



ISP CHINA STUDIES PROGRAM

April, 2024

Myanmar's Key Stakeholders and their Perceptions of

# SINO-MYANMAR RELATIONS A SURVEY





2023





The original Burmese version of Myanmar's Key Stakeholders and their Perceptions of Sino-Myanmar Relations - A Survey (2023) was published in April 2024, and its English translation was published in June 2024.

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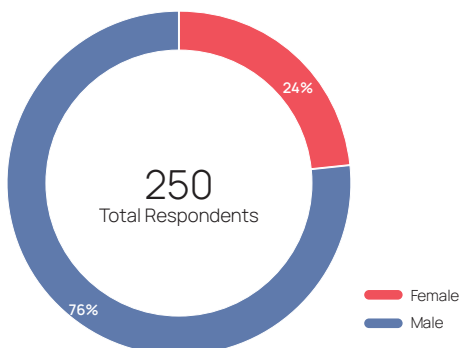
## About the Survey

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.

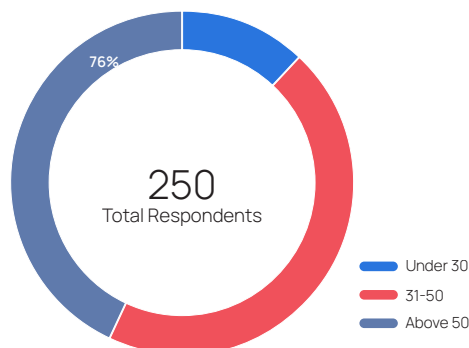
### Population and Percentage of Stakeholders Surveyed from Six Key Communities

Community	Population	Percentage
Political Society	21	8.4%
Business Community	101	40.4%
Prominent Individuals	41	16.4%
EAOs	61	24.4%
PDFs/LDFs	15	6%
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. ■**

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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.

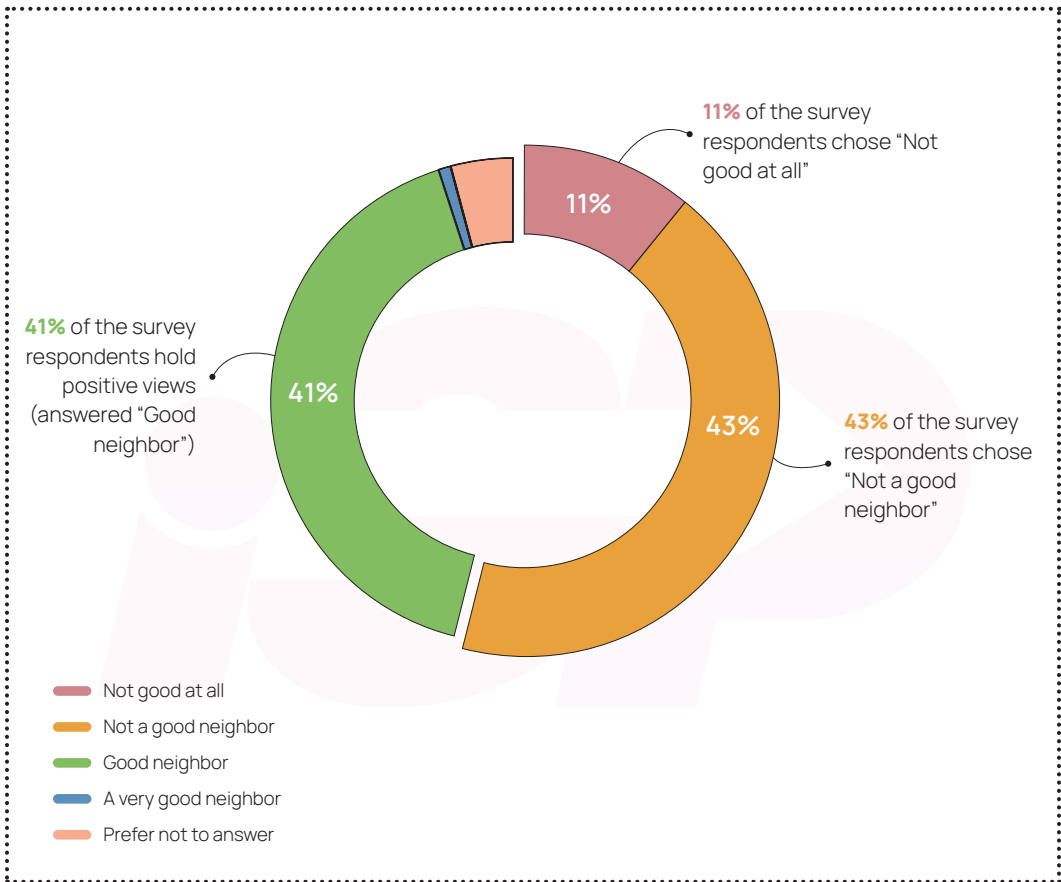
The majority of respondents continue to hold strong views that China's governance, economic development, and concept of democracy with China's characteristics are not ideal for Myanmar, despite China's efforts to build relations in various sectors of Myanmar through soft power. Specifically, most leaders 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 Findings

Key Finding-1

Divided sentiments on China as a good neighbor



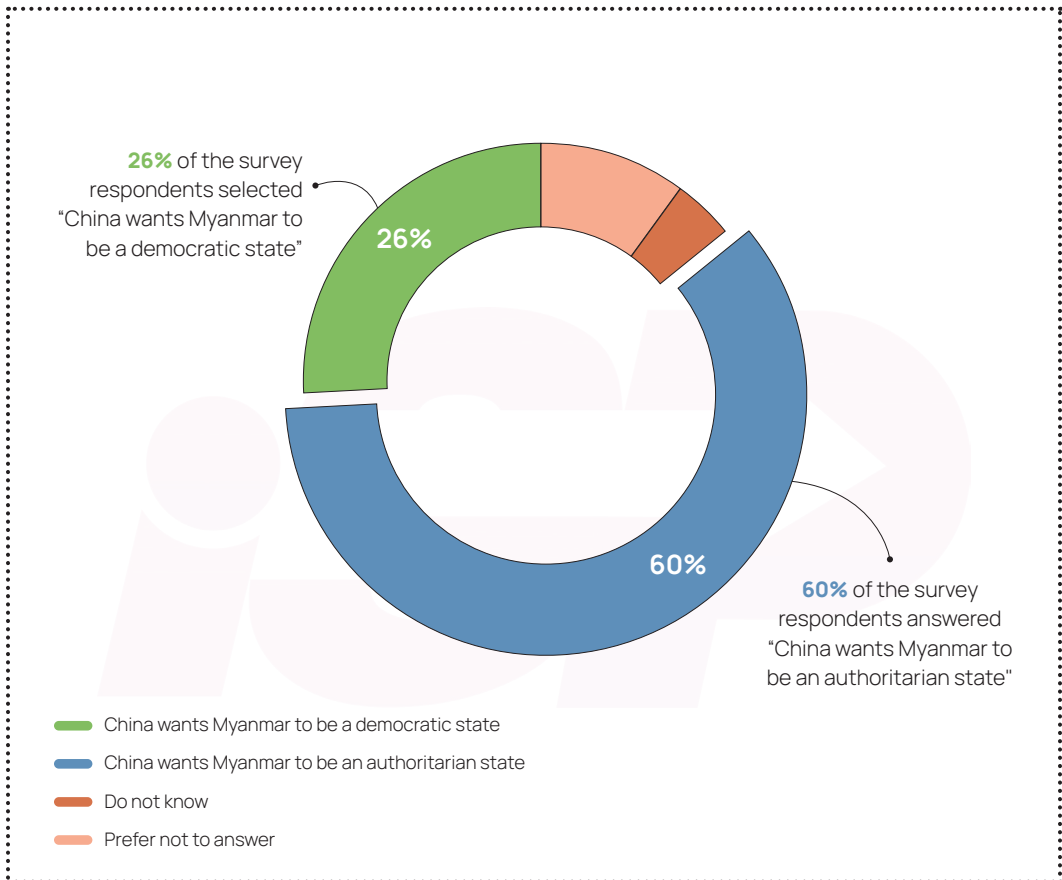
54%

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

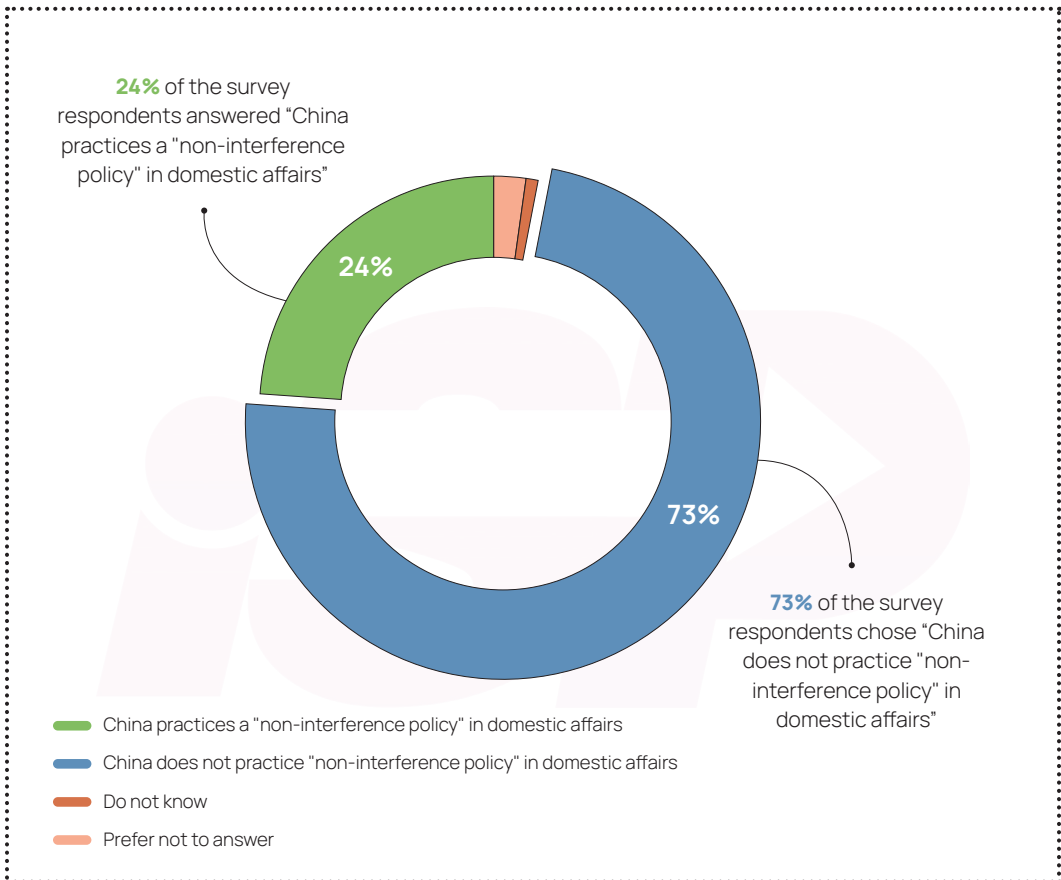


60%

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

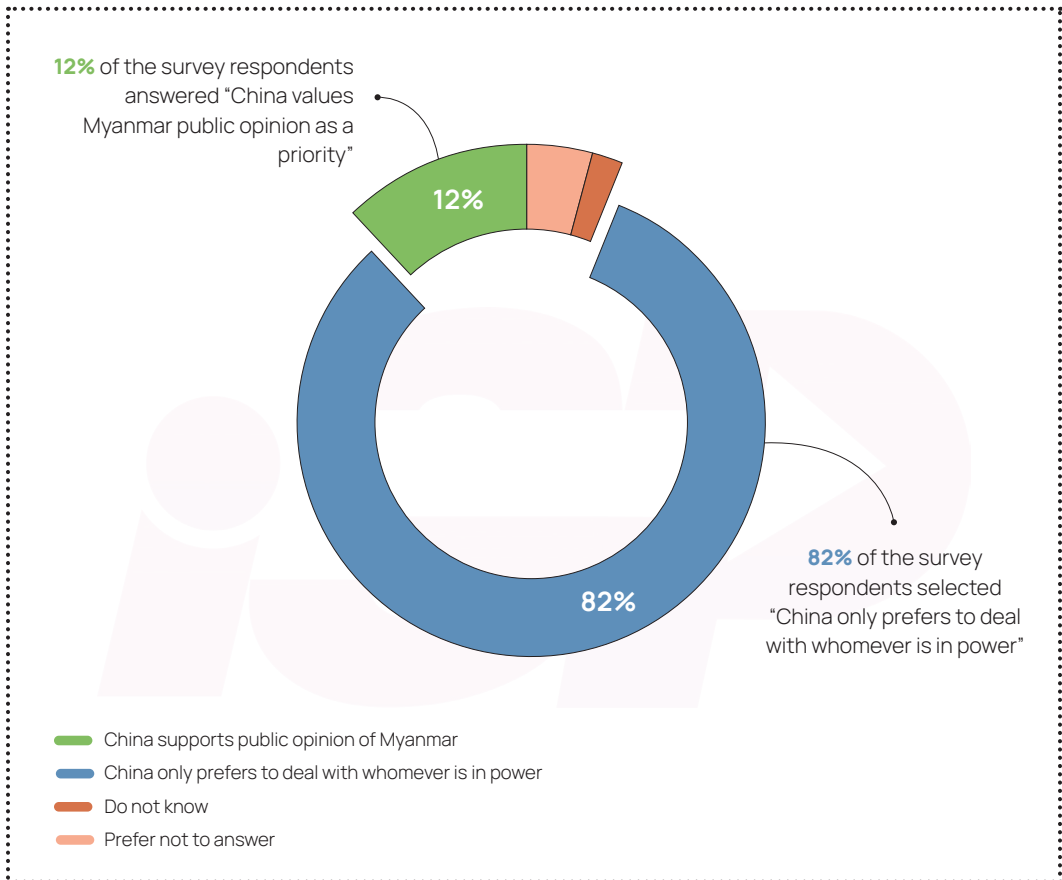


73%

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

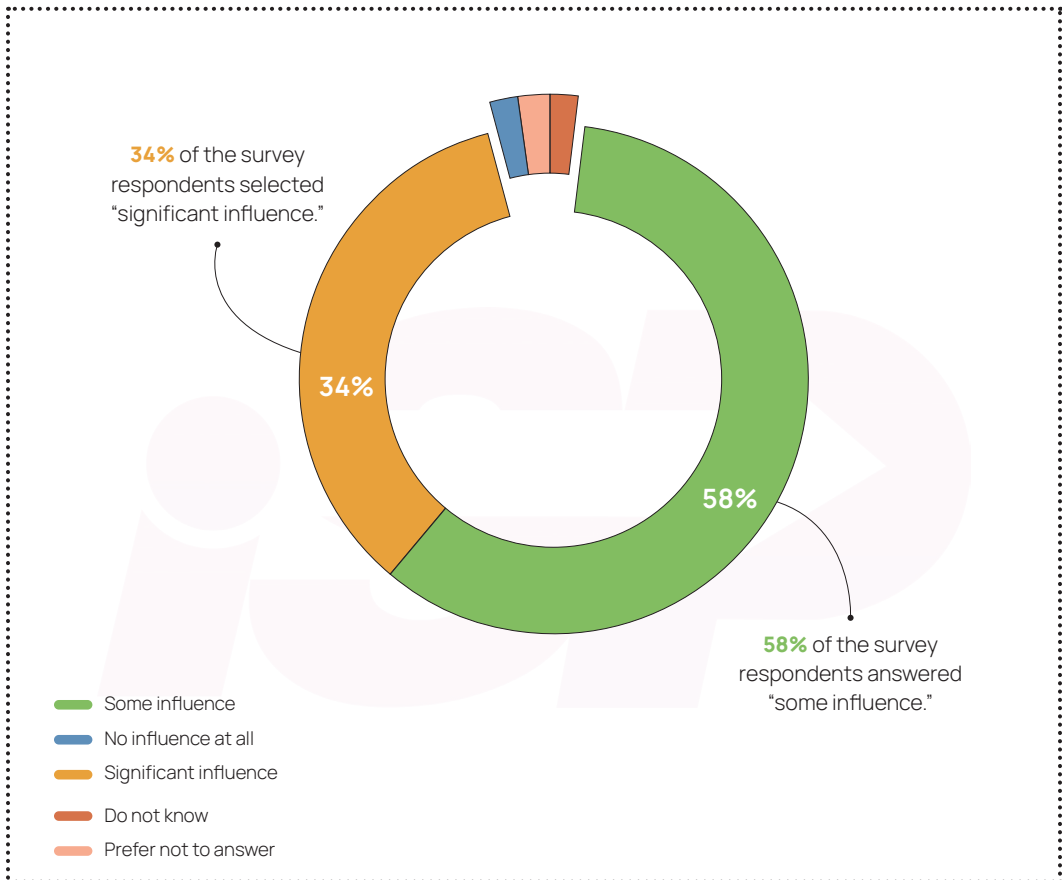


82%

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

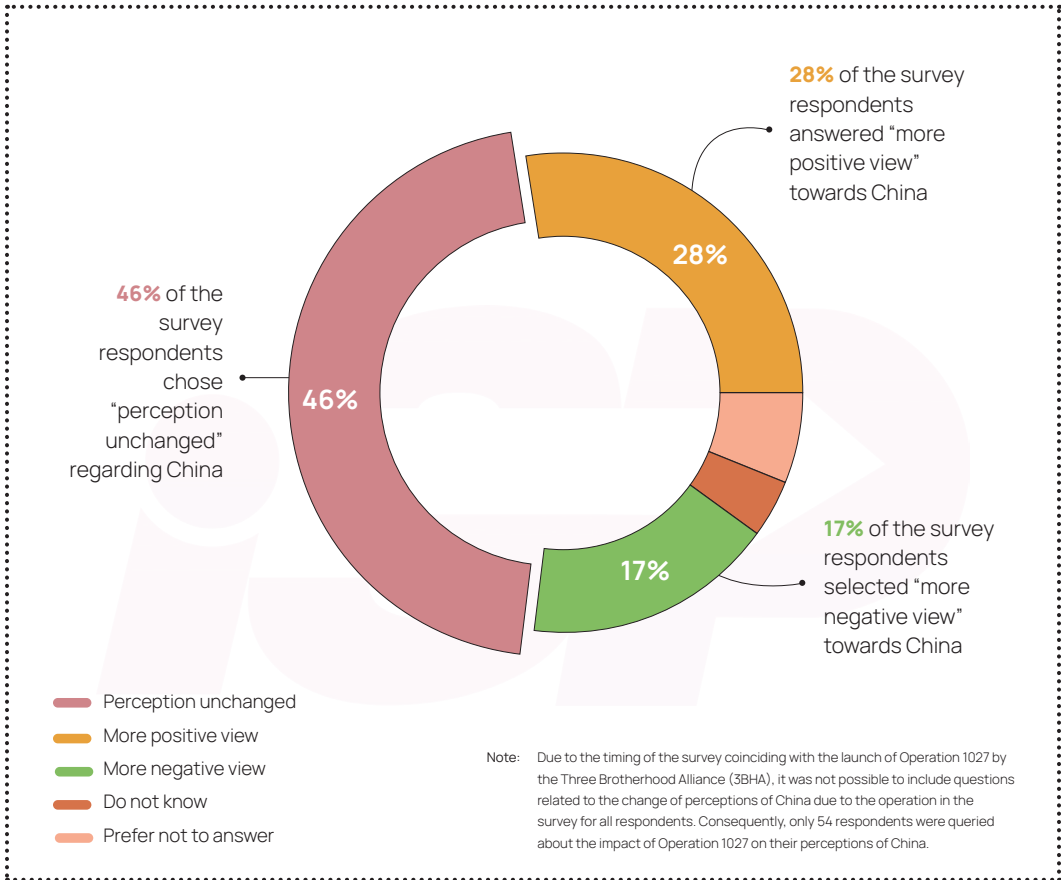


92%

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

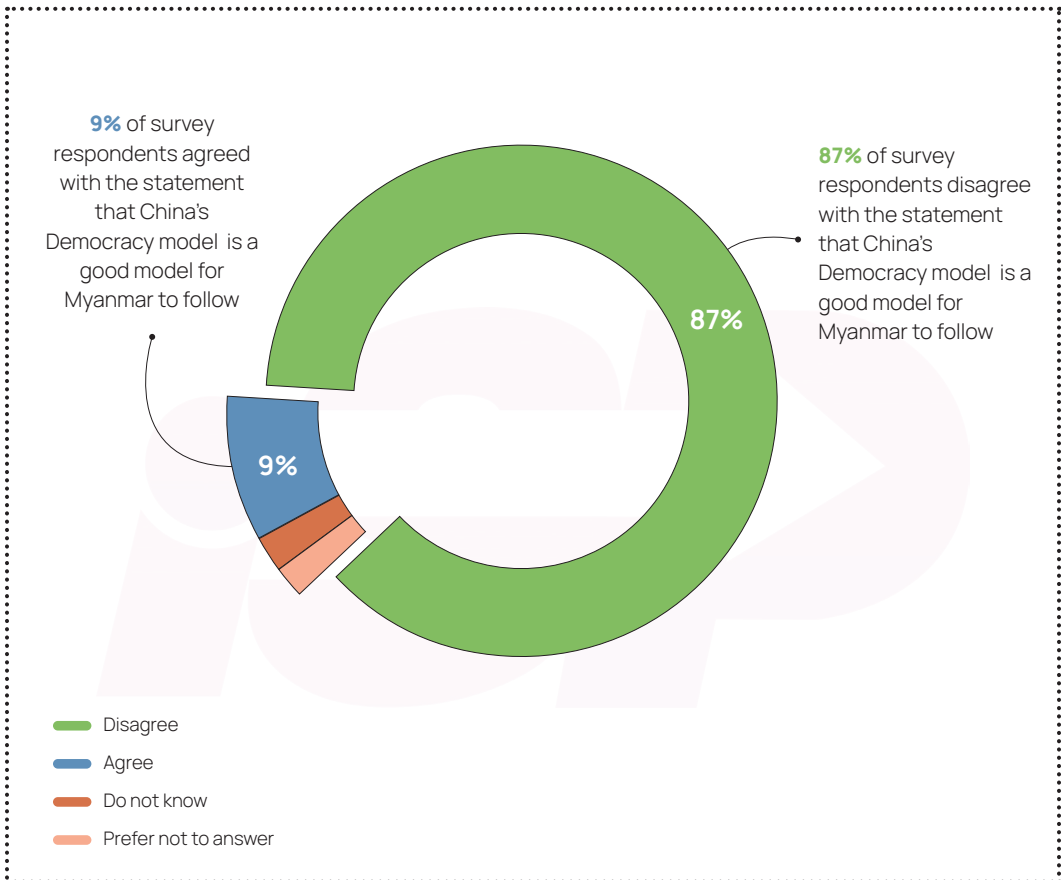


46%

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

## Democracy with Chinese characteristics unfit for Myanmar

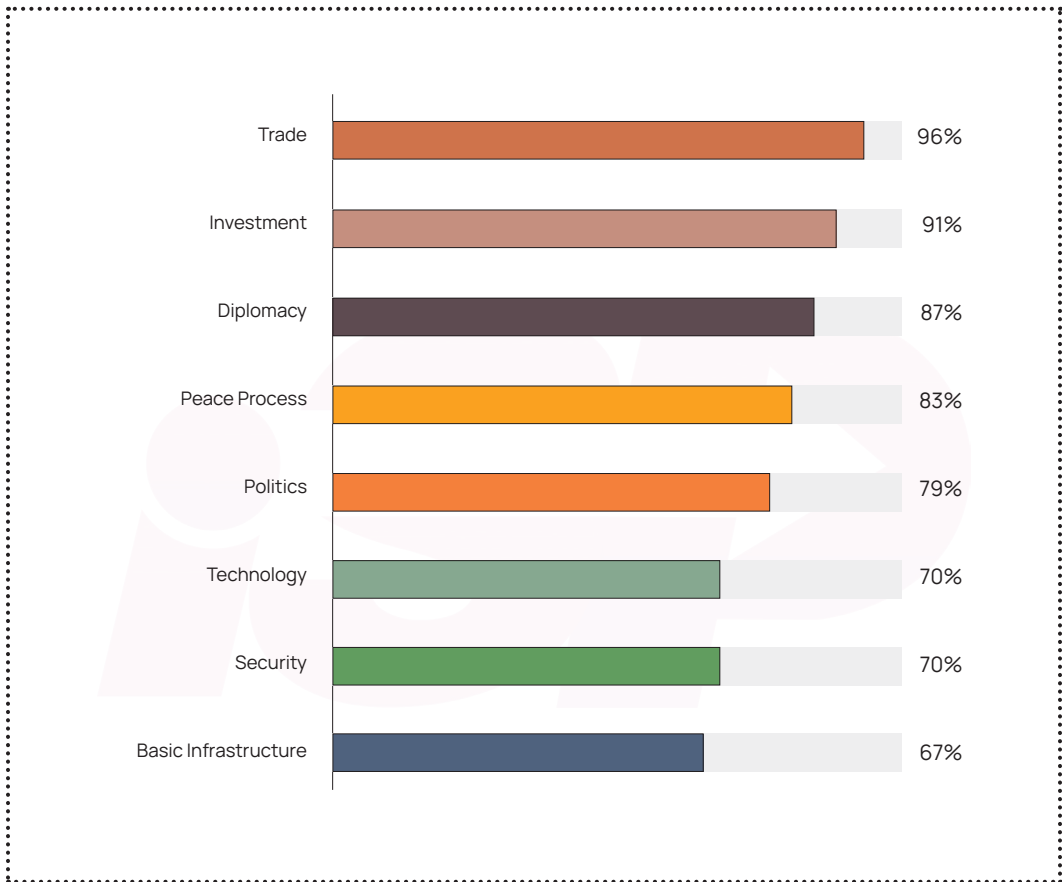


87%

When asked about whether democracy with Chinese 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 Chinese characteristics is an ideal model.

Key Finding-8

Myanmar is perceived as dependent on China in all sectors

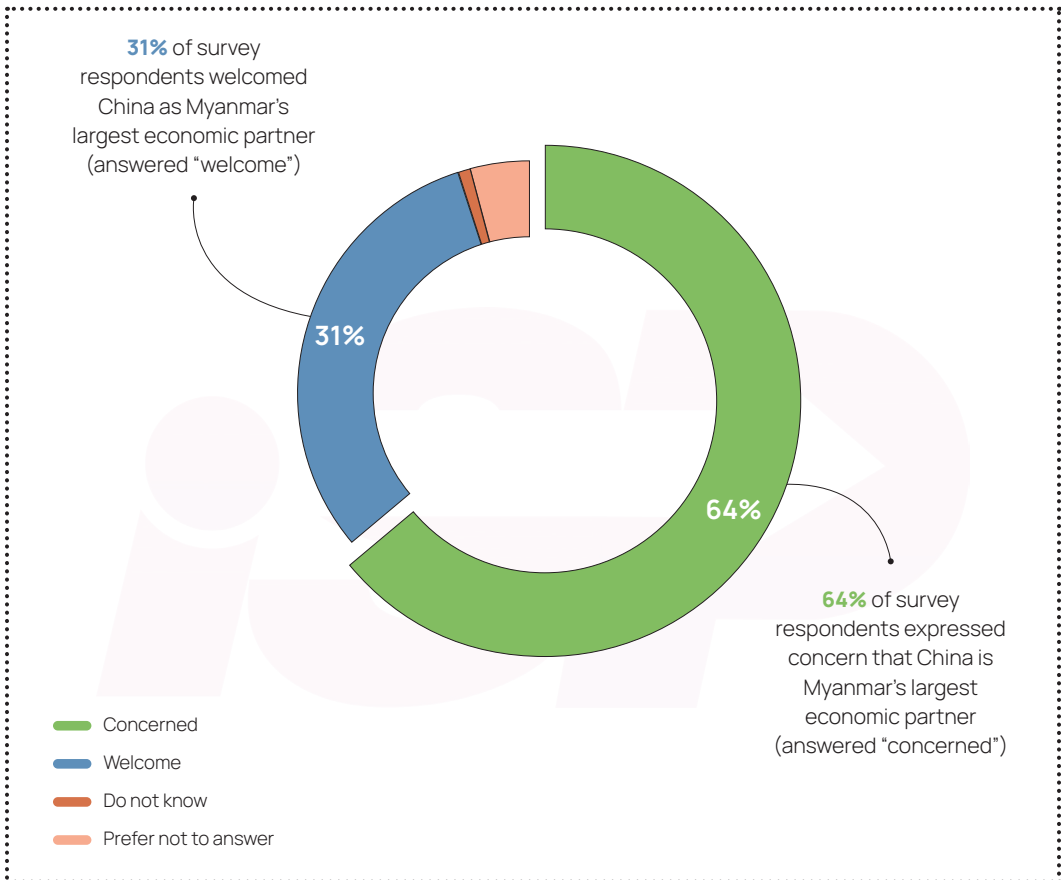


96%

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



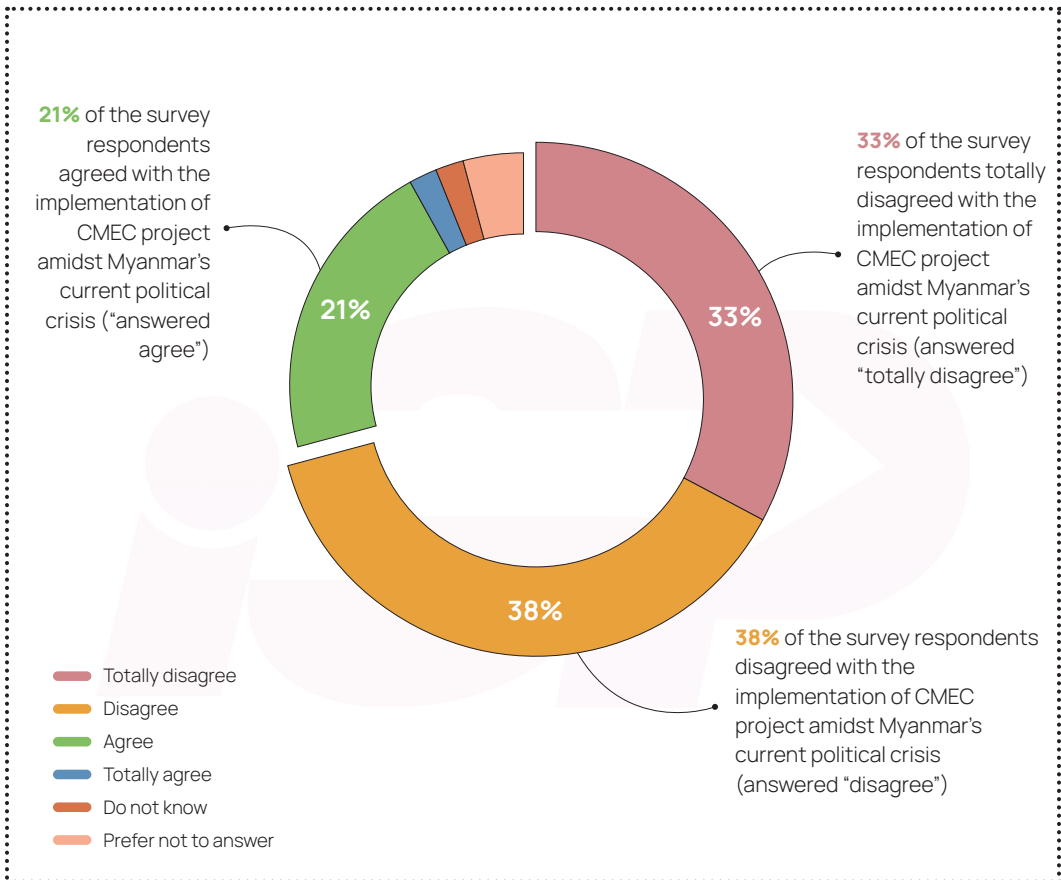
64%

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

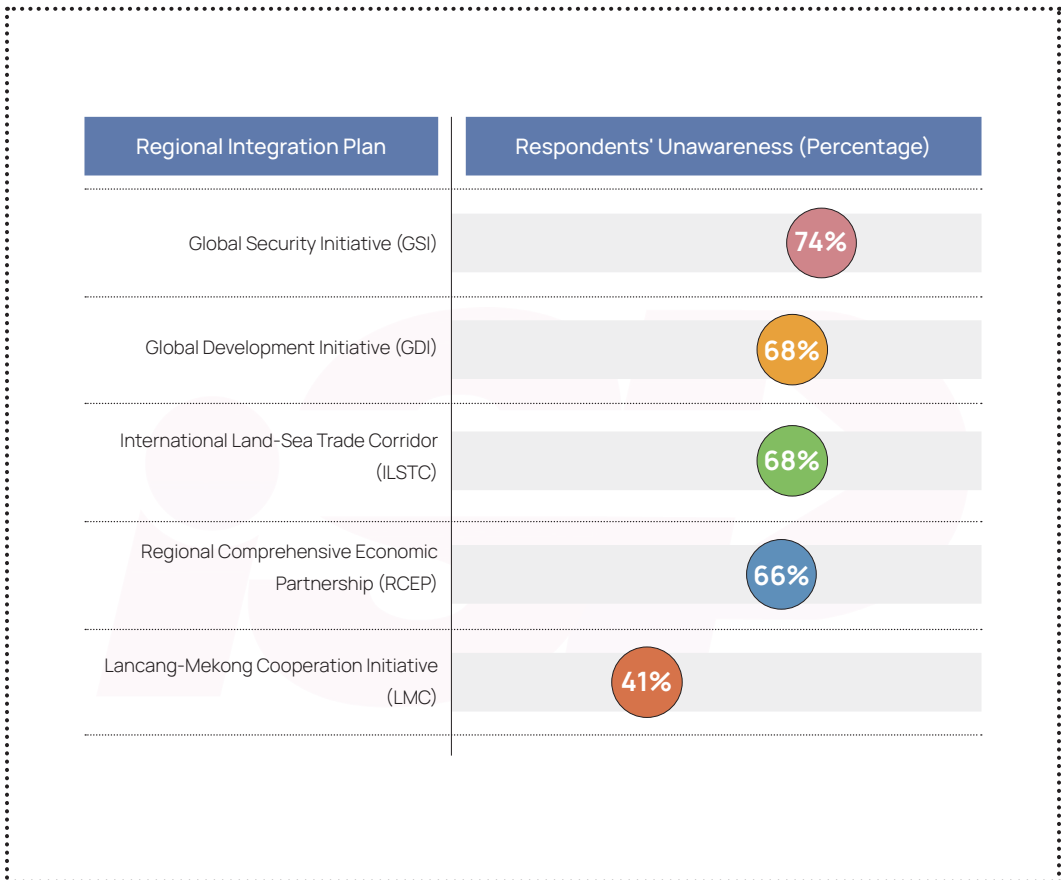


**71%**

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.

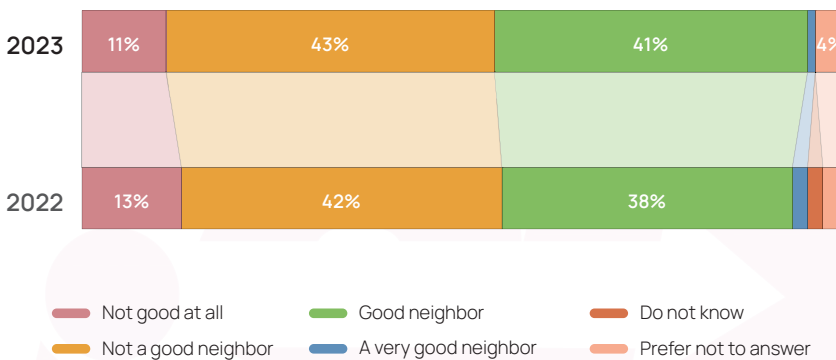
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## General Perceptions of China

Question-1

### Is China a good neighbor for Myanmar or not?

For survey question No. 1, respondents were asked to rate about whether China is a good neighbor for Myanmar or not by providing a set of responses based on a four-point scale— (1) Not good at all, (2) Not a good neighbor, (3) Good neighbor, and (4) A very good neighbor.



Among Myanmar’s key stakeholders surveyed, **54 percent** expressed a negative view of China as a neighbor (represented by the responses “not good at all” and “not a good neighbor”), while **42 percent** expressed a positive view (represented by the responses “a good neighbor” and “a very good neighbor”). If we disaggregate the data, **43 percent** indicated that China is not a good neighbor, with another **11 percent** choosing the option “not good at all.” On the other hand, **41 percent** believed China to be a good neighbor, and an insignificant number, merely **one percent**, chose the option “a very good neighbor.” Notably, **four percent** of respondents refused to answer this question.

There is no significant difference in the perception of China as a neighbor for Myanmar between the survey results of 2022 and those of 2023. In the 2022 survey, a total of **55 percent** expressed a negative opinion of China as a neighbor, while **40 percent** expressed a positive view.

**Analysis of the Survey Results**

When comparing sentiments expressed by different policy communities on China as a neighbor, negative attitudes were the strongest among civil society organizations, as **72 percent** chose either “not good at all” or “not a good neighbor.” Similarly, **60 percent** of the EAOs and **54 percent** of the PDFs/LDFs indicated either “not good at all” or “not a good neighbor.” The views of political society and the business community on China were more positive, as **57 percent** and **78 percent** respectively indicated a “good neighbor” and “a very good neighbor.”

Question-1

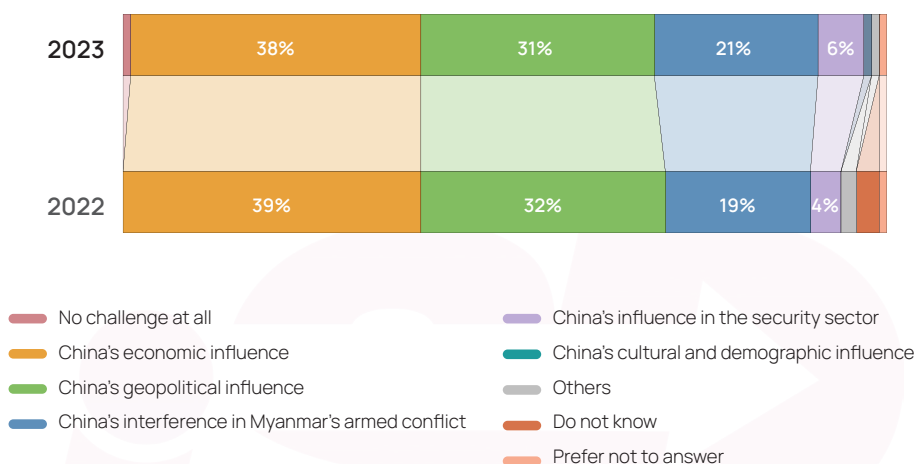
Is China a good neighbor for Myanmar or not?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not good at all	11%	19%	0%	0%	7%	13%	18%
Not a good neighbor	43%	53%	29%	22%	46%	47%	36%
Good neighbor	41%	27%	52%	76%	36%	40%	46%
A very good neighbor	1%	0%	5%	2%	0%	0%	0%
Do not know	0%	0%	5%	0%	0%	0%	0%
Prefer not to answer	4%	1%	9%	0%	11%	0%	0%

Question-2

### What is the main challenge Myanmar faces in its relations with China?

For survey question No. 2, respondents were asked to select only one option from a list of challenges that Myanmar faces in its relations with China.



According to the majority of surveyed key stakeholders in Myanmar, the primary challenges in Myanmar's relations with China are perceived to be China's economic and geopolitical influence, with **38 percent** and **31 percent** of respondents selecting each option, respectively. Following these are China's interference in Myanmar's armed conflict, which was chosen by **21 percent** of the respondents, and China's influence in the security sector, which was chosen by **six percent**. The least common option was China's cultural and demographic influence, which was perceived as a challenge by merely **one percent** of the respondents.

No significant differences were observed between the survey results of 2022 and those of 2023. However, slight increases were noted in the percentages of respondents choosing "China's interference in Myanmar's armed conflict" and "China's influence in the security sector."

Analysis of the Survey Results

Upon analyzing the perspectives regarding the challenges Myanmar faces in its relations with China, it becomes apparent that PDFs/LDFs (55 percent) and EAOs (47 percent) respondents predominantly view China's economic influence as a primary concern. This concern is also shared by civil society organizations (44 percent) and business community (39 percent) respondents. On the other hand, prominent individuals (43 percent) and political society (38 percent) assume China's geopolitical influence as the primary concern. Moreover, it is also notable that PDFs/LDFs (27 percent) are the most prominent in considering China's interference in Myanmar's armed conflict to be the primary concern. On the other hand, PDFs/LDFs and political society respondents lead in identifying China's security influence as a significant challenge.

Question-2

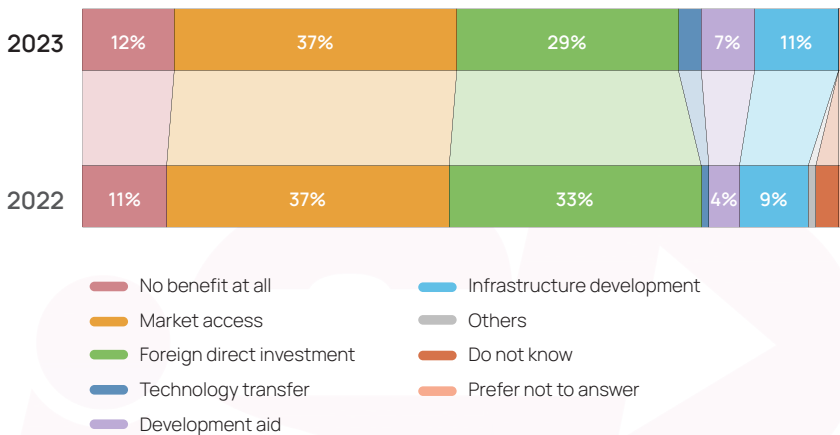
What is the main challenge Myanmar faces in its relations with China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No challenge at all	1%	0%	0%	5%	0%	0%	0%
China's economic influence	38%	44%	29%	39%	26%	47%	55%
China's geopolitical influence	31%	26%	38%	27%	43%	40%	0%
China's interference in Myanmar's armed conflict	21%	23%	19%	22%	21%	13%	27%
China's influence in the security sector	6%	7%	10%	2%	7%	0%	9%
China's cultural and demographic influence	1%	0%	4%	2%	0%	0%	9%
Others	1%	0%	0%	0%	2%	0%	0%
Do not know	0%	0%	0%	0%	0%	0%	0%
Prefer not to answer	1%	0%	0%	3%	1%	0%	0%

Question-3

What is the main benefit Myanmar gains from its relations with China?

For survey question No. 3, respondents were asked to select only one option from a list of possible benefits Myanmar gains from its relations with China.



On the question of the main benefit Myanmar gains from its relations with China, **37 percent** of the respondents replied, "market access," while **29 percent** felt it was foreign direct investment. **Twelve percent** answered that Myanmar gains no benefit at all as a result of its relations with China. **Eleven percent** selected "infrastructure development," and **seven percent** of respondents indicated that development aid from China is the main benefit. Only **three percent** responded that technological transfer is the main benefit.

The results from the 2022 and 2023 surveys reveal some notable differences. Specifically, there is a **four percent** decline in respondents choosing foreign direct investment, whereas a **two percent** rise is observed for development aid, infrastructure development, and technology transfer.



Analysis of the Survey Results

One significant finding is that across all surveyed communities, the primary benefit seen in Myanmar's engagements with China is market access. Specifically, **52 percent** of political society respondents, **42 percent** of business community respondents, **36 percent** of PDFs/LDFs respondents, **34 percent** of both civil society organization respondents and prominent individuals, and **33 percent** of EAO respondents share this perspective. Moreover, **27 percent** of PDFs/LDFs also favored infrastructure development, and **13 percent** of EAOs chose development aid, the highest for each option compared to other groups.

Question-3

What is the main benefit Myanmar gains from its relations with China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No benefit at all	12%	19%	10%	5%	10%	7%	9%
Market access	37%	34%	52%	42%	34%	33%	36%
Foreign direct investment	29%	27%	23%	37%	34%	27%	9%
Technology transfer	3%	3%	5%	2%	0%	0%	19%
Development aid	7%	8%	0%	2%	10%	13%	0%
Infrastructure development	11%	8%	10%	12%	12%	20%	27%
Others	0%	0%	0%	0%	0%	0%	0%
Do not know	0%	0%	0%	0%	0%	0%	0%
Prefer not to answer	1%	1%	0%	0%	0%	0%	0%

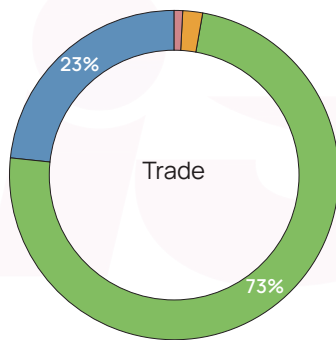
Questions-4 to 13

### How dependent is Myanmar on China?

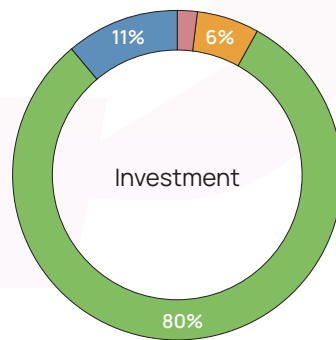
For survey questions No. 4 to 13, respondents were asked to rate about their views on several issues related to Myanmar's dependence on China. The options were provided on a four-point scale (from 1. Not dependent at all to 4. Completely dependent).

- Not dependent at all
- Dependent
- Do not know
- Not dependent
- Completely dependent
- Prefer not to answer

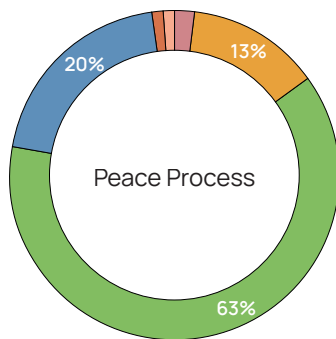
■ Question-4



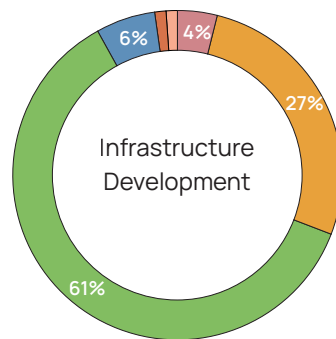
■ Question-5



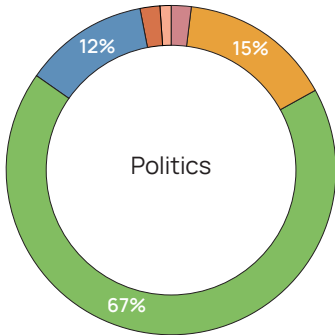
■ Question-6



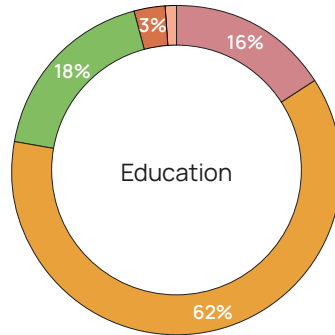
■ Question-7



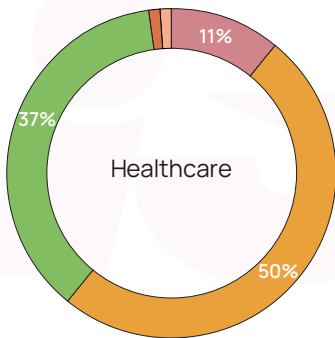
■ Question-8



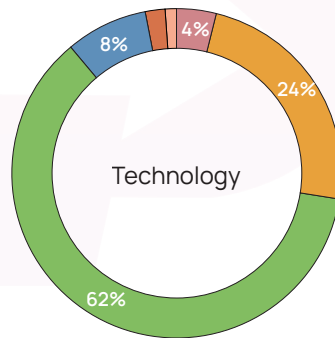
■ Question-9



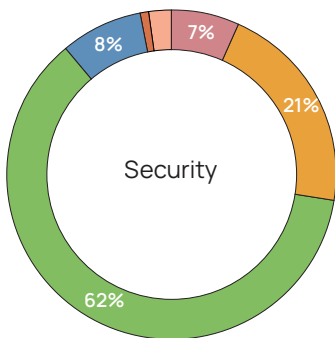
■ Question-10



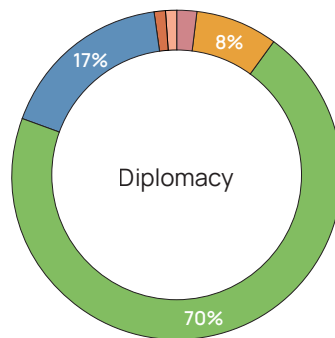
■ Question-11



■ Question-12



■ Question-13



### Analysis of the Survey Results

In analyzing the views of Myanmar's dependence on China from each community, all respondents (**100 percent**) from three policy communities: EAOs, members of political society, and prominent individuals, perceived that Myanmar is dependent on China in terms of trade. Likewise, **97 percent** of the business community viewed Myanmar as dependent on China regarding trade, while only **two percent** answered that it was not dependent. All respondents (**100 percent**) from PDFs/LDFs perceived Myanmar as totally dependent on China in investment. Furthermore, the respondents from political society (**95 percent**), prominent individuals (**93 percent**), and EAOs (**93 percent**) viewed Myanmar's investment dependency on China as significant.

All six demographics shared the view that Myanmar is dependent on China regarding the peace process, as **91 percent** of political society respondents, **90 percent** of prominent individuals, and **90 percent** of business community respondents opted for this perception. **Ninety-one percent** of PDFs/LDFs respondents, the group that favored this question the most, believed that Myanmar is dependent on China in terms of infrastructure development.

Meanwhile, **83 percent** of prominent individuals perceived Myanmar as politically dependent on China, while **81 percent** of political society and civil society organization respondents hold a similar view. **Eighty-two percent** of respondents from the category of prominent individuals saw Myanmar as dependent on China in terms of security, whereas **54 percent** of PDFs/LDFs respondents indicated independence in their responses.

The majority of business community respondents, **83 percent**, perceived Myanmar as dependent on China in terms of technology, and **95 percent** of them see it as dependent on China with regard to diplomacy. Regarding the healthcare sector, **73 percent** of EAO respondents and **71 percent** of political society respondents answered that Myanmar was independent of China. In the education sector, the majority of civil society organizations and EAO respondents perceived Myanmar as non-dependent, with **80 percent** agreement from both groups. However, **36 percent** of PDFs/LDFs answered that Myanmar was dependent on China for education.

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The percentages in the analysis reflect the combined proportions of responses categorized as "Not dependent at all" and "Not dependent," as well as those categorized as "Dependent" and "Completely dependent."

Question-4 Trade

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	1%	3%	0%	0%	0%	0%	0%
Not dependent	3%	4%	0%	3%	0%	0%	9%
Dependent	73%	66%	81%	73%	79%	80%	82%
Completely dependent	23%	27%	19%	24%	21%	20%	9%
Do not know	0%	0%	0%	0%	0%	0%	0%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%

Question-5 Investment

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	2%	5%	0%	3%	0%	0%	0%
Not dependent	6%	6%	5%	12%	5%	7%	0%
Dependent	80%	77%	81%	78%	80%	93%	82%
Completely dependent	11%	12%	14%	7%	13%	0%	18%
Do not know	0%	0%	0%	0%	0%	0%	0%
Prefer not to answer	1%	0%	0%	0%	2%	0%	0%

Question-6 Peace Process

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	2%	3%	0%	2%	2%	0%	0%
Not dependent	13%	18%	5%	5%	8%	33%	19%
Dependent	63%	59%	67%	61%	72%	60%	45%
Completely dependent	20%	17%	23%	29%	18%	7%	36%
Do not know	1%	1%	5%	0%	0%	0%	0%
Prefer not to answer	1%	2%	0%	3%	0%	0%	0%

Question-7 Infrastructure Development

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	4%	7%	0%	2%	2%	0%	9%
Not dependent	27%	31%	48%	22%	20%	33%	0%
Dependent	61%	54%	52%	66%	69%	60%	82%
Completely dependent	6%	5%	0%	10%	7%	0%	9%
Do not know	1%	2%	0%	0%	0%	7%	0%
Prefer not to answer	1%	1%	0%	0%	2%	0%	0%

Question-8 Politics

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	2%	3%	5%	0%	2%	0%	10%
Not dependent	15%	15%	9%	15%	11%	33%	27%
Dependent	67%	65%	76%	63%	75%	67%	36%
Completely dependent	12%	16%	5%	15%	8%	0%	27%
Do not know	2%	1%	5%	5%	0%	0%	0%
Prefer not to answer	2%	0%	0%	2%	4%	0%	0%

Question-9 Education

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	16%	25%	19%	2%	7%	13%	28%
Not dependent	62%	55%	62%	73%	69%	67%	36%
Dependent	18%	17%	19%	22%	16%	13%	36%
Completely dependent	0%	0%	0%	0%	2%	0%	0%
Do not know	3%	3%	0%	3%	3%	7%	0%
Prefer not to answer	1%	0%	0%	0%	3%	0%	0%

Question-10 Healthcare

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	11%	18%	0%	0%	7%	13%	27%
Not dependent	50%	40%	71%	54%	61%	60%	27%
Dependent	37%	41%	29%	46%	30%	20%	46%
Completely dependent	0%	0%	0%	0%	0%	0%	0%
Do not know	1%	1%	0%	0%	0%	7%	0%
Prefer not to answer	1%	0%	0%	0%	2%	0%	0%

Question-12 Security

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	7%	10%	0%	2%	3%	6%	36%
Not dependent	21%	26%	14%	24%	11%	27%	18%
Dependent	62%	54%	71%	56%	77%	67%	36%
Completely dependent	8%	10%	5%	12%	5%	0%	0%
Do not know	1%	0%	5%	3%	0%	0%	0%
Prefer not to answer	1%	0%	5%	3%	4%	0%	10%

Question-13 Diplomacy

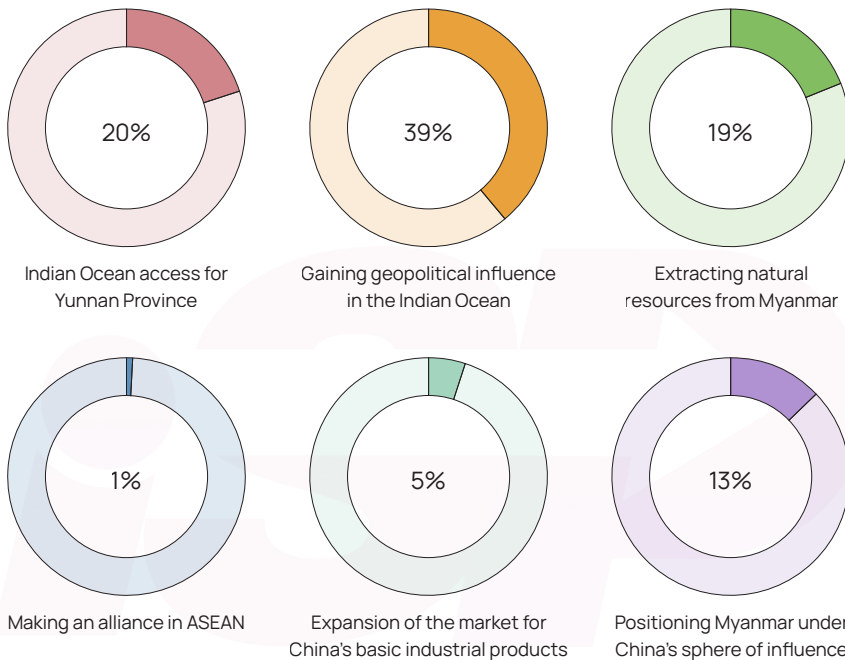
	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	2%	2%	5%	0%	2%	0%	18%
Not dependent	8%	11%	5%	0%	10%	13%	9%
Dependent	70%	64%	71%	73%	77%	74%	64%
Completely dependent	17%	22%	14%	22%	10%	13%	9%
Do not know	2%	0%	5%	3%	0%	0%	0%
Prefer not to answer	1%	1%	0%	2%	1%	0%	0%

Note: Detailed survey results on Question No. 11 can be viewed on Appendix 3.

## Question-14

## What is the major interest of China in its relations with Myanmar?

For survey question No. 14, respondents were asked to select only one option from the list of responses regarding China's interests in its relations with Myanmar.



When asked about China's primary interests in its relations with Myanmar, the predominant choice among respondents is "gaining geopolitical influence in the Indian Ocean," which was selected by **39 percent**. Following behind is "Indian Ocean access for Yunnan Province," chosen by **20 percent**, with "extracting natural resources from Myanmar" ranking third, at **19 percent**. Notably, **13 percent** of respondents opted for the option, "to position Myanmar under China's sphere of influence", which was newly introduced in this year's survey.

Comparing these findings with those of the 2022 survey, slight shifts can be observed. While "gaining geopolitical influence in the Indian Ocean" remained the top choice in both surveys, "extracting natural resources from Myanmar" occupied second place last year, followed by "Indian Ocean access for Yunnan Province."



Analysis of the Survey Results

In analyzing the perspectives of different groups, the most popular option across all policy communities is “gaining geopolitical influence in the Indian Ocean.” This perspective is shared among **48 percent** of political society respondents, **46 percent** of PDFs/LDFs respondents, and **44 percent** of prominent individuals. On the other hand, significant portions of business community respondents (**34 percent**) and prominent individuals (**23 percent**) answered “Indian Ocean access for Yunnan Province.” **Twenty percent** of EAOs, **17 percent** of civil society organizations, and **11 percent** of prominent individuals chose the newly introduced option, “to position Myanmar under China’s sphere of influence.” In last year’s survey, there were no respondents who selected “making an alliance in ASEAN” or “no interest” as options. In this year’s survey, only **one percent** of respondents chose the former option.

**Question-14**

What is the main interest of China in its relations with Myanmar?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No interest of China at all	0%	1%	0%	0%	0%	0%	0%
Indian Ocean access for Yunnan Province	20%	15%	19%	34%	23%	13%	18%
Gaining geopolitical influence in the Indian Ocean	39%	36%	48%	37%	44%	27%	46%
Extracting natural resources from Myanmar	19%	26%	5%	15%	15%	20%	18%
Making an alliance in ASEAN	1%	2%	0%	0%	0%	0%	9%
Extension of the market for China's basic industrial products	5%	3%	10%	7%	2%	13%	0%
Positioning Myanmar under China's sphere of influence	13%	17%	10%	7%	11%	20%	9%
Others	2%	0%	5%	0%	5%	0%	0%
Do not know	0%	0%	0%	0%	0%	0%	0%
Prefer not to answer	1%	0%	3%	0%	0%	7%	0%

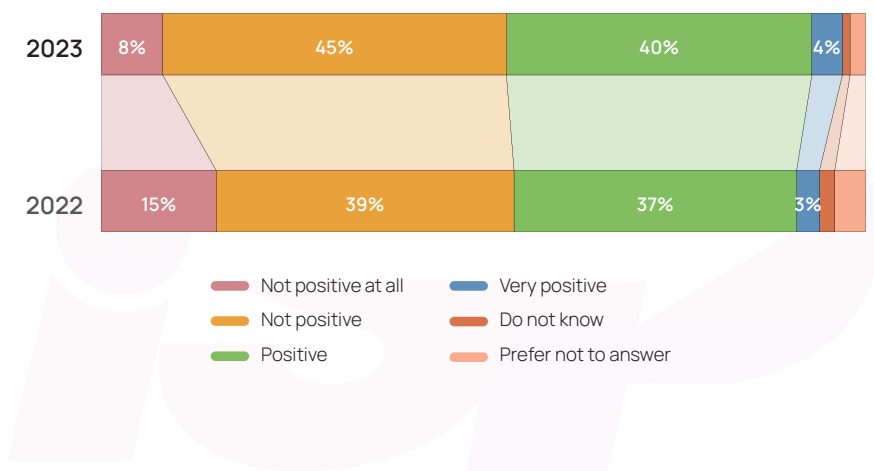
# 2

## Perceptions of the Role of China in Myanmar's Political Crisis

Question-15

To what extent does China's involvement bring a positive influence in resolving Myanmar's political crisis?

For survey question No. 15, respondents were asked to what extent China's involvement has a positive influence on resolving Myanmar's political crisis. Respondents were asked to rank their views on a four-point scale, ranging from 1. Not positive at all to 4. Very positive.



Overall, **45 percent** of respondents perceived no positivity in China's involvement in resolving Myanmar's political crisis, and **40 percent** perceived it to have a positive influence. Additionally, **eight percent** perceived it as not positive at all, and **four percent** perceived it as very positive.

Compared to perceptions from the 2022 survey, several changes were observed in this year's survey. There was a **six percent** increase in respondents answering "not positive," with **39 percent** perceiving this way in the previous survey. Additionally, there was a **seven percent** decrease in respondents perceiving China's involvement as "not positive at all," dropping from **15 percent** last year to **eight percent** this year. Conversely, there was a **three percent** rise in respondents viewing the involvement as "positive," increasing from **37 percent** last year to **40 percent** this year.

Analysis of the Survey Results

Zooming in on the perspectives of different groups, **72 percent** of political society members and **61 percent** of the business community perceived that China's involvement in resolving Myanmar's political crisis is positive (represented by the responses "positive" and "very positive"). Civil society organizations (**63 percent**), EAOs (**60 percent**), and PDFs/LDFs (**54 percent**) perceived that China's involvement was not positive (represented by the responses "not positive at all" and "not positive"). Interestingly, the responses from the PDFs/LDFs are divided, as the remaining **46 percent** of them perceived that China's involvement was positive (represented by the responses "positive" and "very positive").

Question-15

To what extent does China's involvement bring a positive influence in resolving Myanmar's political crisis?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not positive at all	8%	9%	0%	5%	7%	7%	27%
Not positive	45%	54%	18%	32%	49%	53%	27%
Positive	40%	33%	62%	54%	41%	40%	19%
Very positive	4%	2%	10%	7%	0%	0%	27%
Do not know	1%	1%	5%	2%	0%	0%	0%
Prefer not to answer	2%	1%	5%	0%	3%	0%	0%

Questions-16 to 21

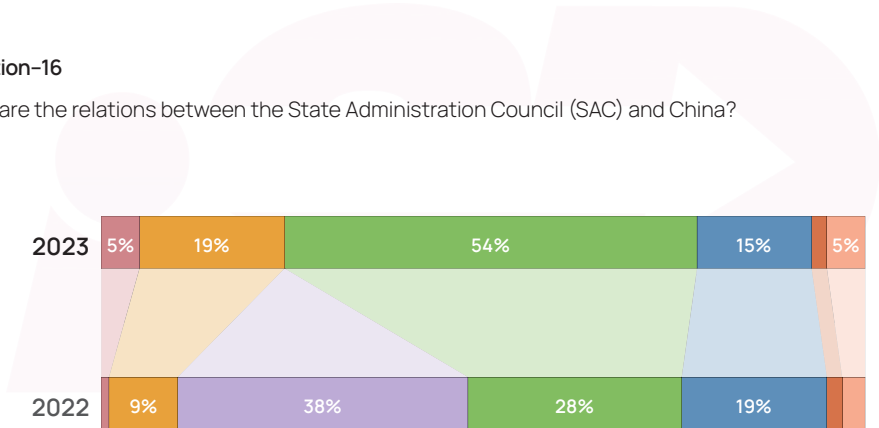
### How are the relations between key actors in Myanmar and China?

For survey questions No. 16 to 21, respondents were asked about relations between key Myanmar and China actors in a post-coup setting and were given a four-point scale to rank them (from 1. Not good at all to 4. Very good). Although the option "neutral" was included in last year's survey, it was removed for 2023. The Union Solidarity and Development Party (USDP) and Shan National League for Democracy (SNLD) were newly added for this year.

- Not good at all
- Good
- Do not know
- Neutral
- Not good
- Very good
- Prefer not to answer

**Question-16**

How are the relations between the State Administration Council (SAC) and China?



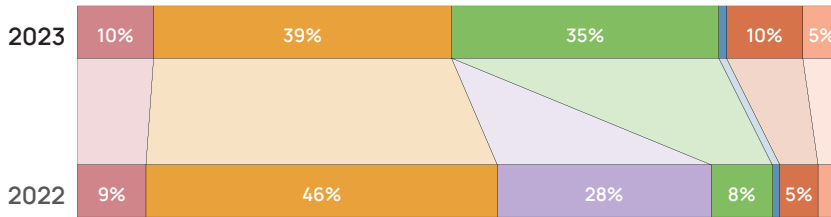
**Question-17**

How are the relations between the Union Solidarity and Development Party (USDP) and China?



■ Question-18

How are the relations between the National League for Democracy (NLD) and China?



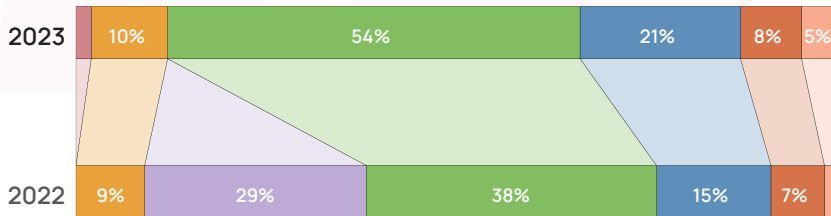
■ Question-19

How are the relations between the Shan Nationalities League for Democracy (SNLD) and China?



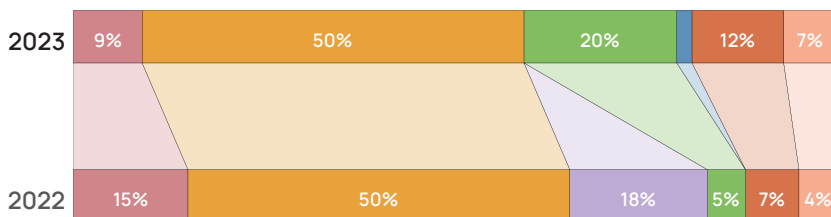
■ Question-20

How are the relations between northern Shan State EAOs and China?



■ Question-21

How are the relations between the National Unity Government (NUG) and China?



Among the respondents, **54 percent** answered that relations between China's government and the State Administration Council (SAC) are good, while **19 percent** answered not good. Comparing with the data from the previous survey, this year shows a **26 percent** increase in respondents who believe that the relations are good. Meanwhile, **35 percent** of respondents answered that the relations between the NLD and China's government are good, indicating a **27 percent** increase compared to the previous survey. Likewise, there is a **seven percent** decrease in respondents who answered that the relations between the NLD and China are not good, as **39 percent** answered this way. This year, **54 percent** of the respondents answered that the relations between China and northern Shan State EAOs are good and increased by **16 percent** compared to last year's result. An additional question to measure China's relations with the Union Solidarity and Development Party (USDP) and the Shan Nationalities League for Democracy (SNLD) was included this year. Among the respondents, **58 percent** and **38 percent** answered that relations are good with the USDP and SNLD, respectively. On the question of the NUG's relations with China, **20 percent** answered good, a **15 percent** increase compared to last year. Similarly, there were no significant differences in perceiving that NUG has no good relations with the Chinese government, as **50 percent** of respondents chose this answer.

### Analysis of the Survey Results

EAOs and PDFs/LDFs, in contrast to the other communities surveyed, exhibited a notably higher perception of positive relations between China and the SAC. In the survey, **86 percent** of EAOs perceived the relations between the Chinese government and the SAC as good, while **82 percent** of PDFs/LDFs shared the same view. The majority of civil society organization respondents (**65 percent**), PDFs/LDFs respondents (**64 percent**), and EAO respondents (**60 percent**) answered that the relations between the NLD and China are not good. A good relationship between the SNLD and China is also perceived by **49 percent** of the prominent individuals and **47 percent** of the EAOs. However, **46 percent** of civil society organizations respondents believe that the relations are not good.

All respondents perceived the relations between China and northern Shan State EAOs as good, as EAOs (**94 percent**), prominent individuals (**86 percent**), and PDFs/LDFs (**82 percent**) responded in this way. All five communities, other than PDFs/LDFs, answered that the relations between China's government and the NUG are not good. Respondents from PDFs/LDFs (**54 percent**) assumed the relations are good between China and the NUG.

Question-16

How are the relations between the State Administration Council (SAC) and China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not good at all	5%	7%	0%	2%	5%	0%	18%
Not good	19%	14%	19%	12%	38%	7%	0%
Good	54%	54%	57%	59%	44%	73%	55%
Very good	15%	20%	14%	12%	7%	13%	27%
Prefer not to answer	2%	1%	10%	3%	1%	0%	0%
Do not know	5%	4%	0%	12%	5%	7%	0%

Question-17

How are the relations between the Union Solidarity and Development Party (USDP) and China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not good at all	6%	10%	5%	3%	2%	0%	9%
Not good	16%	13%	19%	12%	20%	27%	18%
Good	58%	54%	62%	59%	62%	53%	55%
Very good	8%	9%	5%	7%	3%	13%	18%
Prefer not to answer	9%	10%	9%	7%	11%	7%	0%
Do not know	3%	4%	0%	12%	2%	0%	0%

Question-18

How are the relations between the National League for Democracy (NLD) and China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not good at all	10%	19%	5%	7%	2%	0%	0%
Not good	39%	46%	29%	27%	31%	60%	64%
Good	35%	24%	48%	34%	51%	33%	27%
Very good	1%	0%	0%	0%	3%	0%	9%
Prefer not to answer	10%	9%	13%	17%	10%	0%	0%
Do not know	5%	2%	5%	15%	3%	7%	0%



Question-19

How are the relations between the Shan Nationalities League for Democracy (SNLD) and China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not good at all	5%	10%	0%	0%	2%	7%	0%
Not good	31%	36%	24%	29%	26%	32%	27%
Good	38%	35%	43%	34%	46%	47%	27%
Very good	2%	1%	0%	3%	3%	0%	9%
Prefer not to answer	18%	16%	24%	17%	21%	7%	37%
Do not know	6%	2%	9%	17%	2%	7%	0%

Question-20

How are the relations between northern Shan State EAOs and China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not good at all	2%	4%	0%	2%	0%	0%	0%
Not good	10%	14%	0%	5%	10%	6%	0%
Good	54%	52%	52%	41%	66%	47%	64%
Very good	21%	18%	24%	22%	20%	47%	18%
Prefer not to answer	8%	9%	19%	13%	2%	0%	9%
Do not know	5%	3%	5%	17%	2%	0%	9%

Question-21

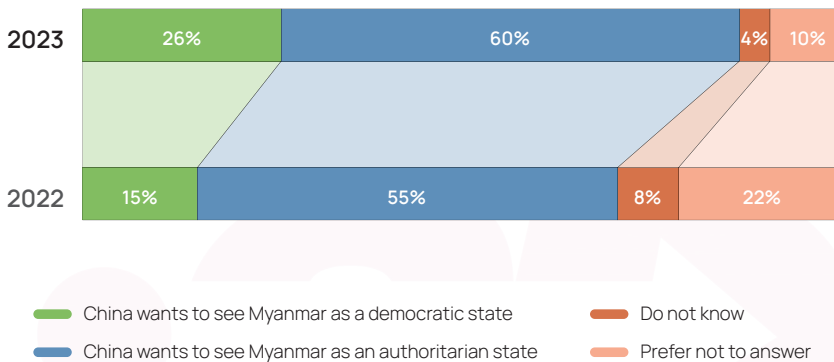
How are the relations between the National Unity Government (NUG) and China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not good at all	9%	15%	5%	10%	2%	7%	9%
Not good	50%	45%	57%	44%	61%	67%	28%
Good	20%	19%	14%	15%	23%	19%	45%
Very good	2%	3%	0%	0%	0%	0%	9%
Prefer not to answer	12%	12%	19%	15%	12%	0%	0%
Do not know	7%	6%	5%	16%	2%	7%	9%

## Question-22

## What political system does China want to see in Myanmar?

For survey question No. 22, respondents were asked to select which response best matched their opinion among the two options.



Individuals from Myanmar's policy communities generally held the view that China prefers to see Myanmar as an authoritarian state rather than a democratic one. Those who responded, "China wants to see Myanmar as an authoritarian state" made up **60 percent** of respondents, while **26 percent** answered, "China wants to see Myanmar as a democratic state."

The results show certain changes as compared to the 2022 survey. **Five percent** more respondents expressed the view that China wants to see Myanmar as an authoritarian state. Likewise, there was a **11 percent** increase in the view that China wants to see Myanmar as a democratic state.

Analysis of the Survey Results

To analyze the perspectives of different groups, **80 percent** of civil society organizations answered, "China wants to see Myanmar as an authoritarian state." PDFs/LDFs (**64 percent**) also answered the same. In contrast, EAO and business community respondents perceived that China wants to see Myanmar as a democratic state, with **53 percent** and **46 percent** respectively. Notably, political society was evenly split, with **43 percent** believing that China wants to see Myanmar as a democratic state and an equal **43 percent** believing that China wants to see Myanmar as an authoritarian state. Meanwhile, some political society respondents (**ten percent**) and prominent individuals (**19 percent**) preferred not to answer.

Question-22

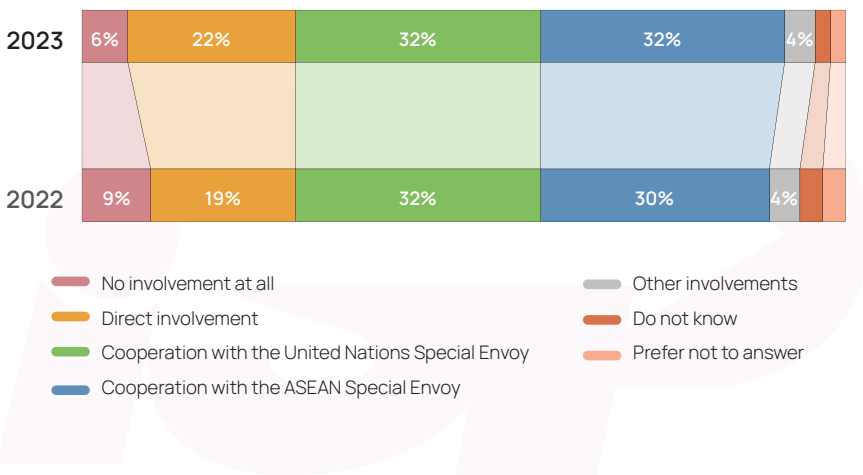
What political system does China want to see in Myanmar?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Myanmar as a democratic state	26%	12%	43%	46%	25%	53%	18%
Myanmar as an authoritarian state	60%	80%	43%	37%	54%	40%	64%
Do not know	4%	3%	4%	7%	2%	7%	0%
Prefer not to answer	10%	5%	10%	10%	19%	0%	18%

Question-23

### How should China be involved in resolving Myanmar's post-coup political crisis?

For survey question No. 23, respondents were presented with a list of possible intervention strategies for China to use in solving Myanmar's post-coup political crisis and asked to select the most effective one in their opinion.



Among the key stakeholders, the most popular views of how China should be involved in resolving Myanmar's political crisis were cooperation with the United Nations Special Envoy and cooperation with the ASEAN Special Envoy (**both 32 percent**). Moreover, **22 percent** selected China's direct involvement.

Compared to the 2022 survey results, minimal changes were observed. While there were no changes in respondents who selected "cooperation with the United Nations Special Envoy," there was a **three percent** decrease in those who selected "no involvement at all." Additionally, there was a **three percent** increase in respondents selecting "direct involvement," and a **two percent** increase in respondents who chose "cooperation with the ASEAN Special Envoy."

Analysis of the Survey Results

Different perspectives yielded varying results upon analysis. Cooperation with the ASEAN Special Envoy was perceived by the business community (**39 percent**), prominent individuals (**34 percent**), and EAOs (**33 percent**) as the way China should be involved in resolving Myanmar's political crisis. Civil society organizations (**40 percent**) and political society (**29 percent**) answered "cooperation with the United Nations Special Envoy." The survey revealed a significant finding that **36 percent** of respondents from PDFs/LDFs and **33 percent** from EAOs perceived that China should involve directly.

Question-23

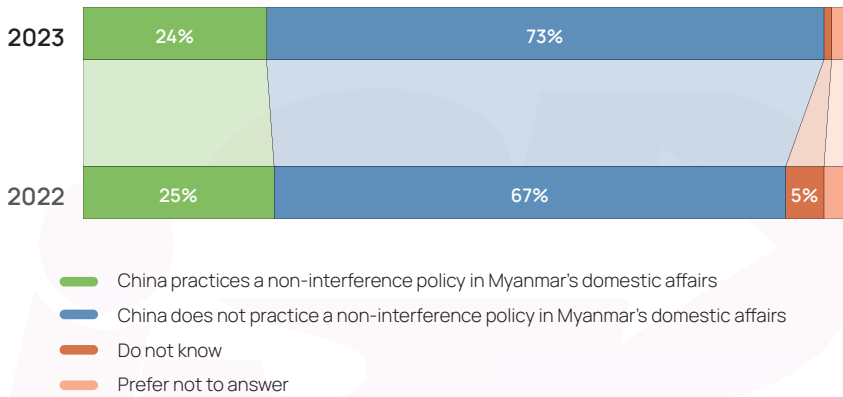
How should China be involved in resolving Myanmar's post-coup political crisis?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No involvement at all	6%	10%	0%	0%	3%	7%	10%
Direct involvement	22%	15%	24%	22%	28%	33%	36%
Cooperation with the UN Special Envoy	32%	40%	29%	29%	23%	27%	27%
Cooperation with the ASEAN Special Envoy	32%	31%	14%	39%	34%	33%	27%
Other involvements	4%	2%	23%	0%	8%	0%	0%
Do not know	2%	1%	5%	3%	4%	0%	0%
Prefer not to answer	2%	1%	5%	7%	0%	0%	0%

Question-24

### Do you think China practices a non-interference policy in Myanmar's domestic affairs?

For survey question No. 24, respondents were presented with the question, "Do you think China practices a non-interference policy in Myanmar's domestic affairs?" and asked to respond either in the affirmative or negative way.



The majority of respondents (**73 percent**) responded that China does not practice a policy of non-interference in Myanmar affairs. **Twenty-four percent** averred that China follows a policy of non-interference.

Some changes were found compared with the 2022 survey results. Additional **six percent** of respondents perceived that "China does not practice a non-interference policy in Myanmar's domestic affairs."

Analysis of the Survey Results

The survey shows that the view of China not practicing a policy of non-interference with regard to Myanmar is widespread among all surveyed key stakeholders communities. Members of political society (**86 percent**), prominent individuals (**79 percent**), business community members (**71 percent**), civil society organizations (**70 percent**), EAOs (**67 percent**), and PDFs/LDFs (**64 percent**) responded in this way. Significantly, there were not many differences between the responses of EAOs and PDFs/LDFs respondents, and no respondents picked “do not know” nor “prefer not to answer.”

Question-24

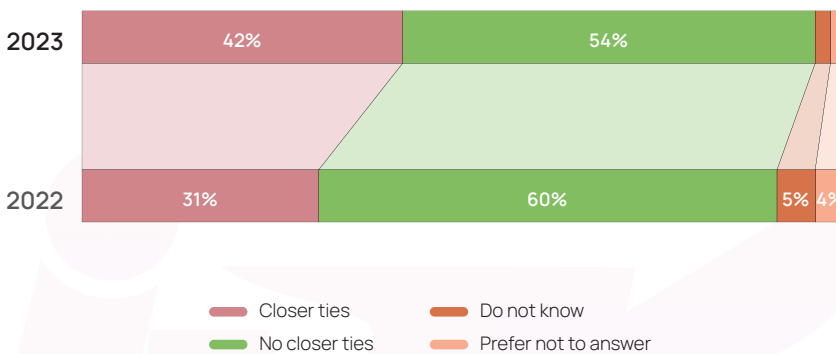
Do you think China practices a non-interference policy in Myanmar's domestic affairs?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
China practices a non-interference policy	24%	26%	10%	27%	20%	33%	36%
China does not practice a non-interference policy	73%	70%	86%	71%	79%	67%	64%
Do not know	1%	2%	4%	0%	0%	0%	0%
Prefer not to answer	2%	2%	0%	2%	1%	0%	0%

Question-25

### Has the post-coup political crisis brought China and Myanmar closer together?

For survey question No. 25, respondents were asked either to respond in the affirmative or the negative way to whether the political crisis following the 2021 coup brought China and Myanmar closer together.



Most respondents did not think China and Myanmar developed closer ties since the coup. **Fifty-four percent** responded in this way (answered, “the political crisis has not brought China and Myanmar closer together”), while **42 percent** answered that the two countries became closer (answered, “the political crisis brought China and Myanmar closer together”).

Compared with the 2022 survey results, there were some changes. **Eleven percent** more respondents perceived that the two countries’ ties grew closer, while respondents believing the contrary decreased by **six percent**.



Analysis of the Survey Results

Based on the survey, the majority of five communities did not think that China and Myanmar had been closer in the post-coup period. PDFs/LDFs respondents (**91 percent**), prominent individuals (**66 percent**) and members of political society (**62 percent**) indicated this. In contrast, a majority (**53 percent**) of civil society organization respondents answered, "the political crisis has brought China and Myanmar closer together."

Question-25

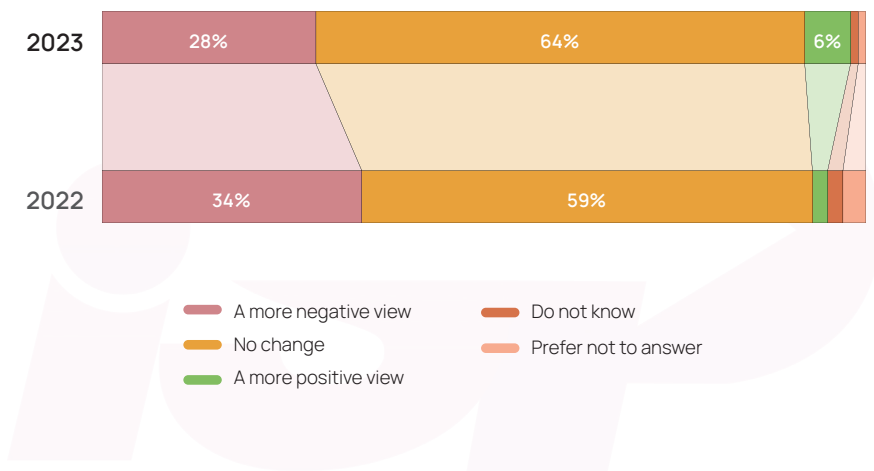
Has the post-coup political crisis brought China and Myanmar closer together?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Closer ties	42%	53%	33%	39%	33%	40%	9%
No closer ties	54%	42%	62%	56%	66%	53%	91%
Do not know	2%	4%	5%	0%	0%	0%	0%
Prefer not to answer	2%	1%	0%	5%	1%	7%	0%

Question-26

### How have Myanmar policy communities' perceptions toward China shifted since the coup?

For survey question No. 26, respondents were asked whether they had developed a more negative or positive view of China since the coup or their views had not changed.



On the question of a change in perceptions of China after the coup, **64 percent** of respondents answered “no change,” while **28 percent** have developed a more negative view. **Six percent** have shifted towards a more positive view of China.

Compared to the 2022 results, there has been a **five percent** increase in respondents whose perceptions regarding China remain unchanged after the coup. Conversely, there has been a **six percent** decline in respondents expressing a more negative view of China, alongside a **four percent** increase in those viewing China more positively.

Analysis of the Survey Results

When examining different communities' perspectives, a majority indicated no change in perception towards China since the coup. Most PDFs/LDFs (**82 percent**) and political society respondents (**81 percent**) answered that their views had undergone no change. Significantly, among civil society organizations, **47 percent** of respondents reported a shift towards a more negative view.

Question-26

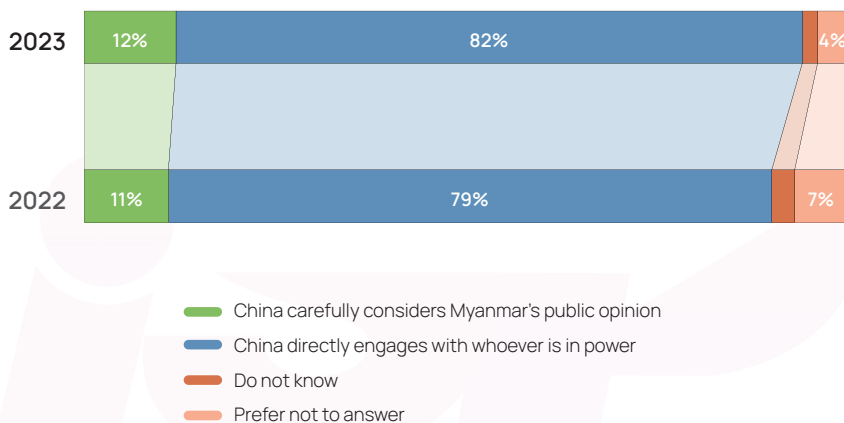
How have Myanmar policy communities' perceptions toward China shifted since the coup?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
A more negative view	28%	47%	5%	12%	16%	27%	18%
No change	64%	50%	81%	72%	72%	67%	82%
A more positive view	6%	2%	9%	12%	10%	6%	0%
Do not know	1%	1%	0%	2%	0%	0%	0%
Prefer not to answer	1%	0%	5%	2%	2%	0%	0%

## Question-27

## How does China primarily decide on its policies for Myanmar in the post-coup period?

For survey question No. 27, respondents were asked to choose only one from the two options: 1. China carefully considers Myanmar's public opinion, and 2. China directly engages with whoever is in power.



The vast majority of respondents (**82 percent**) indicated that China directly engages with anyone whoever is in power when it considers Myanmar policies. Only **12 percent** of respondents answered that China carefully considers Myanmar's public opinions.

A slight difference is noted compared with the 2022 survey: a **three percent** increase in respondents who perceived that China directly engages with whoever is in power.

Analysis of the Survey Results

The survey shows the salience of the view that China directly engages with anyone whoever is in power when it considers its policy towards Myanmar. EAOs (**93 percent**), civil society organizations (**90 percent**), prominent individuals (**84 percent**), and PDFs/LDFs (**82 percent**) answered in this way. Meanwhile, some of the business community (**22 percent**) answered that China carefully considers Myanmar's public opinions, the highest proportion among all six communities.

Question-27

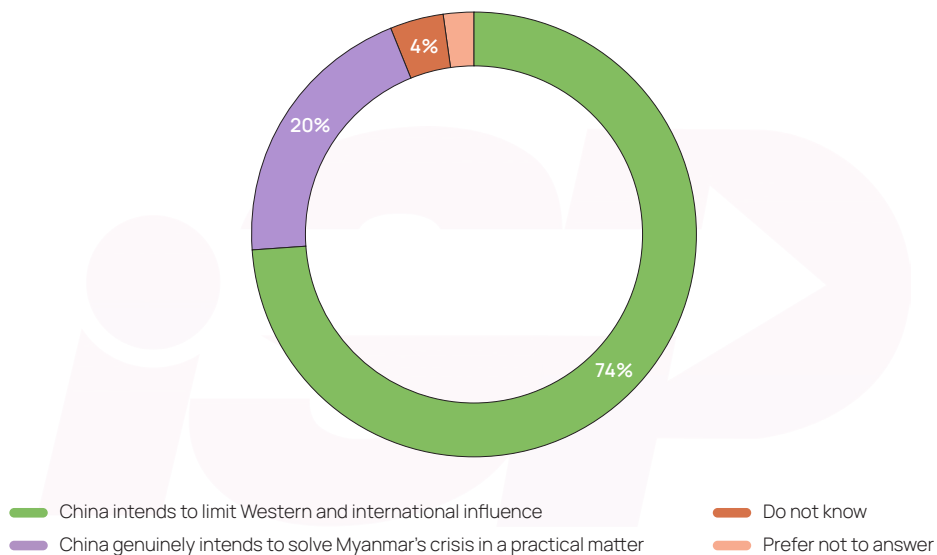
How does China primarily decide on its policies for Myanmar in the post-coup period?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
China carefully considers Myanmar's public opinion	12%	7%	14%	22%	11%	7%	18%
China directly engages with whoever is in power	82%	90%	62%	66%	84%	93%	82%
Do not know	2%	2%	5%	5%	0%	0%	0%
Prefer not to answer	4%	1%	19%	7%	5%	0%	0%

## Question-28

## What is the motive behind China's approach to Myanmar's post-coup political crisis as a regional issue?

For survey question No. 28, respondents were asked to choose only one between the two options: 1. China intends to limit Western and international influence, and 2. China genuinely intends to solve Myanmar's crisis in a practical manner.



The 2023 survey included a new question regarding the narrative of China's approach to resolving Myanmar's political crisis as a regional issue. When asking key stakeholders on their views on the possible motive behind adopting this approach, **74 percent** of the respondents selected "China intends to limit Western and international influence." Meanwhile, only **20 percent** answered, "China genuinely intends to solve Myanmar's crisis in a practical matter." **Four percent** of respondents answered "do not know" and **two percent** refused to answer.

Analysis of the Survey Results

The survey reveals the view that China intends to limit Western and international influence in its solution to Myanmar's crisis, with the majority of civil society organizations (**85 percent**) and prominent individuals (**80 percent**) holding this perception. EAOs and PDFs/LDFs (**both 73 percent**), and members of political society (**62 percent**) and the business community (**44 percent**) similarly perceived China's intentions in this manner. In contrast, a large minority of the business community (**37 percent**) believe that China genuinely seeks to address Myanmar's crisis. Political society respondents (**33 percent**) are the second-most group expressing this belief.

Question-28

What is the motive behind China's approach to Myanmar's post-coup political crisis as a regional issue?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
China intends to limit Western and international influence	74%	85%	62%	44%	80%	73%	73%
China genuinely intends to solve Myanmar's crisis in a practical matter	20%	12%	33%	37%	15%	27%	27%
Do not know	4%	3%	5%	10%	2%	0%	0%
Prefer not to answer	2%	0%	0%	9%	3%	0%	0%

Questions-29 to 32

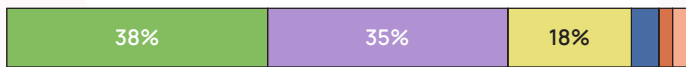
### How helpful is China's advocated election process in solving Myanmar's crisis?

For survey questions No. 29 to 32, respondents were asked to choose one answer from the given options on how helpful China's advocated election process is in solving Myanmar's crisis. The responses ranged from 1. Not helpful at all to 4. Very helpful.

- Not helpful at all
- Not helpful
- Helpful
- Very helpful
- Do not know
- Prefer not to answer

**Question-29**

How helpful is China's advocated election process in solving Myanmar's crisis in the long run?



**Question-30**

How helpful is China's advocated election process in solving Myanmar's crisis through ASEAN's effort?



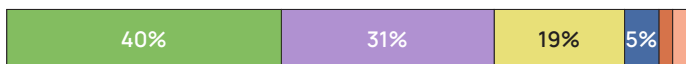
**Question-31**

How does China's advocated election process benefit the Myanmar Armed Forces?



**Question-32**

How helpful is China's advocated election process in solving Myanmar's current crisis?





A prevalent belief is that China is urging the SAC to seek a political exit through the electoral process. However, **35 percent** of respondents did not consider this approach helpful for long-term conflict resolution, and **38 percent** responded "not helpful at all." Regarding ASEAN's efforts in Myanmar's affairs, **37 percent** of respondents answered "not helpful," whereas **18 percent** answered "not helpful at all." Regarding how beneficial the China-advocated election process is for the Myanmar Armed Forces, **49 percent** answered "helpful," while **32 percent** selected "very helpful." Finally, **40 percent** expressed skepticism that the election process would provide a good resolution for the current crisis, answering "not helpful at all," while an additional **31 percent** responded "not helpful."

### Analysis of the Survey Results

The survey shows that **91 percent** of PDFs/LDFs did not find China's advocated election process for the SAC's escape as helpful (represented by the responses "not helpful at all" and "not helpful") to conflict resolution in the long run. A similar perspective is shared by **86 percent** of EAO respondents, **84 percent** of civil society organization respondents, and **80 percent** of prominent individuals surveyed. PDFs/LDFs respondents (**72 percent**), EAO respondents (**67 percent**), prominent individuals (**64 percent**) and CSO respondents (**61 percent**) also believed that China's push for election exit was not helpful towards ASEAN's efforts (represented by the responses "not helpful at all" or "not helpful"). All groups perceived that the advocacy was beneficial only to the Myanmar Armed Forces and the SAC. This perspective was predominantly shared among all EAO respondents (**100 percent**). Political society respondents (**86 percent**), CSO respondents (**85 percent**), PDFs/LDFs respondents (**81 percent**), prominent individuals (**79 percent**), and business community respondents (**66 percent**) also agreed with this sentiment.

Question-29

How helpful is China's advocated election process in solving Myanmar's crisis in the long run?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not helpful at all	38%	45%	29%	17%	44%	33%	55%
Not helpful	35%	39%	19%	24%	36%	53%	36%
Helpful	18%	12%	43%	29%	13%	14%	9%
Very helpful	4%	2%	5%	15%	3%	0%	0%
Do not know	2%	1%	4%	5%	0%	0%	0%
Prefer not to answer	3%	1%	0%	10%	4%	0%	0%

Question-31

How does China's advocated election process benefit the Myanmar Armed Forces?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not helpful at all	3%	4%	5%	2%	5%	0%	0%
Not helpful	10%	8%	5%	15%	11%	0%	19%
Helpful	49%	45%	57%	54%	48%	67%	45%
Very helpful	32%	40%	29%	12%	31%	33%	36%
Do not know	3%	2%	4%	7%	0%	0%	0%
Prefer not to answer	3%	1%	0%	10%	5%	0%	0%

Question-32

How helpful is China's advocated election process in solving Myanmar's current crisis?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not helpful at all	40%	49%	24%	15%	46%	40%	55%
Not helpful	31%	33%	38%	29%	28%	40%	18%
Helpful	19%	13%	29%	29%	18%	20%	18%
Very helpful	5%	3%	5%	12%	3%	0%	9%
Do not know	2%	1%	4%	5%	0%	0%	0%
Prefer not to answer	3%	1%	0%	10%	5%	0%	0%

Note: Detailed survey results on Question No. 30 can be viewed on Appendix 3.

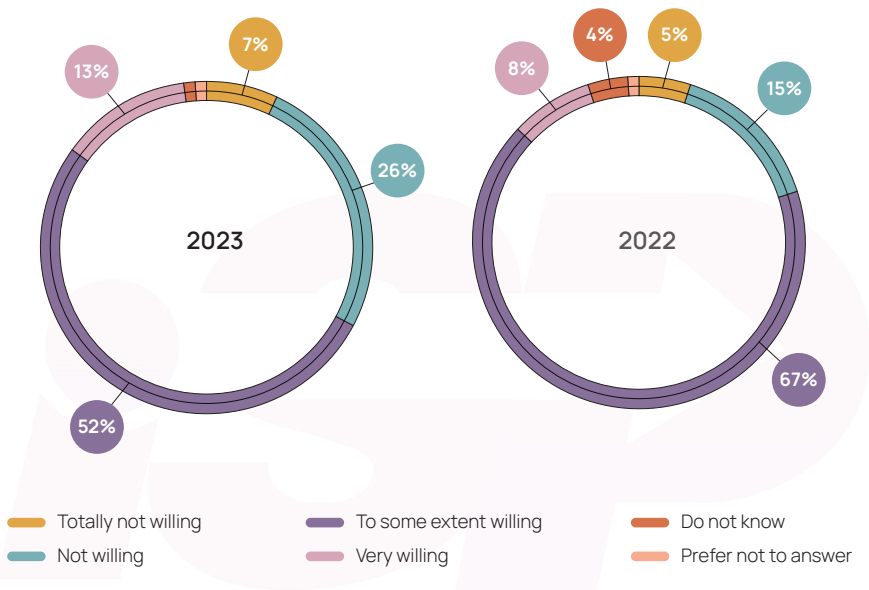
# 3

## Perceptions of the Role of China in Myanmar's Peace Process

Question-33

### To what extent is China willing to achieve peace in Myanmar?

For survey question No. 33, respondents were asked to rank a response to the question of to what extent China is willing to achieve peace in Myanmar. A four-point scale ranged from 1. Totally not willing, to 4. Very willing.



Of all survey respondents, **52 percent** answered “to some extent willing,” while **13 percent** responded “very willing.” In contrast, **26 percent** answered “not willing,” while **seven percent** selected “totally not willing.”

In contrast to the 2022 survey, there has been a **15 percent** decrease in respondents who believed that China has the will to achieve peace in Myanmar, while there has been an **11 percent** increase in those who perceived that China is not willing.

Analysis of the Survey Results

The survey indicates that the majority of respondents from nearly all groups perceive China as keen to achieve peace in Myanmar. Members of political society (**86 percent**), the business community (**85 percent**), and EAOs (**80 percent**) perceived that China is keen to achieve peace in Myanmar (represented by the responses "to some extent willing" or "very willing"). Civil society organizations are divided as **42 percent** of them perceive China is willing to achieve peace in Myanmar but **54 percent** of the respondents believed that China does not want peace in Myanmar (represented by the responses "totally not willing" or "not willing"). Notably, among PDFs/LDFs respondents, **36 percent** indicated that China lacks interest in peace for Myanmar (represented by the responses "not willing"). Conversely, another **36 percent** within the same group expressed the belief that China is highly eager to achieve peace in Myanmar (represented by the response "very willing").

Question-33

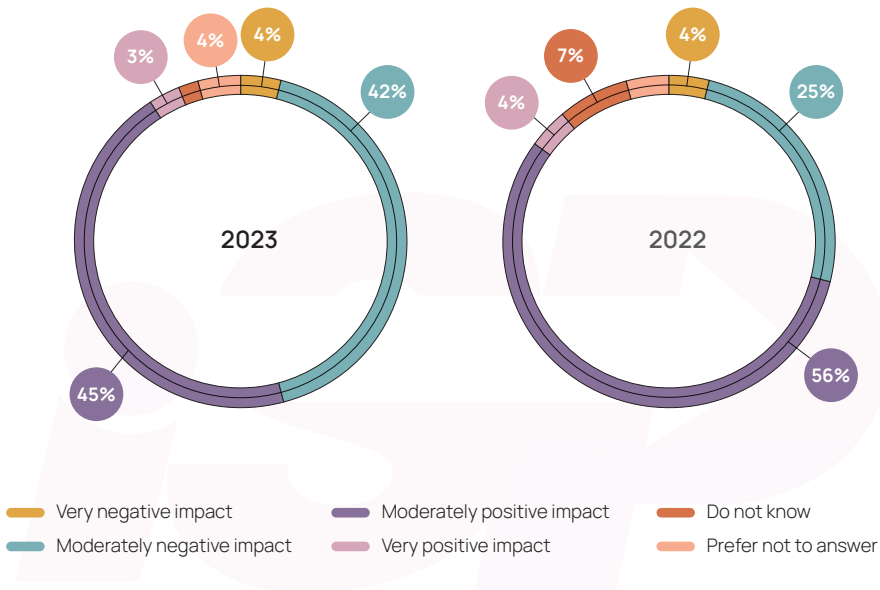
To what extent is China willing to achieve peace in Myanmar?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally not willing	7%	14%	0%	0%	2%	13%	0%
Not willing	26%	40%	10%	15%	18%	7%	36%
To some extent willing	52%	36%	57%	63%	67%	73%	28%
Very willing	13%	6%	29%	22%	10%	7%	36%
Do not know	1%	2%	4%	0%	0%	0%	0%
Prefer not to answer	1%	2%	0%	0%	3%	0%	0%

Question-34

What impact does China's involvement have on Myanmar's peace process?

For survey question No. 34, respondents were asked to assess the impact of China's involvement on Myanmar's peace process using a four-point scale, ranging from 1. Very negative impact to 4. Very positive impact.



Regarding the impact of China's involvement on Myanmar's peace process, **45 percent** of the respondents answered "moderately positive impact," while **42 percent** of the respondents selected "moderately negative impact."

There was an **11 percent** decrease in respondents who found that China's involvement was beneficial compared with the previous survey. On the contrary, there was a **17 percent** increase in those believing that China's involvement impacts Myanmar's peace process negatively.

Analysis of the Survey Results

Comparing the responses across six policy communities, most PDFs/LDFs (**73 percent**) and civil society organization respondents (**63 percent**) answered that China's involvement has a negative impact on Myanmar's peace process (represented by the responses "very negative impact" or "moderately negative impact"). By contrast, a majority of political society (**71 percent**), business community (**64 percent**), and EAO respondents (**60 percent**) and prominent individuals (**58 percent**) perceived China's involvement as a positive influence (represented by the responses "moderately positive impact" or "very positive impact"). Notably, **Thirty-three percent** of civil society organizations similarly shared this positive view.

Question-34

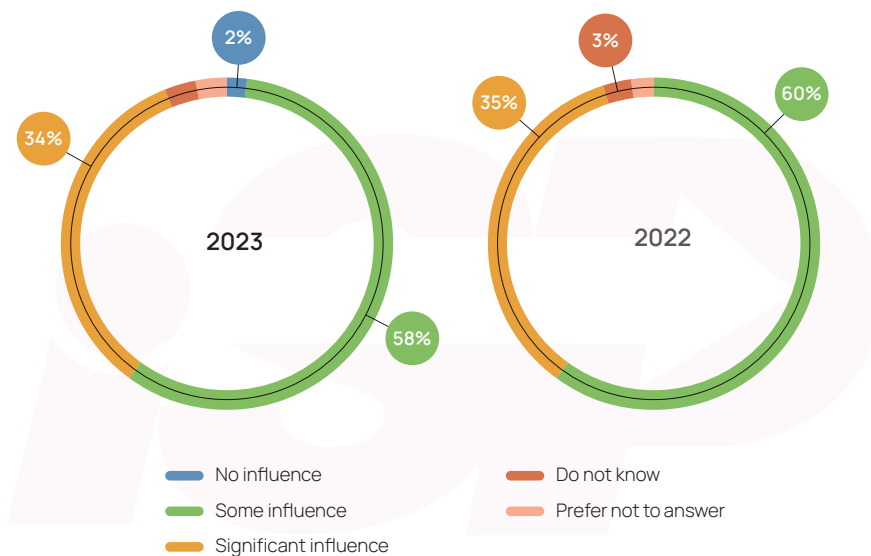
What impact does China's involvement have on Myanmar's peace process?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Very negative impact	4%	7%	0%	0%	0%	13%	9%
Moderately negative impact	42%	56%	19%	22%	39%	20%	64%
Moderately positive impact	45%	31%	57%	59%	56%	60%	18%
Very positive impact	3%	2%	14%	5%	2%	0%	0%
Do not know	2%	4%	5%	2%	0%	0%	0%
Prefer not to answer	4%	0%	5%	12%	3%	7%	9%

Question-35

### How much influence does China have over ethnic armed organizations (EAOs) in northern Shan State?

For survey question No. 35, respondents were asked how much influence China has over ethnic armed organizations (EAOs) in northern Shan State and to rank the degree of influence on a scale, with responses ranging from 1. No influence at all to 4. Significant influence.



The majority of respondents, totaling **58 percent**, noted that China retains some influence over EAOs in northern Shan State. Specifically, **34 percent** indicated "significant influence," while a mere **two percent** reported "no influence."

There were only a few minimal changes observed compared to the previous year's survey, with only a **two percent** decrease in responses indicating "some influence" and a **one percent** increase in responses indicating "significant influence."



Analysis of the Survey Results

The majority of Myanmar's key stakeholders across six policy communities predominantly believed that China has some or significant influence among the EAOs in northern Shan state. All of EAO respondents, **99 percent** of prominent individuals, **93 percent** of civil society organization respondents, **91 percent** of political society respondents, **83 percent** of business community respondents, and **82 percent** of PDFs/LDFs respondents answered in this way. Significantly, **48 percent** of political society respondents selected "significant influence."

Question-35

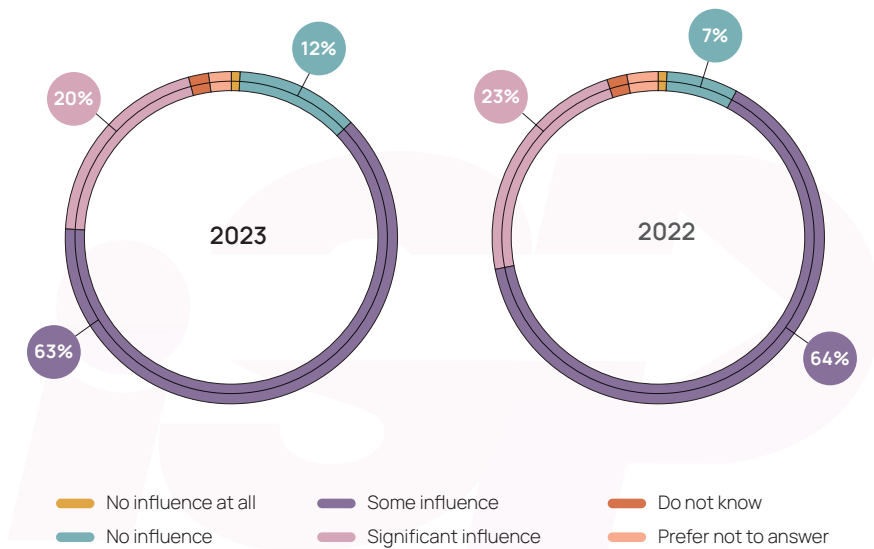
How much influence does China have over ethnic armed organizations (EAOs) in northern Shan State?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No influence at all	0%	0%	0%	0%	0%	0%	9%
No influence	2%	3%	5%	5%	0%	0%	0%
Some influence	58%	57%	43%	49%	69%	67%	55%
Significant influence	34%	36%	48%	34%	30%	33%	27%
Do not know	3%	3%	4%	2%	0%	0%	9%
Prefer not to answer	3%	1%	0%	10%	1%	0%	0%

Question-36

### How much influence does China have over the State Administration Council (SAC)?

For survey question No. 36, respondents were asked to assess China's influence over the SAC using a four-point scale ranging from 1. No influence at all to 4. Significant influence.



Among the respondents, **63 percent** answered “some influence,” while **20 percent** selected “significant influence.” Only **12 percent** responded, “no influence,” and **one percent** answered, “no influence at all.”

No remarkable changes were observed in comparison with the 2022 survey other than a **five** increase in perceiving no influence and a **three percent** decrease in perceiving significant influence.

Analysis of the Survey Results

The majority of respondents from all communities answered that China has an influence over the SAC. The full cohort of PDFs/LDFs respondents perceive this to be the case (represented by the responses "some influence" or "significant influence"). Similarly, civil society organization respondents (**95 percent**), prominent individuals (**79 percent**), EAOs (**73 percent**), members of the political community (**71 percent**), and business community respondents (**61 percent**) answered that China wields influence over the SAC (represented by the responses "some influence" or "significant influence"). Remarkably, among PDF/LDF respondents answering that China has an influence on the SAC, **45 percent** selected "some influence," while the other **55 percent** answered "significant influence."

Question-36

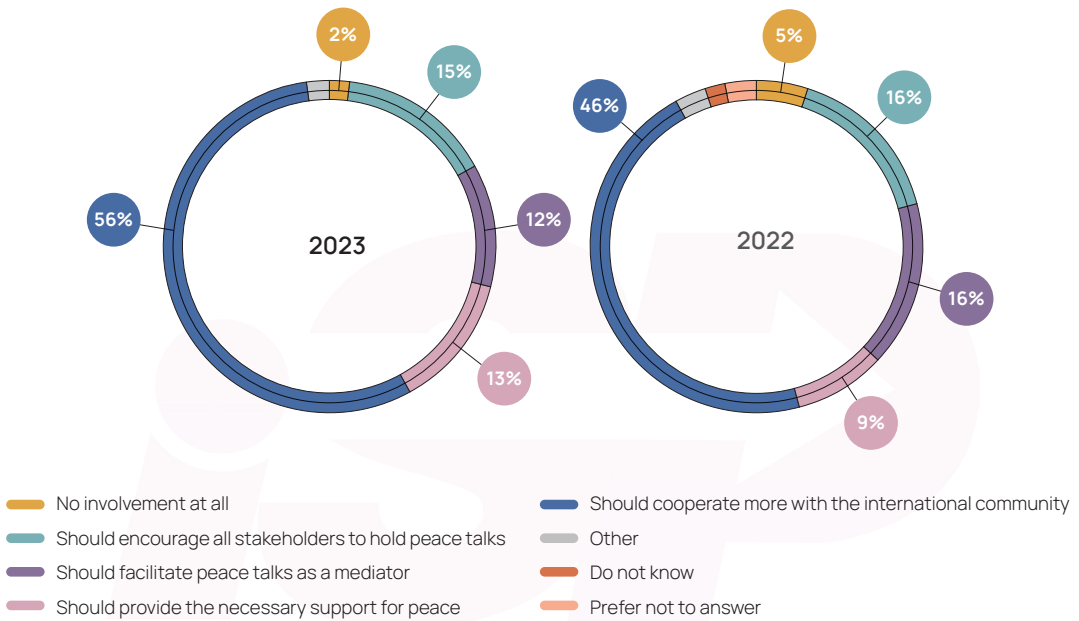
How much influence does China have over the State Administration Council (SAC)?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No influence at all	1%	0%	0%	5%	2%	0%	0%
No influence	12%	4%	19%	22%	15%	27%	0%
Some influence	63%	68%	71%	54%	61%	60%	45%
Significant influence	20%	27%	0%	7%	18%	13%	55%
Do not know	2%	1%	10%	5%	1%	0%	0%
Prefer not to answer	2%	0%	0%	7%	3%	0%	0%

Question-37

### How should China help Myanmar's peace process succeed?

In survey question No. 37, respondents were asked how China should help Myanmar's peace process succeed and had to choose one from among several options.



The largest proportion of respondents, **56 percent**, answered that China should cooperate more with the international community to help Myanmar's peace process succeed. On the other hand, **15 percent** answered that China should encourage all stakeholders to engage in peace talks, while **13 percent** answered that China should provide the necessary support for peace. Only **12 percent** selected that China should facilitate peace talks as a mediator.

Upon comparison with the results from the 2022 survey, a **10 percent** increase can be identified in the respondents perceiving that China should cooperate more with the international community to drive Myanmar's peace process forward. At the same time, there is a **three percent** decrease in those who preferred no involvement of China in the process.

Analysis of the Survey Results

The survey reveals that most of the policy communities believed that China should cooperate more with the international community to help Myanmar's peace process succeed. PDFs/LDFs (**73 percent**) represented the largest group of respondents in this perspective, followed by civil society organizations (**68 percent**), prominent individuals (**54 percent**), EAOs (**47 percent**), the business community (**39 percent**), and political society (**29 percent**). Notably, another **29 percent** of political society respondents answered that China should facilitate peace talks as a mediator.

Question-37

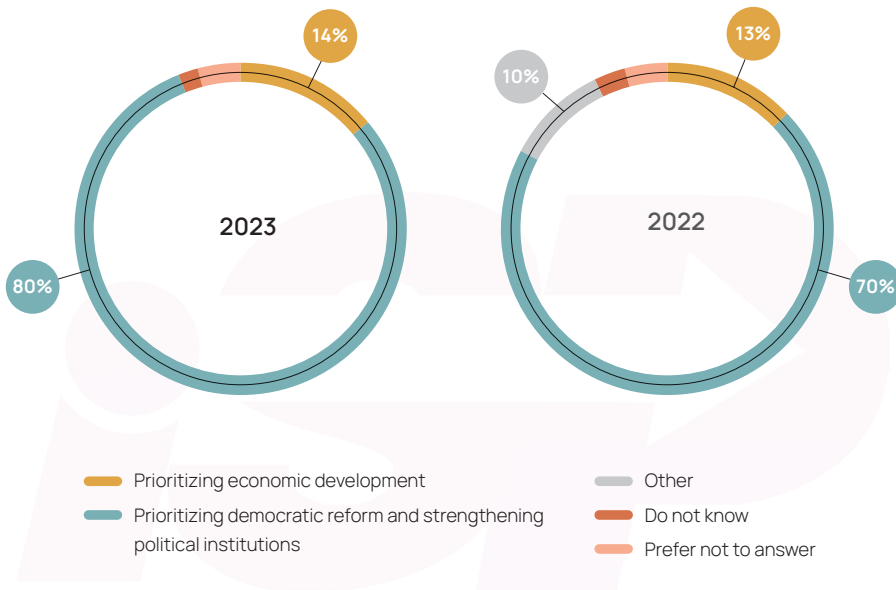
How should China help Myanmar's peace process succeed?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No involvement at all	2%	5%	0%	0%	0%	0%	0%
Should encourage all stakeholders to hold peace talks	15%	10%	24%	15%	18%	20%	18%
Should facilitate peace talks as a mediator	12%	4%	29%	17%	16%	20%	0%
Should provide the necessary support for peace	13%	11%	9%	27%	8%	13%	9%
Should cooperate more with the international community	56%	68%	29%	39%	55%	47%	73%
Other	2%	1%	9%	0%	3%	0%	0%
Do not know	0%	1%	0%	0%	0%	0%	0%
Prefer not to answer	0%	0%	0%	2%	0%	0%	0%

Question-38

### Two strategies to achieve peace in Myanmar

For survey question No. 38, respondents were asked to choose one of two plausible strategies for achieving peace in Myanmar.



When asked about the most plausible strategy to achieve peace in Myanmar, the majority of respondents, **80 percent**, chose the option of “prioritizing democratic reform and strengthening political institutions.” Only **14 percent** answered “prioritizing economic development.”

A **ten percent** increase was seen in the answer “prioritizing democratic reform and strengthening political institutions” compared with the 2022 survey.

Analysis of the Survey Results

The survey reveals that the majority of the respondents across all policy communities chose the option of “prioritizing democratic reform and strengthening political institutions,” except the business community. Notably, all respondents from EAOs chose this option. Civil society organizations (**92 percent**), PDFs/LDFs (**91 percent**), prominent individuals (**84 percent**), and political society (**67 percent**) also responded this way. On the other hand, business community respondents (**46 percent**) selected “prioritizing economic development.”

Question-38

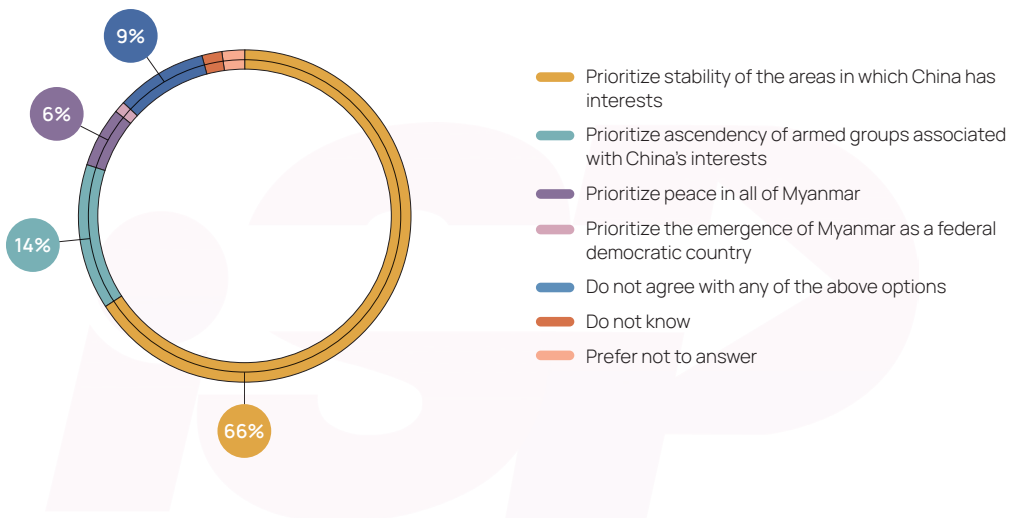
Two strategies to achieve peace in Myanmar

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Prioritizing economic development	14%	2%	29%	46%	13%	0%	9%
Prioritizing democratic reform and strengthening political institutions	80%	92%	67%	44%	84%	100%	91%
Do not know	2%	3%	4%	2%	0%	0%	0%
Prefer not to answer	4%	3%	0%	8%	3%	0%	0%

## Question-39

## View on China's efforts towards Myanmar's peace process

For survey question No. 39, respondents were asked to choose one option that best matches their view on China's effort regarding Myanmar's peace process following the 2021 coup.



In asking about China's emphasis, which is a newly introduced question in this year's survey, **66 percent** of the respondents answered that China prioritizes stability of the areas in which China has interests, while **14 percent** believed that China prioritizes the ascendancy of armed groups associated with its interests. **Six percent** answered that China prioritizes peace in all of Myanmar, while **one percent** perceived that China prioritizes the emergence of Myanmar as a federal democratic country. **Nine percent** of respondents did not agree with any of the options, while **two percent** each selected "do not know" and "prefer not to answer."



Analysis of the Survey Results

The survey reveals that the majority of respondents predominantly believed that China only emphasizes stability for the areas where its interests exist. Prominent individuals (**84 percent**), PDFs/LDFs (**82 percent**) and EAOs (**80 percent**), civil society organizations (**58 percent**), political society (**57 percent**), and the business community (**54 percent**) selected this answer.

Question-39

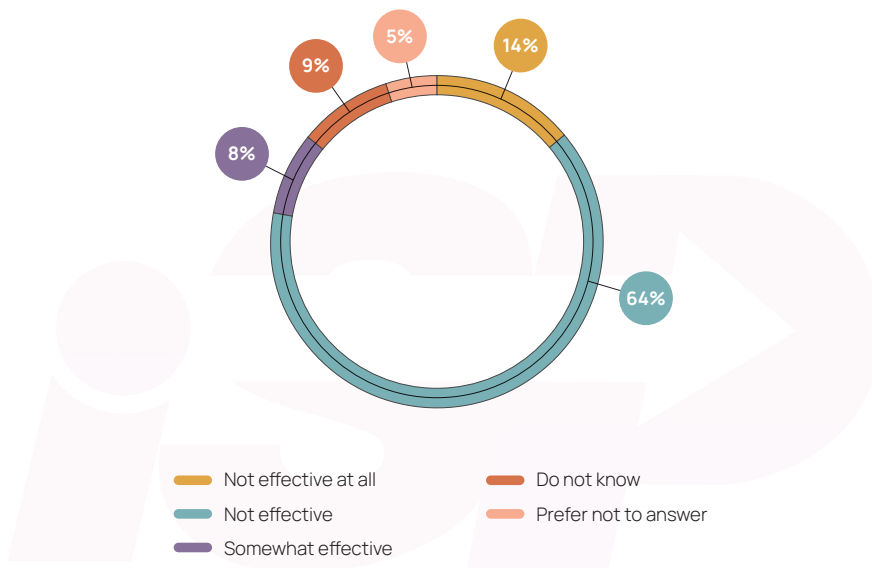
View on China's efforts towards Myanmar's peace process

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Prioritize stability of the areas in which China has interests	66%	58%	57%	54%	84%	80%	82%
Prioritize ascendancy of armed groups associated with China's interests	14%	25%	10%	5%	5%	13%	0%
Prioritize peace in all of Myanmar	6%	2%	19%	15%	5%	7%	0%
Prioritize the emergence of Myanmar as a federal democratic country	1%	2%	0%	2%	0%	0%	0%
Do not agree with any of the above options	9%	12%	5%	10%	5%	0%	18%
Other	0%	0%	0%	0%	1%	0%	0%
Do not know	2%	1%	5%	5%	0%	0%	0%
Prefer not to answer	2%	0%	4%	9%	0%	0%	0%

## Question-40

## How effective is China in helping the Rohingya repatriation process?

For survey question No. 40, respondents were asked to rate the effectiveness of Myanmar, Bangladesh, and China's tripartite solution for Rohingya repatriation. The responses range from 1. Not effective at all to 4. Very effective.



The survey this year included this new question, and **64 percent** of the respondents viewed Myanmar, Bangladesh, and China's tripartite solution for Rohingya repatriation as ineffective (represented by the response "not effective"). This process is considered not effective at all by **14 percent** of the respondents, while only **eight percent** answered "somewhat effective." However, **nine percent** of respondents do not know about the effectiveness of the process.

**Analysis of the Survey Results**

Myanmar's key stakeholders from all communities perceive that China's help in the Rohingya repatriation process is ineffective. The majority of civil society or- ganization respondents (**89 percent**), prominent individuals (**82 percent**), EAO respondents (**80 percent**), business community respondents (**64 percent**), PDFs/LDFs respondents (**54 percent**), and political society respondents (**53 per- cent**) answered not effective. Significantly, **36 percent** of PDFs/LDFs respond- ents answered that the process was somewhat effective.

**Question-40**

How effective is China in helping the Rohingya repatriation process?

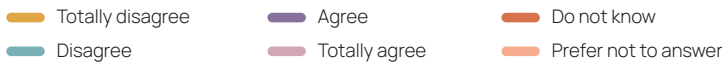
	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not effective at all	14%	15%	5%	10%	20%	13%	18%
Not effective	64%	74%	48%	54%	62%	67%	36%
Somewhat effective	8%	3%	19%	12%	5%	7%	36%
Very effective	0%	0%	0%	0%	0%	0%	0%
Do not know	9%	6%	14%	17%	8%	7%	10%
Prefer not to answer	5%	2%	14%	7%	5%	6%	0%

Note : Ineffective means the combined results of "Not effective at all" and "Not effective," while effective means "Somewhat effective" and Very effective."

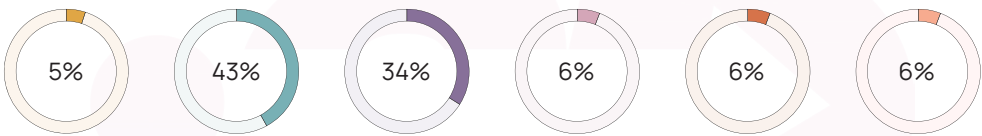
Questions-41 to 44

### What are the impacts of China's mediated discussions between the SAC and northern Shan State EAOs?

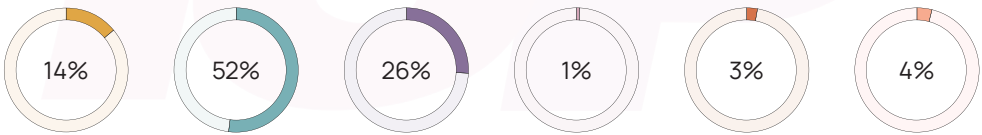
For survey questions No. 41 to 44, the respondents were asked to choose their perspective on the impacts of China's mediated discussions between the SAC and northern Shan State EAOs and rank their views on four questions with a four-point scale, ranging from 1. Totally disagree to 4. Totally agree.



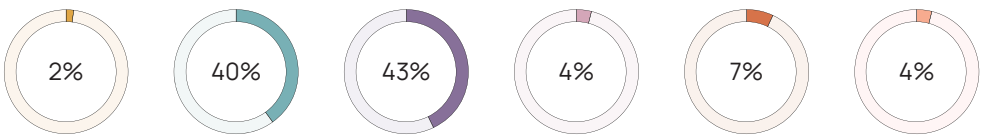
**Question-41** Weaken the emerging political entities following the coup



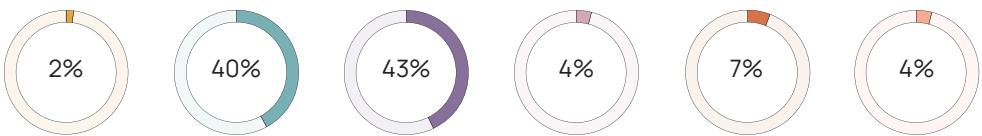
**Question-42** Helpful for Myanmar's peace process



**Question-43** Worsen Myanmar's conflict



**Question-44** Steer towards short-term ceasefires



Analysis of the Survey Results

Most of Myanmar's key stakeholders predominantly viewed that China's mediated discussions will not weaken the political forces formed after the coup. The majority of EAO respondents (**60 percent**), civil society organization respondents (**51 percent**), prominent individuals (**48 percent**), business community respondents (**44 percent**), PDFs/LDFs respondents (**36 percent**), and political society respondents (**34 percent**) shared this perspective (represented by the responses "agree" or "totally agree"). The majority also did not perceive that the discussions are supportive of Myanmar's peace process. Civil society organization respondents (**82 percent**) and members of political society (**43 percent**) disagreed that they are supportive (represented by the responses "totally disagree" and "disagree"). Significantly, another proportion of the political society respondents (**43 percent**) answered that they are supportive (represented by the responses "agree" or "totally agree"). A majority of civil society organizations (**70 percent**) and PDFs/LDFs respondents (**64 percent**) agreed that the discussions worsened Myanmar's conflict and only aimed for short-term ceasefires (represented by the responses "Agree" or "totally agree"). By contrast, EAO (**60 percent**) and business community respondents (**59 percent**), prominent individuals (**56 percent**) and members of political society (**53 percent**) disagreed (represented by the responses "totally disagree" and "disagree").

Question-41

Weaken the emerging political entities following the coup

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	5%	6%	5%	5%	5%	0%	9%
Disagree	43%	45%	29%	39%	43%	60%	27%
Agree	34%	34%	38%	29%	36%	27%	46%
Totally agree	6%	9%	5%	3%	3%	7%	9%
Do not know	6%	3%	9%	12%	10%	0%	0%
Prefer not to answer	6%	3%	14%	12%	3%	6%	9%

Question-42

Helpful for Myanmar's peace process

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	14%	16%	5%	5%	16%	13%	28%
Disagree	52%	66%	38%	39%	48%	40%	36%
Agree	26%	15%	43%	37%	25%	40%	36%
Totally agree	1%	1%	0%	2%	2%	0%	0%
Do not know	3%	1%	5%	7%	5%	0%	0%
Prefer not to answer	4%	1%	9%	10%	4%	7%	0%

Question-43

Worsen Myanmar's conflict

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	2%	1%	5%	5%	0%	7%	0%
Disagree	40%	23%	48%	54%	56%	53%	36%
Agree	43%	63%	29%	22%	31%	33%	46%
Totally agree	4%	7%	5%	0%	2%	0%	18%
Do not know	7%	5%	5%	10%	7%	0%	0%
Prefer not to answer	4%	1%	8%	9%	4%	7%	0%

Question-44

Steer towards short-term ceasefires

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	2%	1%	5%	5%	0%	7%	0%
Disagree	40%	23%	48%	54%	56%	53%	36%
Agree	43%	63%	29%	22%	31%	33%	46%
Totally agree	4%	7%	5%	0%	2%	0%	18%
Do not know	7%	5%	5%	10%	7%	0%	0%
Prefer not to answer	4%	1%	8%	9%	4%	7%	0%

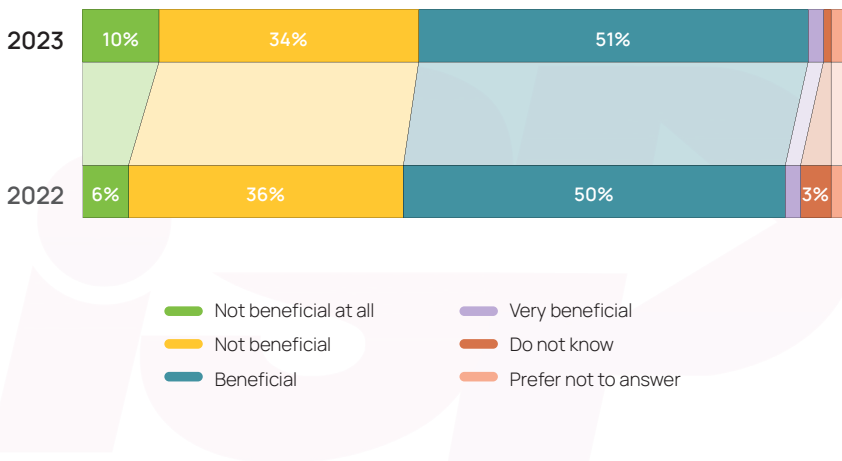
# 4

## Sino-Myanmar Economic Relations

Question-45

### How beneficial are China's economic investments for Myanmar's people?

For survey question No. 45, respondents were asked to choose their perspective on how China's economic investments benefit Myanmar's people and rank their views on a four-point scale, ranging from 1. Not beneficial at all to 4. Very beneficial.



Regarding the benefits of China's economic investments for Myanmar's people, **51 percent** of the respondents answered "beneficial." Additionally, **34 percent** answered "not beneficial," and **ten percent** selected "not beneficial at all."

No significant differences were measured in comparison with the 2022 survey other than a **two percent** decrease in those answering "not beneficial" and a **four percent** increase in those answering "not beneficial at all."



Analysis of the Survey Results

Civil society organization respondents (**68 percent**) predominantly perceived that China's economic investments were not favorable (answered "not beneficial" and "not beneficial at all") to Myanmar's people. EAO respondents (**60 percent**) also answered similarly. The majority of business community respondents (**87 percent**) selected "beneficial" and "very beneficial" for this question, followed by **72 percent** of political society respondents. Likewise, prominent individuals (**64 percent**) and PDFs/LDFs respondents (**55 percent**) also answered "beneficial."

Question-45

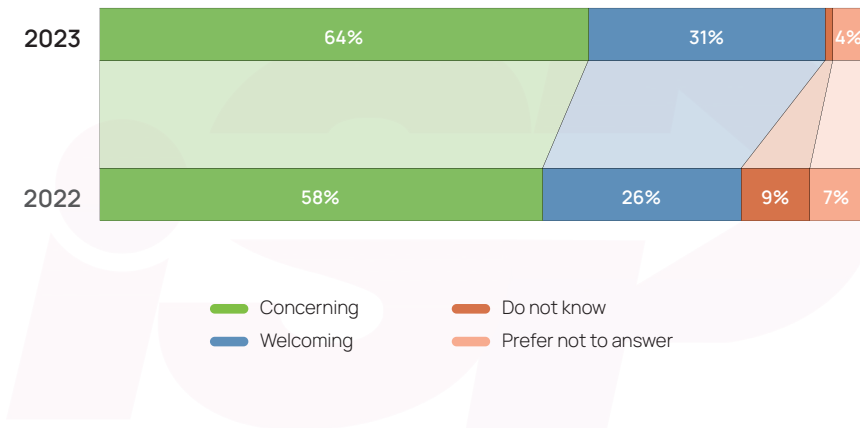
How beneficial are China's economic investments for Myanmar's people?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	10%	20%	0%	0%	7%	0%	0%
Not beneficial	34%	48%	24%	10%	25%	60%	36%
Beneficial	51%	30%	67%	80%	64%	40%	55%
Very beneficial	2%	0%	5%	7%	0%	0%	0%
Do not know	1%	0%	4%	0%	3%	0%	0%
Prefer not to answer	2%	2%	0%	3%	1%	0%	9%

Question-46

### What are the perceptions of China's status as Myanmar's largest economic partner?

For survey question No. 46, respondents were asked to choose their perception of China as Myanmar's largest economic partner, with the following options given: 1. Concerning, and 2. Welcoming.



Regarding China's status as Myanmar's largest economic partner, **64 percent** of the respondents answered that it was "concerning." In contrast, **31 percent** welcomed China as the largest partner.

Compared with the 2022 survey, there is a **six percent** increase in respondents finding China's status as concerning and a **five percent** increase in respondents finding China's status as welcoming.

**Analysis of the Survey Results**

The survey revealed that the majority of the civil society organization respondents (**92 percent**) find it concerning that China is Myanmar’s largest economic partner (answered “concerning”). Following them, EAO respondents (**67 percent**), prominent individuals (**61 percent**), and PDFs/LDFs respondents (**55 percent**) also shared the same view. Meanwhile, the majority of business community respondents (**78 percent**) welcomed China as the largest economic partner (answered “welcoming”). Similarly, **62 percent** of political society respondents also gave the same answer.

**Question-46**

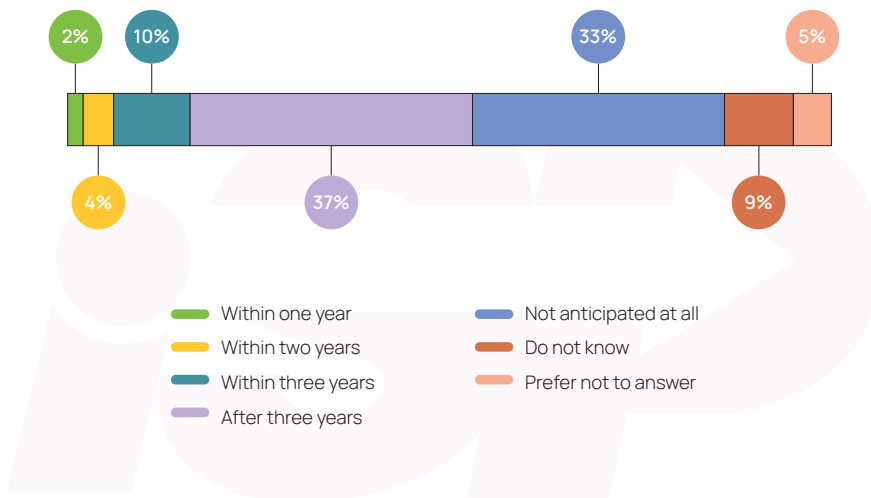
What are the perceptions of China's status as Myanmar's largest economic partner?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Concerning	64%	92%	33%	17%	61%	67%	55%
Welcoming	31%	7%	62%	78%	30%	27%	36%
Do not know	1%	0%	5%	0%	2%	0%	0%
Prefer not to answer	4%	1%	0%	5%	7%	6%	9%

## Question-47

## When can one expect improvements in China-Myanmar economic relations?

For survey question No. 47, respondents were asked about when can they expect improvements in China-Myanmar economic relations with options indicating the period of years within which this could happen.



The majority of respondents, **37 percent**, believed that China-Myanmar economic relations could improve only after three years, possibly in 2026. The second-largest group, comprising **33 percent** of respondents, believed it would not improve (answered "not anticipated at all"). **Ten percent** of respondents believed there could be improvement within three years, while **four percent** expected it within two years. Only **two percent** foresaw improvement within a year.

This question was also included in the 2022 survey, where the majority of respondents could not predict when the China-Myanmar economic relations would improve, and the "do not know" option was chosen by **24 percent** of respondents.

Analysis of the Survey Results

According to the survey, political society respondents (**52 percent**), PDFs/LDFs respondents (**45 percent**), prominent individuals (**44 percent**) and business community respondents (**41 percent**) answered “after three years,” indicating that the economic relations between China and Myanmar would improve starting in 2026. In contrast, civil society organizations (**51 percent**) and EAOs (**47 percent**) saw no possibility of improvement (answered “not anticipated at all”). Significantly, none of the respondents from EAOs or PDFs/LDFs or from among prominent individuals answered “within one year.”

Question-47

When can one expect improvements in China-Myanmar economic relations?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Within one year	2%	3%	5%	5%	0%	0%	0%
Within two years	4%	3%	5%	7%	3%	0%	9%
Within three years	10%	5%	10%	17%	10%	20%	18%
After three years	37%	30%	52%	41%	44%	20%	45%
Not anticipated at all	33%	51%	5%	15%	23%	47%	18%
Do not know	9%	6%	14%	5%	13%	13%	10%
Prefer not to answer	5%	2%	9%	10%	7%	0%	0%

Questions-48 to 53

## How does China's great reopening impact Myanmar's economy following Covid-19?

For survey questions No. 48 to 53, respondents were asked to give their perceptions on the impact of "China's great reopening" on Myanmar's economy following Covid-19, in areas such as investment, trade and employment and other areas.

■ Greatly decreased    
 ■ Unchanged    
 ■ Greatly increased    
 ■ Prefer not to answer  
■ Slightly decreased    
 ■ Slightly increased    
 ■ Do not know

**Question-48** Investment



**Question-49** Trade



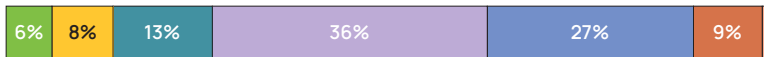
**Question-50** Employment



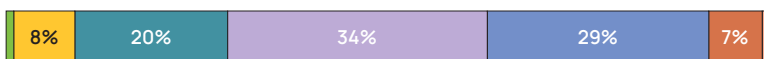
**Question-51** Tourism



**Question-52** Cross-border Crimes



**Question-53** Illicit Trade



This year's survey included a new question to measure the impact of China's great reopening on Myanmar's economy. The majority of respondents perceived that China's great reopening following Covid-19 has led to a decline in investment, trade, employment rate, and tourism. Regarding investment, **33 percent** of respondents answered that China's reopening has "decreased" it, while **26 percent** selected "increased" and **24 percent** indicated "unchanged." Respondents also answered "decreased" regarding trade (**52 percent**), the employment (**62 percent**) and tourism (**75 percent**). However, **63 percent** of respondents believe that the development of cross-border crimes and illicit trade has "increased".

### Analysis of the Survey Results

The survey indicates that most of Myanmar's key stakeholders perceived a decline in investment as the impact of China's great reopening after Covid-19 (represented by the responses "greatly decreased" or "decreased"). This perspective is shared by **53 percent** of business community respondents. **Sixty-eight percent** of the business community also predominantly answered that trade has decreased (represented by the responses "greatly decreased" or "decreased"). A staggering **86 percent** of the business community also had the same answer in terms of tourism (represented by the responses "greatly decreased" or "decreased"). Significantly, over half of all groups other than political society perceived a decrease in the employment rate (represented by the responses "greatly decreased" or "decreased"). The EAOs (**73 percent**) mostly perceived an increase in cross-border crime (represented by the responses "greatly increased" or "increased"). On the other hand, **44 percent** of the business community and **40 percent** of EAO respondents indicated an increase in illicit trade (represented by the responses "greatly increased" or "increased"). This view on illicit trade is also shared by **74 percent** of civil society organization respondents, **81 percent** of PDFs/LDFs respondents, **66 percent** of political society members, and **61 percent** of prominent individuals.

Question-48 Investment

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Greatly decreased	7%	9%	5%	2%	10%	7%	0%
Slightly decreased	33%	24%	24%	51%	34%	40%	45%
Unchanged	24%	26%	43%	20%	16%	33%	18%
Slightly increased	26%	28%	19%	24%	28%	13%	27%
Greatly increased	4%	9%	5%	0%	2%	0%	0%
Do not know	6%	4%	4%	3%	8%	7%	10%
Prefer not to answer	0%	0%	0%	0%	2%	0%	0%

Question-49 Trade

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Greatly decreased	10%	11%	5%	7%	10%	7%	18%
Slightly decreased	42%	38%	33%	61%	38%	53%	36%
Unchanged	16%	12%	29%	17%	18%	20%	9%
Slightly increased	23%	29%	29%	12%	21%	13%	27%
Greatly increased	4%	8%	0%	0%	2%	0%	0%
Do not know	5%	2%	4%	3%	10%	7%	10%
Prefer not to answer	0%	0%	0%	0%	1%	0%	0%

Question-50 Employment

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Greatly decreased	19%	25%	10%	10%	21%	7%	18%
Slightly decreased	43%	41%	29%	59%	34%	60%	55%
Unchanged	19%	14%	43%	20%	18%	12%	27%
Slightly increased	13%	15%	10%	10%	16%	7%	0%
Greatly increased	1%	1%	0%	0%	0%	7%	0%
Do not know	5%	4%	8%	1%	8%	7%	0%
Prefer not to answer	0%	0%	0%	0%	3%	0%	0%



Question-51 Tourism

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Greatly decreased	32%	33%	14%	32%	39%	20%	46%
Slightly decreased	42%	42%	48%	54%	33%	60%	27%
Unchanged	10%	13%	10%	5%	7%	0%	27%
Slightly increased	9%	7%	19%	7%	11%	7%	0%
Greatly increased	1%	1%	5%	0%	0%	0%	0%
Do not know	5%	4%	4%	2%	8%	7%	0%
Prefer not to answer	1%	0%	0%	0%	2%	6%	0%

Question-52 Cross-border Crimes

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Greatly decreased	6%	7%	5%	2%	3%	7%	18%
Slightly decreased	8%	9%	19%	7%	8%	0%	0%
Unchanged	13%	13%	5%	17%	10%	13%	36%
Slightly increased	36%	36%	33%	34%	33%	73%	9%
Greatly increased	27%	31%	19%	20%	36%	0%	27%
Do not know	9%	4%	19%	17%	8%	7%	10%
Prefer not to answer	1%	0%	0%	3%	2%	0%	0%

Question-53 Illicit Trade

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Greatly decreased	1%	2%	0%	0%	0%	0%	0%
Slightly decreased	8%	6%	10%	15%	8%	0%	9%
Unchanged	20%	16%	14%	32%	20%	47%	0%
Slightly increased	34%	33%	52%	32%	31%	33%	45%
Greatly increased	29%	41%	14%	12%	30%	7%	36%
Do not know	7%	2%	10%	7%	10%	13%	10%
Prefer not to answer	1%	0%	0%	2%	1%	0%	0%

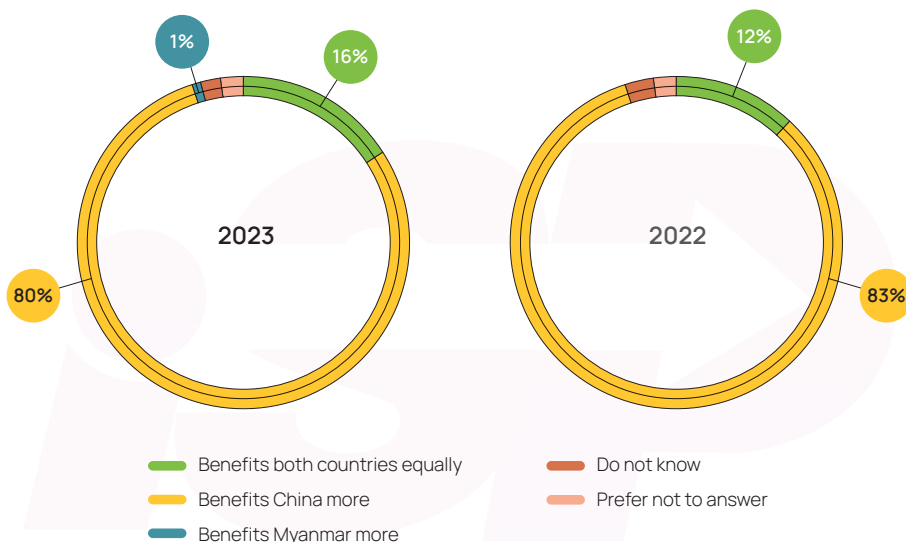
# 5

## China-Myanmar Economic Corridor (CMEC) Projects

## Question-54

## Which country benefits more from the China-Myanmar Economic Corridor (CMEC) projects?

For survey question No. 54, respondents were asked to identify whether the China-Myanmar Economic Corridor (CMEC) project would be mutually beneficial, more beneficial to China, or more beneficial to Myanmar.



The majority of respondents – **80 percent** – answered that the China-Myanmar Economic Corridor (CMEC) projects bring more economic advantages to China, while **16 percent** viewed the projects as beneficial to both countries equally. Merely **one percent** indicated that the project benefits Myanmar more.

There were no significant differences with the 2022 survey, with this year's only showing a **three percent** decrease in respondents who perceived the projects as more beneficial for China (answered "benefits China more") and a **four percent** increase in those who viewed them as beneficial for both countries equally.

Analysis of the Survey Results

The survey revealed that across all respondent groups, the China-Myanmar Economic Corridor (CMEC) projects are perceived to benefit China more. All PDFs/LDFs respondents shared this sentiment, as well as the majority of civil society organization respondents (**94 percent**), EAO respondents (**93 percent**), and prominent individuals (**74 percent**). In contrast, business community respondents (**41 percent**) and members of political society (**33 percent**) were more likely to view the projects as mutually beneficial.

Question-54

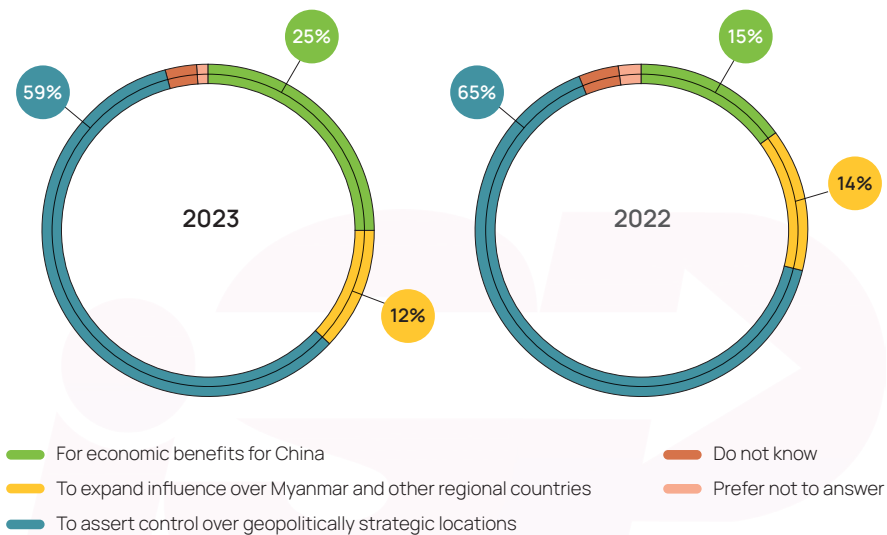
Which country benefits more from the China-Myanmar Economic Corridor (CMEC) projects?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Benefits both countries equally	16%	4%	33%	41%	18%	7%	0%
Benefits China more	<b>80%</b>	<b>94%</b>	<b>57%</b>	<b>56%</b>	<b>74%</b>	<b>93%</b>	<b>100%</b>
Benefits Myanmar more	1%	1%	5%	0%	0%	0%	0%
Do not know	2%	1%	5%	0%	3%	0%	0%
Prefer not to answer	1%	0%	0%	3%	5%	0%	0%

## Question-55

## Views on the purpose for the China-Myanmar Economic Corridor (CMEC)?

For survey question No. 55, respondents were asked for their opinion on the purpose of the China-Myanmar Economic Corridor (CMEC).



Across all communities, holding the view of China to assert its control over geopolitically strategic locations through CMEC project was the most prevalent (**59 percent**). On the other hand, **25 percent** indicated that the aim of the CMEC is for China's economic benefit, while **12 percent** felt that it is for China to expand its influence over Myanmar and other regional countries.

Compared with the 2022 survey, there has been a **ten percent** rise in participants believing that the projects are for China's economic benefit. Meanwhile, there has been a **six percent** decrease in respondents perceiving that China's purpose is to assert control over geopolitically strategic locations, as well as a **two percent** decrease in respondents perceiving that China's purpose is to expand its influence over Myanmar and other regional countries.

Analysis of the Survey Results

Respondents across different communities predominantly perceived that China's purpose for the China-Myanmar Economic Corridor (CMEC) project is to assert control over geopolitically strategic locations. This perspective is held by civil society organizations (**68 percent**), members of political society (**62 percent**), EAOs (**60 percent**), and prominent figures (**59 percent**). Meanwhile, **44 percent** of the business community believed that the project serves China's economic interests (answered "for economic benefits"). Additionally, **20 percent** of EAOs saw the project as a tool for China to expand its influence over Myanmar and its neighboring countries (answered "to expand influence over Myanmar and other regional countries").

Question-55

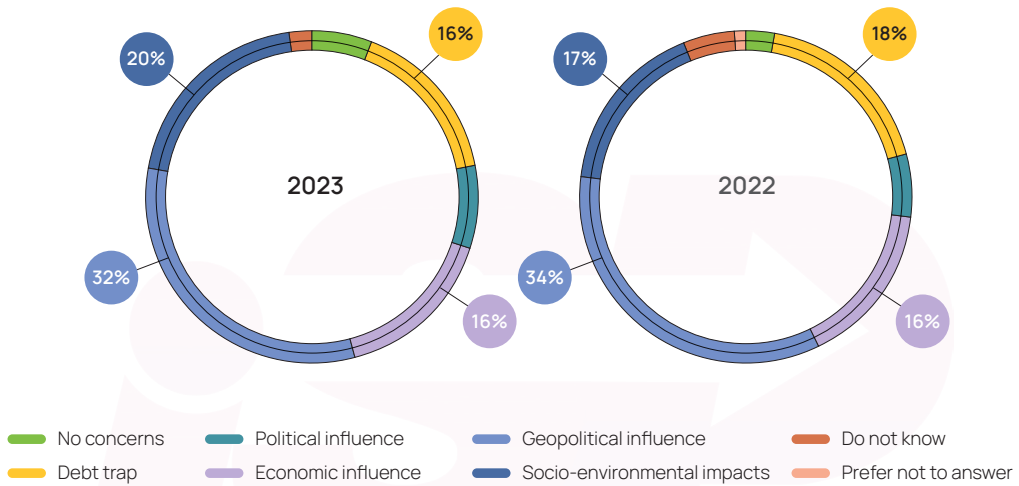
Views on the purpose for the China-Myanmar Economic Corridor (CMEC)?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
For economic benefits for China	25%	24%	19%	44%	18%	20%	27%
To expand influence over Myanmar and other regional countries	12%	8%	10%	17%	16%	20%	9%
To assert control over geopolitically strategic locations	59%	68%	62%	37%	59%	60%	55%
Do not know	3%	0%	9%	0%	3%	0%	9%
Prefer not to answer	1%	0%	0%	2%	4%	0%	0%

Question-56

### What are key stakeholders' concerns regarding the China-Myanmar Economic Corridor (CMEC)?

For survey question No. 56, respondents were asked to select the biggest concern about the China-Myanmar Economic Corridor (CMEC) from a list.



Regarding concerns about the China-Myanmar Economic Corridor (CMEC), **32 percent** of respondents shared the common concern of China's growing geopolitical influence over the region (answered "geopolitical influence"). **Twenty percent** of respondents found it concerning that the project would lead to a socio-environmental impact in Myanmar. **Sixteen percent** of respondents showed concern about Myanmar falling into a debt trap (answered "debt trap"), while another **16 percent** find China's economic influence a source of distress (answered "economic influence"). Additionally, **eight percent** answered "political influence" regarding the CMEC's concern, while **six percent** selected "no concerns."

When juxtaposed with the 2022 survey, this year's survey reveals no significant variances. Respondents expressing concern over geopolitical influence decreased by **two percent**, and those expressing concern over socio-environmental impacts increased by **three percent**.

Analysis of the Survey Results

All surveyed key stakeholders of Myanmar other than PDFs/LDFs respondents expressed concern about China's geopolitical influence. Political society members (**43 percent**), EAOs respondents (**40 percent**), prominent individuals (**38 percent**), civil society organization respondents (**29 percent**) and business community members (**27 percent**) answered "geopolitical influence." Interestingly, **27 percent** of PDFs/LDFs respondents were respectively concerned with the problem of a debt trap, political influence or economic influence regarding the CMEC.

Question-56

What are key stakeholders' concerns regarding the China-Myanmar Economic Corridor (CMEC)?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No concerns	6%	1%	14%	20%	5%	0%	0%
Debt trap	16%	20%	19%	12%	13%	6%	27%
Political influence	8%	8%	10%	5%	8%	0%	27%
Economic influence	16%	17%	5%	24%	10%	27%	27%
Geopolitical influence	32%	29%	43%	27%	38%	40%	19%
Socio-environmental impacts	20%	25%	5%	10%	25%	27%	0%
Do not know	2%	0%	4%	0%	1%	0%	0%
Prefer not to answer	0%	0%	0%	2%	0%	0%	0%



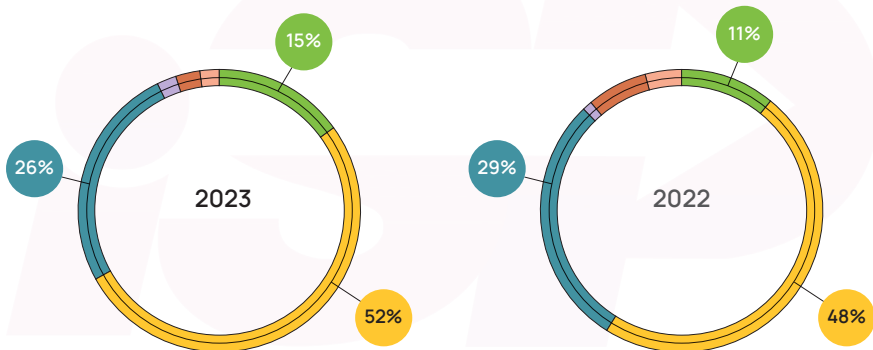
Questions-57 to 60

### Views on the potential impacts of the China-Myanmar Economic Corridor (CMEC)

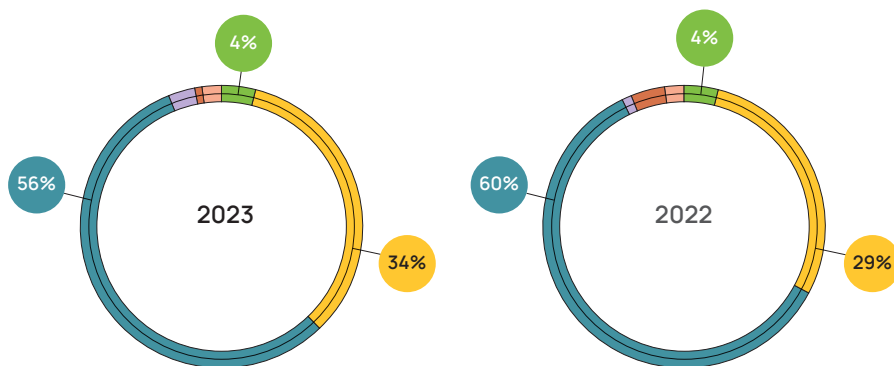
For survey questions No. 57 to 60, respondents were asked to what extent they agree with a series of statements regarding the CMEC's impacts on the peace process, economic development, socio-economic advancements, and potential exit for the economic and political crises.

- Totally disagree
- Agree
- Do not know
- Disagree
- Totally agree
- Prefer not to answer

**Question-57** CMEC has positive impacts on the peace process.



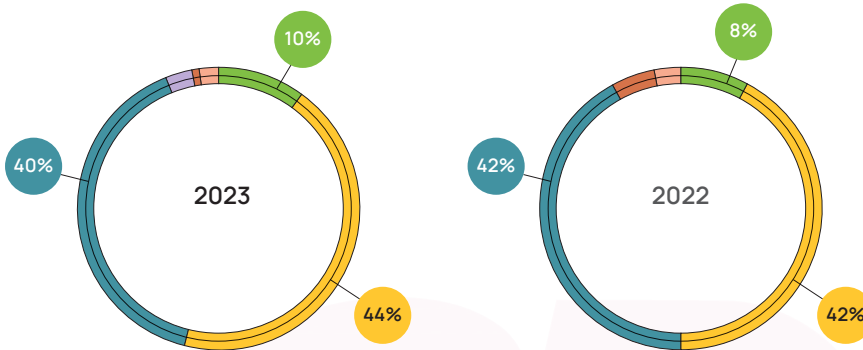
**Question-58** CMEC aid Myanmar's economic development.



- Totally disagree
- Agree
- Do not know
- Disagree
- Totally agree
- Prefer not to answer

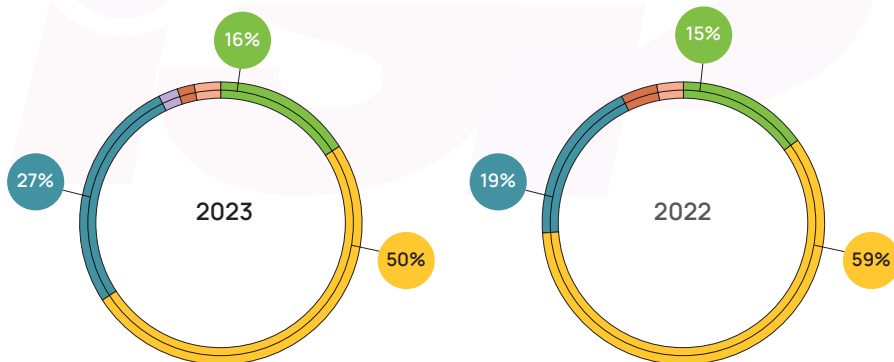
**Question-59**

CMEC helps improve the socio-economic situations of the public.



**Question-60**

CMEC is a potential exit for the economic and political crises.



**Fifty-two percent** of the respondents disagreed that the China-Myanmar Economic Corridor (CMEC) supports the peace process, while **56 percent** agreed that the CMEC contributes to economic development. The respondents also weighed in on the CMEC's benefit to socio-economic development, with **40 percent** agreeing and **44 percent** disagreeing. When asked whether the CMEC would offer a solution to Myanmar's economic and political crises, **50 percent** disagreed, while **27 percent** agreed. This indicates little difference in comparison to the previous survey results.

Analysis of the Survey Results

The majority of business community members (**63 percent**) believed that the CMEC would have a positive impact on the peace process. However, the majority of the respondents from EAOs (**93 percent**) disagreed with this perspective. Similarly, the majority of business community members (**88 percent**) believed that the CMEC would contribute to Myanmar’s economic development. Members of political society (**81 percent**) also held a similar perception of the CMEC’s impact on economic development, while the majority of civil society organization respondents (**63 percent**) disagreed. Additionally, **80 percent** of the business community believed that the CMEC would improve Myanmar’s people’s socio-economic livelihoods, whereas **80 percent** of civil society organization respondents disagreed with this notion. Furthermore, **86 percent** of civil society organization respondents disagree that the CMEC would provide a solution to the economic and political crises facing Myanmar, while **61 percent** of the business community believed it would. Interestingly, **40 percent** of the EAOs and **45 percent** of the PDFs/LDFs expressed agreement that the CMEC would contribute to socioeconomic development in Myanmar.

Question-57

CMEC has positive impacts on the peace process.

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	15%	27%	5%	0%	15%	0%	9%
Disagree	52%	57%	33%	29%	49%	93%	73%
Agree	26%	14%	43%	56%	30%	7%	9%
Totally agree	2%	1%	5%	7%	0%	0%	0%
Do not know	3%	1%	9%	3%	5%	0%	9%
Prefer not to answer	2%	0%	5%	5%	1%	0%	0%

Question-58

CMEC aid Myanmar's economic development.

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	4%	8%	0%	0%	2%	0%	0%
Disagree	34%	55%	10%	10%	26%	27%	27%
Agree	56%	37%	71%	76%	69%	67%	55%
Totally agree	3%	0%	10%	12%	2%	0%	0%
Do not know	1%	0%	5%	0%	1%	0%	9%
Prefer not to answer	2%	0%	4%	2%	0%	6%	9%

Question-59

CMEC helps improve the socio-economic situations of the public.

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	10%	20%	0%	0%	3%	13%	0%
Disagree	44%	60%	24%	17%	43%	40%	45%
Agree	40%	20%	57%	68%	49%	40%	45%
Totally agree	3%	0%	10%	12%	2%	0%	0%
Do not know	1%	0%	5%	0%	2%	0%	10%
Prefer not to answer	2%	0%	4%	3%	1%	7%	0%

Question-60

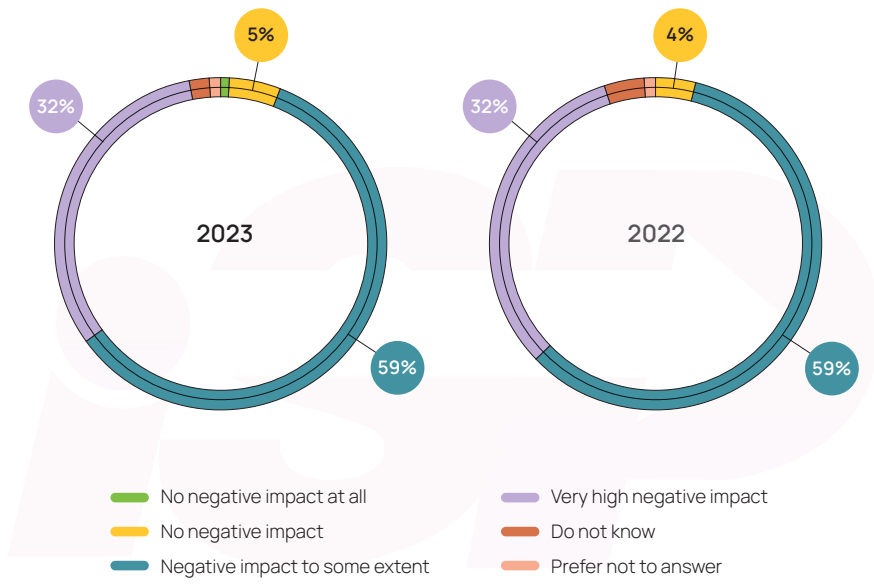
CMEC is a potential exit for the economic and political crises.

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	16%	27%	5%	0%	16%	0%	27%
Disagree	50%	59%	38%	32%	46%	73%	55%
Agree	27%	13%	33%	54%	36%	20%	9%
Totally agree	2%	0%	10%	7%	0%	0%	0%
Do not know	2%	1%	4%	2%	0%	0%	9%
Prefer not to answer	3%	0%	10%	5%	2%	7%	0%

Question-61

### The socio-environmental impacts of the China-Myanmar Economic Corridor (CMEC)

In survey question No. 61, respondents were asked to rank to what extent the CMEC would affect the socio-environmental aspects in Myanmar.



Regarding the socio-environmental impacts of the China-Myanmar Economic Corridor (CMEC), **59 percent** of respondents considered it to be negatively impactful to a certain extent, while **32 percent** viewed that it has high negative impacts.

There were no considerable differences compared with the 2022 survey, as merely **one percent** of respondents increased in answering “no negative impact,” and another **one percent** responded “no negative impact at all.”

Analysis of the Survey Results

The civil society organizations (**95 percent**) predominantly answered that the CMEC has a negative socio-environmental impact on Myanmar's people. EAOs and prominent individuals (**both 93 percent**), PDFs/LDFs and political society respondents (**both 91 percent**), and business community respondents (**75 percent**) perceived similarly (the percentages shown here are represented by the responses "negative impact to some extent" and "high negative impact").

Question-61

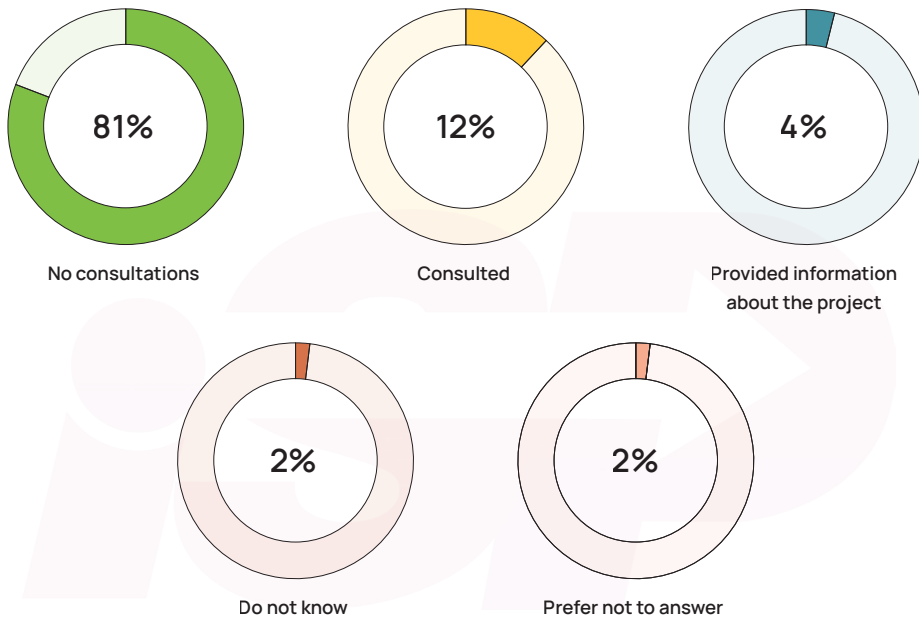
The socio-environmental impacts of the China-Myanmar Economic Corridor (CMEC)

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No negative impact at all	1%	2%	5%	0%	0%	0%	0%
No negative impact	5%	3%	0%	17%	3%	7%	0%
Negative impact to some extent	59%	38%	86%	73%	67%	86%	64%
Very high negative impact	32%	57%	5%	2%	26%	7%	27%
Do not know	2%	0%	4%	2%	2%	0%	9%
Prefer not to answer	1%	0%	0%	6%	2%	0%	0%

Question-62

### Consultations regarding the China-Myanmar Economic Corridor (CMEC)

For survey question No. 62, respondents were asked whether Chinese company authorities consulted the key stakeholders regarding the China-Myanmar Economic Corridor (CMEC) or not and were asked to select more than one answer if applicable.



Regarding consultations related to the China-Myanmar Economic Corridor (CMEC), **81 percent** of respondents reported that Chinese companies did not contact or consult with them at all. Only **12 percent** indicated that they were consulted, while **four percent** stated that they were provided with information about the project. **Two percent** admitted that they were not aware of any consultations.

Compared to the 2022 survey, there has been a **six percent** increase in respondents who reported not being consulted, along with a **one percent** increase in those who were consulted.

Analysis of the Survey Results

The majority of respondent groups reported no contact from Chinese companies and authorities regarding the CMEC project. This was affirmed by members of civil society organizations (88 percent), PDFs/LDFs (82 percent), EAOs (80 percent), prominent individuals (79 percent), business community members (76 percent), and political society respondents (62 percent). However, 14 percent of political society respondents and five percent of both business community and civil society organization respondents stated that they were provided with information about the project. Additionally, respondents of the political community (29 percent), prominent individuals (15 percent), EAOs (13 percent), business community members (12 percent), PDFs/LDFs (9 percent), and civil society organizations (7 percent) stated that they were explained and consulted by Chinese company authorities.

Question-62

Consultations regarding the China-Myanmar Economic Corridor (CMEC)

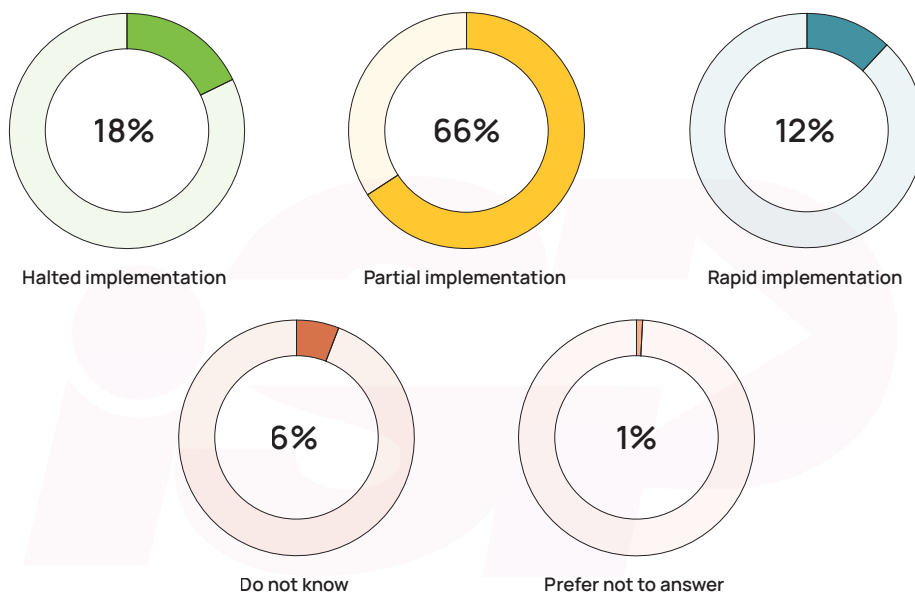
	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
No consultations	81%	88%	62%	76%	79%	80%	82%
Consulted	12%	7%	29%	12%	15%	13%	9%
Provided information about the project	4%	5%	14%	5%	0%	0%	0%
Do not know	2%	0%	0%	5%	3%	0%	0%
Prefer not to answer	2%	0%	5%	2%	3%	7%	9%



## Question-63

## Views on the implementation status of CMEC projects

For survey question No. 63, respondents were asked about their perceptions of the implementation status of the China-Myanmar Economic Corridor (CMEC) between the State Administration Council (SAC) and China, and allowed the respondents to choose more than one option. The percentage for each option is calculated based on 100 percent.



Regarding the implementation status of the China-Myanmar Economic Corridor (CMEC) projects in the post-coup period, **66 percent** of the respondents perceived that the CMEC was being partially implemented by the State Administration Council (SAC) and China. Additionally, **18 percent** of the respondents thought that the project's implementation were halted, while **12 percent** viewed it as being implemented rapidly. **Six percent** of the respondents answered that they do not know about the CMEC's current implementation status. This question was newly added to this year's survey.

Analysis of the Survey Results

In examining responses from the six communities regarding the status of CMEC implementation, **71 percent** of political society respondents indicated partial implementation. Conversely, **23 percent** of civil society organization respondents reported “rapid implementation,” while **40 percent** of the EAOs primarily indicated “halted implementation.”

Question-63

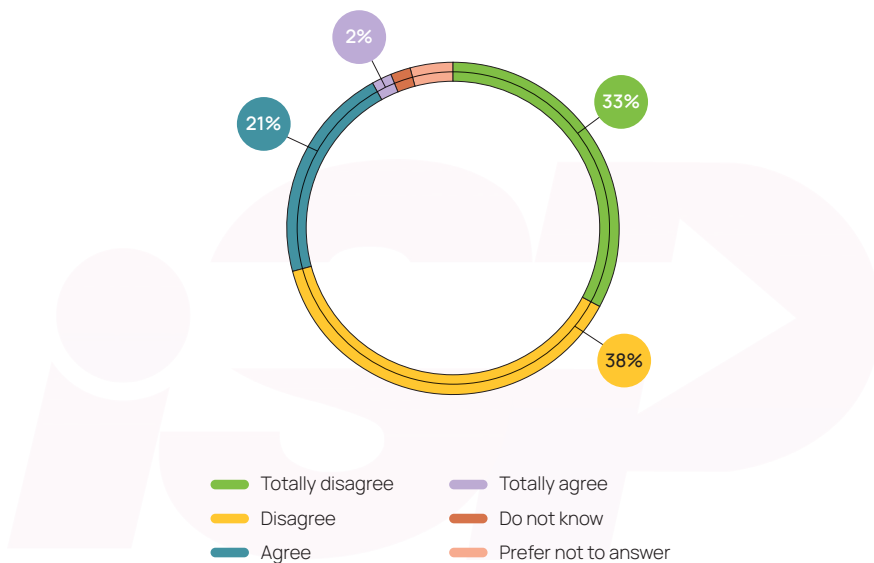
Views on the implementation status of CMEC projects

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Halted implementation	18%	11%	14%	27%	18%	40%	18%
Partial implementation	66%	66%	71%	56%	70%	60%	64%
Rapid implementation	12%	23%	0%	5%	5%	0%	9%
Do not know	6%	4%	10%	7%	7%	0%	9%
Prefer not to answer	1%	0%	5%	5%	0%	0%	0%

Question-64

### How are the China-Myanmar Economic Corridor (CMEC) implementation efforts perceived?

For survey question No. 64, respondents were asked whether they agree or disagree with the efforts made to implement the CMEC project.



The addition of a new question in this year's survey, focusing on the implementation efforts of the China-Myanmar Economic Corridor (CMEC), revealed a significant trend among Myanmar's key stakeholders. The majority of respondents, **71 percent**, expressed disagreement (represented by the responses "totally disagree" and "disagree") with the implementation during the political crises. In contrast, agreement (represented by the responses "totally agree" and "agree") accounted for only **23 percent**. This notable level of disagreement warrants further analysis to better understand its implications.

Analysis of the Survey Results

Perceptions regarding the potential implementation of the China-Myanmar Economic Corridor (CMEC) amidst Myanmar's political crisis varied among different stakeholder groups. The majority of respondents among PDFs/LDFs (**91 percent**), EAOs (**87 percent**), civil society organizations (**85 percent**), prominent individuals (**79 percent**), and political society members (**52 percent**) and some business community members (**27 percent**) expressed disagreement (answered either "totally disagree" or "disagree"). Conversely, respondents from business community (**59 percent**) political society members (**43 percent**), prominent individuals (**18 percent**) and EAO (**13 percent**), and civil society organization respondents (**12 percent**) expressed agreement (answered either "totally agree" or "agree").

Question-64

How are the China-Myanmar Economic Corridor (CMEC) implementation efforts perceived?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	33%	48%	19%	7%	33%	27%	36%
Disagree	38%	37%	33%	20%	46%	60%	55%
Agree	21%	11%	38%	49%	18%	13%	0%
Totally agree	2%	1%	5%	10%	0%	0%	0%
Do not know	2%	1%	5%	4%	0%	0%	9%
Prefer not to answer	4%	2%	0%	10%	3%	0%	0%

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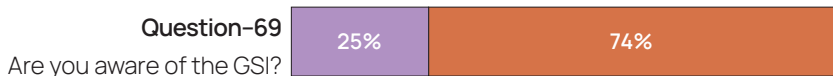
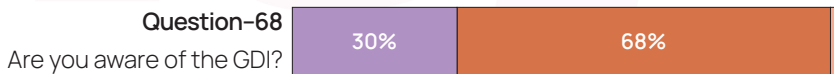
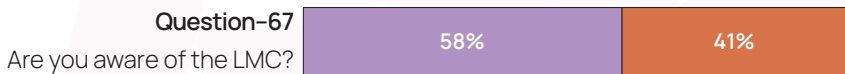
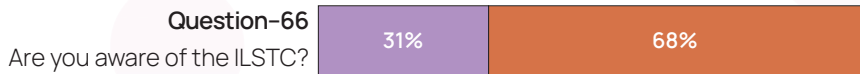
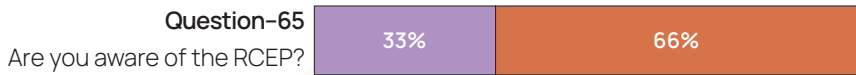
## Myanmar's Perceptions of China's Regional Integration Projects

Questions-65 to 69

### What is the awareness of China's regional integration projects?

For survey questions No. 65 to 69, respondents were asked about their awareness of China's Regional Intregation projects.

■ Yes    
 ■ No    
 ■ Prefer not to answer



- RCEP - Regional Comprehensive Economic Partnership
- ILSTC - International Land-Sea Trade Corridor
- LMC - Lancang-Mekong Cooperation
- GDI - Global Development Initiative
- GSI - Global Security Initiative

Analysis of the Survey Results

The survey results showed that **61 percent** of respondents from the majority of the business community reported being aware of China's Regional Comprehensive Economic Partnership (RCEP). In contrast, **93 percent** of respondents from EAOs stated that they had no knowledge of RCEP, while **78 percent** of respondents from civil society organizations and **73 percent** of respondents from PDFs/LDFs also claimed to be unaware of it. Regarding the new International Land–Sea Trade Corridor (ILSTC), **39 percent** of business community respondents, the largest percentage among different groups, indicated awareness, while the majority of EAO respondents (**87 percent**) reported being unaware. Similarly, **82 percent** of PDFs/LDFs respondents and **71 percent** of political society respondents stated that they had no knowledge of the ILSTC. Most prominent individuals (**75 percent**) admitted being aware of the Lancang–Mekong Cooperation (LMC). However, **73 percent** of PDFs/LDFs respondents and **57 percent** of civil society organization respondents claimed to have no knowledge of it. Regarding the Global Development Initiative (GDI), **41 percent** of prominent individuals stated that they were aware of it, while **87 percent** of EAO respondents reported being unaware. Additionally, **73 percent** of PDFs/LDFs respondents and **72 percent** of civil society organization respondents claimed awareness of the GDI, while **68 percent** of business community respondents stated that they were unaware of it. Finally, concerning the Global Security Initiative (GSI), **83 percent** of respondents from civil society organizations, **80 percent** of respondents from EAOs, and **71 percent** of respondents from the business community reported having no knowledge of it.

Question-65

Are you aware of the RCEP?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Yes	33%	22%	38%	61%	39%	7%	27%
No	66%	78%	62%	34%	61%	93%	73%
Prefer not to answer	1%	0%	0%	5%	0%	0%	0%

Question-66

Are you aware of the ILSTC?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Yes	31%	33%	29%	39%	31%	13%	18%
No	68%	67%	71%	56%	69%	87%	82%
Prefer not to answer	1%	0%	0%	5%	0%	0%	0%

Question-67

Are you aware of the LMC?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Yes	58%	43%	71%	73%	75%	53%	27%
No	41%	57%	29%	22%	25%	47%	73%
Prefer not to answer	1%	0%	0%	5%	0%	0%	0%

Question-68

Are you aware of the GDI?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Yes	30%	27%	38%	27%	41%	13%	27%
No	68%	72%	62%	68%	59%	87%	73%
Prefer not to answer	2%	1%	0%	5%	0%	0%	0%

Question-69

Are you aware of the GSI?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Yes	25%	16%	33%	24%	36%	20%	45%
No	74%	83%	67%	71%	64%	80%	55%
Prefer not to answer	1%	1%	0%	5%	0%	0%	0%



Questions-70 to 72

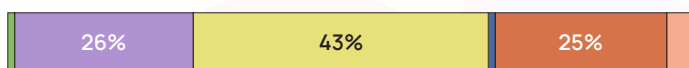
### What is the perception on the impact of China's Regional Comprehensive Economic Partnership (RCEP)?

For survey questions, No. 70 to 72, respondents were asked about their opinions on the impact of China's Regional Comprehensive Economic Partnership (RCEP).

- Totally disagree
- Disagree
- Agree
- Totally agree
- Do not know
- Prefer not to answer

**Question-70**

Does the RCEP support trade development between the two countries?



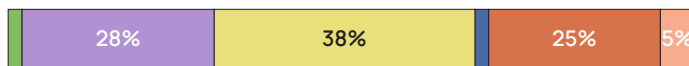
**Question-71**

Does the RCEP solely benefit Myanmar?



**Question-72**

Does the RCEP benefit all member countries, including Myanmar?



These three new questions were added this year to measure the perception of the impact of the RCEP. Most respondents (**43 percent**) agreed that the RCEP is impacting the development of China–Myanmar trade. However, **46 percent** of respondents disagreed that the RCEP is solely beneficial to Myanmar, while nine percent agreed. Regarding the RCEP's benefits for all member countries, including Myanmar, **38 percent** agreed, and **28 percent** disagreed. Meanwhile, **25 percent** of respondents answered “do not know” to each of these questions.

Analysis of the Survey Results

The majority of respondents from the business community (**80 percent**) as well as the political society respondents (**48 percent**) agreed that the RCEP impacts the development of China-Myanmar trade. Civil society organization respondents (**45 percent**) predominantly disagreed on this issue, as well as respondents from PDFs/LDFs (**45 percent**). The majority of the surveyed communities also disagreed that the RCEP solely benefits Myanmar, including **76 percent** of civil society organization respondents and **66 percent** of business community respondents.

Question-70

Does the RCEP support trade development between the two countries?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	1%	2%	0%	0%	2%	0%	0%
Disagree	26%	43%	10%	10%	15%	20%	45%
Agree	43%	35%	48%	73%	44%	13%	27%
Totally agree	1%	0%	0%	7%	0%	0%	0%
Do not know	25%	19%	42%	5%	33%	67%	18%
Prefer not to answer	4%	1%	0%	5%	6%	0%	10%

Question-71

Does the RCEP solely benefit Myanmar?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	16%	25%	4%	5%	12%	0%	36%
Disagree	46%	51%	43%	61%	36%	27%	27%
Agree	9%	5%	10%	20%	8%	7%	9%
Totally agree	0%	0%	0%	2%	0%	0%	0%
Do not know	25%	18%	43%	5%	36%	66%	19%
Prefer not to answer	4%	1%	0%	7%	8%	0%	9%

Note: Detailed survey results on Question No. 72 can be viewed on Appendix 3.

Questions-73 to 75

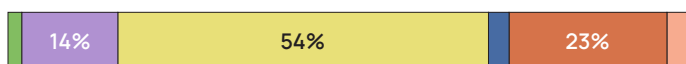
## What is the perception of the impact of China's International Land-Sea Trade Corridor (ILSTC)?

For survey questions, No. 73 to 75, respondents were asked about their opinion on the impact of China's International Land-Sea Trade Corridor (ILSTC).

- Totally disagree
- Agree
- Do not know
- Disagree
- Totally agree
- Prefer not to answer

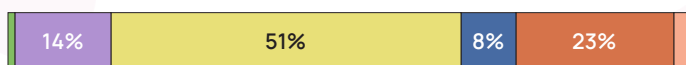
**Question-73**

The ILSTC potentially improves basic infrastructure development in Myanmar.



**Question-74**

The ILSTC potentially drives the creation of more interest-oriented conflict actors.



**Question-75**

The ILSTC potentially impacts the growth of China's economic influence.



The three questions above to measure the potential impact of the International Land-Sea Trade Corridor (ILSTC) initiative were newly added in this year's survey. Regarding the ILSTC initiative, the majority of respondents (**54 percent**) agreed that it would impact basic infrastructure development, while **23 percent** answered "do not know." Additionally, **51 percent** of respondents agreed that it would create more interest-oriented conflict groups across the corridor, while another **23 percent** answered "do not know." For the ILSTC's impact on the growth of China's economic influence, **48 percent** agreed and **21 percent** did not know.

Analysis of the Survey Results

Business community respondents (**78 percent**) and civil society organization respondents (**60 percent**) agreed that the International Land-Sea Trade Corridor (ILSTC) initiative would improve basic infrastructure development. Likewise, **75 percent** of civil society organization respondents agreed that the initiative would create more interest-oriented conflict groups across the corridor. Respondents from PDFs/LDFs (**73 percent**) also agreed with this perspective. Regarding the matter that the ILSTC initiative would increase the development of China's economic influence, civil society organization respondents (**82 percent**), PDFs/LDFs respondents (**73 percent**) and prominent individuals (**59 percent**) agreed with the statement.

Question-74

The ILSTC potentially drives the creation of more interest-oriented conflict actors.

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EOOs	PDFs/LDFs
Totally disagree	1%	1%	0%	0%	2%	0%	9%
Disagree	14%	10%	14%	32%	11%	7%	0%
Agree	51%	62%	38%	39%	44%	39%	73%
Totally agree	8%	13%	5%	2%	5%	7%	0%
Do not know	23%	11%	43%	22%	31%	47%	18%
Prefer not to answer	3%	3%	0%	5%	7%	0%	0%

Question-75

The ILSTC potentially impacts the growth of China's economic influence.

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EOOs	PDFs/LDFs
Totally disagree	1%	1%	0%	2%	0%	0%	9%
Disagree	9%	5%	14%	24%	5%	7%	0%
Agree	48%	50%	33%	46%	51%	39%	55%
Totally agree	16%	32%	5%	0%	8%	7%	18%
Do not know	21%	9%	43%	20%	30%	47%	18%
Prefer not to answer	5%	3%	5%	8%	6%	0%	0%

Note: Detailed survey results on Question No. 73 can be viewed Appendix 3.

Questions-76 to 79

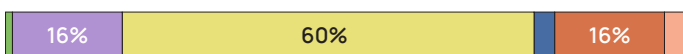
### What is the perception of the impact of Lancang-Mekong Cooperation (LMC)?

For survey questions No. 76 to 79, respondents were asked about their opinion on the impact of Lancang-Mekong Cooperation (LMC).

- Totally disagree
- Agree
- Do not know
- Disagree
- Totally agree
- Prefer not to answer

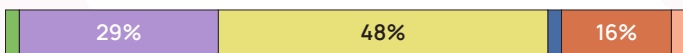
**Question-76**

LMC potentially enhances regional connectivity between Myanmar and neighboring countries



**Question-77**

LMC potentially improves basic infrastructure



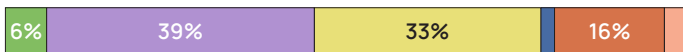
**Question-78**

LMC potentially reduces poverty



**Question-79**

LMC potentially enhances human resources



These four questions were added to this year's survey to measure the potential impacts of the Lancang-Mekong Cooperation (LMC). The majority of respondents (**60 percent**) predominantly believed that the LMC would enhance regional connectivity between Myanmar and neighboring countries. **Forty-eight percent** agreed that infrastructure development would improve as a result of the LMC. As for poverty reduction, **43 percent** of respondents disagreed that the LMC would contribute to this goal. Additionally, **39 percent** of respondents disagreed that the LMC would enhance human resources in Myanmar.

Analysis of the Survey Results

Sixty percent of policy community respondents agreed that the Lancang-Mekong Cooperation (LMC) initiative will enhance regional connectivity between Myanmar and neighboring countries. Business community respondents (87 percent), EAOs (67 percent), prominent individuals (64 percent) and political society respondents (62 percent) agreed with this perspective (represented by the responses “agree” and “totally agree”). Additionally, 78 percent of the business community agreed that the LMC would improve basic infrastructure, followed by 57 percent of political society and 54 percent of EAOs (represented by the responses “agree” and “totally agree”). In terms of its impact on poverty reduction, civil society organizations (72 percent) predominantly disagreed (represented by the responses “disagree” and “totally disagree”), while 71 percent of the business community agreed with this perspective (represented by the responses “agree” and “totally agree”). The business community (68 percent) also agreed (represented by the responses “agree” and “totally agree”) that the LMC has the potential to enhance human resources in Myanmar, while civil society organization respondents (63 percent) disagreed (represented by the responses “disagree” and “totally disagree”) with this perspective.

Question-76

LMC potentially enhances regional connectivity between Myanmar and neighboring countries

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	1%	3%	0%	0%	0%	0%	0%
Disagree	16%	27%	19%	7%	11%	0%	0%
Agree	60%	52%	52%	80%	62%	67%	45%
Totally agree	3%	1%	10%	7%	2%	0%	9%
Do not know	16%	14%	19%	6%	18%	27%	37%
Prefer not to answer	4%	3%	0%	0%	7%	6%	9%

Question-77

LMC potentially improves basic infrastructure

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	2%	1%	0%	2%	2%	0%	9%
Disagree	29%	41%	24%	15%	30%	13%	0%
Agree	48%	42%	52%	73%	41%	47%	45%
Totally agree	2%	0%	5%	5%	2%	7%	0%
Do not know	16%	13%	19%	5%	18%	26%	37%
Prefer not to answer	3%	3%	0%	0%	7%	7%	9%

Question-78

LMC potentially reduces poverty

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	8%	16%	0%	2%	7%	0%	0%
Disagree	43%	56%	33%	22%	39%	33%	45%
Agree	28%	13%	43%	66%	26%	33%	9%
Totally agree	2%	1%	5%	5%	0%	0%	9%
Do not know	15%	12%	19%	5%	21%	27%	28%
Prefer not to answer	4%	2%	0%	0%	7%	7%	9%

Question-79

LMC potentially enhances human resources

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	6%	13%	0%	2%	2%	0%	0%
Disagree	39%	50%	33%	22%	36%	33%	27%
Agree	33%	22%	38%	61%	31%	33%	36%
Totally agree	2%	1%	10%	7%	0%	0%	0%
Do not know	16%	12%	19%	6%	23%	27%	27%
Prefer not to answer	4%	2%	0%	2%	8%	7%	10%

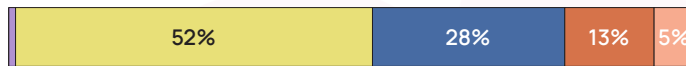
Questions-80 to 82

## Which organizations and individuals benefit from the Lancang-Mekong Cooperation (LMC)?

For survey questions No. 80 to 82, respondents were asked about their opinion on whom the Lancang-Mekong Cooperation (LMC) benefits, and to rank the assessment on a scale of No. 1 (Not beneficial at all) to No. 4 (Very beneficial).

- Not beneficial at all
- Beneficial to some extent
- Do not know
- Not beneficial
- Very beneficial
- Prefer not to answer

**Question-80** Is the LMC beneficial for the State Administration Council (SAC)?



**Question-81** Is the LMC beneficial for private business owners in Myanmar?



**Question-82** Is the LMC beneficial for farmers and the rural population?



A majority of respondents, constituting **52 percent**, believed that the Lancang-Mekong Cooperation (LMC) primarily benefits the State Administration Council (SAC). Furthermore, **69 percent** of respondents viewed the LMC as advantageous for private business owners. However, concerning its benefits for farmers and the rural population, **25 percent** of respondents found it “beneficial to some extent,” while **41 percent** of them find it “not beneficial.” At the same time, an additional **16 percent** deemed it “not beneficial at all.” These three inquiries were newly introduced in this year’s survey.



Analysis of the Survey Results

The survey findings suggest that according to all respondent groups, the Lancang–Mekong Cooperation (LMC) primarily benefits the State Administration Council (SAC). Civil society organization respondents held this view the most widely, with **87 percent** of respondents agreeing, followed by **85 percent** of respondents from the business community and **82 percent** of respondents from PDFs/LDFs (represented by the responses “beneficial to some extent” and “very beneficial”). Civil society organizations (**80 percent**) and business community (**87 percent**) respondents predominantly agreed that the LMC benefits private business owners in Myanmar (represented by the responses “beneficial to some extent” and “very beneficial”). However, opinions were divergent regarding its impact on farmers and the rural population, as **74 percent** of civil society organization respondents believed it is not beneficial (represented by the responses “not beneficial” and “not beneficial at all”), and **64 percent** of business community respondents perceived it as beneficial (represented by the responses “beneficial to some extent” and “very beneficial”).

Question-80

Is the LMC beneficial for the State Administration Council (SAC)?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	0%	1%	0%	0%	0%	0%	0%
Not beneficial	1%	1%	0%	2%	2%	0%	0%
Beneficial to some extent	52%	48%	62%	73%	41%	53%	55%
Very beneficial	28%	39%	10%	12%	30%	27%	27%
Do not know	13%	9%	14%	10%	18%	20%	18%
Prefer not to answer	6%	2%	14%	3%	9%	0%	0%

Question-81

Is the LMC beneficial for private business owners in Myanmar?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	0%	0%	0%	0%	2%	0%	0%
Not beneficial	6%	7%	10%	2%	7%	0%	9%
Beneficial to some extent	69%	72%	67%	80%	59%	60%	73%
Very beneficial	6%	8%	0%	8%	5%	13%	0%
Do not know	16%	11%	23%	8%	22%	27%	18%
Prefer not to answer	3%	2%	0%	2%	5%	0%	0%

Question-82

Is the LMC beneficial for farmers and the rural population?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	16%	29%	5%	2%	8%	7%	18%
Not beneficial	41%	45%	43%	24%	44%	47%	46%
Beneficial to some extent	25%	14%	29%	59%	23%	20%	9%
Very beneficial	1%	0%	0%	5%	0%	0%	9%
Do not know	15%	11%	23%	8%	20%	26%	18%
Prefer not to answer	2%	1%	0%	2%	5%	0%	0%

Questions-83 to 85

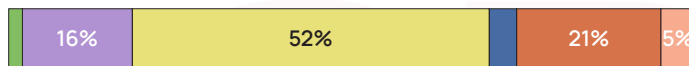
### What are the Global Security Initiative's (GSI) potential impacts on Myanmar's Security sector?

For survey questions No. 83 to 85, respondents were asked about their opinion on the impact of the Global Security Initiative (GSI) on Myanmar's Security sector.

- Totally disagree
- Agree
- Do not know
- Disagree
- Totally agree
- Prefer not to answer

**Question-83**

Will the GSI potentially strengthen armed forces and police forces cooperation between Myanmar and China?



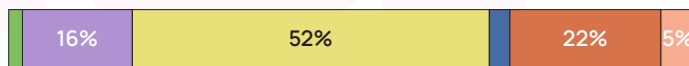
**Question-84**

Will the GSI potentially increase crackdown of transnational organized crimes (TOCs)?



**Question-85**

Will the GSI potentially facilitate the sharing of intelligence information between Myanmar and China?



These three new questions were introduced in this year's survey to analyze Myanmar's key stakeholders' perceptions of the potential impact of the Global Security Initiative (GSI). A significant portion of respondents (**52 percent**) agreed that the GSI would bolster cooperation between the armed forces and police. In terms of its potential to crackdown cross-border crime, **42 percent** of respondents agree and **27 percent** disagreed. Additionally, **52 percent** agreed that the GSI would facilitate sharing security intelligence between Myanmar and China. Those who answered "do not know" in these three questions constitute more than **20 percent** of all respondents.

Analysis of the Survey Results

Most business community respondents (**63 percent**) believed that the Global Security Initiative (GSI) strengthens the cooperation between two countries' armed forces and police ("totally agree" and "agree"). Civil society organization respondents (**60 percent**) also held that view. Meanwhile, **61 percent** of the business community respondents perceived that the GSI enhances cross-border crime elimination, followed by **48 percent** of the political community respondents ("totally agree" and "agree"). PDFs/LDFs respondents (**73 percent**) and business community respondents (**63 percent**) expressed agreement that GSI will foster sharing security intelligence between Myanmar and China will ("totally agree" and "agree").

Question-83

Will the GSI potentially strengthen armed forces and police forces cooperation between Myanmar and China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EOOs	PDFs/LDFs
Totally disagree	2%	3%	0%	0%	0%	0%	9%
Disagree	16%	23%	10%	5%	13%	27%	18%
Agree	52%	57%	27%	61%	51%	27%	46%
Totally agree	4%	3%	10%	2%	2%	6%	9%
Do not know	21%	9%	43%	24%	28%	40%	18%
Prefer not to answer	5%	5%	10%	8%	6%	0%	0%

Question-84

Will the GSI potentially increase crackdown of transnational organized crimes (TOCs)?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	1%	3%	0%	0%	0%	0%	0%
Disagree	27%	40%	5%	10%	25%	27%	27%
Agree	42%	41%	38%	59%	39%	33%	36%
Totally agree	3%	1%	10%	2%	3%	0%	10%
Do not know	22%	11%	47%	22%	28%	40%	27%
Prefer not to answer	5%	4%	0%	7%	5%	0%	0%

Question-85

Will the GSI potentially facilitate the sharing of intelligence between Myanmar and China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	2%	6%	0%	0%	0%	0%	0%
Disagree	16%	24%	5%	7%	15%	20%	9%
Agree	52%	52%	38%	61%	51%	40%	64%
Totally agree	3%	3%	10%	2%	0%	0%	9%
Do not know	22%	11%	47%	22%	30%	40%	18%
Prefer not to answer	5%	4%	0%	8%	4%	0%	0%

Questions-86 to 89

### Which organizations and individuals benefit from the Global Security Initiative (GSI)?

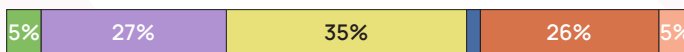
For survey questions No. 86 to 89, respondents were asked about their opinion on whom the Global Security Initiative (GSI) benefits, on a scale, with responses ranging from 1. Not beneficial at all to 4. Very beneficial.

- Not beneficial at all
- Beneficial to some extent
- Do not know
- Not beneficial
- Very beneficial
- Prefer not to answer

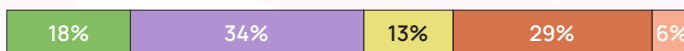
**Question-86** Is the GSI beneficial for the State Administration Council (SAC)?



**Question-87** Is the GSI beneficial for Ethnic Armed Organizations (EAOs)?



**Question-88** Is the GSI beneficial for the National Unity Government (NUG)?



**Question-89** Is the GSI beneficial for Myanmar's citizens?



Predominantly, **45 percent** of respondents agreed that the Global Security Initiative (GSI) is beneficial towards the State Administration Council (SAC). Regarding the impact on EAOs, **35 percent** of all respondents agreed that it is beneficial. The majority also believe that the GSI does not benefit the National Unity Government (NUG), with **34 percent** agreeing with this perspective. **Twenty-nine percent** of respondents believed that it has no benefit for Myanmar's citizens, while **24 percent** perceived that it does. These four questions were newly introduced in this year's survey, and over **20 percent** of respondents answered "do not know" to each question.

Analysis of the Survey Results

Majority of the PDFs/LDFs (**82 percent**) answered that the Global Security Initiative (GSI) has a beneficial impact on the State Administration Council (SAC) (represented by the responses "beneficial to some extent" and "very beneficial"). This perspective was also held by **80 percent** of civil society organization respondents. A majority of respondents from PDFs/LDFs (**64 percent**) answered that the GSI is beneficial towards the EAOs (represented by the responses "beneficial to some extent" and "very beneficial"). Regarding the impact of the GSI on the National Unity Government (NUG), respondents from EAOs (**60 percent**) predominantly answered that it is not beneficial, while civil society organization respondents (**59 percent**) agreed (represented by the responses "not beneficial" and "not beneficial at all"). Additionally, civil society organizations (**68 percent**) also answered that the GSI is not beneficial for the regular citizens of Myanmar (represented by the responses "not beneficial" and "not beneficial at all").

Question-86

Is the GSI beneficial for the State Administration Council (SAC)?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	1%	2%	0%	0%	0%	0%	0%
Not beneficial	5%	4%	5%	5%	7%	7%	0%
Beneficial to some extent	45%	51%	37%	44%	36%	47%	55%
Very beneficial	22%	29%	10%	12%	23%	7%	27%
Do not know	22%	10%	43%	27%	28%	39%	18%
Prefer not to answer	5%	4%	5%	12%	6%	0%	0%

Question-87

Is the GSI beneficial for Ethnic Armed Organizations (EAOs)?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	5%	5%	4%	7%	3%	7%	0%
Not beneficial	27%	35%	24%	17%	23%	40%	9%
Beneficial to some extent	35%	45%	14%	27%	33%	13%	64%
Very beneficial	2%	1%	10%	5%	2%	0%	0%
Do not know	26%	12%	48%	32%	33%	40%	27%
Prefer not to answer	5%	2%	0%	12%	6%	0%	0%

Question-88

Is the GSI beneficial for the National Unity Government (NUG)?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	18%	20%	14%	17%	18%	7%	18%
Not beneficial	34%	39%	24%	24%	36%	53%	9%
Beneficial to some extent	13%	20%	5%	12%	5%	0%	27%
Very beneficial	0%	0%	0%	0%	0%	0%	9%
Do not know	29%	18%	48%	35%	34%	40%	37%
Prefer not to answer	6%	3%	9%	12%	7%	0%	0%

Question-89

Is the GSI beneficial for Myanmar's citizens?

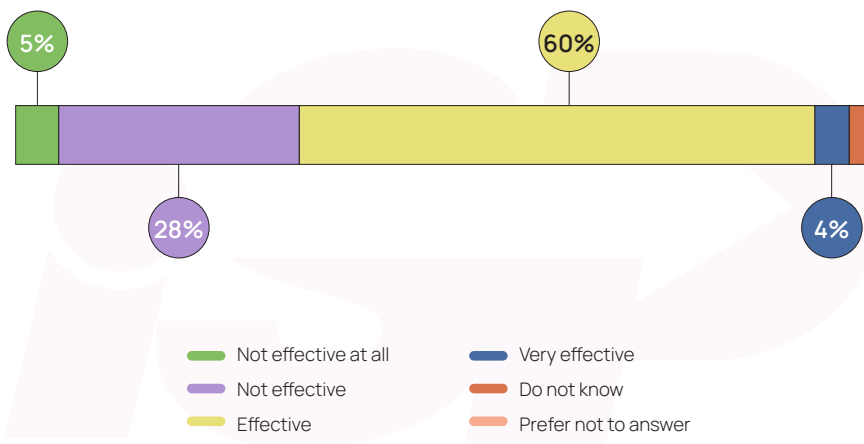
	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	17%	30%	0%	2%	16%	13%	0%
Not beneficial	29%	38%	14%	10%	33%	27%	36%
Beneficial to some extent	24%	18%	33%	44%	18%	20%	36%
Very beneficial	2%	2%	0%	2%	0%	0%	9%
Do not know	23%	10%	48%	29%	28%	40%	19%
Prefer not to answer	5%	2%	5%	13%	5%	0%	0%



Question-90

How effective is the cooperation on the crackdown of transnational organized crimes (TOCs)?

For survey question No. 90, respondents were asked about their opinion on the level of effectiveness of the cooperation on the crackdown of transnational organized crimes (TOCs), mostly led by the Chinese nationals, on a scale with responses ranging from "not effective at all" to "very effective."



The perception that the crackdown of transnational organized crimes (TOCs) is being effectively combated by the cooperation of the Chinese government and neighboring countries is held by a majority (**60 percent**), while a considerable minority considered it ineffective (**28 percent**). This year's survey included this question for the first time.

Analysis of the Survey Results

The majority of Myanmar's policy community respondents agreed that the cooperation of the Chinese government and neighboring countries is "effective" at the crackdown of transnational organized crimes (TOCs). This perspective was shared by **76 percent** of political society respondents and business community respondents, **73 percent** of respondents from EAOs and PDFs/LDFs, **61 percent** of prominent individuals and **47 percent** of respondents from civil society organizations. Interestingly, civil society organization respondents (**44 percent**), EAO respondents (**27 percent**), and prominent individuals (**23 percent**) expressed that it is "not effective."

Question-90

How effective is the cooperation on the crackdown of transnational organized crimes (TOCs)?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not effective at all	5%	6%	0%	0%	8%	0%	9%
Not effective	28%	44%	14%	13%	23%	27%	9%
Effective	60%	47%	76%	76%	61%	73%	73%
Very effective	4%	1%	5%	7%	7%	0%	0%
Do not know	2%	1%	5%	2%	1%	0%	9%
Prefer not to answer	1%	1%	0%	2%	0%	0%	0%

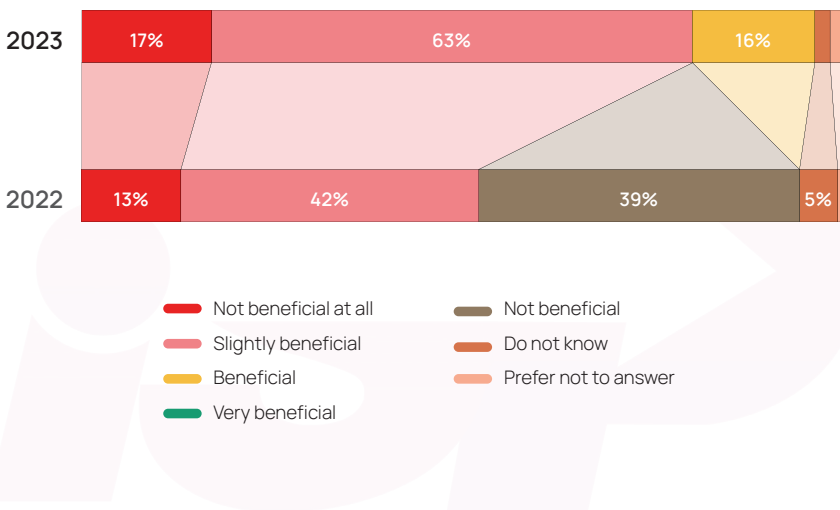
# 7

## Perceptions of China's Soft Power

Question-91

### How beneficial is China's development aid?

For survey question No. 91, respondents were asked about their opinion on how beneficial is China's development aid, with answers ranging from 1. Not beneficial at all to 4. Very beneficial.



With regard to China's development aid to Myanmar, **63 percent** of respondents viewed China's development aid as "slightly beneficial." Respondents who viewed the development aid as "not beneficial at all" made up **17 percent** while **16 percent** indicated that it was "beneficial."

Certain changes were measured compared with 2022's survey, such as a **21 percent** increase in respondents answering "slightly beneficial" and a **four percent** increase in respondents responding "not beneficial at all."

Analysis of the Survey Results

The survey indicates that **82 percent** of respondents from PDFs/LDFs perceived that China's development aid is "slightly beneficial." **Sixty-seven percent** of both EAOs and prominent individuals also viewed it as slightly beneficial. Meanwhile, civil society organization respondents (**25 percent**) answered "not beneficial at all" and business community respondents (**44 percent**) responded "beneficial." Significantly, no respondents selected "very beneficial."

Question-91

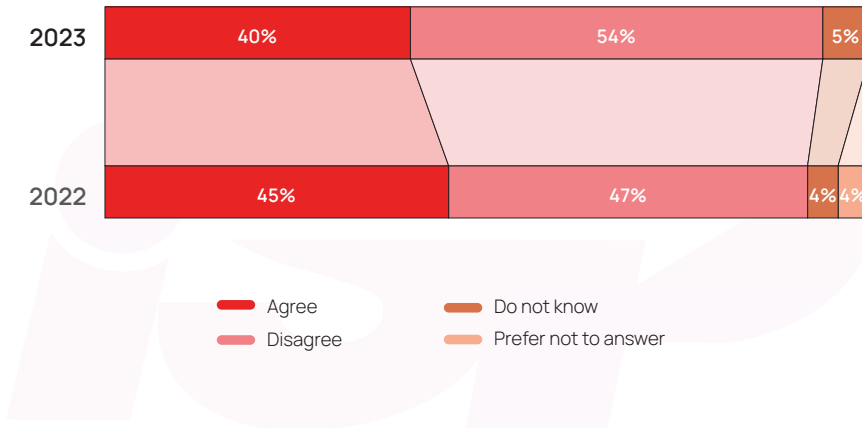
How beneficial is China's development aid?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not beneficial at all	17%	25%	5%	5%	20%	13%	0%
Slightly beneficial	63%	65%	67%	49%	64%	67%	82%
Beneficial	16%	6%	18%	44%	15%	20%	9%
Very beneficial	0%	0%	0%	0%	0%	0%	0%
Do not know	2%	2%	5%	2%	1%	0%	9%
Prefer not to answer	2%	2%	5%	0%	0%	0%	0%

Question-92

### Is China's economic development an ideal model for Myanmar to emulate?

For survey question No. 92, respondents were asked whether they agree or disagree with the statement that China's economic development is an ideal model for Myanmar.



When asked whether China's development model is an ideal economic model for Myanmar, **54 percent** of the respondents answered "disagree," while **40 percent** answered "agree."

Comparison with the previous survey in 2022 indicates a **seven percent** increase in disagreement and a **five percent** decrease in agreement.

Analysis of the Survey Results

Civil society organization respondents and prominent figures, **64 percent** of each, disagreed that China's economic development model is an ideal model for Myanmar. Among those in agreement, the business community respondents were predominant, at **76 percent**. While **60 percent** of EAOs responded with answers "disagree" on this matter, interestingly, **45 percent** of PDFs/LDFs respondents agreed that China's economic development model is ideal. Similarly, **48 percent** of political society members agreed with this statement, while another **48 percent** remarkably disagreed.

Question-92

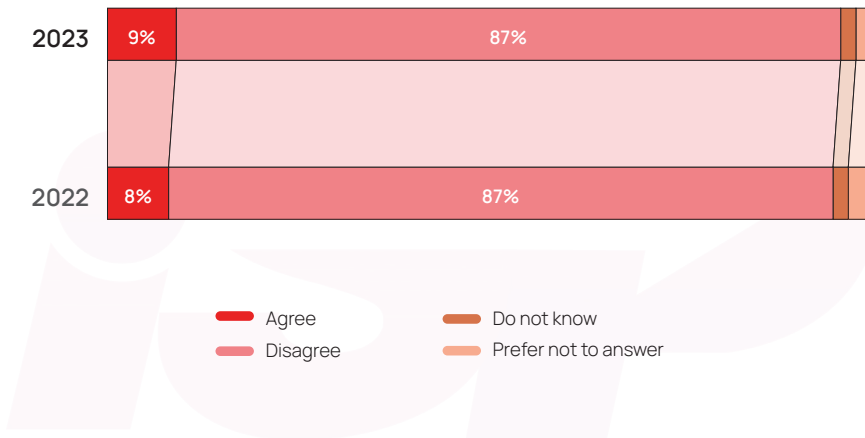
Is China's economic development an ideal model for Myanmar to emulate?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Agree	40%	30%	48%	76%	31%	40%	45%
Disagree	54%	64%	48%	22%	64%	60%	36%
Do not know	6%	6%	4%	2%	5%	0%	19%
Prefer not to answer	0%	0%	0%	0%	0%	0%	0%

Question-93

Is democracy with Chinese characteristics a model Myanmar should emulate?

For survey question No. 93, respondents were asked whether or not democracy with Chinese characteristics was appropriate and should be practiced in Myanmar.



The survey revealed that **87 percent** of respondents disagreed with the idea that democracy with Chinese characteristics is suitable and should be adopted in Myanmar. By contrast, **nine percent** of respondents agreed with this idea.

No significant changes compared with the previous survey were measured, as there was a merely **one percent** increase in respondents who agreed.



Analysis of the Survey Results

The survey highlights a significant finding: the full cohort of EAOs and PDFs/LDFs respondents disagreed that democracy with Chinese characteristics is suitable for Myanmar. Similarly, **95 percent** of prominent individuals and **89 percent** of civil society organization respondents expressed the same perspective. However, **20 percent** of business community respondents and **19 percent** of political society respondents agreed that this form of democracy is appropriate and should be practiced.

Question-93

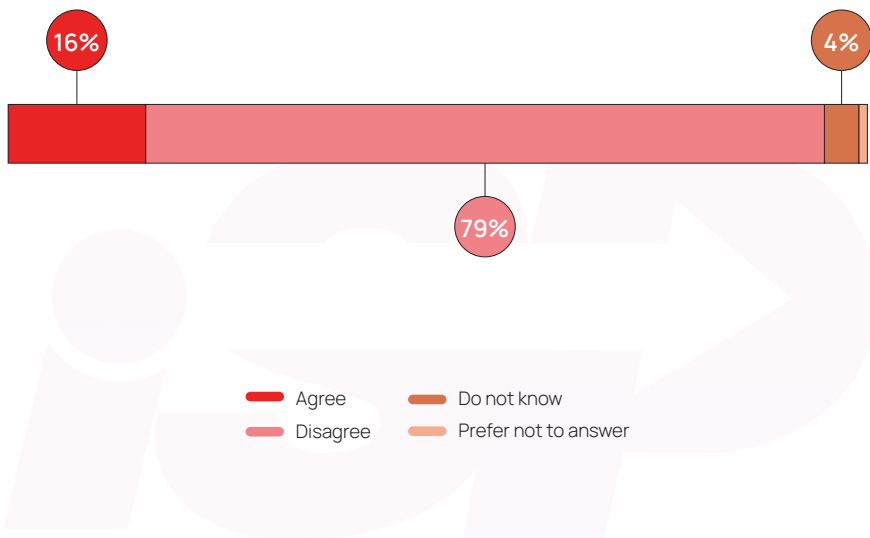
Is democracy with Chinese characteristics a model Myanmar should emulate?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Agree	9%	7%	19%	20%	5%	0%	0%
Disagree	87%	89%	76%	68%	95%	100%	100%
Do not know	2%	2%	5%	5%	0%	0%	0%
Prefer not to answer	2%	2%	0%	7%	0%	0%	0%

Question-94

### Should Myanmar emulate the Chinese governance model?

For survey question No. 94, respondents were asked whether or not the Chinese governance model is appropriate and should be practiced in Myanmar.



Most of Myanmar's key stakeholders disagreed that the Chinese governance model is ideal. The survey revealed that **79 percent** of respondents disagreed with this idea, while **16 percent** agreed. This question was a new addition to the survey this year.

Analysis of the Survey Results

The survey indicates that all EAOs respondents disagreed that the Chinese governance model is ideal. Civil society organization respondents (**85 percent**) and PDFs/LDFs respondents (**82 percent**) also disagreed. Meanwhile, **29 percent** of the business community respondents agreed with the idea.

Question-94

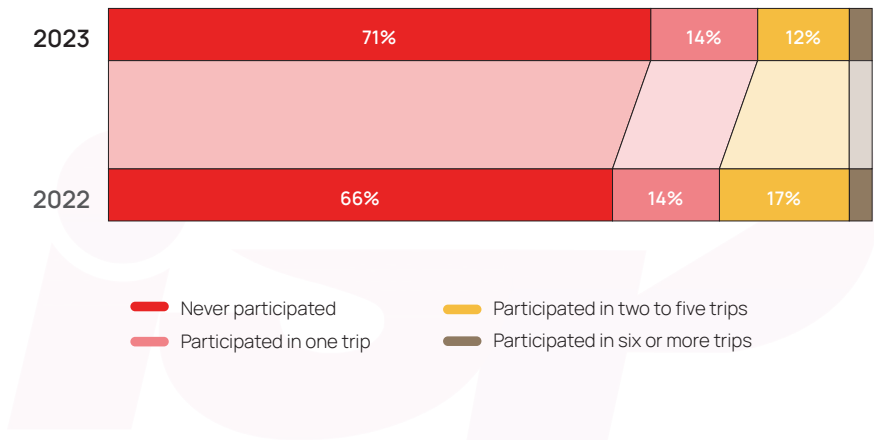
Should Myanmar emulate the Chinese governance model?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Agree	16%	11%	19%	29%	16%	0%	18%
Disagree	79%	85%	71%	56%	80%	100%	82%
Do not know	4%	3%	5%	7%	4%	0%	0%
Prefer not to answer	1%	1%	5%	8%	0%	0%	0%

Question-95

### Have you ever participated in trips or training programs organized by China?

For question No. 95, respondents were asked how many trips or training programs organized by Chinese institutions they had participated in.



When asked whether they had participated in study tours or training programs organized by the Chinese government, businesses, or universities and other institutions, **71 percent** of respondents answered that they had not. Meanwhile, **14 percent** answered they had “participated in one trip,” while **12 percent** answered that they had “participated in two to five trips.” Only **three percent** had participated in six or more trips. Compared with the 2022’s survey result, this year indicates a **five percent** increase in respondents who have never participated.

Analysis of the Survey Results

**Ninety-two percent** of civil society organization respondents had not participated in study tours or training programs organized by the Chinese government, businesses, or universities and other institutions. Respondents from PDFs/LDFs (**82 percent**) and EAOs (**80 percent**) confirmed that they have not participated in any of these activities either. **Sixty-one percent** of business community respondents have engaged in these tours at least once, making them the group with the highest numbers of trips. Among them, **32 percent** have attended two to five times. Following the business community, prominent individuals ranked second among the groups, with **42 percent** having participated in these trips at least once.

Question-95

Have you ever participated in trips or training programs organized by China?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Never participated	71%	92%	62%	39%	56%	79%	82%
Participated in one trip	14%	4%	28%	20%	23%	7%	9%
Participated in two to five trips	12%	3%	5%	32%	16%	7%	9%
Participated in six or more trips	3%	0%	5%	9%	3%	7%	0%
Do not know	0%	1%	0%	0%	0%	0%	0%
Prefer not to answer	0%	0%	0%	0%	2%	0%	0%

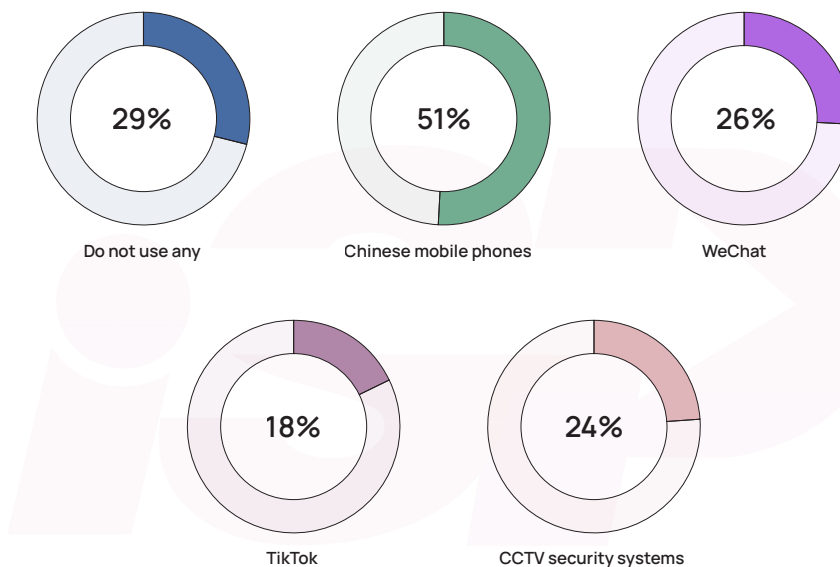
# 8

## Chinese Technology Usage

## Question-96

## Do survey respondents use information and communications technology and devices made by Chinese companies?

For survey question No. 96, respondents were asked if they use communication and information technology and devices made by Chinese companies from a given list. They were asked to answer more than one option if applicable.



Regarding the use of listed products made by Chinese companies, **29 percent** of the respondents answered that they do not use any of the listed Chinese-made products. However, **51 percent** used Chinese-made mobile phones, **26 percent** used WeChat, **24 percent** used Chinese CCTV security systems, and **18 percent** used TikTok.

In comparison with the result of the 2022 survey, this year's survey saw a **three percent** increase in Chinese phone users and a **two percent** increase in WeChat users, and a **ten percent** increase in TikTok app users.

Analysis of the Survey Results

According to the survey, **66 percent** of the business community and **64 percent** of PDFs/LDFs used Chinese-made mobile phones. Additionally, **57 percent** of civil society organizations and **52 percent** of political society respondents also used Chinese-made mobile phones. Significantly, **71 percent** of business community respondents used Chinese-made CCTV for their security systems.

Question-96

Do survey respondents use information and communications technology and devices made by Chinese companies?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EOs	PDFs/LDFs
Do not use any	29%	28%	19%	2%	49%	40%	36%
Chinese mobile phones	51%	57%	52%	66%	30%	47%	64%
WeChat	26%	25%	14%	51%	23%	13%	9%
TikTok	18%	22%	14%	17%	18%	13%	9%
CCTV security systems	24%	14%	19%	71%	18%	13%	9%
Do not know	0%	1%	0%	0%	0%	0%	0%
Prefer not to answer	0%	0%	5%	0%	0%	0%	0%



Questions-97 to 100

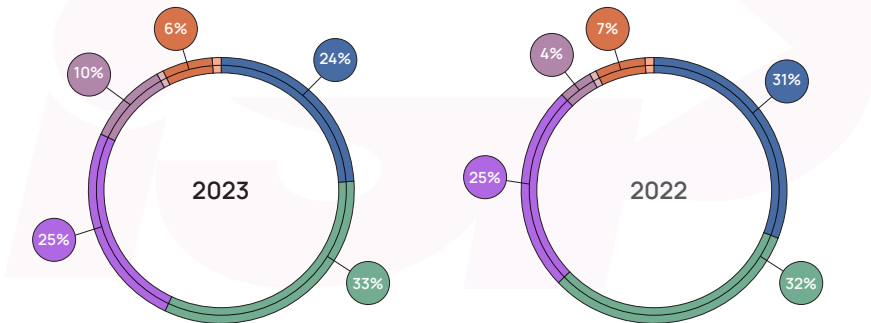
### What is the level of security and privacy associated with products manufactured by Chinese technology firms?

For survey questions No. 97 to 100, respondents were asked about their perceived level of security and privacy associated with each item from the list of communication and information technology and devices made by Chinese companies that they presently use.

- Not secure at all
- Not secure
- Neutral
- Very secure
- Do not know
- Secure
- Prefer not to answer

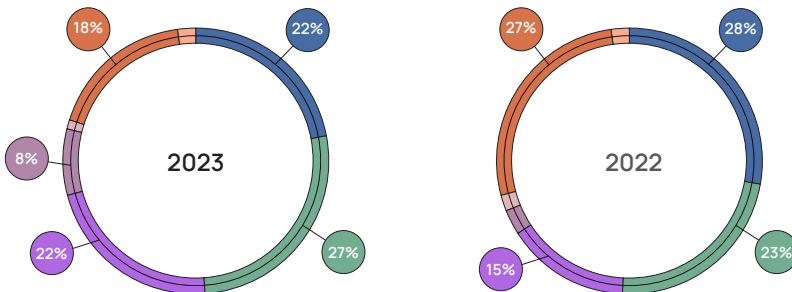
**Question-97**

What is the level of security and privacy associated with mobile phones manufactured by Chinese technology firms?



**Question-98**

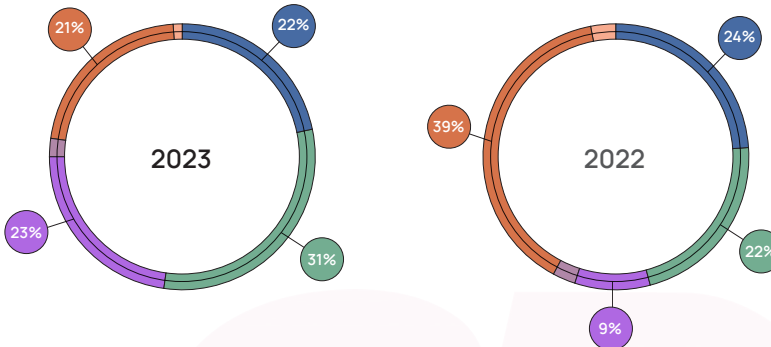
What is the level of security and privacy associated with WeChat?





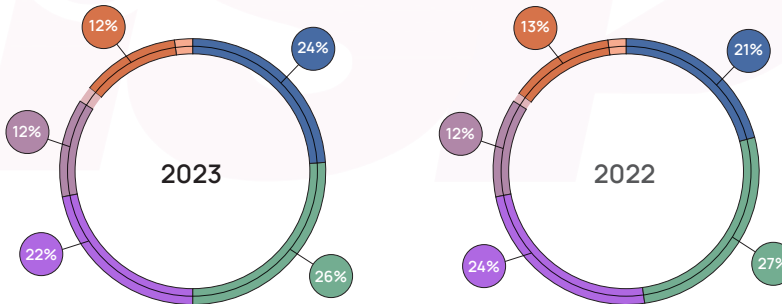
**Question-99**

What is the level of security and privacy associated with TikTok?



**Question-100**

What is the level of security and privacy associated with electronic devices manufactured by Chinese technology firms?



Although many respondents used mobile phones made by Chinese companies, **33 percent** responded, "not secure," and **24 percent** answered "not secure at all" when asked about the security of these phones. Similarly, regarding the use of WeChat, **27 percent** answered "not secure" and **22 percent** selected "not secure at all." For TikTok, **31 percent** expressed concerns about its security (answered "not secure"), while **22 percent** believed it was "not secure at all." Regarding electronic devices manufactured by Chinese technology firms, **26 percent** answered "not secure" and **24 percent** answered "not secure at all."

Analysis of the Survey Results

The survey reveals that a significant majority of respondents from EAOs (**73 percent**), PDFs/LDFs (**72 percent**) and civil society organizations (**71 percent**) expressed concerns about the security of mobile phones made by Chinese companies (represented by the responses “not secure at all” and “not secure”). Similarly, these groups also perceived popular Chinese social media platforms like WeChat and TikTok as insecure, with civil society organization respondents expressing the highest levels of concern at **62 percent** and **71 percent**, respectively (represented by the responses “not secure at all” and “not secure”). Additionally, **81 percent** of PDFs/LDFs stated that they considered electronic devices manufactured by Chinese technology firms to be insecure (represented by the responses “not secure at all” and “not secure”).

**Question-97** What is the level of security and privacy associated with mobile phones manufactured by Chinese technology firms?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not secure at all and not secure	57%	71%	33%	27%	58%	73%	72%
Neutral	25%	18%	48%	41%	23%	13%	9%
Secure and very secure	11%	10%	5%	27%	5%	0%	19%
Do not know	6%	1%	14%	5%	11%	14%	0%
Prefer not to answer	1%	0%	0%	0%	3%	0%	0%

**Question-98** What is the level of security and privacy associated with WeChat?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not secure at all and not secure	49%	62%	29%	19%	55%	47%	54%
Neutral	22%	19%	24%	39%	20%	7%	18%
Secure and very secure	9%	9%	10%	20%	7%	7%	0%
Do not know	18%	10%	33%	22%	16%	39%	18%
Prefer not to answer	2%	0%	4%	0%	2%	0%	10%

Question-99

What is the level of security and privacy associated with TikTok?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not secure at all and not secure	53%	71%	24%	22%	51%	53%	64%
Neutral	23%	14%	29%	46%	23%	7%	27%
Secure and very secure	2%	3%	0%	7%	0%	0%	9%
Do not know	21%	12%	43%	25%	23%	40%	0%
Prefer not to answer	1%	0%	4%	0%	3%	0%	0%

Question-100

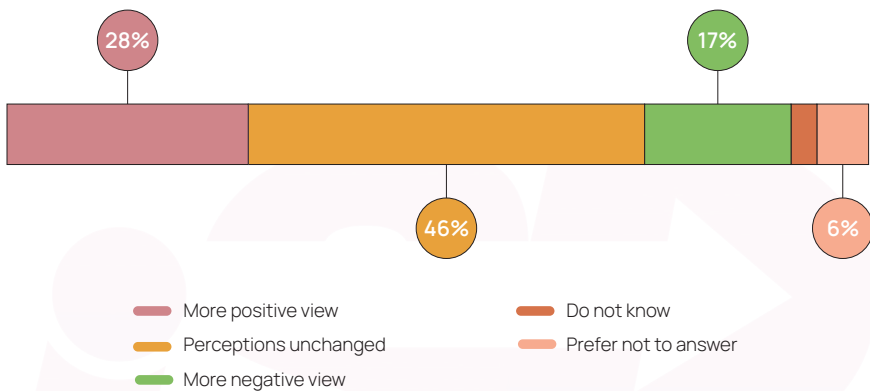
What is the level of security and privacy associated with electronic devices manufactured by Chinese technology firms?

	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not secure at all and not secure	50%	63%	24%	22%	49%	47%	82%
Neutral	22%	15%	38%	44%	21%	0%	0%
Secure and very secure	14%	12%	10%	24%	5%	27%	18%
Do not know	12%	8%	28%	10%	20%	26%	0%
Prefer not to answer	2%	2%	0%	0%	5%	0%	0%

Question-Z

### Are there any shifts in perceptions of China due to Operation 1027?

For Question Z, the respondents were asked if their perceptions of China had changed positively, negatively or stayed the same due to Operation 1027, which took place amidst the survey implementation period. It is important to note that not all respondents were asked this question; only the remaining 54 respondents during the survey period after Operation 1027 was launched were included in this inquiry.



After the Three Brotherhood Alliance (3BHA) launched Operation 1027, **46 percent** answered that their perceptions of China remained the same. On the other hand, **28 percent** shifted towards a “more positive view” while **17 percent** shifted towards a “more negative view.” **Six percent** refused to answer this question.

Question-Z Are there any shifts in perceptions of China due to Operation 1027?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
More positive view	17%	17%	29%	38%	13%	0%	0%
Perceptions unchanged	46%	66%	14%	38%	63%	29%	25%
More negative view	28%	17%	29%	13%	13%	71%	75%
Do not know	3%	0%	14%	11%	0%	0%	0%
Prefer not to answer	6%	0%	14%	0%	11%	0%	0%



## Appendix 1

## Survey Methodology

This survey employed a quantitative research methodology implemented in four steps. The first stage encompassed pre-survey arrangements and formulating survey design, which entailed constructing a work plan, conducting focus group discussions with potential participants, developing baseline data and validating existing data.

The second stage involved group sampling, revision of last year's questionnaires and questionnaires development. Additionally, the comparison and analysis of this year's survey results with those of the previous year (2022) were conducted during this stage. New questions pertaining to the trending issues in Sino-Myanmar relations were also incorporated. Furthermore, in the third stage, activities included sample group analysis, methodology refinement, drafting guidelines for enumerators and supervisors, the implementation of security protocols, the selection of enumerators, and the conducting of training sessions. During the fourth stage, conducting meetings with targeted sample group individuals, followed by data entry, analysis, and report writing.

For the pre-survey preparation and construction of the sampling frame, ISP-Myanmar and People's Alliance for Credible Elections (PACE) worked together to formulate the survey's objectives and its framework, to select methods for analysis, as well as to prepare the survey questions. Moreover, individuals from the sample population were selected using a sampling frame for the sample population inquiry. This stage involved conducting personal meetings with key stakeholders in Myanmar as well as online meetings with political parties, civil society organizations, and representatives from various economic sectors, with over 20 leaders and experts. As part of the pre-survey preparation, discussions were held with over 120 individuals to explain the survey. To ensure the survey's reliability and validity, measures were taken including setting standard values.

A pilot study was carried out, and expert feedback was solicited as well.

Awareness of Sino-Myanmar relations was the main criterion for selecting survey participants. For this reason, random sampling method was difficult to be operationalized. Therefore, ISP-Myanmar applied a purposive

sampling method to categorize survey participants, and the sampling was based on the target respondent's capacity to influence policies related to Sino-Myanmar relations.

ISP-Myanmar identified individuals meeting specific criteria from six distinct communities: (1) political society, (2) civil society organizations, (3) the business community, (4) leaders of ethnic armed organizations (EAOs), (5) prominent individuals, such as scholars, professionals, activists, influential social and religious figures, and (6) leaders of PDFs/LDFs that emerged during the Myanmar's Spring Revolution.

Following the selection of these communities, baseline data was gathered utilizing information from key informants including the websites of the SAC's Union Election Commission (UEC) and the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI). Additionally, data were collected from preliminary discussions with leaders of various communities, civil society organizations from Myanmar and Thailand, EAOs, and PDFs/LDFs. Expert advice was utilized to assess the participants' knowledge on Sino-Myanmar relations, considering their expertise, engagement, and influence on Sino-Myanmar policy and geopolitics.

The survey team selected members from 61 political parties that won seats in national and local legislatures (*Hluttaw*) in 2015 and 2020 and that are located in Kachin State, northern Shan State, Mandalay Region, Magway Region and Rakhine State. However, many political parties have unregistered since the State Administration Council (SAC) amended the political parties registration law. These are areas where the Chinese government-financed China-Myanmar Economic Corridor (CMEC) project will pass through.

The team also selected 218 individuals, particularly from civil society organizations that are: 1) working on research projects related to Sino-Myanmar relations, 2) monitoring Chinese-financed projects and their impacts on environmental and land issues, and 3) supporting the rights of local communities.

The research team also approached a total of 150 union and state level business community members who are directly involved in the CMEC (especially those involved in investment and trade projects). This selection was based on data received from the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI).



Moreover, the survey team selected 133 individuals working on research related to Sino–Myanmar relations, well-known scholars and experts who can influence policy issues, activists, leaders of EAOs and influential persons from social and religious groups. Entities designated as EAOs include solely those that have arisen as a result of ethnic affiliations and those that have engaged with both the preceding governments in formal and informal capacities, a total of 23 groups.

Similarly, in the process of identifying newly emerged armed groups like

PDFs/LDFs, priority was given to those operating in regions where Chinese investments were located.

Additionally, the team considered the size of their forces, selecting groups with 100 or more members, as well as groups designated as "active" by ISP-Myanmar's Conflict data criteria which has three levels: active, rule and control. Utilizing these criteria, a total of 57 PDFs/LDFs were chosen.

In this manner, a baseline dataset was established, comprising a total of 642 individuals from six key stakeholders communities. ■

## Sampling for Interview

For the interview sample selection, individuals from these six communities were selected based on the baseline data established for the research. Proportionate samples were selected from the baseline data of each community. However, political parties, politicians and PDFs/LDFs were found to be unevenly represented compared to civil society organizations and the business community. Therefore, additional respondents were added to these groups based on the baseline data. Additionally, the number of EAO respondents was lower in comparison to prominent individuals within the community. As a result, additional

samples were added to ensure the representation of their perspectives based on the baseline data. A mixed proportion approach was consequently employed to identify the individuals for the interviews.

In the survey, the selection of participants aimed to ensure gender parity. However, an equal gender balance amongst survey participants was not possible, due to the fact that the majority of the community leaders selected based on the China expertise criteria were men and among the women leaders, many of them have to go into hiding following the coup. Despite these conditions, 191 men

### ■ Basic Number and Sampling

Community	Basic Number	Proportionate Sampling	Additional Sampling	Combined Sampling
Political Society	150	70	-	70
Civil Society Organizations	218	102	-	102
Business Community	57	27	30	57
Prominent Individuals	133	62	-	62
PDFs/LDFs	61	29	32	61
EAOs	23	11	12	23
<b>Total</b>	<b>642</b>	<b>301</b>	<b>74</b>	<b>375</b>

■ Population and Percentage of Stakeholders Surveyed from Six Key Communities

Community	Population	Percentage
Political Society	21	8.4%
CSOs	101	40.4%
Business Community	41	16.4%
Prominent Individuals	61	24.4%
EAOs	15	6%
PDFs/LDFs	11	4.4%
Total	<b>250</b>	<b>100%</b>

(76 percent) and 59 women (24 percent) participated in the survey. This represents a one percent increase in women's participation compared to the previous survey, in which there were 49 women participants (23 percent of the total 215 participants).

The current survey was able to query 250 individuals from six communities. Among those, there were 21 individuals from political society, 101 from civil society organizations, 41 from the business community, 61 prominent individuals, 15 from EAOs and 11 from PDFs/LDFs.

To ensure a well-structured survey, ISP-Myanmar and PACE collaborated to develop a handbook aimed at systematizing the survey's objectives and sampled results. This handbook

encompassed all survey objectives and provided detailed instructions on how to achieve them effectively. It outlined approaches and procedures for interviewing participants, documenting their responses, and handling unexpected situations. Additionally, it included guidelines and ethical considerations for enumerators, particularly emphasizing the importance of impartiality and neutrality. The handbook offered a step-by-step guide on how enumerators should approach interviewing participants, particularly to avoid emotional distress for the survey participants.

The handbook's appendix contained abbreviations for technical terms, serving as a reference for enumerators in the event if Myanmar's key stakeholders had questions or

- ▶ confusion regarding these terms. The handbook includes instructions for interacting with respondents, addressing technical issues, and resolving misunderstandings. Additionally, it emphasizes that safeguarding the privacy of respondents is a top priority and provides guidelines to follow.

ISP-Myanmar organized specialized training sessions for enumerators two weeks before conducting the survey. These sessions aimed to enhance their understanding of the survey's objectives, survey systems, the role of enumerators, guidelines and ethics, interviewing techniques, safety precautions, and key issues outlined in the handbook. Additionally, another specialized training session was conducted for enumerators to allow them to better understand China's influence in different sectors of Myanmar.

### ● **Methodology Refinement Following Operation 1027**

An unexpected event during survey design occurred during the survey deployment period: the Three Brotherhood Alliance (3BHA) launched Operation 1027 in northern Shan State. Consequently, an analysis was conducted to assess whether this

event had any impact on the survey results. As a result of this, seven questions analyzing China's role were reposed to 20 individuals (from different communities) who had previously been surveyed before Operation 1027, forming the control group via focus group discussions. In contrast, the treatment group comprised participants surveyed after Operation 1027; they were asked whether their views towards China had become more positive or negative after the operation. Given that the operation did not induce significant changes in the respondents' perceptions of China, the survey results were considered to be not substantially affected. The outcomes of the focus group discussions are presented in Appendix 2.

### ● **Politics and Security Risk Reduction**

In conducting the survey, strict adherence to research ethics was maintained, including the careful construction of politically sensitive questions. Additionally, comprehensive cybersecurity measures were systematically implemented for all parties involved. ISP-Myanmar ensured the provision of physical security and psychological safety for its members and enumerators. ■



## Appendix 2

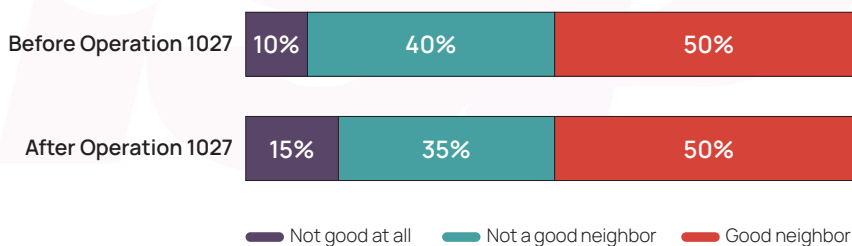
## Focus Group Discussion Results

Following the methodology, an analysis was conducted to determine whether Operation 1027 had an impact on the survey results. After Operation 1027 began, the respondents were asked Question Z, regarding any shifts in their perceptions of China. Additionally,

a focus group discussion involving 20 individuals from various communities was conducted, and seven additional questions were posed to gauge the respondents' perspectives on China's role. The following outlines the results of these inquiries. ■

### ■ Question-1

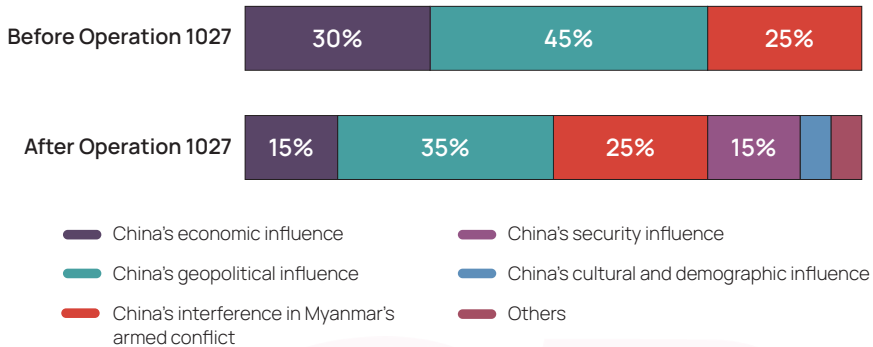
Is China a good neighbor for Myanmar or not?



When comparing the results of the focus group discussion conducted after Operation 1027 with those of the control group, it was found that perceptions remained largely unchanged regarding China's status as a neighbor. The respondents answering "not a good neighbor" decreased by only **five percent**, while those selecting "not good at all" increased by **five percent**.

**Question-2**

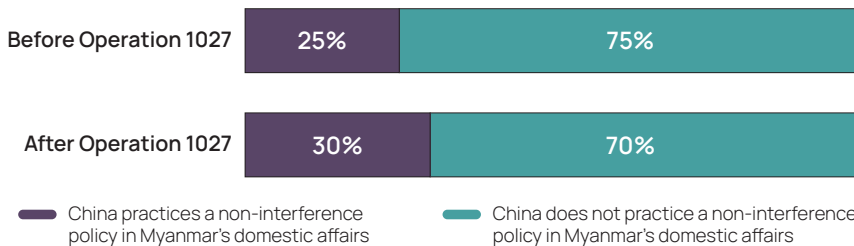
What is the main challenge that Myanmar faces in its relations with China?



The results of the focus group discussion revealed a decrease in respondents' perceptions of China's economic and geopolitical influence as a challenge. However, respondents identified China's influence in the security sector as a more significant challenge. Perceptions remained unchanged regarding China's involvement in Myanmar's armed conflict.

**Question-24**

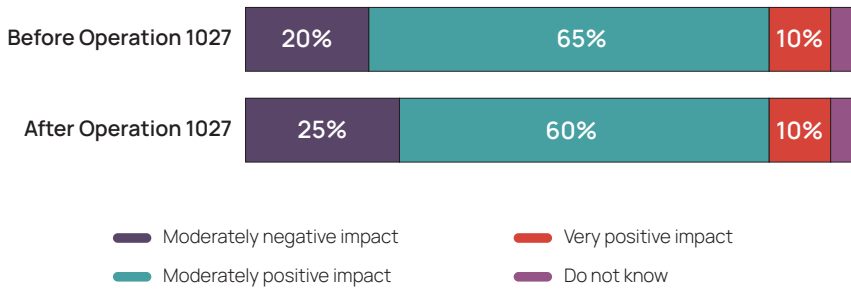
Does China practice a non-interference policy in Myanmar's domestic affairs?



Focus group discussions conducted following the period of Operation 1027 indicated a **five percent** increase in respondents who believed that China practices a non-interference policy in Myanmar's domestic affairs. There was also a **five percent** decrease in respondents answering "China does not practice a non-interference policy in Myanmar's domestic affairs."

**Question-34**

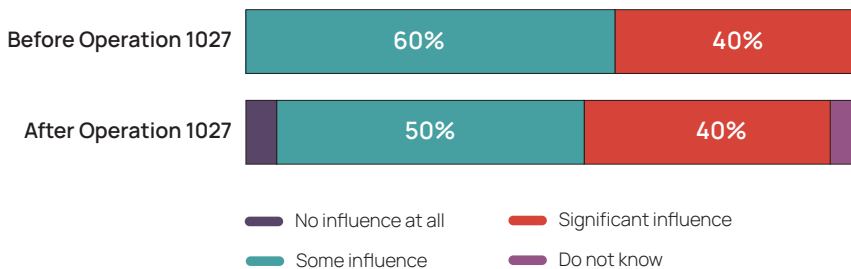
What impact does China's involvement have on Myanmar's peace process?



According to a focus group discussion, after Operation 1027, **five percent** fewer respondents answered "moderately positive impact" regarding China's involvement in Myanmar's peace process. Likewise, there was a **five percent** increase in respondents answering "moderately negative impact."

**Question-35**

How much influence does China have over ethnic armed organizations (EAOs) in northern Shan State?

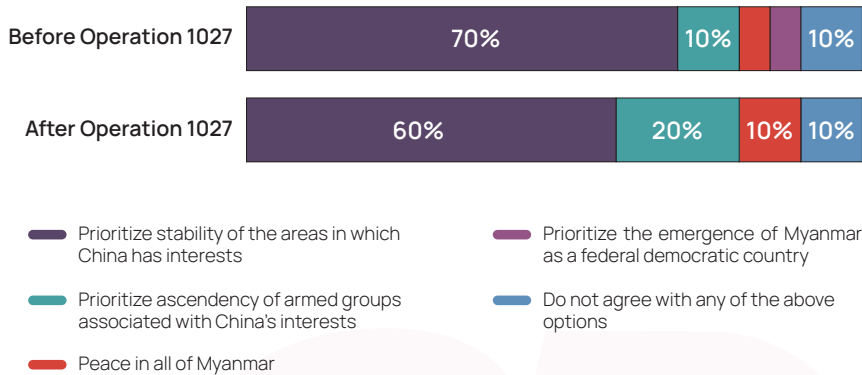


In the focus group discussion regarding China's influence over ethnic armed organizations (EAOs) in northern Shan State, the perception that China has "some influence" decreased by **ten percent** after Operation 1027. Meanwhile, the number of respondents answering "no influence at all" increased by **five percent**.



■ Question-39

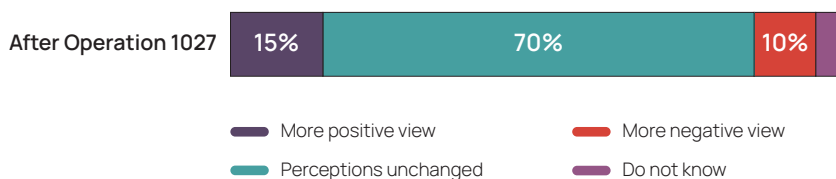
View on China's efforts towards Myanmar's peace process



In the focus group discussion, regarding China's efforts on the Myanmar peace process after the coup, the perception that China prioritize stability of the areas in which China has interests decreased by **ten percent** after Operation 1027. Conversely, the number of respondents answering prioritize ascendancy of armed groups associated with China's interests increased by **ten percent**.

■ Question-Z

Are there any shifts in perceptions of China due to Operation 1027?



In the focus group discussion , **70 percent** indicated that their perceptions of China remained unchanged after Operation 1027. On the other hand, **15 percent** of respondents had a "more positive view" of China, while **ten percent** indicated a "more negative view." Additionally, **five percent** of respondents answered "do not know."



## Appendix 3

# Detailed Survey Results

## Question-11

### Technology

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	4%	8%	0%	0%	3%	0%	0%
Not dependent	24%	20%	29%	17%	32%	27%	27%
Dependent	62%	60%	71%	73%	56%	73%	46%
Completely dependent	8%	10%	0%	0%	3%	0%	27%
Do not know	1%	2%	0%	0%	3%	0%	0%
Prefer not to answer	1%	0%	0%	0%	3%	0%	0%

## Question-30

### How helpful is China's advocated election process in solving Myanmar's crisis through ASEAN's effort?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not helpful at all	18%	19%	14%	10%	26%	7%	27%
Not helpful	37%	42%	14%	24%	38%	60%	46%
Helpful	37%	36%	67%	44%	28%	33%	27%
Very helpful	2%	1%	0%	7%	2%	0%	0%
Do not know	2%	1%	5%	3%	2%	0%	0%
Prefer not to answer	4%	1%	0%	12%	4%	0%	0%

Question-72

Does the RCEP benefit all member countries, including Myanmar?

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	2%	3%	0%	0%	3%	0%	0%
Disagree	28%	43%	14%	12%	20%	20%	36%
Agree	38%	33%	43%	68%	31%	13%	36%
Totally agree	2%	1%	0%	7%	0%	0%	0%
Do not know	25%	17%	43%	5%	36%	67%	19%
Prefer not to answer	5%	3%	0%	8%	10%	0%	9%

Question-73

The ILSTC potentially improves basic infrastructure development in Myanmar.

	Overall	Civil Society Organizations	Political Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Totally disagree	2%	1%	0%	2%	2%	6%	9%
Disagree	14%	26%	10%	0%	11%	0%	9%
Agree	54%	57%	43%	68%	48%	47%	45%
Totally agree	3%	3%	4%	10%	0%	0%	0%
Do not know	23%	10%	43%	17%	34%	47%	27%
Prefer not to answer	4%	3%	0%	3%	5%	0%	10%

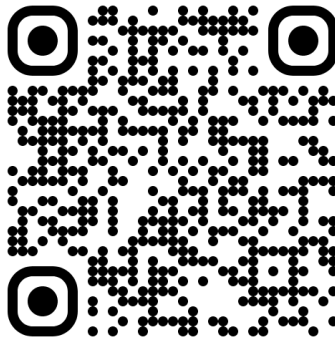
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Established in 2016, the Institute for Strategy and Policy (ISP) - Myanmar is an independent, non-partisan, and non-governmental think tank. ISP-Myanmar promotes democratic leadership and public participation in public affairs as a means to encourage a resilient and tolerant society. Its goals are the advancement of democracy, the building of a federal union, and the strengthening of civil society in Myanmar. The institute's three core activities comprise a policy-oriented research program, a capacity-building and leadership engagement program, and a communications and outreach program. ISP-Myanmar is focusing research in three areas, particularly on a) Conflict, Peace, and Security, b) China Studies based on the two countries' relations, and c) Political Economy of Myanmar. Based on primary research data, ISP-Myanmar extends its work on data presentation, analysis, and forecasting on trends. In addition, ISP-Myanmar has conducted an annual survey on "Myanmar's Key Stakeholders and Their Perceptions of Sino-Myanmar Relations" since 2022. ISP-Myanmar has been exploring socio-economic situations in post-coup Myanmar through a Research Network and presented the findings to enhance the knowledge of the ground situation. ISP-Myanmar has launched a three-month intensive "Bridge Education Program" (BEP) regularly to fill the gap in learning opportunities caused by the 2021 military coup. For more information about ISP-Myanmar, visit our websites at [www.ispmyanmar.com](http://www.ispmyanmar.com) and ISP Gabyin Community. ■

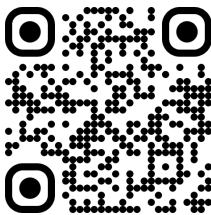
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