

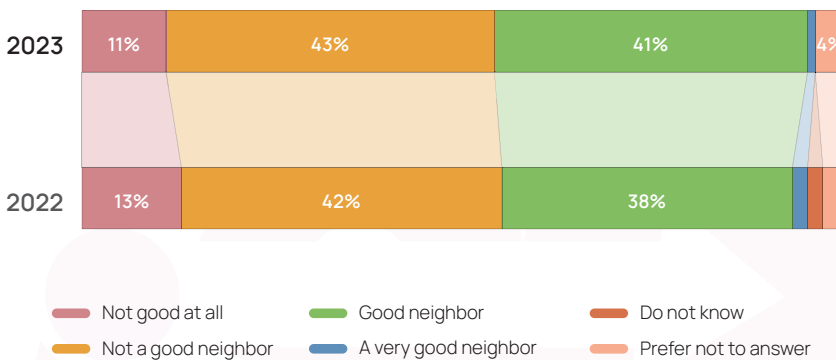
1

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

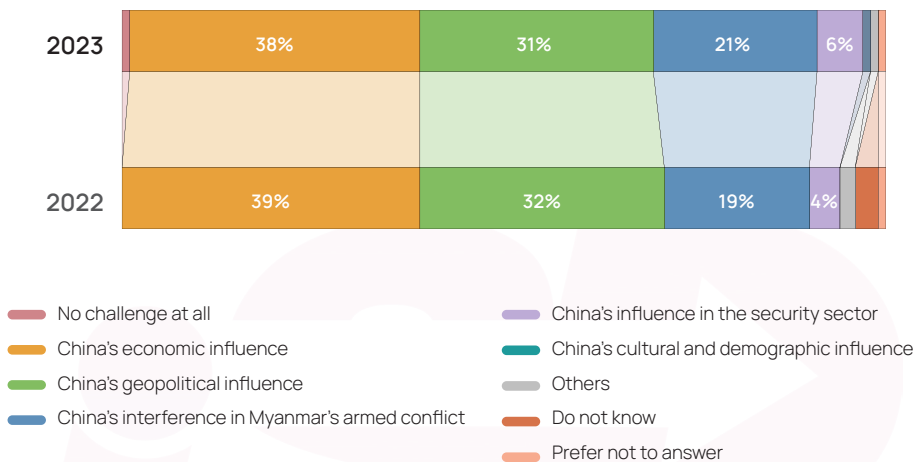
Is China a good neighbor for Myanmar or not?

	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. On the other hand, PDFs/LDFs and political society respondents lead in identifying China's security influence as a significant challenge.

Question-2

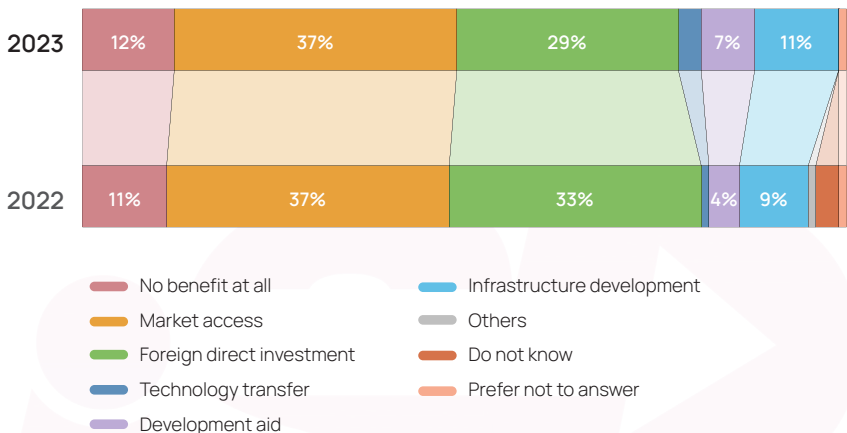
What is the main challenge Myanmar faces in its relations with China?

	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%

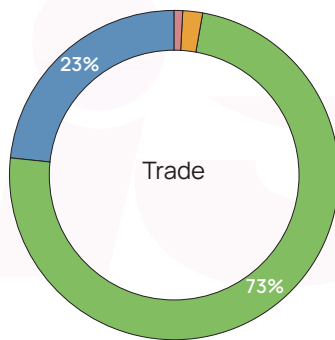
Questions-4 to 13

How dependent is Myanmar on China?

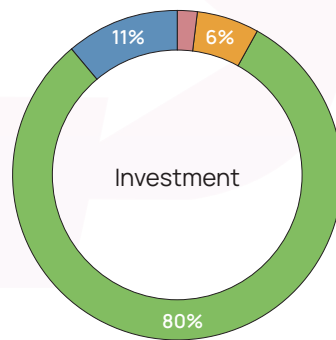
For survey questions No. 4 to 13, respondents were asked to rate about their views on several issues related to Myanmar's dependence on China. The options were provided on a four-point scale (from 1. Not dependent at all to 4. Completely dependent).

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

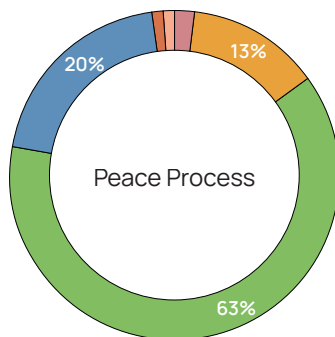
■ Question-4



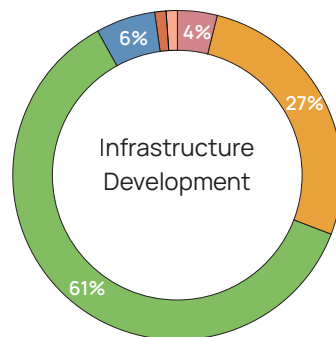
■ Question-5



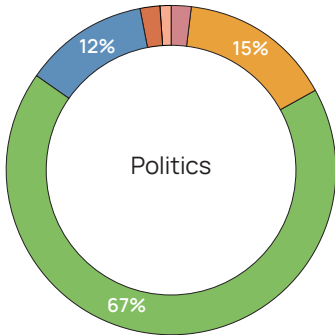
■ Question-6



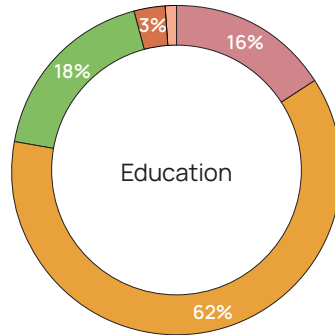
■ Question-7



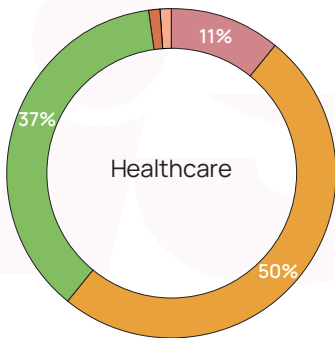
■ Question-8



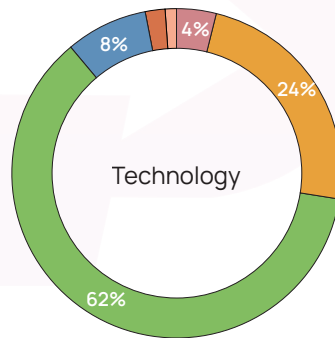
■ Question-9



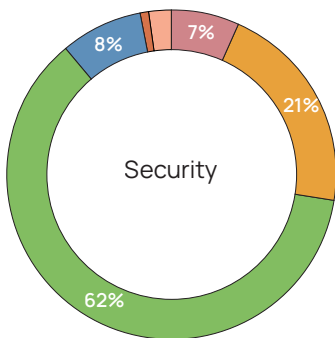
■ Question-10



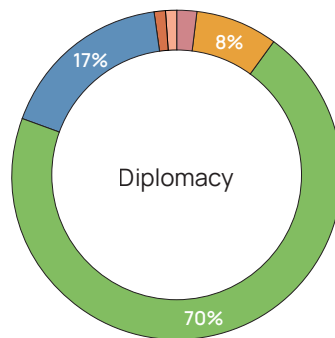
■ Question-11



■ 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.

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

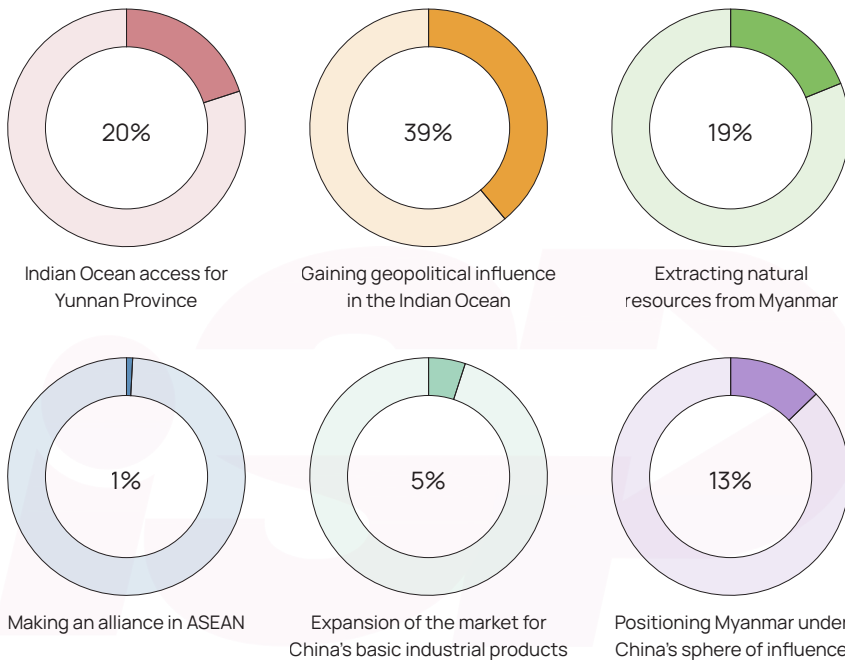
	Overall	Civil Society Organizations	Policial Society	Business Community	Prominent Individuals	EAOs	PDFs/LDFs
Not dependent at all	2%	2%	5%	0%	2%	0%	18%
Not dependent	8%	11%	5%	0%	10%	13%	9%
Dependent	70%	64%	71%	73%	77%	74%	64%
Completely dependent	17%	22%	14%	22%	10%	13%	9%
Do not know	2%	0%	5%	3%	0%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