



ISP CHINA STUDIES PROGRAM

April 2024

Myanmar's Key Stakeholders and Their Perceptions of

SINO-MYANMAR RELATIONS

A SURVEY 2023

Key Findings



Design: MawngDaw

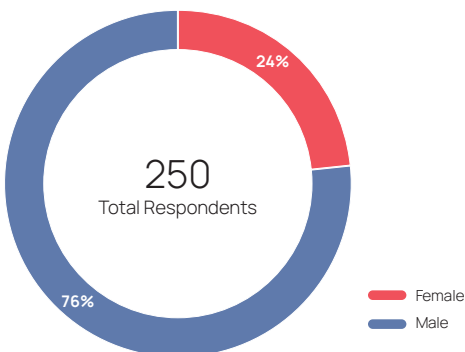
About the Survey

Since 2022, ISP-Myanmar has been conducting an annual survey titled **“Myanmar’s Key Stakeholders and Their Perceptions of Sino-Myanmar Relations”**. The objective is to gather specific insights from key individuals within Myanmar’s policy communities to identify similarities and differences in their perceptions of the key factors influencing Sino-Myanmar relations.

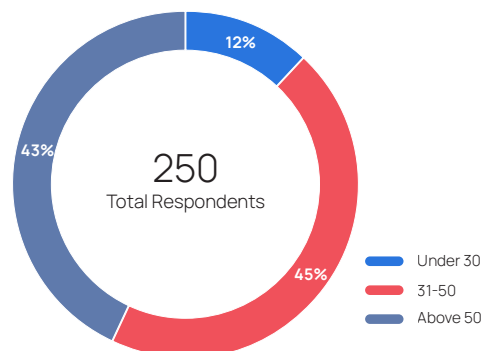
Population and Percentage of Stakeholders Surveyed from Six Key Communities

| Community | Population | Percentage |
|-----------------------------|------------|------------|
| Political Society | 21 | 8.4% |
| Civil Society Organizations | 101 | 40.4% |
| Business Community | 41 | 16.4% |
| Prominent Individuals | 61 | 24.4% |
| EAOs | 15 | 6% |
| PDFs/LDFs | 11 | 4.4% |
| Total | 250 | 100% |

Female Respondents



Respondents' Age Range



This marks the survey's second iteration, in which **250 individuals from six different key stakeholder groups within Myanmar's policy communities were presented with 100 questions**. The survey was conducted from October to November 2023.

The survey respondents encompass six key stakeholder groups: (1) Political Society, (2) Civil Society Organizations (CSOs), (3) Business Community, (4) Prominent Individuals, including scholars and activists, well versed in China's political, economic, and international affairs, (5) Ethnic Armed Organizations (EAOs), and (6) the emerging People's Defense Forces/ Local Defense Forces (PDFs/ LDFs) operating in areas where China's investments are located. During the survey period, the three Brotherhood Alliance (3BHA) and its allied forces launched Operation 1027 in northern Shan State. In response, additional survey questions were incorporated, and further discussions were held with 20 key stakeholders from different communities to explore the implications of the operation for China-related issues.

The survey encompasses inquiries into various aspects of the post-coup

scenario in Myanmar, including the ongoing political crisis, China's involvement in the peace process, and the economic dynamics between China and Myanmar. Additionally, it delves into general perspectives on other China-related issues as well as questions aimed at perceptions regarding China's Belt and Road Initiative (BRI), the Regional Comprehensive Economic Partnership (RCEP) and other China-led regional integration plans, China's soft power initiatives, and the use of China's digital and telecommunication technologies and trust on them. Although the initial target was **300 key stakeholder respondents**, the survey was completed with responses from **250 individuals**. This marks an increase of **35 respondents** compared to that of last year. Additionally, there has been an increase in female participation, with **59 individuals (24 percent of the 250 respondents)** being female, compared to **49 individuals (22.8 percent of 215 respondents)** last year. ISP-Myanmar is grateful to the People's Alliance for Credible Election (PACE) for their excellent technical support and cooperation throughout the survey process. **The full survey will soon be published on the ISP-Myanmar website.** ■

The "Key Findings" of the survey (English version) is published on April 9, 2024 as a translation of the original Burmese version published on April 2, 2024.

Survey Brief

The survey indicates that there is no significant gap between individuals who perceived China to be a good neighbor and those who disagreed with this perception. However, there appears to be concerns about China's economic influence and its status as Myanmar's largest economic partner. Additionally, there was significant agreement on the growing dependency on China regarding trade, investments, peace process, politics and diplomacy as well as technology and security sectors following the 2021 coup. Regarding China's approach to Myanmar, most respondents shared the view that China's approach is pragmatic, focusing on fostering good relations with whoever is in power in Myanmar. The majority of respondents also perceived that China intervenes in Myanmar's domestic affairs.

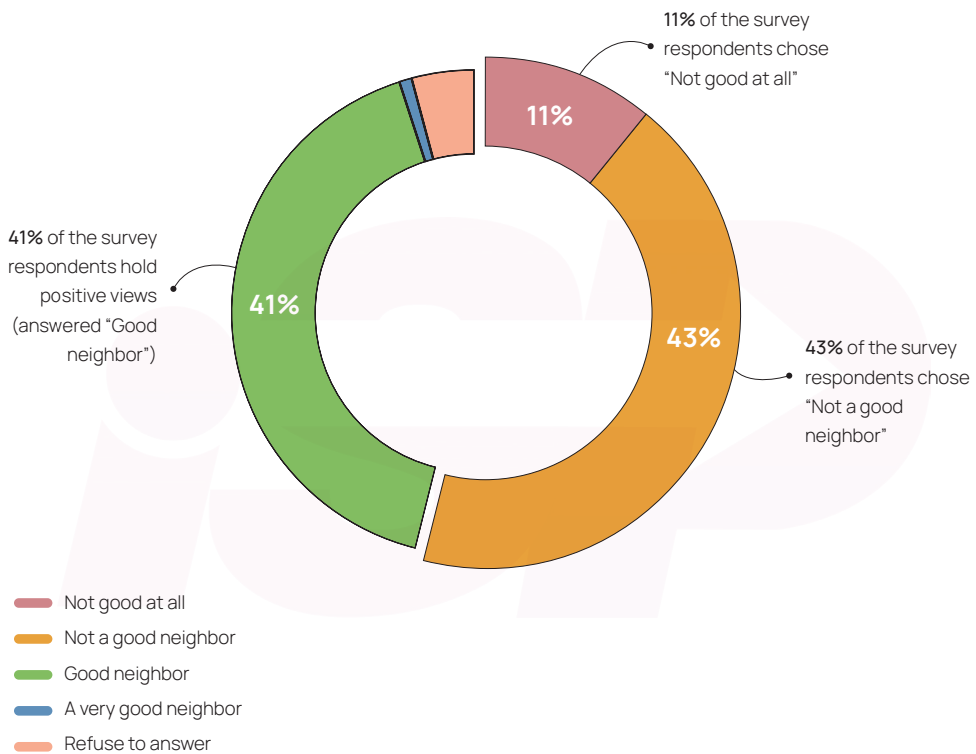
An intriguing finding within Myanmar's policy community was that many respondents were unaware of China's major regional cooperative projects. It is also noteworthy that a significant

portion of respondents expressed disagreement with the ongoing implementations of the China-Myanmar Economic Corridor (CMEC) projects. Furthermore, respondents perceived that China-Myanmar economic relations would undergo development after three years, starting in 2026.

The majority of respondents continue to hold strong views that China's governance, economic development, and concept of democracy with China's characteristics are not ideal for Myanmar, despite China's efforts to build relations in various sectors of Myanmar through soft power. Specifically, most leaders of ethnic armed organizations (EAOs) do not consider China's governance an ideal model. However, there is still a perception among respondents that China holds influence over EAOs in Northern Shan State. Many respondents also indicated that their perceptions remain unchanged despite the ongoing Operation 1027. ■

Key Finding-1

■ Divided Sentiments on China as a Good Neighbor

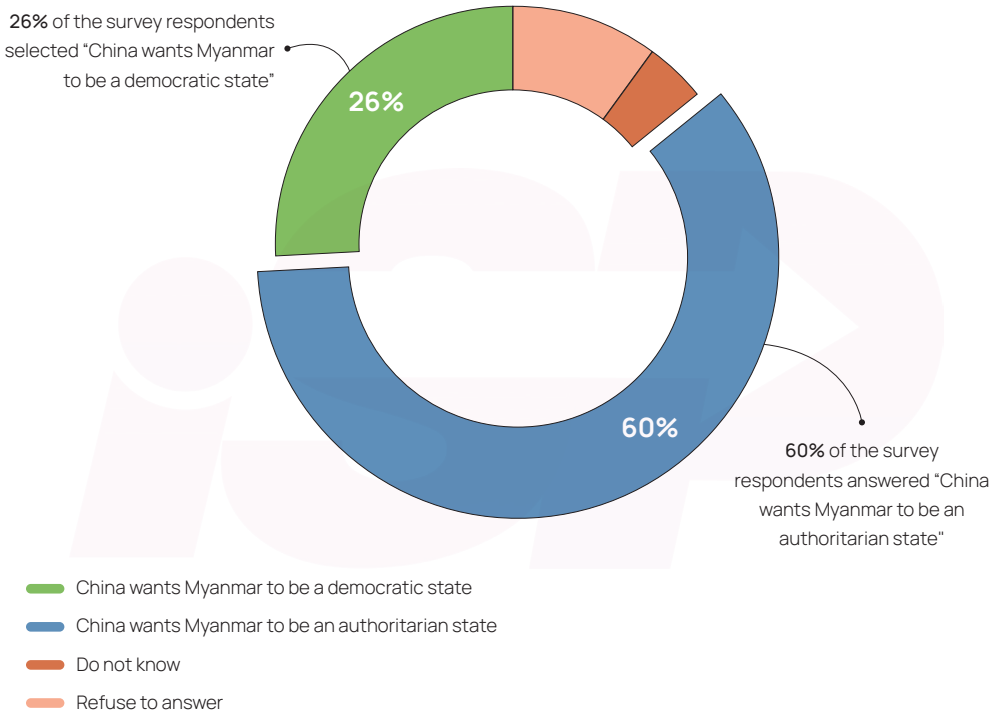


54%

The majority (**54 percent**) of the survey respondents disagreed with the view of China as a good neighbor, while a significant proportion (**42 percent**) viewed China as a good neighbor. In the previous survey, **55 percent** of respondents disagreed with the view of China as a good neighbor, while **40 percent** had a positive view.

Key Finding-2

■ China Is Perceived as Wanting Myanmar to Be an Authoritarian State



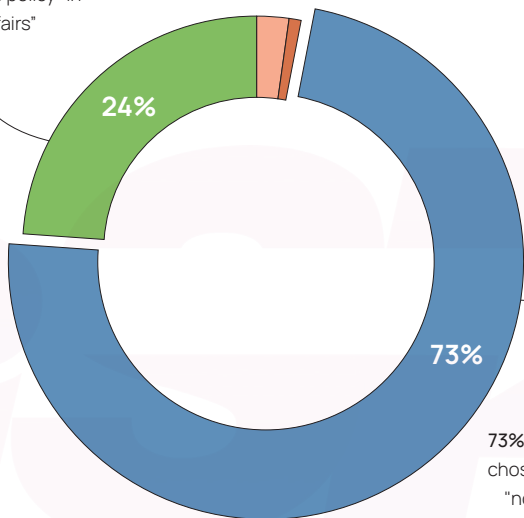
60%

The majority of survey respondents (**60 percent**) believe that China desires Myanmar to be an authoritarian state, while another proportion (**26 percent**) perceive that China prefers Myanmar to be a democratic state. This marks a **five percent** increase from the previous survey, wherein **55 percent** of respondents held the view that China desires for Myanmar to be an authoritarian state.

Key Finding-3

■ China Is Perceived as Interfering in Myanmar's Domestic Affairs

24% of the survey respondents answered "China practices a "non-interference policy" in domestic affairs"



73% of the survey respondents chose "China does not practice "non-interference policy" in domestic affairs"

- China practices a "non-interference policy" in domestic affairs
- China does not practice "non-interference policy" in domestic affairs
- Do not know
- Refuse to answer

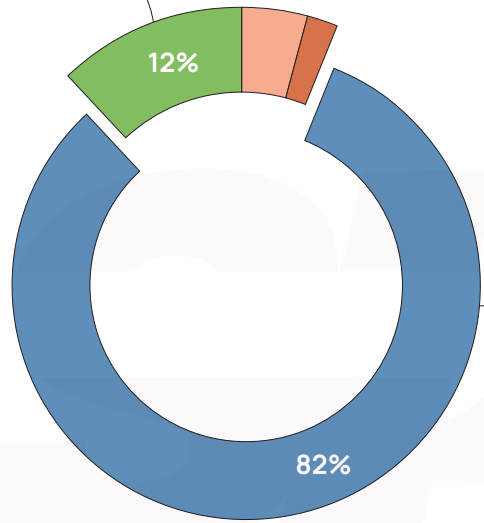
73%

The majority of survey respondents (**73 percent**) do not believe that China adheres to a "non-interference policy" in domestic affairs of Myanmar, while **24 percent** perceive that China does adhere to such a policy. This marks a six percent increase from the previous survey, where **67 percent** of respondents believed that China interferes in domestic affairs.

Key Finding-4

■ Majority Believe China Prefers to Deal with Whomever Is in Power

12% of the survey respondents answered "China values Myanmar public opinion as a priority"



82% of the survey respondents selected "China only prefers to deal with whomever is in power"

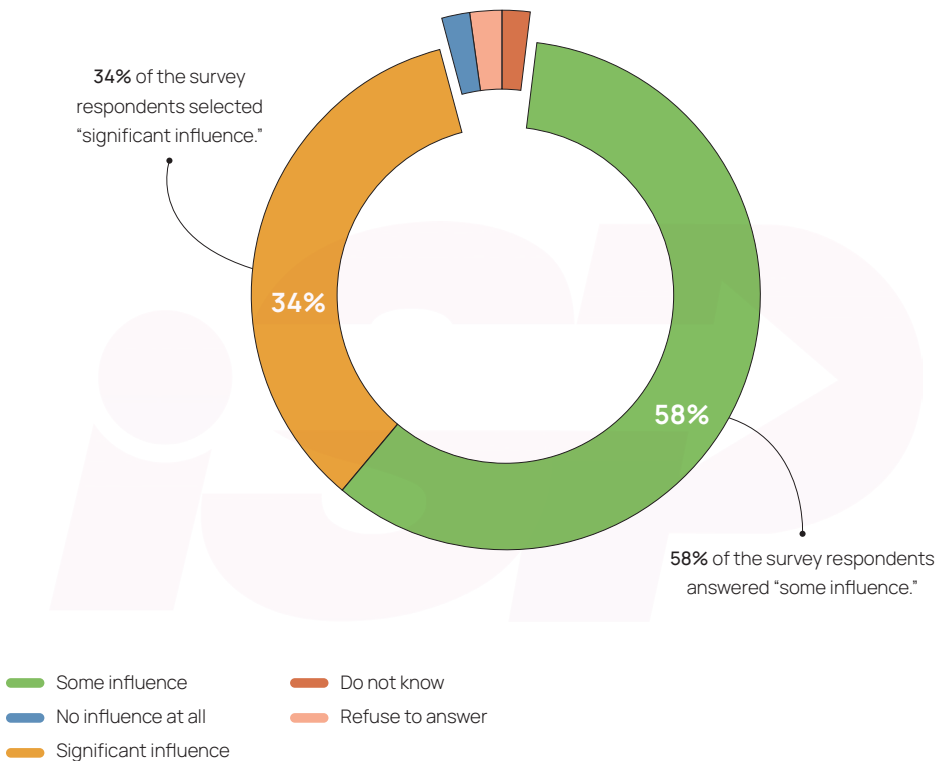
- China values Myanmar public opinion as a priority
- China only prefers to deal with whomever is in power
- Do not know
- Refuse to answer

82%

The majority of respondents (**82 percent**) believe that China only prefers to deal with whomever is in power. This marks a **three percent** increase from the previous survey, where **79 percent** of respondents held the same view.

Key Finding-5

China Is Perceived as Having an Influence Among Northern Shan State EAOs

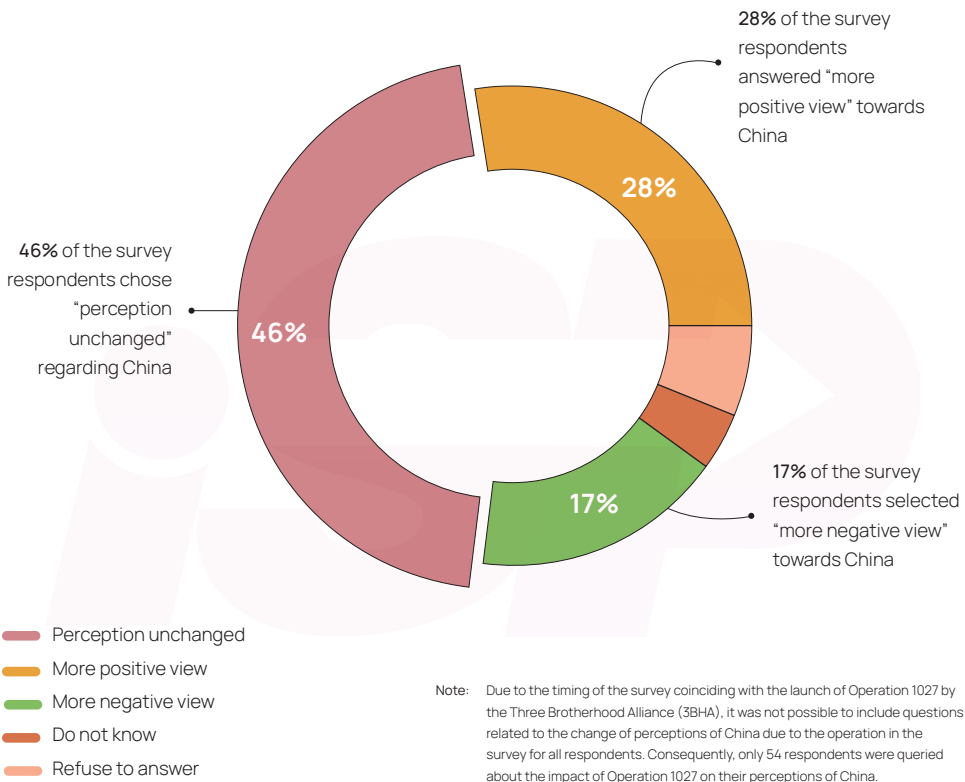


92%

Regarding the influence China holds among Northern Shan State EAOs, **92 percent** of the respondents viewed that there is an influence to some extent while only **two percent** answered that there is no influence at all. This suggests that there have been no significant changes in respondents' perceptions regarding China's influence. In the previous survey, **60 percent** of respondents believed that China had some influence, while **35 percent** believed that China had a significant influence.

Key Finding-6

■ Operation 1027 Did Not Change View on China

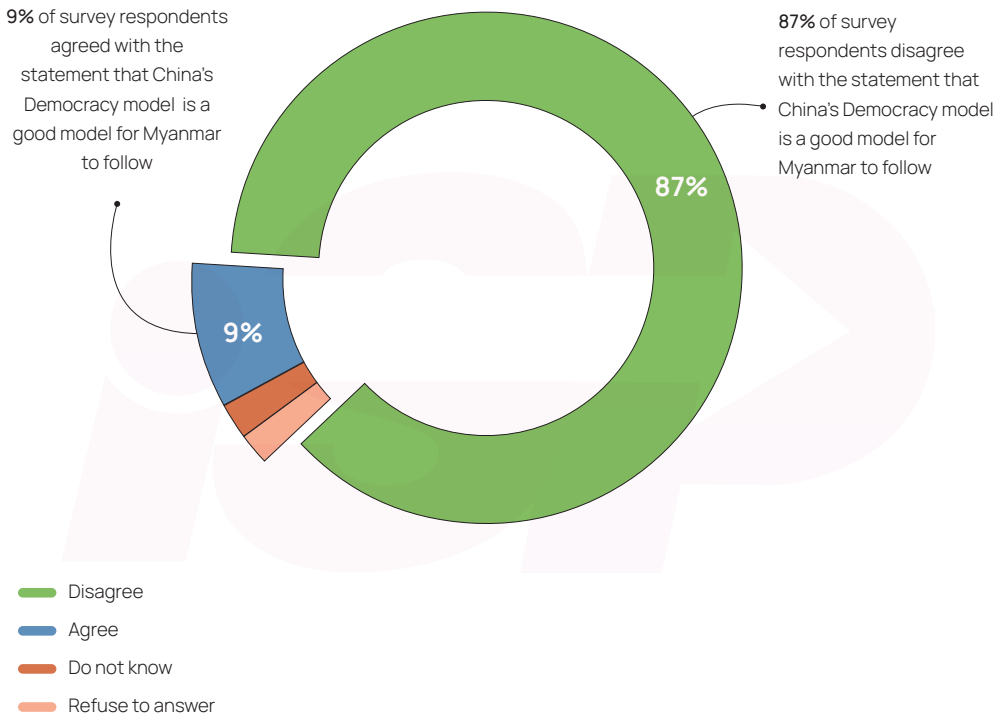


46%

Despite the launch of Operation 1027 by the three Brotherhood Alliance (3BHA) in northern Shan State, **46 percent** of the respondents stated that their perspective on China remained unchanged. **28 percent** indicated that their view had become more positive, while **17 percent** reported that their view had become more negative. **Six percent** of respondents refuse to answer this question.

Key Finding-7

■ China's Democracy Model Unfit for Myanmar

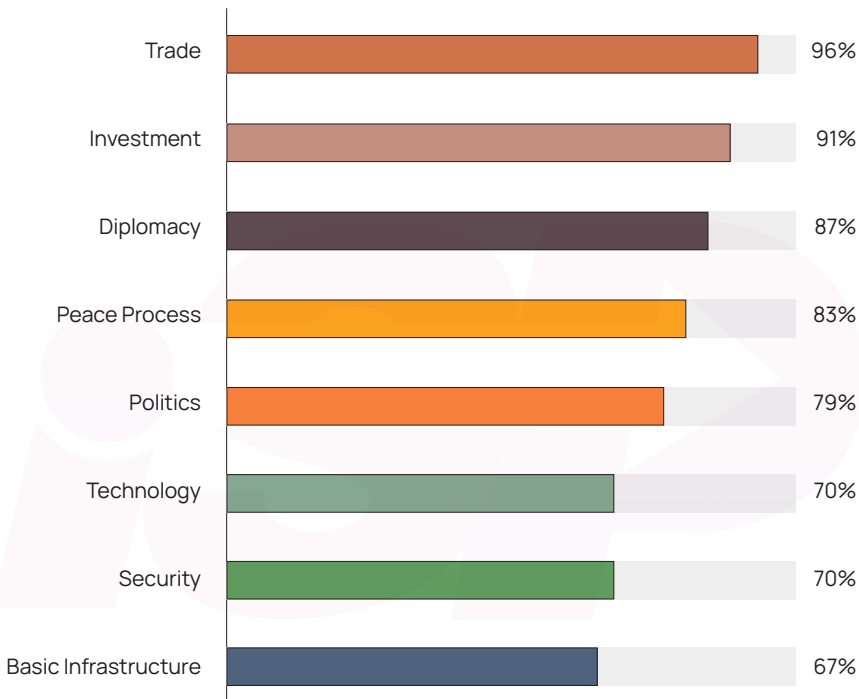


87%

When asked about whether democracy with China's characteristics is an ideal model, **87 percent** of respondents disagreed, while **nine percent** agreed. There were no significant changes compared to the previous survey, with only a **one percent** increase in respondents agreeing that democracy with China's characteristics is an ideal model.

Key Finding-8

■ Myanmar Dependent on China in All Sectors



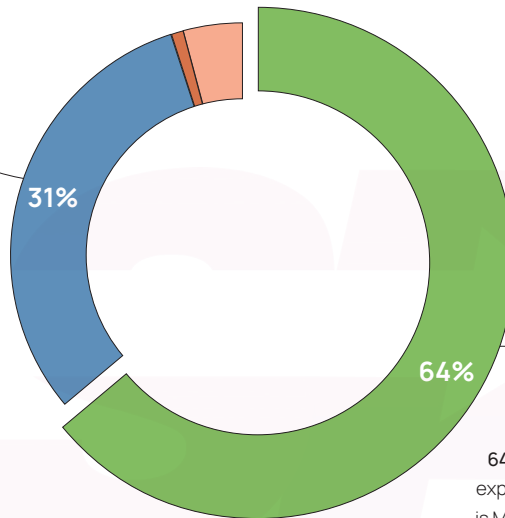
96%

Among the respondents, **96 percent** indicated that Myanmar is dependent on China in terms of trade. Additionally, **91 percent** responded that the dependency extends to investment, while **87 percent** viewed it as concerning diplomacy. In comparison to the last year survey, there have been some changes: trade remains the primary area of dependency, similar to the previous year, while diplomacy became the second-most cited area of dependency, with the peace process dropping to third place.

Key Finding-9

■ China's Status as Myanmar's Largest Economic Partner Concerning

31% of survey respondents welcomed China as Myanmar's largest economic partner (answered "welcome")



64% of survey respondents expressed concern that China is Myanmar's largest economic partner (answered "concerned")

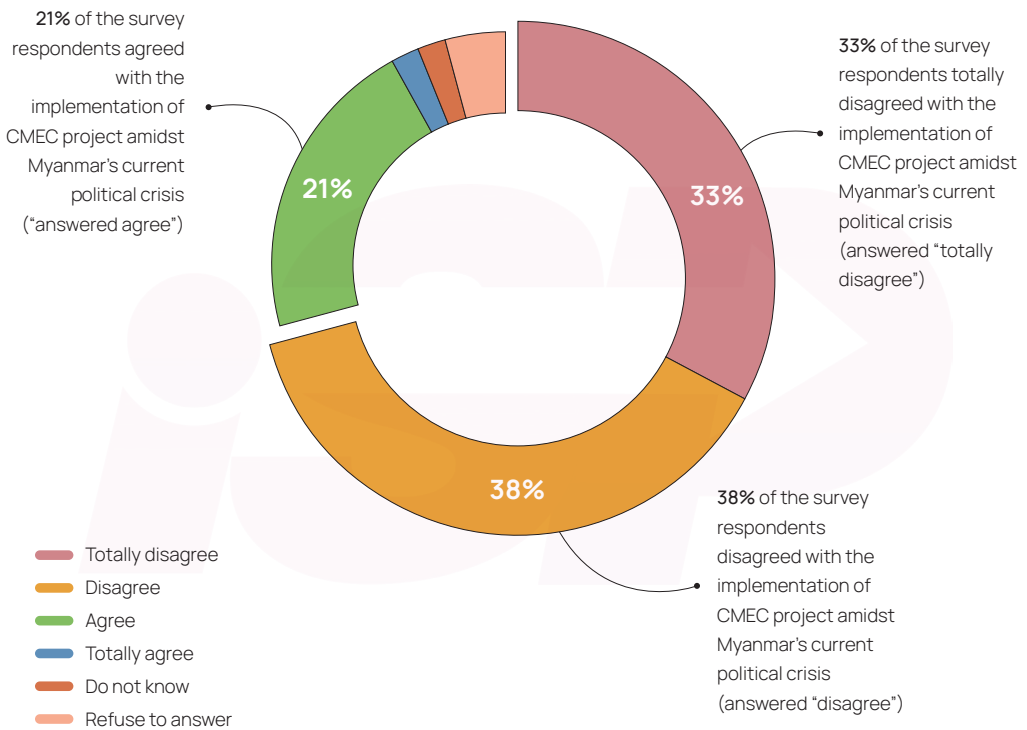
- Concerned
- Welcome
- Do not know
- Refuse to answer

64%

While **31 percent** of respondents welcomed China as Myanmar's largest economic partner, **64 percent** perceived this development as concerning. Compared to the previous year, when **58 percent** found it concerning, there has been a **six percent** increase. Additionally, there has been a **five percent** increase in respondents who find it welcoming, with **26 percent** of respondents holding this view last year.

Key Finding-10

■ Many Disliked the Implementation of CMEC Project Amidst the Current Crisis

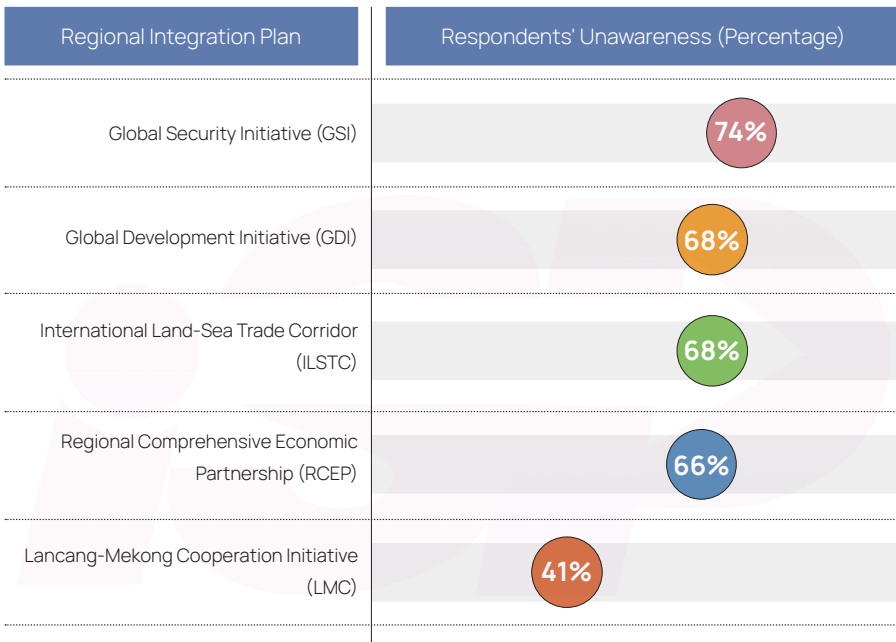


71%

The majority of respondents expressed disagreement with the implementation of the China-Myanmar Economic Corridor (CMEC) amidst Myanmar's current political crisis, with **71 percent** disagreeing compared to **23 percent** who agreed. The significant level of disagreement warrants further research or study.

Key Finding-11

■ Many Are Unaware of China's Regional Integration Plan



74%

Many respondents are unaware of China's regional integration plan within Myanmar. **Seventy-four percent** of the respondents were unaware of GSI while **over 65 percent** were unaware of ILSTC and RCEP. It is an interesting matter that general awareness about these plans is low even among the policy community, despite China's effort to increase awareness toward these initiatives through media and social media.

The full version of "Myanmar's Key Stakeholders and Their Perceptions of Sino-Myanmar Relations – A Survey (2023)" will soon be published on the ISP-Myanmar website.

ISP Series

