiatives led by Japan

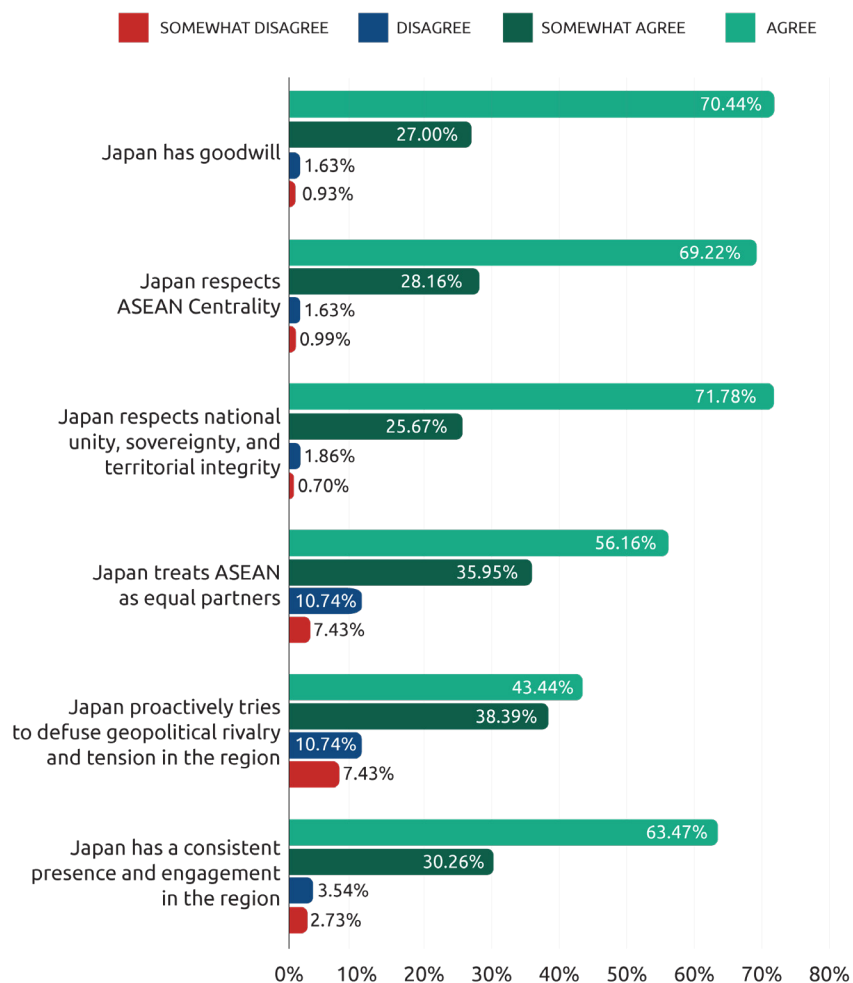
The areas of Japan's cooperation with ASEAN that were considered most satisfactory by respondents were Education, Research, and Academic Exchanges, where the percentage reached 66.14%, the highest satisfaction level compared to other countries in the same category. This was followed by Investment at 40.42% and Infrastructure Development at 37.63%. Meanwhile, security was the least satisfactory sector, with Defense and Security at 29.09%, Transnational Crime at 27.70%, and Cybersecurity at 27.35%.



81. General - Top three areas of ASEAN-Japan cooperation that are most and least satisfactory

In the respondents' perceptions of Japan, another set of positive responses emerged with almost no significant fragmentation. Across the five categories queried, the respondents showed a consistent level of agreement, of almost 71% (ranging from agree to somewhat agree).

Most respondents saw Japan positively in all categories: its goodwill (70.44%), treatment of ASEAN as an equal partner (56.16%), actively defusing geopolitical rivalries (43.44%), and maintaining a consistent presence and engagement in the region (63.47%). Japan's highest score was for respecting national unity, sovereignty, and territorial integrity at (71.78%), this being a category where skepticism was expressed in regards to the three other countries.



82. Perception on Japan's presence in the ASEAN region

Japan was viewed as the partner that was most trustworthy (68.64%), dependable (42.33%), and respectable and credible (66.38%), with average percentages of above 55% in all these categories. Additionally, Japan was seen as a loyal partner in supporting ASEAN’s initiatives and mechanisms (53.60%) and a go-to partner for quality investment (53.02%).

	JAPAN
The most trustworthy partner	68.64%
The least trustworthy partner	4.41%
The most dependable partner	42.33%
The most reluctant to cooperate (in general) with	10.86%
The most respectable and credible partner	66.38%
The go-to partner for quality investment	53.02%
The most compliant with international law	57.84%
The most consistent supporter of ASEAN centrality	52.56%
The strongest projection of soft power in the region	37.80%
The most relevant partner for the future of ASEAN	34.61%
The most loyal partner in supporting ASEAN's initiatives and mechanisms	53.60%
The most aligned with ASEAN's principles in the ASEAN Charter, TAC, and SEANWFZ	55.52%
Partner with the biggest hegemonic ambitions	14.05%
The most detrimental strategic ambition to Southeast Asia	12.60%
The most reasonable major power for Southeast Asia	30.78%
The most likely partner to politically interfere in Southeast Asian countries' affairs	11.85%
The most worrying nationalism	6.91%
The most likely to use economic tools for political objectives in its relations with ASEAN member states	8.83%
The most likely to use coercive measures towards Southeast Asia countries in meeting their strategic interest	9.47%

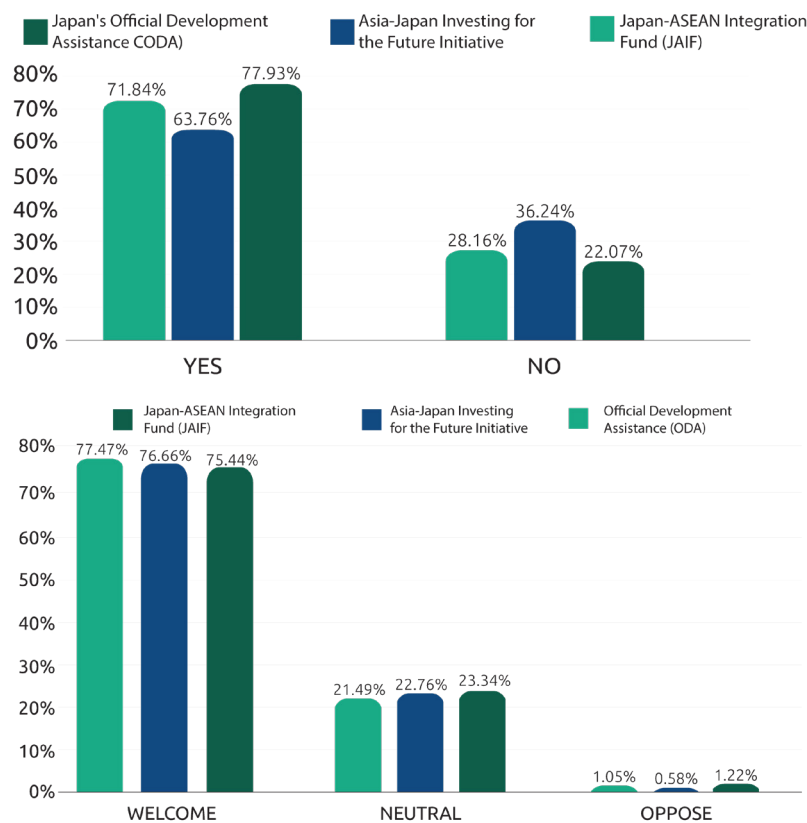
83. General - Statements that reflect countries' contribution - Japan

Regarding its level of influence on ASEAN, Japan scored its highest percentage for the socio-cultural pillar at 43.53%, second highest for the economic pillar at 14.19% (surprisingly slightly higher than the USA), and third highest for political and security issues at 10.15%, below China and the USA. The following graph indicated that Japan’s successful soft diplomacy was relevant to its smooth power projection, the highest among all surveyed countries.

	CHINA	INDIA	JAPAN	USA
Political and Security	32.13%	1.63%	10.15%	56.09%
Economic	71.61%	2.04%	14.19%	12.15%
Socio-culture	27.74%	11.19%	43.53%	17.54%

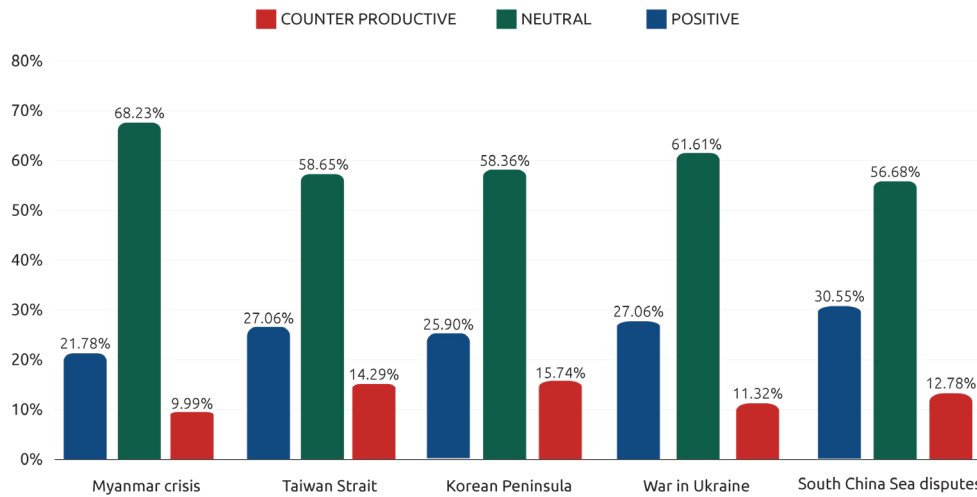
84. General - Three aspects, Countries' Influence to ASEAN

Furthermore, initiatives led by Japan received positive responses due to the high level of familiarity and acceptance of ASEAN people of Japan's three main initiatives. Respondents had both "heard about" and "positively welcomed" the Japan-ASEAN Integration Fund (JAIF) at 71.84% and 75.44%, Asia-Japan Investing for the Future Initiative at 63.76% and 76.66%, and Japan Official Development Assistance (ODA) at 77.93% and 77.47% respectively.



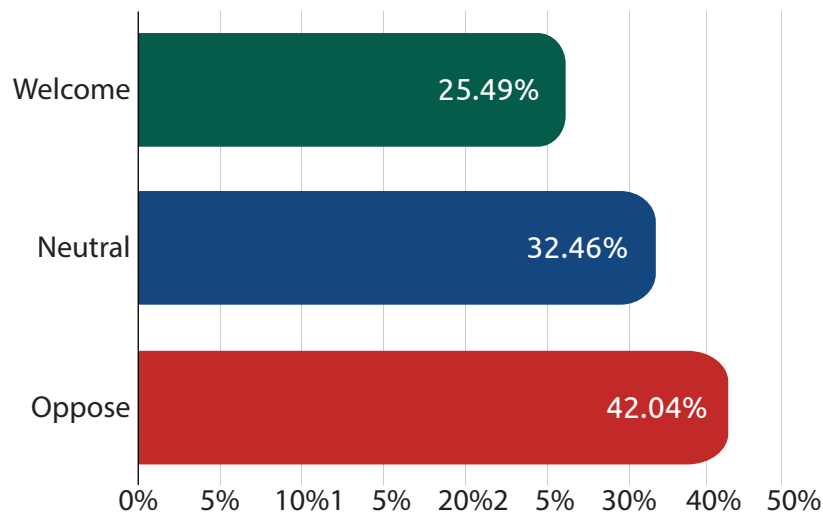
85. General - Awareness and response to Initiatives led by Japan

Respondents mostly took a neutral position on their perceptions of Japan's responses to geopolitical conflicts in various regions. Few regarded it as positive or counterproductive 42,04% of the respondents strongly opposed NATO's potential activities. On the other side of the graph, 25,40% welcomed them, while (32,46%) were neutral on NATO countries' naval operations in the region.



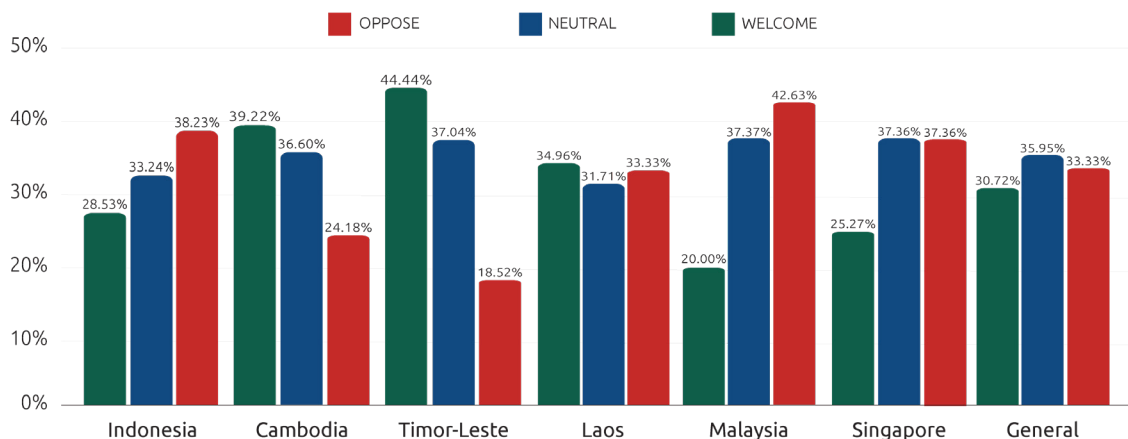
86. General - Japan's role in various issues

A total of 42.04% of respondents strongly opposed potential NATO naval operations in the region. On the other hand, 25.49% expressed a welcoming stance, while 32.46% said they were neutral on NATO countries' naval operations.



87. General - Potential NATO Naval Operation

The idea of NATO establishing an office in Japan also elicited more rejections than acceptances, although the gap was not huge, with 33.33% opposing the idea and 30.72% welcoming it. This specific finding is marked by opposition from Indonesia, Malaysia, and Singapore, while Laos, Cambodia, and Timor Leste were more welcoming of the idea.



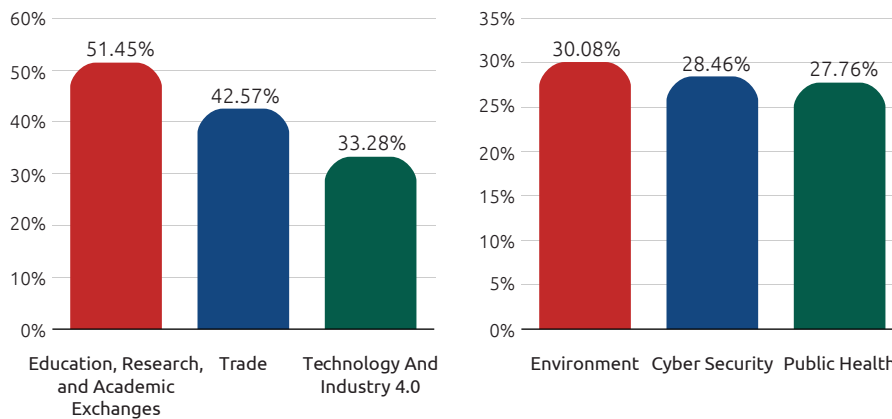
88. Opening NATO Office in Japan

C. INDIA

Despite not assuming a huge presence in the region, India showcases potential across varied sectors within ASEAN, boasting notable satisfaction rates, particularly in Education, Research, and Academic Exchanges.

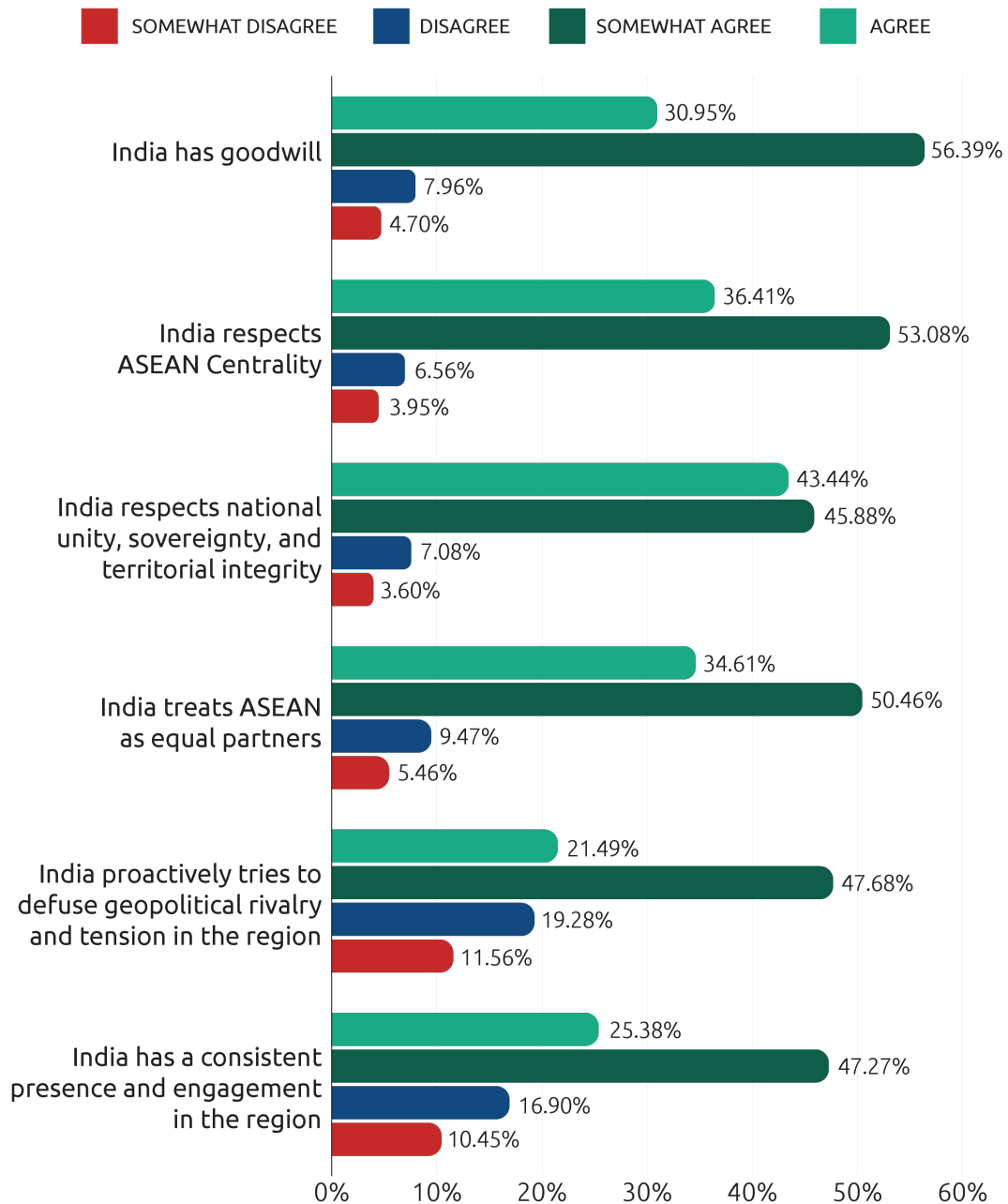
Awareness of India's presence in ASEAN varied, yet the overall acceptance was considerable, even with limited awareness. Despite perceived limitations in India's influence on critical issues, including the Myanmar Crisis and the Rohingya issue, the majority of respondents lean towards a neutral stance. There was, however, a recognition of the pressing need for improved immigration-border cooperation between India and Myanmar.

India's presence in this survey aligned with its potential across various sectors within ASEAN. Notably, India boasted a substantial (51.45%) satisfaction rate in Education, Research, and Academic Exchanges, followed by Trade at (42.57%) and Technology and Industry 4.0 at (33.28%). Intriguingly, while high politics often dominated satisfaction metrics in other nations, in India, low politics, particularly Environmental concerns, took precedence with a (30.08%) satisfaction rate, followed by Cyber Security (28.46%) and Public Health (27.76%).



89. General - Top three areas of ASEAN-India cooperation that are most and least satisfactory

Examining India’s presence further, it is generally perceived positively and relatively concerning by ASEAN respondents, resembling the sentiments towards Japan. Overall, perceptions of India’s presence fell within the moderate range, encompassing aspects such as goodwill (30,95%), respect centrality (36,41%), and consistent engagement (25,38%), with “somewhat agree” levels ranging from 46% to 56%. That overall numbers of respondents viewed India’s role favourably consistently surpass those numbers who viewed it negatively, which peak at 19.28% on the issue of defusing geopolitical rivalry and tension in the region.



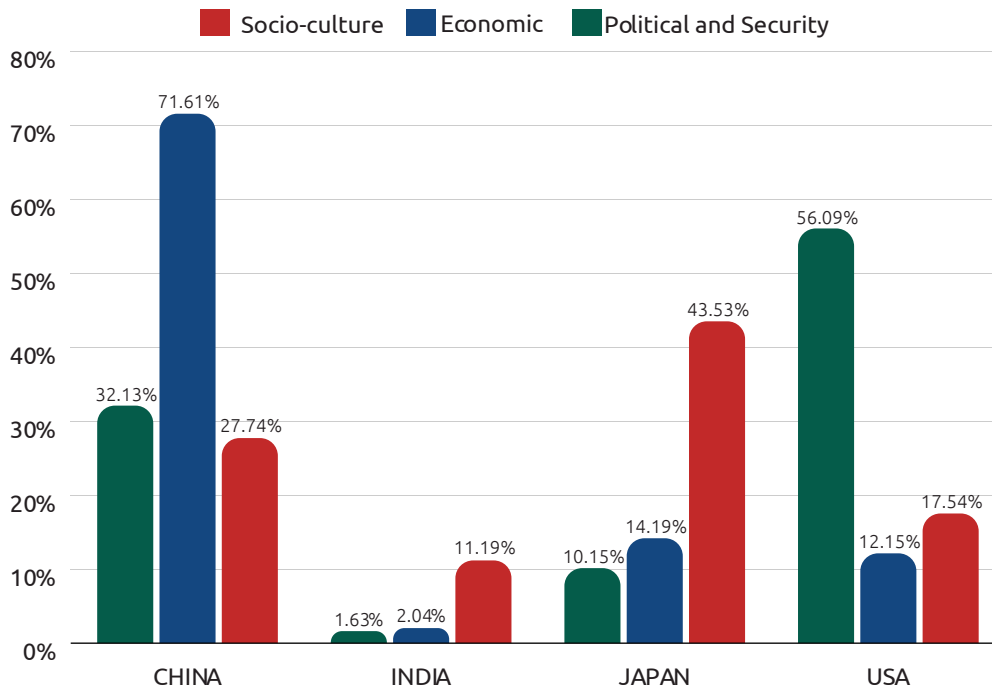
90. General - India Presence in ASEAN

In contrast to Japan, India registered relatively lower percentages in categories such as most trustworthy (5.05%), most dependable (6.68%), and go-to partner for quality investment (3.54%). Despite this, India’s perceived minimal threat projection is rooted in its bottom-ranking positions in specific categories, including most detrimental strategic ambition (6.79%), the biggest hegemonic ambition (5.57%), and the most likely to politically interfere in ASEAN countries’ affairs (4.47%). India plays an outlier role, strategically safeguarding its interests while minimizing interventions.

	INDIA
The most trustworthy partner	5.05%
The least trustworthy partner	18.58%
The most dependable partner	6.68%
The most reluctant to cooperate	29.79%
The most respectable and credible partner	4.65%
The go-to partner for quality investment	3.54%
The most compliant with international law	6.91%
The most consistent supporter of ASEAN centrality	9.35%
The strongest projection of soft power in the region	7.26%
The most relevant partner for the future of ASEAN	9.18%
The most loyal partner in supporting ASEAN's initiatives and mechanisms	8.13%
The most aligned with ASEAN's principles in the ASEAN Charter, TAC, and SEANWFZ	10.86%
Partner with the biggest hegemonic ambitions	5.57%
The most detrimental strategic ambition to Southeast Asia	6.79%
The most reasonable major power for Southeast Asia	8.54%
The most likely partner to politically interfere in Southeast Asian countries' affairs	4.47%
The most worrying nationalism	17.31%
The most likely to use economic tools for political objectives in its relations with ASEAN member states	5.23%
The most likely to use coercive measures towards Southeast Asia countries in meeting their strategic interest	4.01%

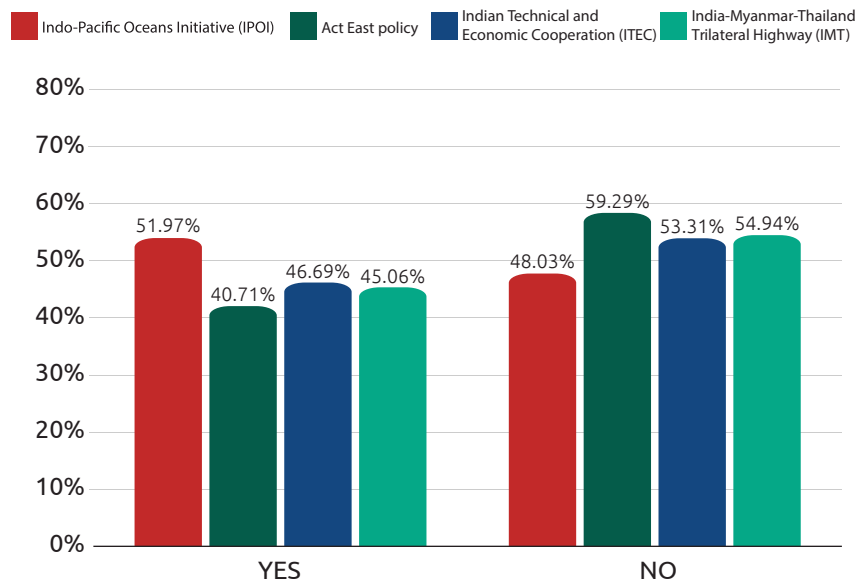
91. Respondents view comparison over India

The perception that India’s influence on the region is minimal is supported by a comparison of the findings on the four countries’ influence levels, which showed that India’s top influence on the region is only in the socio-culture sphere.



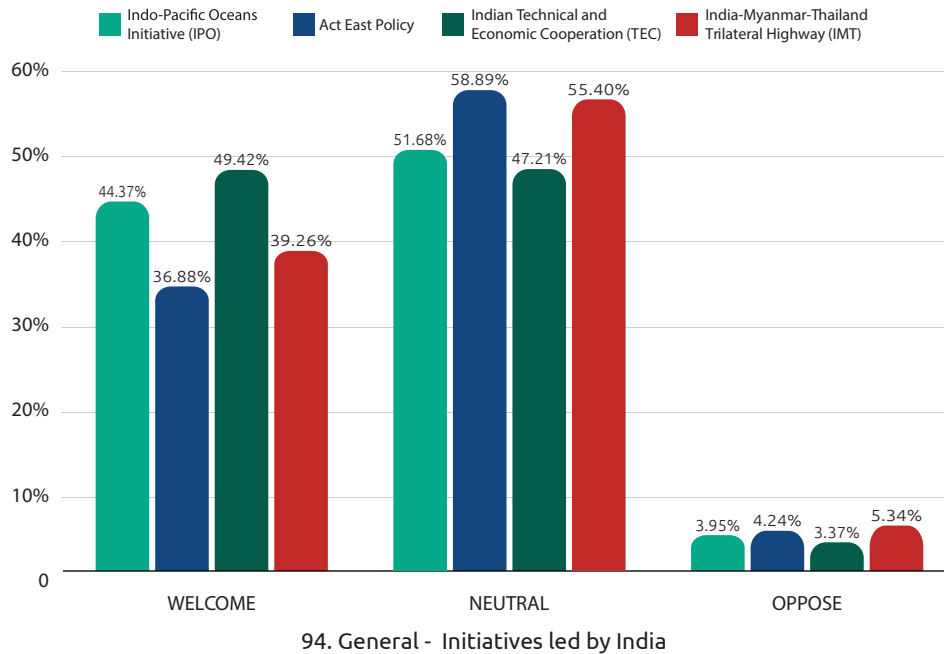
92. General - Countries Influence to ASEAN

Four different Indian initiatives were identified that relate to or have an impact on ASEAN: the Indo-Pacific Oceans Initiative (IPOI), Act East Policy (AEP), Indian Technical and Economic Cooperation (ITEC), and the India-Myanmar-Thailand Trilateral Highway (IMT). Surprisingly, only the IPOI, was familiar to a majority of respondents, with a 51.97% recognition rate, while the figures for the others were 41.71% for AEP, 46.69% for ITEC, and 45.06% for IMT

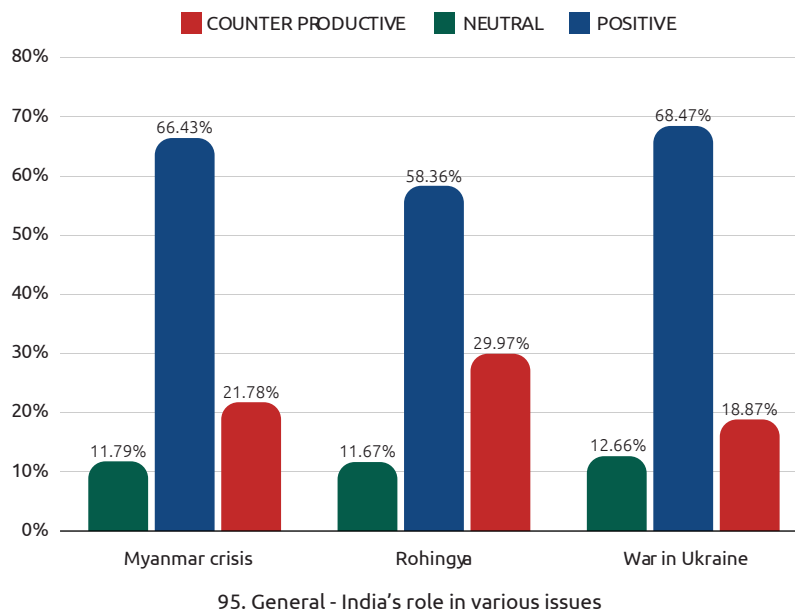


93. General - India's initiatives

Despite the relatively low awareness of India's initiatives, these received minimal rejection from ASEAN respondents. The initiative with the highest rejection rate was IMT, with 5.34% of the respondents saying that they opposed the initiative. The other three were below 5%. with a substantial proportion of respondents welcoming or expressing neutrality towards these initiatives, averaging between 37% and 59% respectively. The highest acceptance was observed for ITEC at 49.42%, followed by IPOI at 44.37%, IMT at 39.26%, and AEP at 36.68%.

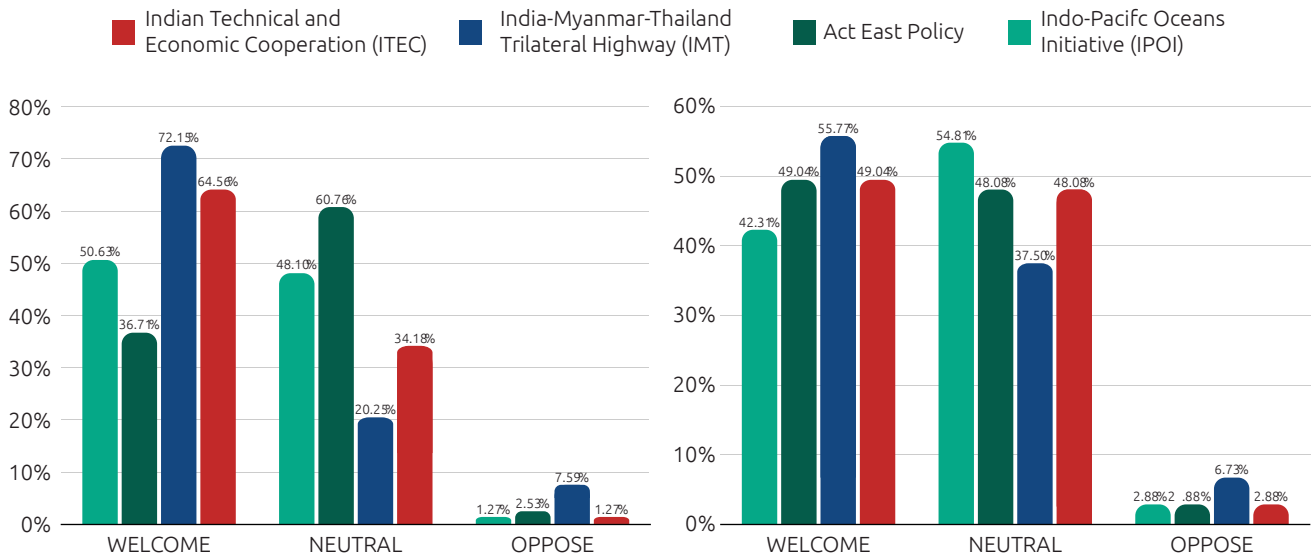


Concerning critical issues, India’s influence was perceived as less significant, especially in regards to the Myanmar Crisis, the Rohingya Issue, and the War in Ukraine. Overall, India’s role was not regarded as overwhelmingly positive, with low statistical percentages for positive perceptions, such as 11.79% for the Myanmar Crisis, 11.67% for the Rohingya Issue, and 12.66% for the War in Ukraine. Counterproductive perceptions were notably higher, ranging from 19% to 30%. However, a majority tend to adopt a neutral stance, with percentages ranging from 58% to 68%.



Specific finding: despite Government officials asserting that Environmental Cooperation was the least satisfying aspect of cooperation with India, Public Health was viewed as the most unsatisfactory overall by survey respondents.

Respondents from Myanmar expressed the need for improved immigration-border cooperation with India, acknowledging the long-land border and concerns over the treatment of Myanmar refugees by India. While some tensions and concerns existed, the general sentiment was more welcoming, particularly towards India’s initiatives, notably ITEC. The IMT project found greater acceptance in Myanmar than in Thailand. On the whole, Myanmar respondents welcomed India’s initiatives more favourably than Thailand.



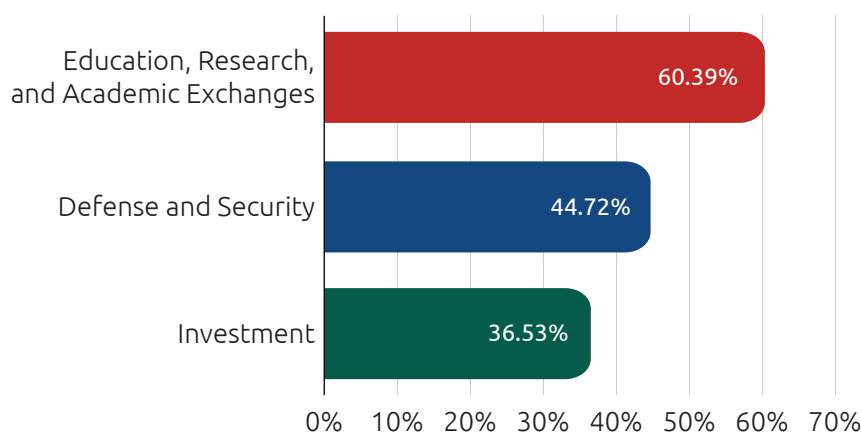
96. Myanmar - Response Initiatives led by India | Thailand - Response to Initiatives led by India

Across all affiliations, there appears to be a general indifference towards India’s role in the Myanmar crisis, the Rohingya Issue, and the War in Ukraine. Even Myanmar respondents lean towards a neutral stance regarding India’s involvement in their country and the Rohingya Crisis, possibly influenced by growing counterproductive opinions.

D. USA

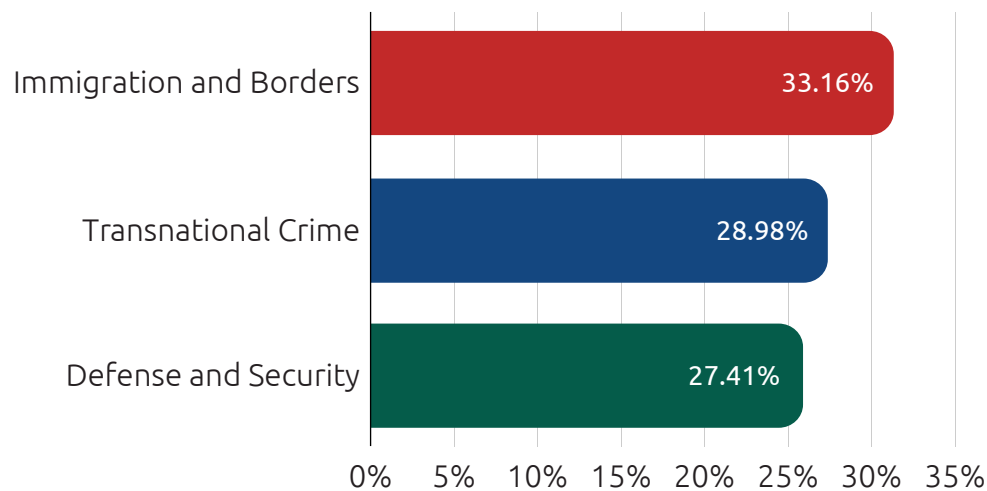
The survey underscores the USA’s influence over Southeast Asia across the political, security, economic, and sociocultural dimensions. Familiarity and acceptance of USA-led initiatives, particularly in the Philippines, revealed a focal point of satisfaction and trust in defense and security cooperation. However, while key sectors, such as Education and Defense, highlight the USA’s significant influence, a delicate balance of positive and negative opinions emerged on different ASEAN-related issues. The survey findings highlighted the intricacies of geopolitical dynamics, emphasizing the multifaceted nature of perceptions towards the USA in shaping regional alliances and strategic preference.

Perceptions of the USA within the ASEAN region exhibited significant values, ranging from remarkably high to exceptionally low, mirroring the diverse sentiments of respondents. Analogous to other nations, the USA holds significant prominence in key areas such as Education, Research, and Academic Exchanges at 60.39%, followed by Defense and Security at 44.72%, and Investment at 36.53% — a distinctive combination of sectors compared to the findings for the other three other nations.



97. General - Top three areas of ASEAN-USA cooperation that are least satisfactory

Conversely, the least satisfactory sectors include Immigration and Borders at 33.16%, an enduring issue, followed by Transnational Crime at 28.98%, and Defense and Security at 27.41%.



98. General - Top three areas of ASEAN-USA cooperation that are least satisfactory

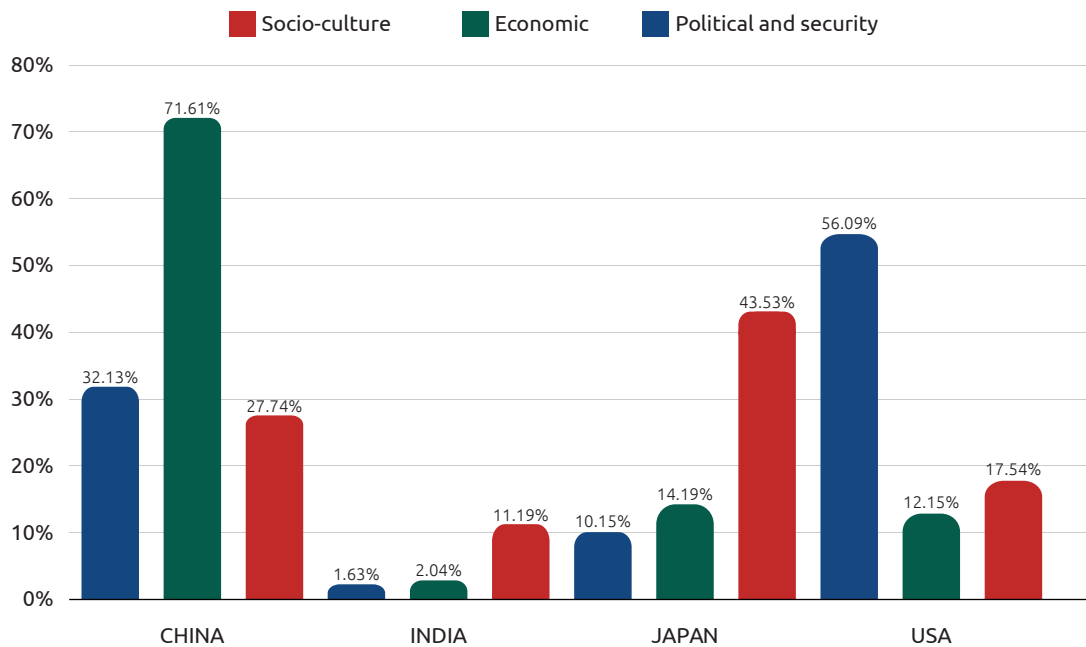
In evaluating the USA's presence, the results reflected a relative balance in respondents' positive and negative opinions on various ASEAN-related issues. Of the five categories queried, three show positive values regarding the USA's presence in the region. Respondents mostly agreed or somewhat agreed with aspects such as the USA's goodwill, respect for ASEAN centrality, respect for national unity, sovereignty, and territorial integrity, and consistent presence and engagement in the region. However, many respondents indicated disagreement with the statements that the USA is treating ASEAN as an equal partner and that the USA is proactively attempting to defuse geopolitical rivalry and tension in the region.

The USA was perceived as the least trustworthy partner by 33.80% of respondents, ranking below China. A similar perception could also be noted in the questions on "having the biggest hegemonic ambition" (31.24%), and "the most detrimental strategic ambition to the region" (27.29%), in which the respondents consistently placed the USA second after China. At the same time, 46.75% of respondents considered the USA the most likely partner country to politically interfere in ASEAN member countries' internal affairs.

	USA
The most trustworthy partner	11.44%
The least trustworthy partner	33.80%
The most dependable partner	21.54%
The most reluctant to cooperate	23.98%
The most respectable and credible partner	15.39%
The go-to partner for quality investment	18.06%
The most compliant with international law	26.67%
The most consistent supporter of ASEAN centrality	16.90%
The strongest projection of soft power in the region	20.62%
The most relevant partner for the future of ASEAN	14.81%
The most loyal partner in supporting ASEAN's initiatives and mechanisms	14.17%
The most aligned with ASEAN's principles in the ASEAN Charter, TAC, and SEANWFZ	15.33%
Partner with the biggest hegemonic ambitions	31.24%
The most detrimental strategic ambition to Southeast Asia	27.29%
The most reasonable major power for Southeast Asia	19.98%
The most likely partner to politically interfere in Southeast Asian countries' affairs	46.75%
The most worrying nationalism	22.59%
The most likely to use economic tools for political objectives in its relations with ASEAN member states	28.75%
The most likely to use coercive measures towards Southeast Asia countries in meeting their strategic interest	37.98%

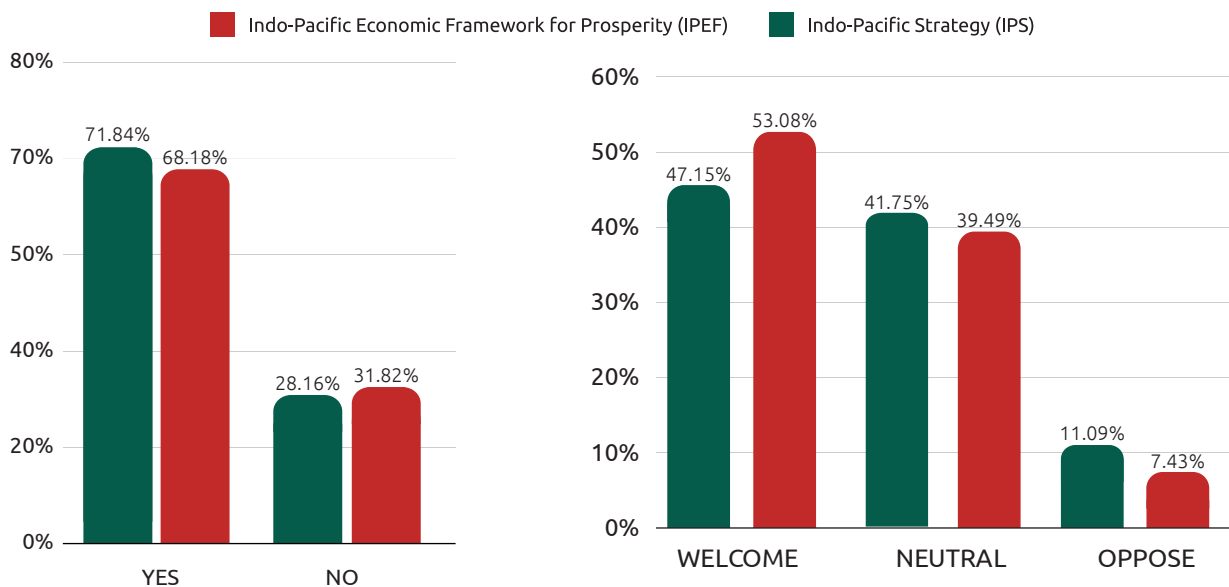
99. General - Statements that reflect countries' contribution - USA

Regarding the three main aspects, respondents believed that the USA holds strategic influence in the region. The USA scored the highest percentage in political and security matters at 56.09%, nearly 50% more than China at 32.13%. Economically, the USA recorded a percentage of 12.15%, lagging significantly behind China's 71.61%. Socio-culturally, the USA attained a percentage of 17.54%, ranking third, behind Japan (43.53%) and China (27.74%).



100. General - Countries influence to ASEAN

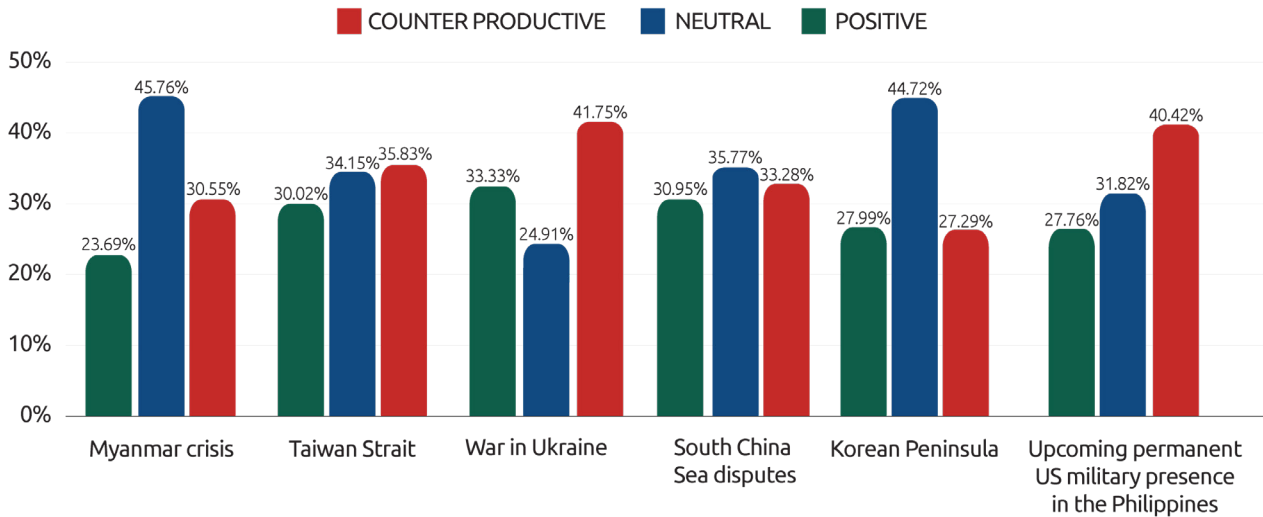
Concerning USA-led initiatives, respondents displayed a high level of familiarity with both of the identified initiatives — the Indo-Pacific Strategy (IPS) and the Indo-Pacific Economic Framework for Prosperity (IPEF). Remarkably, 71.84% of respondents have heard of IPS, with only 28.16% unaware of it. Similarly, IPEF registered only slightly lower percentages, with 68.18% having heard of it, and 31.82% being unaware. Respondents' level of acceptance of the two American initiatives was notably high, with (47.15%) welcoming IPS, and a mere 11.09% rejecting it, while 41.75% remained neutral. There was a slightly higher acceptance rate for IPEF at 53.08%) with total rejections amounting to only 7.43%, while 39.49% of respondents said they were neutral.



101. General - Awareness to Initiatives Led by the USA & General - Response to Initiatives Led by the USA

In strategic matters, the respondents generally perceived the USA's role as counterproductive. Notably, in the Myanmar Crisis, 30.55% saw the USA's role as counterproductive, while 23.69% viewed it positively. A similar pattern emerged in the Taiwan Strait issue, with 35.83% leaning towards counterproductive and 30.02% towards positive. As for the War in Ukraine, 41.75% said it was counterproductive, while 33.33% viewed it positively. Concerning the anticipated US military presence

in the Philippines, (40.42%) considered this to be counterproductive, while 27.76% viewed it positively. Yet, on the South China Sea Dispute and the Korean Peninsula, opinions vary with no clear distinctions.



102. General - the USA roles in various issues

Finally, the survey also revealed a positive percentage (64.37%) regarding the USA's consistent presence and engagement in the region, particularly with the Philippines, which supports the notion of enduring trust and satisfaction in the diplomatic and military ties between the two nations.



103. Philippines - the USA's Presence

IV. CONCLUSION: VIEWS ON COUNTRIES

The world is changing, and Southeast Asians know that their region and their countries will be affected by these changes. Geographically located at the crossroads of civilizations and trade for thousands of years, Southeast Asia is increasingly becoming one of the epicenters of global politics in the twenty-first century. The emerging importance of Southeast Asia has encouraged many external powers to further expand their presence in the region.

This year's FPCI-ERIA ASEAN Peoples' Perceptions Survey attempts to capture the perceptions and attitudes of the people of ASEAN countries towards four of the most important ASEAN partners: China, India, Japan, and the USA. The survey findings reveal that a simple Great Power politics lens is inadequate to understand ASEAN peoples' perspectives of these important, but often competing, countries. They see each of the countries in a more nuanced manner, carefully assessing the relationships and their complexities.

For example, rather than clearly siding with the USA or with China, most respondents view both countries as important partners giving rise to different concerns. For example, while China raised many concerns among the respondents by topping the lists of which countries are the "most reluctant to cooperate", "biggest hegemonic ambitions," "most detrimental strategic ambition to Southeast Asia," "most likely to use economic tools for political objectives in its relations with ASEAN member states," "most likely to use coercive measures towards Southeast Asia countries in meeting their strategic interest," it is also acknowledged as the "most relevant partner for the future." The respondents are also quite familiar with and welcoming of China's economic initiatives, while at the same time recognizing the USA's influence across the political, security, economic, and sociocultural realms in the region. While key sectors such as Education and Defense highlight the USA's significant influence, a delicate balance of positive and negative opinions nevertheless emerges on diverse ASEAN-related issues.

Japan, on the other hand, is generally perceived as the most favorable partner for ASEAN. It tops the list as to which country is the "most trustworthy", "most dependable", "most respectable and credible partner", "most compliant with international law", "most consistent supporter of ASEAN centrality", "most loyal partner in supporting ASEAN's initiatives and mechanisms", and "most aligned with ASEAN's principles." However, this is not something that can be taken for granted, as indicated by the finding that its rival, China, is playing an increasingly dominant role in economic cooperation with ASEAN countries.

India, on the other hand, showcases potential across various sectors of cooperation, with notable satisfaction rates especially in Education, Research, and Academic Exchanges. However, its presence in the region is still relatively limited.



Download this Survey Report and Data Table at

www.aseanperceptionsurvey.com


From 2020 to 2022, FPCI published the “ASEAN-China Survey,” a comprehensive study designed to capture the perceptions of Southeast Asians toward China. Each year, the survey collected responses from over 1000 participants across ASEAN countries.

Download ASEAN-China Survey at: www.aseanchinasurvey.com



Survey of ASEAN Peoples' Perceptions on China, India, Japan, and the USA

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