

Indonesian Public and Elite Perception of Major Power Influence on Regional and Latest Geopolitical Issues

**“NAVIGATING BETWEEN GIANTS:
UNPACKING THE COMPLEXITIES OF INDONESIAN PERCEPTIONS
OF CHINA AND THE U.S.”**

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CONTENTS

A. Introduction	4
B. Method	4
C. Indonesian Views of Major Powers	6
D. Indonesian's Views of China	25
E. Categorical Perspectives on Some Key Issues	28
F. Indonesian's View on Selected Regional and International Issues	31
G. Conclusion	42

Executive Summary

The Indonesian public primarily views major powers through the lens of their strengths and areas of influence. The U.S. is seen as the world's leading military power, while China is regarded as a global economic powerhouse. South Korea is recognized for its cultural and entertainment impact. Japan, along with the U.S. and China, is seen as being at the forefront of technological progress.

When identifying sources of threats to Indonesia, the majority of the public primarily focuses on China or the U.S., while most elite respondents focus solely on China. It is important to note, however, that most of the public and elite respondents also regard China as Indonesia's closest ally.

The majority of the public and elite respondents focus on China and the U.S. as the countries with significant influence on Indonesia. China is viewed as having the greatest impact on Indonesia's economy, while the U.S. is seen as influential in the country's politics, military, and diplomacy. Additionally, in terms of cultural influence, the public also includes South Korea and Japan among the top three powers with considerable sway.

A significantly larger share of both the public and elite respondents holds favourable opinions of South Korea and Japan compared to other major powers. In contrast, the U.S. and China receive the most negative evaluations from the public. Among elite respondents, China is viewed most negatively. It is important to note, however, that the majority of the public expresses neutral feelings toward all the major powers under consideration, while this sentiment is not reflected among elite respondents.

The Indonesian public and elite respondents seem to perceive more differences than similarities in the foreign policy behaviour of major powers under consideration. Among the public, China is most likely to be seen as a peaceful force, while both China and the U.S. are more likely than Japan to be viewed as meddling in other countries' domestic affairs.

Most of the public and elite respondents support prioritizing the expansion of Indonesia's cooperation with either China, Japan, the U.S., or South Korea depending on the sectors of cooperation. In other words, there is no overwhelming preference among Indonesians for any particular major power as their cooperation partner.

More than half of Indonesians are more concerned about China's economic impact on Indonesia than its influence on geopolitical dynamics. Their primary concerns include the influx of Chinese workers, the importation of cheap manufactured products, and the potential debt traps associated with Chinese infrastructure projects in Indonesia.

In contrast, elite respondents are more concerned about the geopolitical dynamics involving China. The proportion of elite respondents worried about the influx of Chinese workers and the potential debt traps from Chinese infrastructure projects is significantly lower compared to the general public.

Both the general public and elite respondents view the Jakarta-Bandung High-Speed Railway (HSR) project as presenting opportunities. Although public awareness of the project is relatively low, a significant majority of those who are aware believe it has benefited the country. In contrast, all elite respondents are aware of the project, with more than half evaluating it positively.

Gen-Z generally has lower favorability toward the U.S. compared to the three Asian countries. In contrast, Millennials and Gen-Z show slightly higher favorability toward China, while older generations tend to view China less favorably. Notably, the favorability levels for the U.S. and China remain below those for Japan and South Korea across all generational categories. The highest levels of favorability for both Japan and South Korea are found among Gen-Z.

A significant number of both public and the elite respondents believe that external forces, particularly China and the United States, have a major influence on ASEAN. In addition, a significant majority of the public and nearly half of the elites are satisfied with Indonesia's position within ASEAN.

Regarding the Palestine-Israel conflict, fewer than 1 percent of Indonesians are on the Israel's side, and none of the elite respondents are in favor of Israel. When asked about the role of the U.S. in the conflict, 75.7 percent of elite respondents view it negatively. When asked about the role of China in restoring Iran-Saudi Arabia relations, most elite respondents (48.6 percent) view it positively.

Regarding the situation in Taiwan, approximately 40 percent of the public and over half of the elite respondents believe that tensions between China and Taiwan have a significant influence on Indonesia. The majority of the public believe that Indonesia should adopt a neutral stance, while approximately 73.8 percent of the elite respondents think that Indonesia should oppose the use of force through diplomatic measures.

Forty five percent of the public believe that the Russia-Ukraine conflict has a significant influence on Indonesia; Half of the public are concerned about the conflict. When asked whether the Russia-Ukraine conflict is similar to the situation in Taiwan, most of Indonesians chose 'do not know' or did not answer the question.

A. Introduction

This report is divided into seven sections. Following this introductory section, we present research method which comprise of two surveys: public and opinion maker survey. In the third section, we examine how Indonesians view the major powers under concerned, namely the United States (the U.S.), China, Japan, South Korea, and Australia. In the fourth section, we further looks into how Indonesians see China, identifying the perceived threats and opportunities from the rising power. In the fifth section, we note important variations across generational groups regarding how they see the major powers. In the sixth section, we explore how Indonesians see some important regional and international issues, i.e. ASEAN and its future, Israeli-Palestinian conflict, Russia-Ukraine war, Taiwan issue, and rivalry between the U.S. and China. The report than ends with concluding section summarizing the important findings of the survey and briefly discussing the what the findings imply for how Indonesia conduct its relations with the major powers in the future.

B. Method

B.1. Public Opinion Survey

The population of this survey is all Indonesian citizens who have the right to vote in general elections, namely those who are 17 years of age or older, or married when the survey was conducted.

Sampling used the multistage random sampling method. In this survey, the sample size was 820 people from 29 provinces out of 38 provinces in Indonesia, distributed proportionally.

Assuming a simple random sampling method, a sample size of 820 respondents has a margin of error (MoE) of around $\pm 3.5\%$ at a 95% confidence level.

Selected respondents were interviewed face to face by trained interviewers.

Quality control of interview results was carried out randomly on 20% of the total sample by the field supervisor by returning to selected respondents (spot check). In this quality control no significant errors were found.

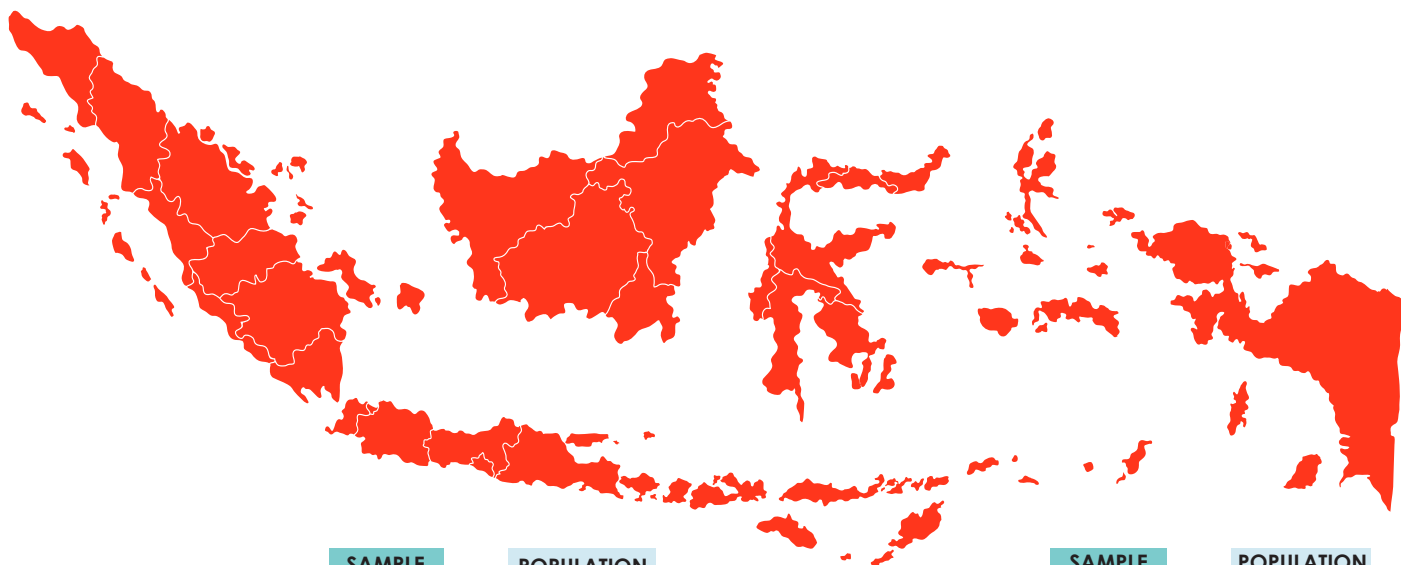
The interview were conducted from 2 to 7 December 2023.

SAMPLE VALIDATION

	SAMPLE	POPULATION
GENDER		
Male	50,6	50,6
Female	49,4	49,4
RURAL/URBAN		
Rural	50,3	50,2
Urban	49,7	49,8
AGE GROUP		
<= 20 years old	9,1	9,2
21-25 years old	10,9	10,9
26-30 years old	10,8	10,8
31-35 years old	10,7	10,7
36-40 years old	10,9	10,8
41-45 years old	10,0	10,0
46-50 years old	9,2	9,3
51-55 years old	8,2	8,2
56-60 years old	6,7	6,7
> 60 years old	13,5	13,5

	SAMPLE	POPULATION
EDUCATION		
<= ELEMENTARY	37,2	37,0
MIDDLE SCHOOL	18,1	18,0
HIGH SCHOOL	31,1	31,2
UNIVERSITY	13,6	13,7
RELIGION		
Islam	88,4	87,2
Protestan/Katolik	9,1	9,9
Lainnya	2,5	3,0

SAMPLE VALIDATION



	SAMPLE	POPULATION
ETHNICITY		
Jawa	40,7	40,2
Sunda	16,0	15,5
Batak	3,5	3,6
Madura	3,2	3,0
Betawi	2,9	2,9
Minang	2,7	2,7
Bugis	2,5	2,7
Melayu	2,4	2,3
Lainnya	26,2	27,1

	SAMPLE	POPULATION
PROVINCE		
ACEH	1,8	1,8
SUMATERA UTARA	5,3	5,3
SUMATERA BARAT	2,0	2,0
RIAU	2,3	2,3
JAMBI	1,3	1,3
SUMATERA SELATAN	3,1	3,1
BENGKULU	0,7	0,7
LAMPUNG	3,2	3,2
BANGKA BELITUNG	0,5	0,5
KEPULAUAN RIAU	0,7	0,7
DKI JAKARTA	4,1	4,1
JAWA BARAT	17,6	17,6
JAWA TENGAH	13,9	13,9
DI YOGYAKARTA	1,4	1,4
JAWA TIMUR	15,5	15,5
BANTEN	4,4	4,4
BALI	1,6	1,6
NUSA TENGGARA BARAT	1,9	1,9
NUSA TENGGARA TIMUR	2,0	2,0
KALIMANTAN BARAT	1,9	1,9
KALIMANTAN TENGAH	1,0	1,0
KALIMANTAN SELATAN	1,5	1,5
KALIMANTAN TIMUR	1,4	1,4
KALIMANTAN UTARA	0,2	0,2
SULAWESI UTARA	1,0	1,0
SULAWESI TENGAH	1,1	1,1
SULAWESI SELATAN	3,3	3,3
SULAWESI TENGGARA	0,9	0,9
GORONTALO	0,4	0,4
SULAWESI BARAT	0,5	0,5
MALUKU	0,7	0,7
MALUKU UTARA	0,5	0,5
PAPUA BARAT	0,4	0,4
PAPUA	1,7	1,7

B.2 Opinion Maker Survey

Respondents in this survey were Indonesian citizens who work as academics, diplomats, NGOs, media, private sector (business people), religious figures, and politicians.

The total sample was 103 respondents. Face-to-face interviews, either directly or via Zoom, were conducted by interviewers who had been trained to interview selected elite respondents. Interviews were conducted from January 17 to June 12, 2024.

The distribution of respondents by profession is as follows:

	Frequency	Percent
Academics	38	36,9
Diplomats	4	3,9
NGO	17	16,5
Media	17	16,5
Private sector (Businessperson)	6	5,8
Religious leaders	8	7,8
Politicians	13	12,6
Total	103	100,0

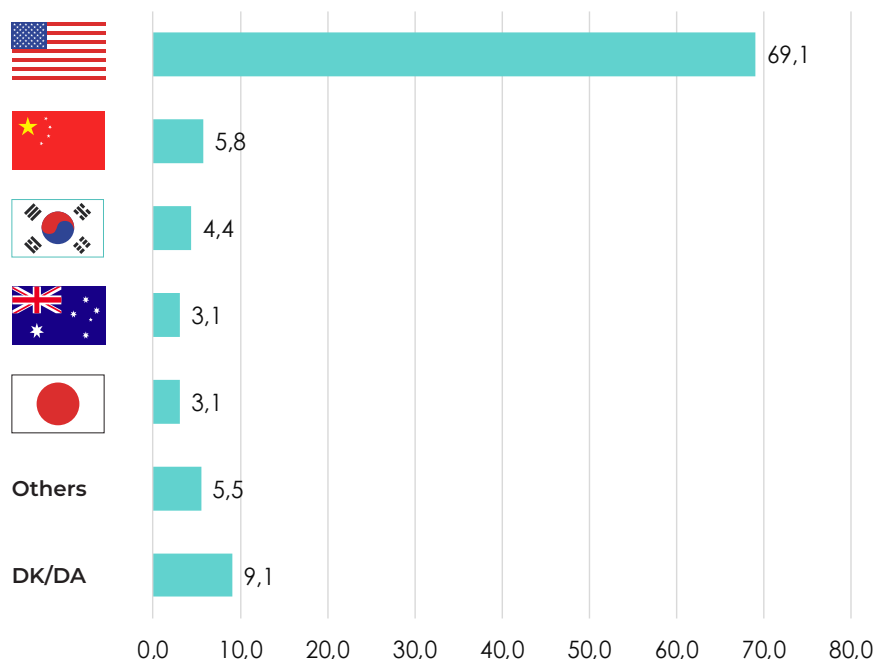
C. Indonesian Views of Major Powers

C.1 Leading Power in the World

Most of the public focuses solely on the U.S. and China when identifying the world's strongest military or economic powers, leaving Japan, Australia, and South Korea out of consideration. A substantial majority of the public identifies the U.S. as the strongest military in the world. Almost half of the public regards that the American's military as "very strong". When identifying the world's strongest economic and financial power, 47.6 percent of the public point to China, while 27.6 percent still believe the U.S. leads in these sectors compared to China. However, more people view China's economic power as "very strong" compared to those who hold the same opinion about the U.S. 45.4 percent of the public of the public view China being the world's strongest economic power as beneficial for Indonesia. In contrast, opinions about the U.S. being the world's strongest military power are more mixed, with the public expressing a range of views from positive to negative, or neutral.

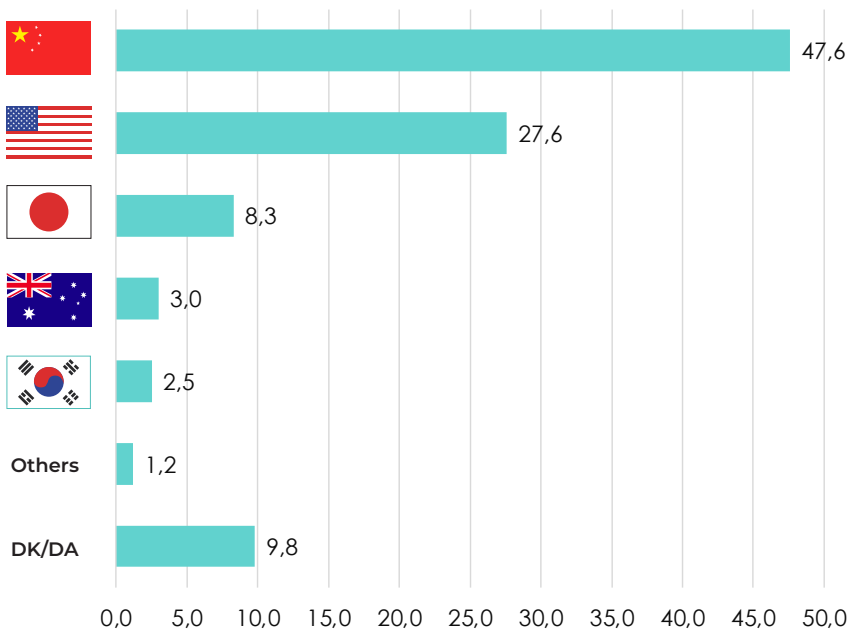
THE GREATEST MILITARY POWER IN THE WORLD

Among the following countries, which country has the greatest military power in the world? ... (%)



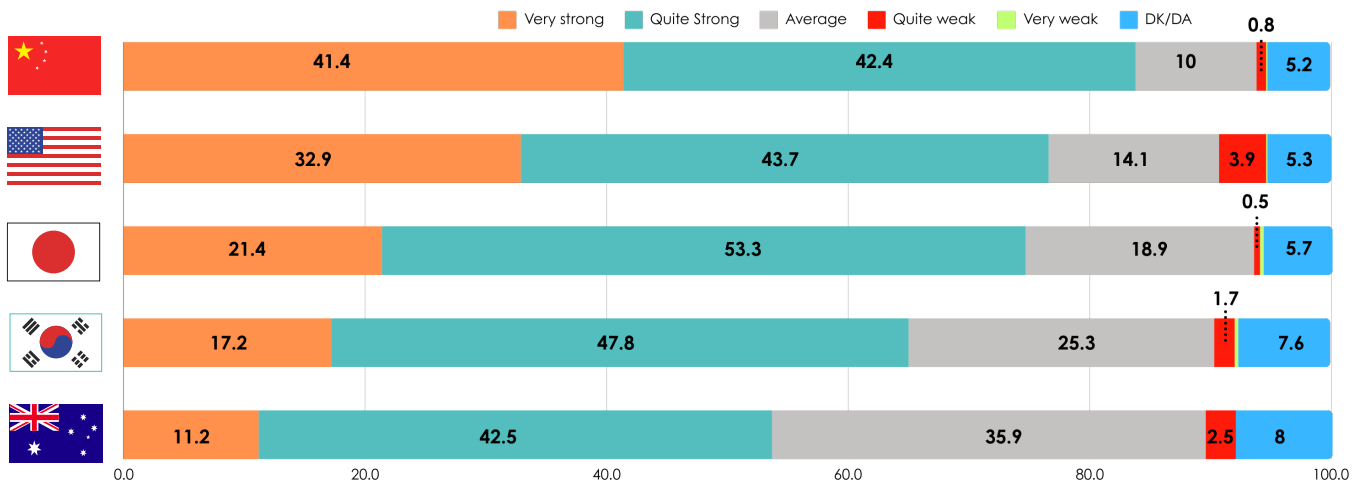
THE GREATEST ECONOMIC & FINANCIAL POWER

Among the following countries, which country has the greatest economic and financial power in the world? ... (%)



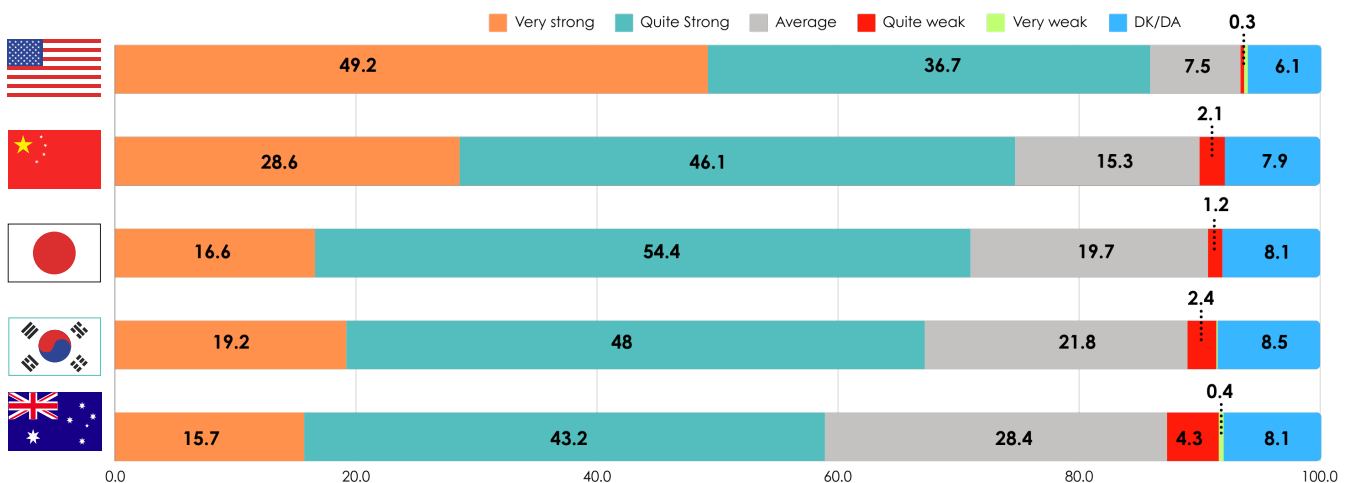
PERCEPTION ON ECONOMIC STRENGTH (5 MAJOR COUNTRIES)

How strong are the following countries in term of their economic power?... (%)



PERCEPTION ON MILITARY STRENGTH (5 MAJOR COUNTRIES)

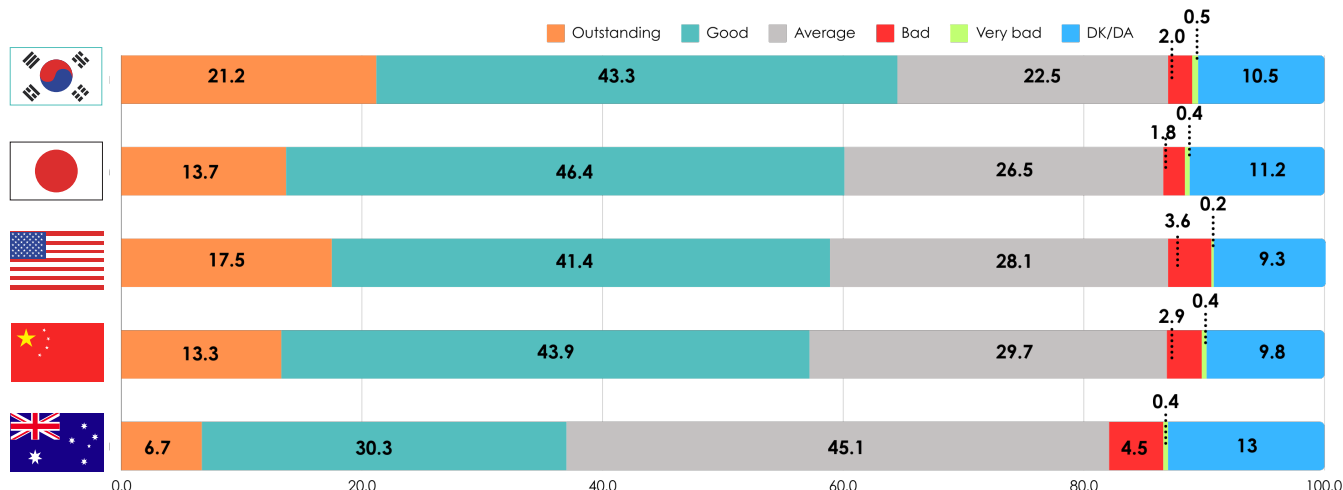
How strong are the following countries in term of their military power?... (%)



In the field of entertainment, more people consider either South Korea or the U.S to be “outstanding” compared to those who view Japan, China, or Australia in the same light. In addition, most of the public views the U.S., Japan, and China as “very advanced” in terms of technological progress. Moreover, most of the public also believe that the U.S. is home to the “outstanding” higher educational institutions, compared to the other major powers in question.

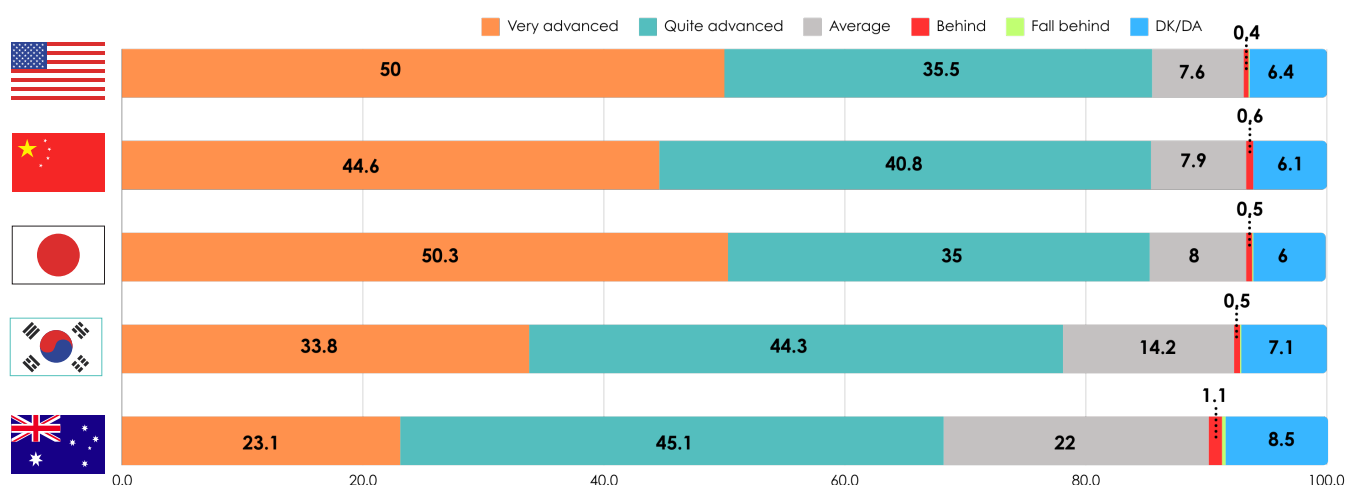
PERCEPTION ON ARTS/ENTERTAINMENT (5 MAJOR COUNTRIES)

How good are the following countries in the field of entertainment (music, film, television)?... (%)



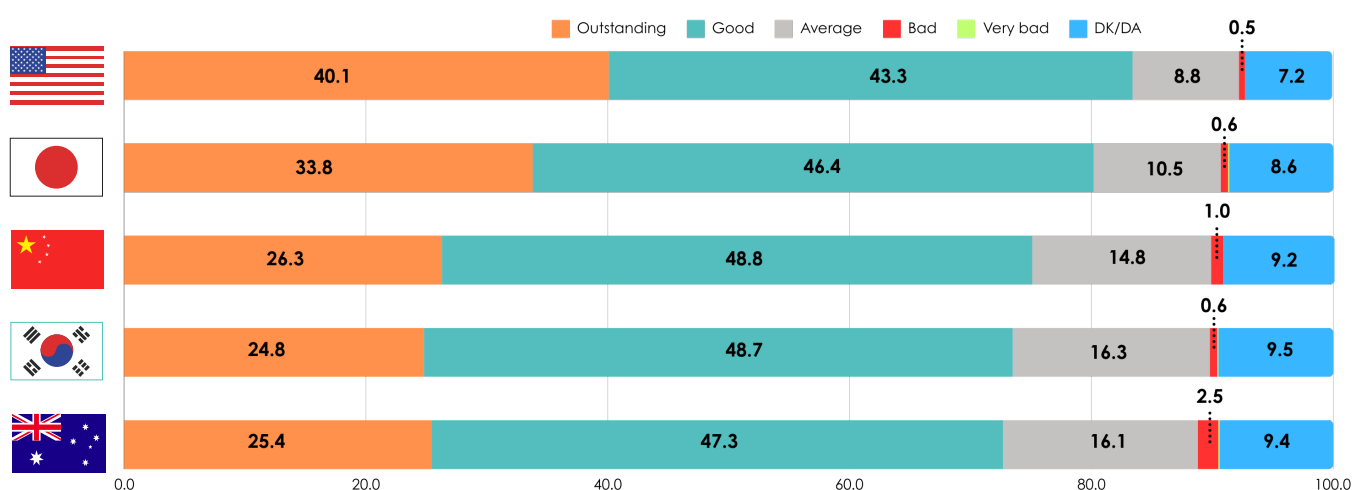
PERCEPTION ON TECHNOLOGICAL ADVANCEMENT (5 MAJOR COUNTRIES)

How advanced are the following countries in the field of technology?... (%)



PERCEPTION ON HIGHER EDUCATION INSTITUTIONS (5 MAJOR COUNTRIES)

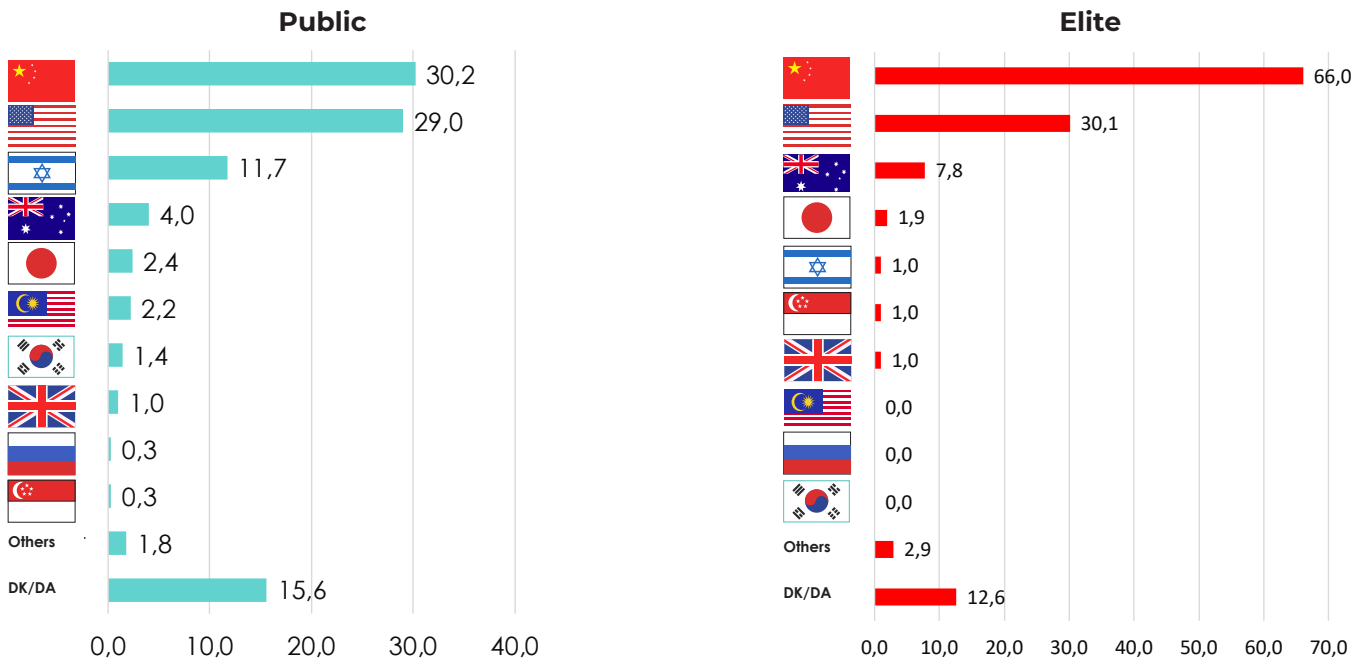
How good are the educational institutions (schools, universities) in the following countries?... (%)



The majority of the public views either China or the U.S. as the biggest threat to Indonesia, with 30.2 percent selecting China and 29 percent selecting the U.S. Additionally, 11.7 percent of the public see Israel as the biggest threat to Indonesia, a significantly higher percentage compared to those who view Australia, Japan, or South Korea in the same light.

COUNTRY WHO PRESENTS THE BIGGEST THREAT TO INDONESIA

In your own opinion, which country presents the biggest threat to Indonesia? ... (%)

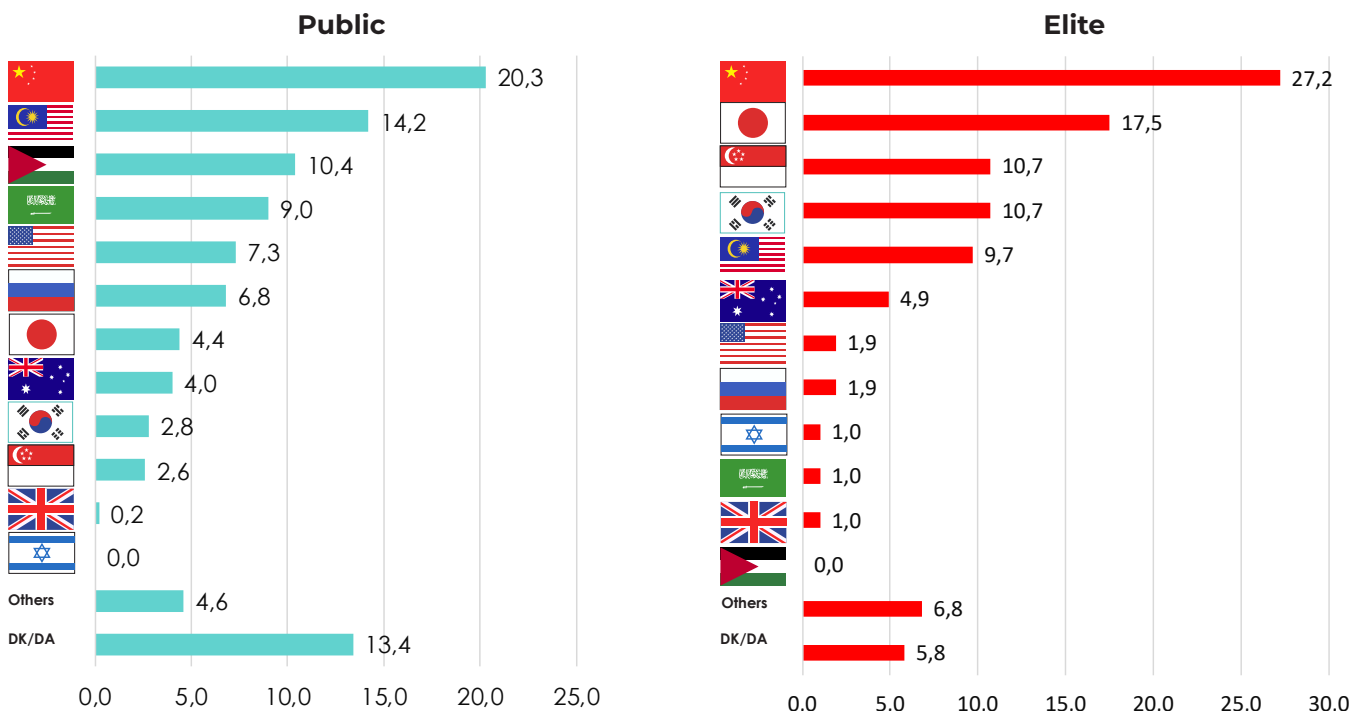


On the other hand, among elite respondents, China is most frequently identified as the biggest threat to Indonesia, with the U.S. and Australia following as the second and third most mentioned, though far less frequently.

In response to an open-ended question, 20.3 percent of the public identify China as Indonesia's closest ally. A larger proportion view Malaysia as their country's closest ally, rather than the U.S., while Japan, Australia, and South Korea are less favoured.

INDONESIA'S CLOSEST ALLY (OPEN-ENDED)

In your own opinion, which country is Indonesia's closest ally? ... (%)

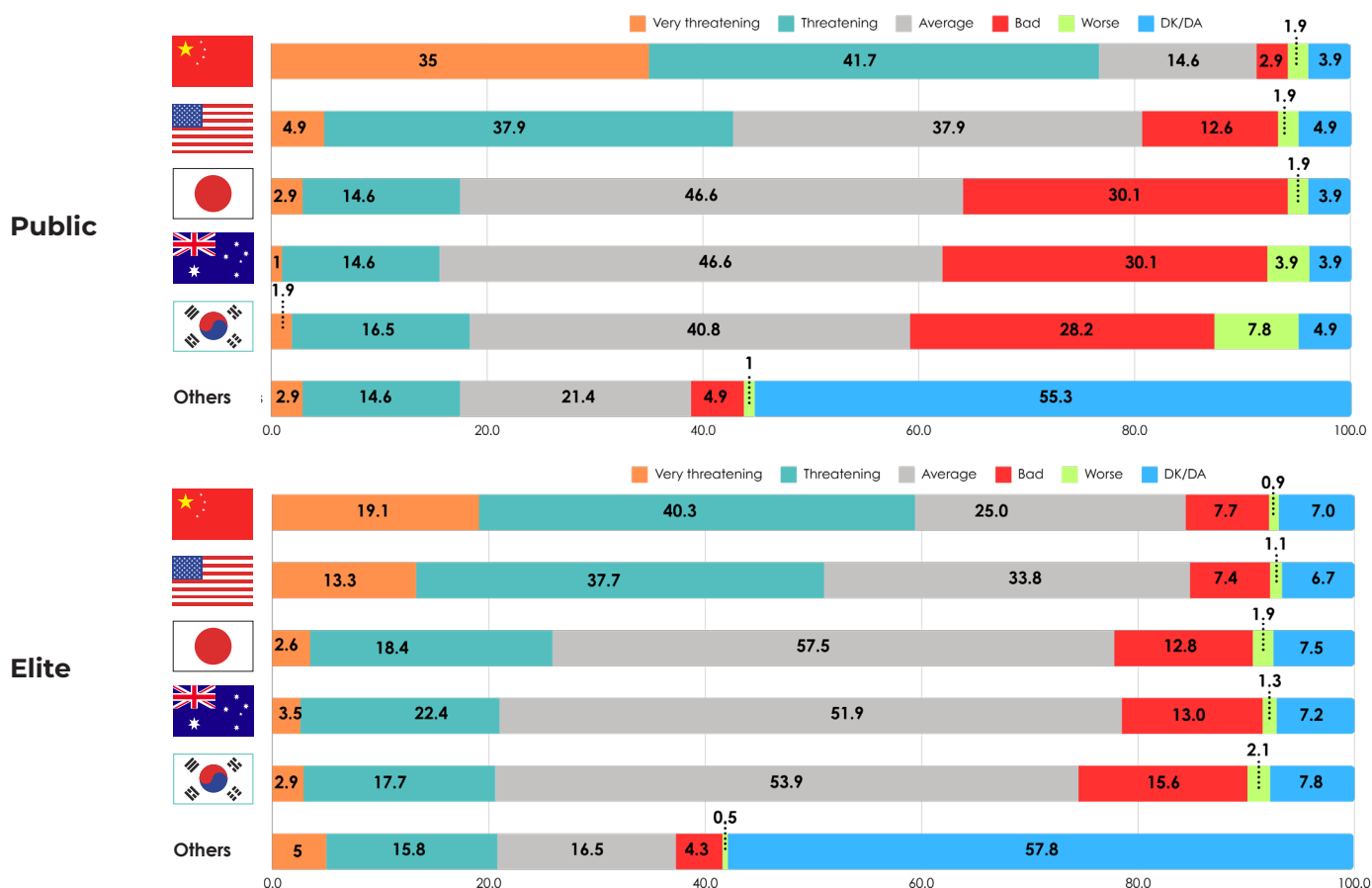


The public views the threat that China poses to Indonesia's economy in the most negative light. However, when it comes to national security, the public considers both the U.S. and China to be the greatest threats. In contrast, much smaller percentages of the public view Japan, Australia, and South Korea as significant threats to either Indonesia's economy or national security.

Among elite respondents, on the other hand, China is perceived as a greater threat to both Indonesia's economy and security compared to any other major powers. 72 percent, 53 percent, and 39 percent of elites perceive China, the U.S., and Australia, respectively, as the greatest threats to Indonesia's security. In contrast, fewer elites see Japan and South Korea as security threats. Among elites, on the other hand, 77 percent view China and 43 percent view the U.S. as threats to Indonesia's economy, while only a small proportion hold similar views about South Korea, Japan, and Australia.

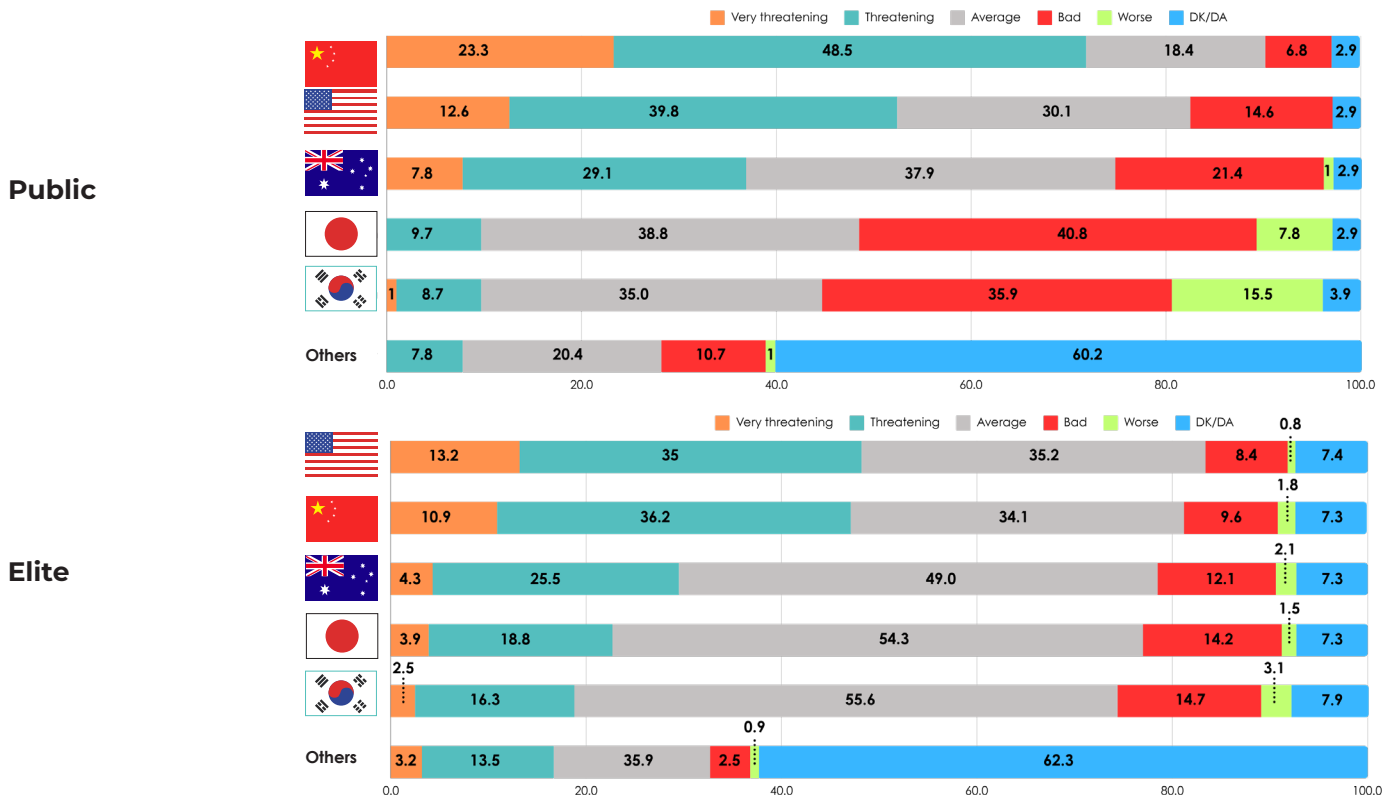
LEVEL OF THREAT TO INDONESIAN ECONOMY (5 MAJOR COUNTRIES)

How threatening are the following countries to the Indonesian economy? ... (%)



LEVEL OF THREAT TO INDONESIAN SECURITY (5 MAJOR COUNTRIES)

How threatening are the following countries to Indonesia's national security?... (%)



C.3. Country's Perceived Influence in Indonesia

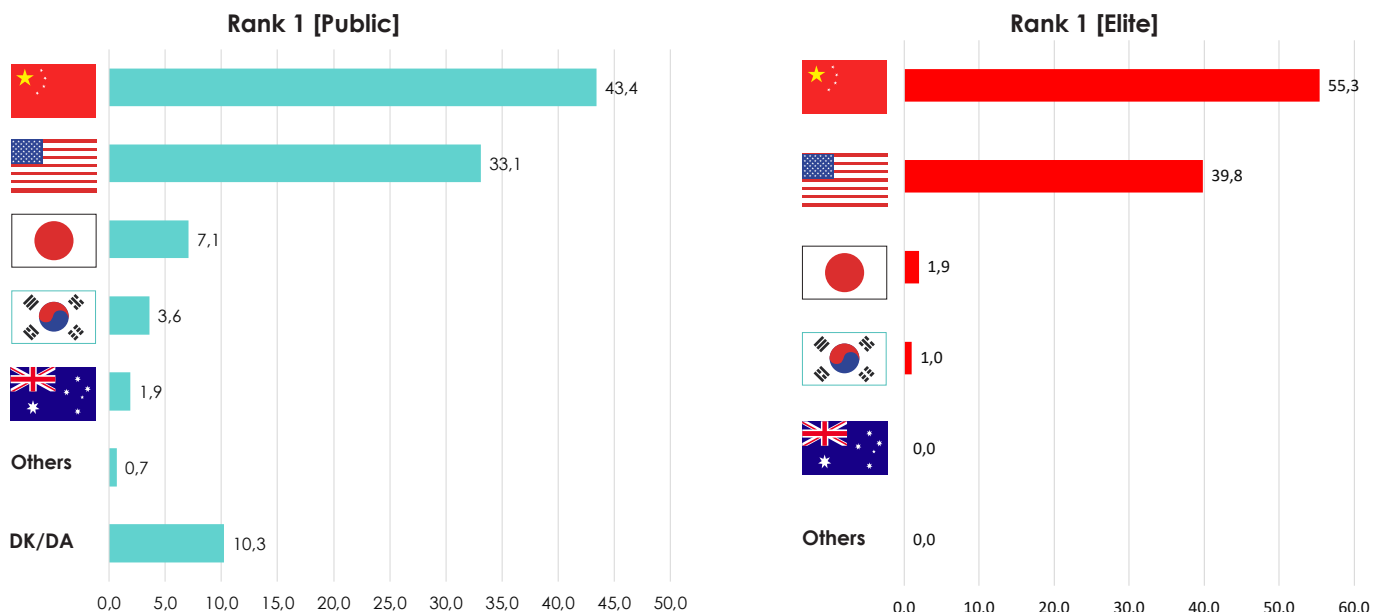
The public considers China, the United States, and Japan as the top three major powers with significant influence in Indonesia. However, 43.4 percent rank China first, while only 33.1 percent rank the U.S., and 7.1 percent rank Japan in the same position. This highlights the significant gap in perceived influence among these three countries.

For most of the public, nevertheless, China's greatest influence is seen specifically in Indonesia's economy. In contrast, when it comes to politics, military, and diplomacy, they still consider the U.S. to have the greatest influence. Regarding the major powers' cultural influence in Indonesia, the public interestingly includes South Korea and Japan as the top four powers with considerable influence.

THREE COUNTRIES WITH BIGGEST GENERAL INFLUENCE IN INDONESIA

How would you rank these five countries in terms of their general influence in Indonesia?

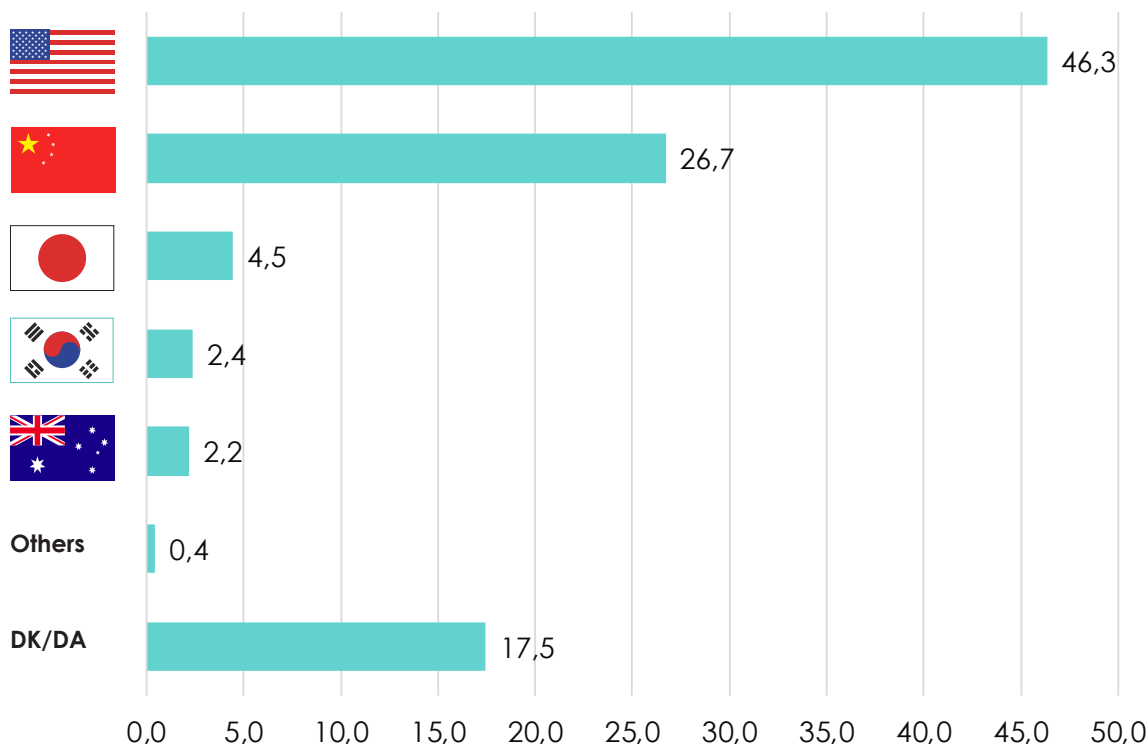
Please rank three countries with biggest general influence in Indonesia. ... (%)



THREE COUNTRIES WITH BIGGEST INFLUENCE IN INDONESIAN POLITICS

How would you rank these five countries' influence in the area of politics in Indonesia?
Please rank three countries with biggest influence in Indonesian politics. ...(%)

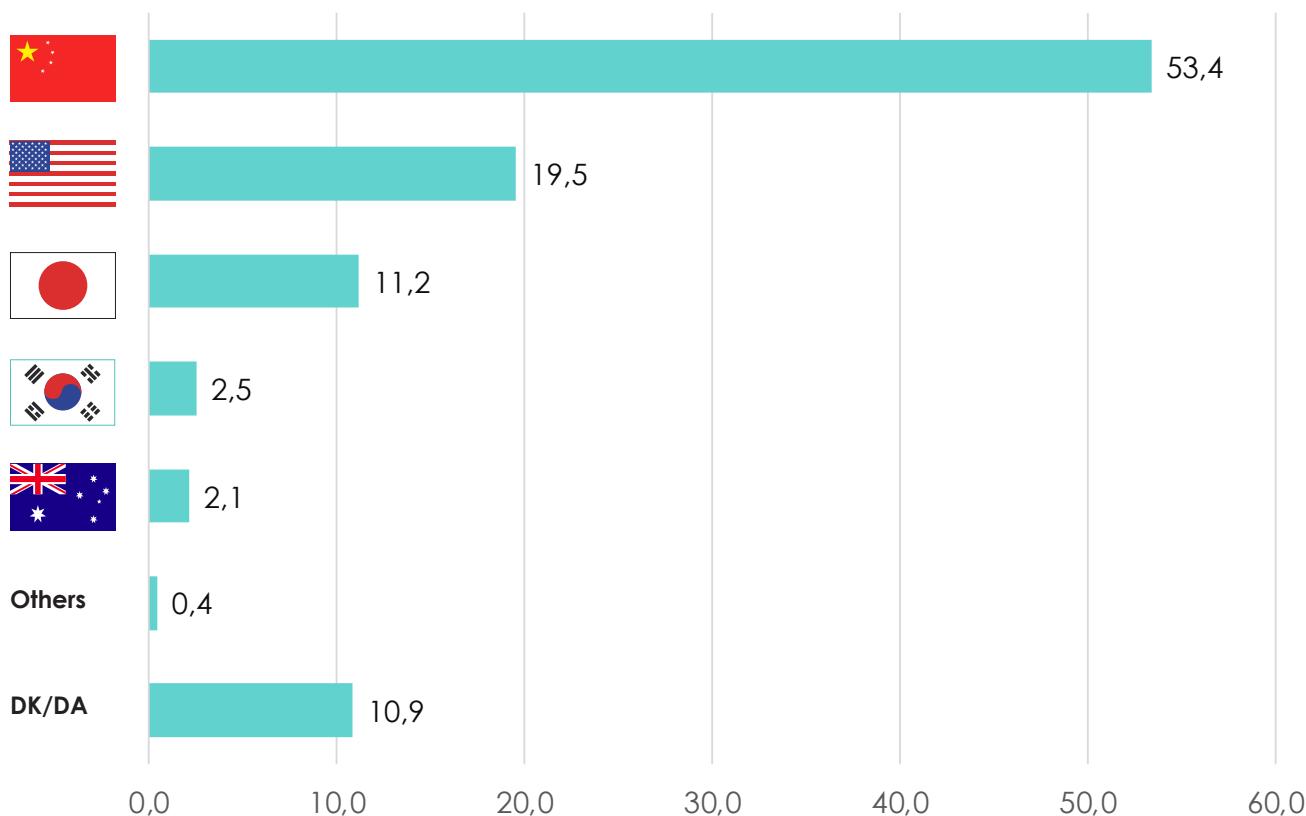
Rank 1



THREE COUNTRIES WITH BIGGEST INFLUENCE IN INDONESIAN ECONOMY

How would you rank these five countries' influence in the area of economy in Indonesia?
Please rank three countries with biggest influence in Indonesian economy ...(%)

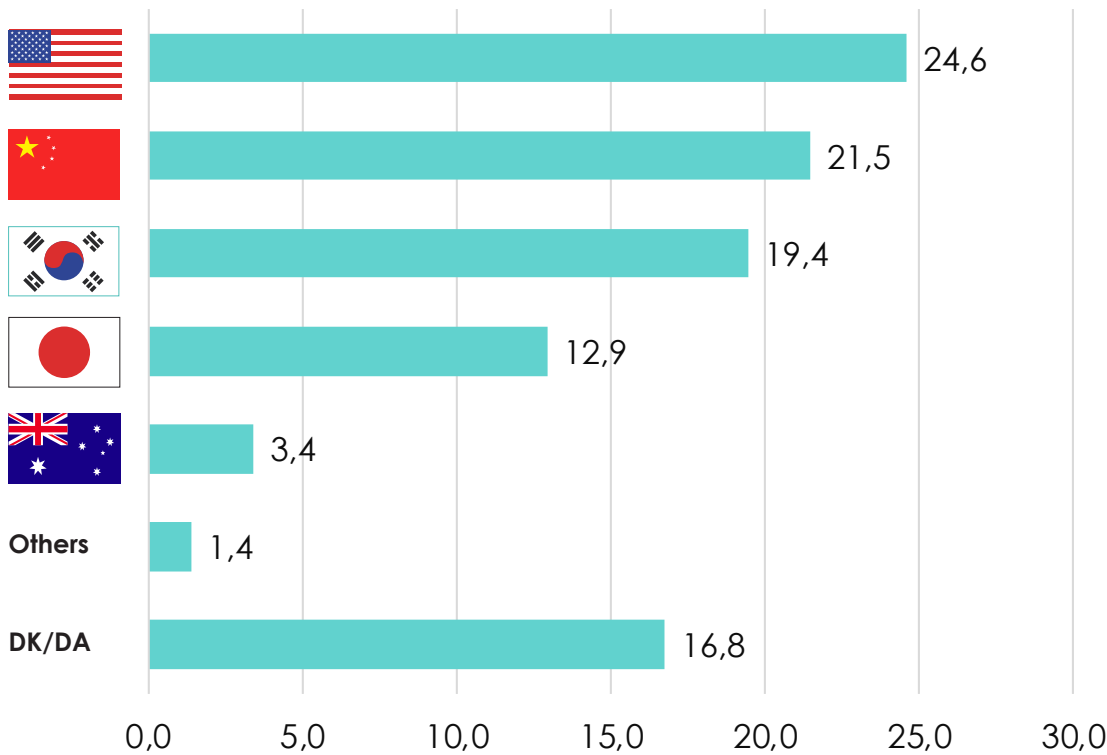
Rank 1



THREE COUNTRIES WITH BIGGEST CULTURAL INFLUENCE IN INDONESIA

How would you rank these five countries' influence in the area of culture in Indonesia?
Please rank three countries with biggest cultural influence in Indonesia... (%)

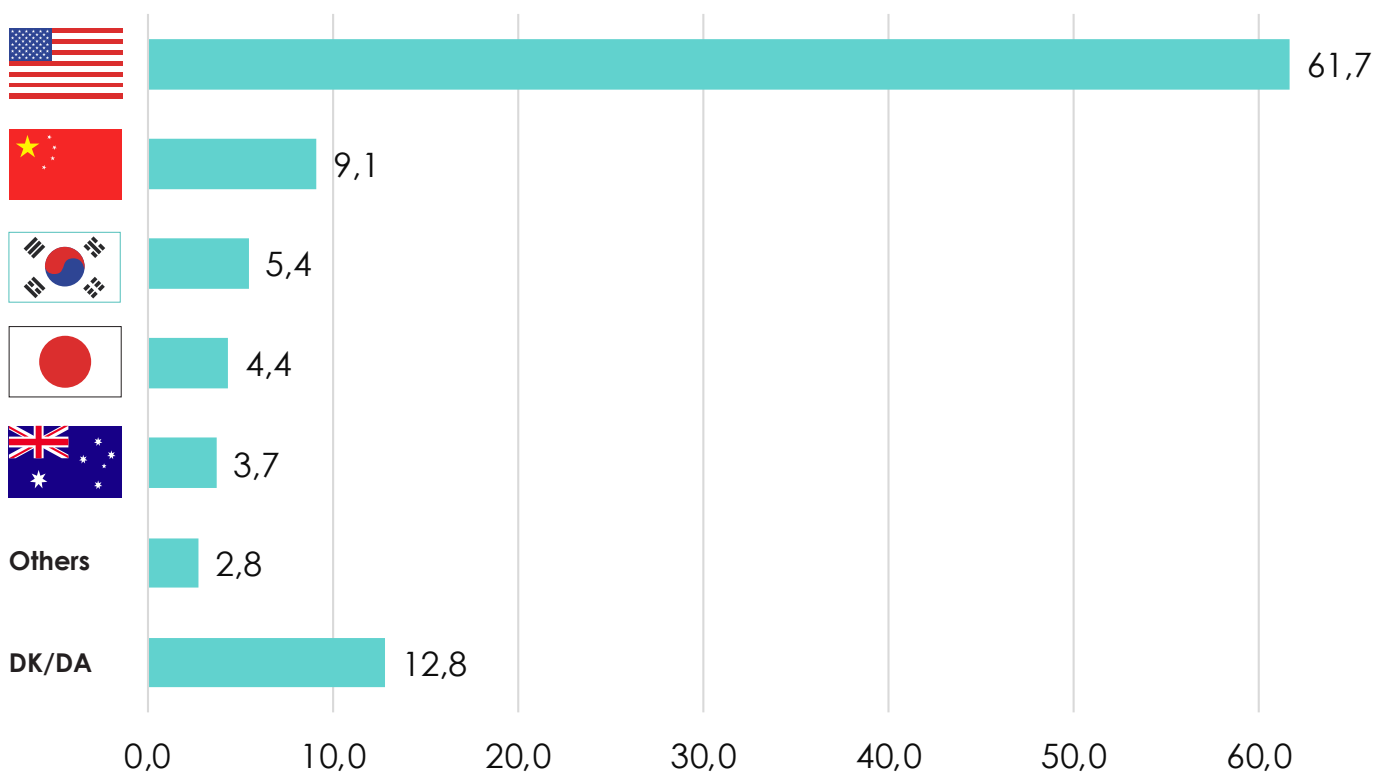
Rank 1



THREE COUNTRIES WITH BIGGEST INFLUENCE IN INDONESIAN MILITARY

How would you rank these five countries' influence in the area of military in Indonesia?
Please rank three countries with biggest influence in Indonesian military... (%)

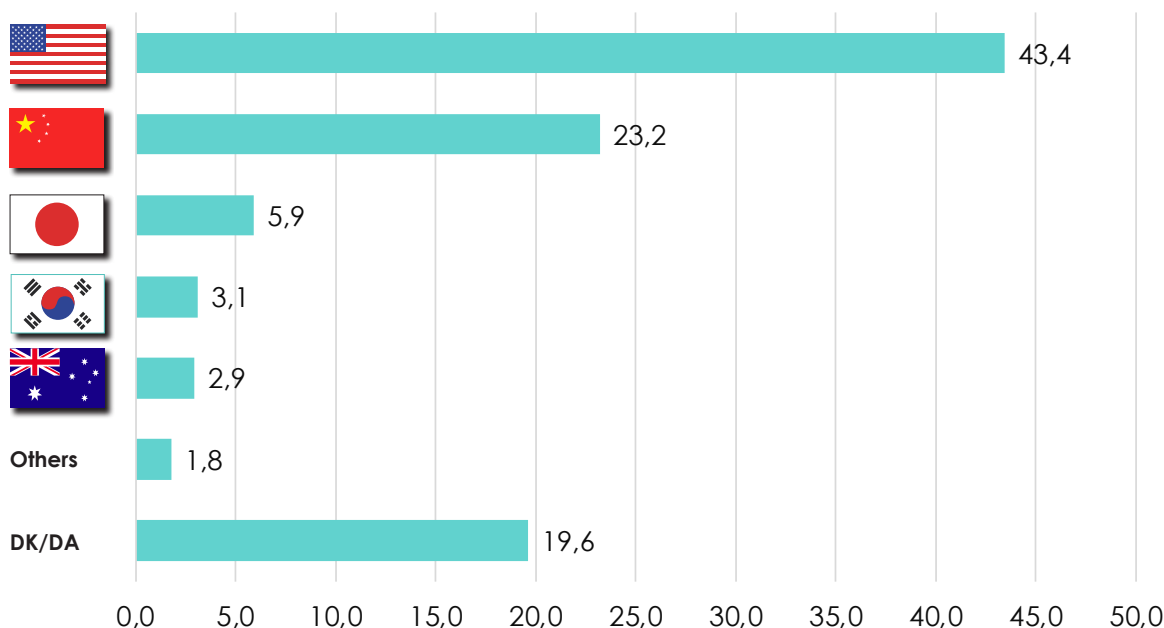
Rank 1



THREE COUNTRIES WITH BIGGEST INFLUENCE IN INDONESIAN DIPLOMACY

How would you rank these five countries' influence in the area of international relations in Indonesia? **Please rank three countries with biggest influence in Indonesian diplomacy...(%)**

Rank 1



A significant portion of the elite focuses primarily on China and the U.S. when asked which country has the most influence over Indonesia, with 55.3 percent citing China and 39.8 percent naming the U.S. In contrast, Japan, South Korea, and Australia are largely overlooked, with each receiving less than 2 percent of the elite's consideration."

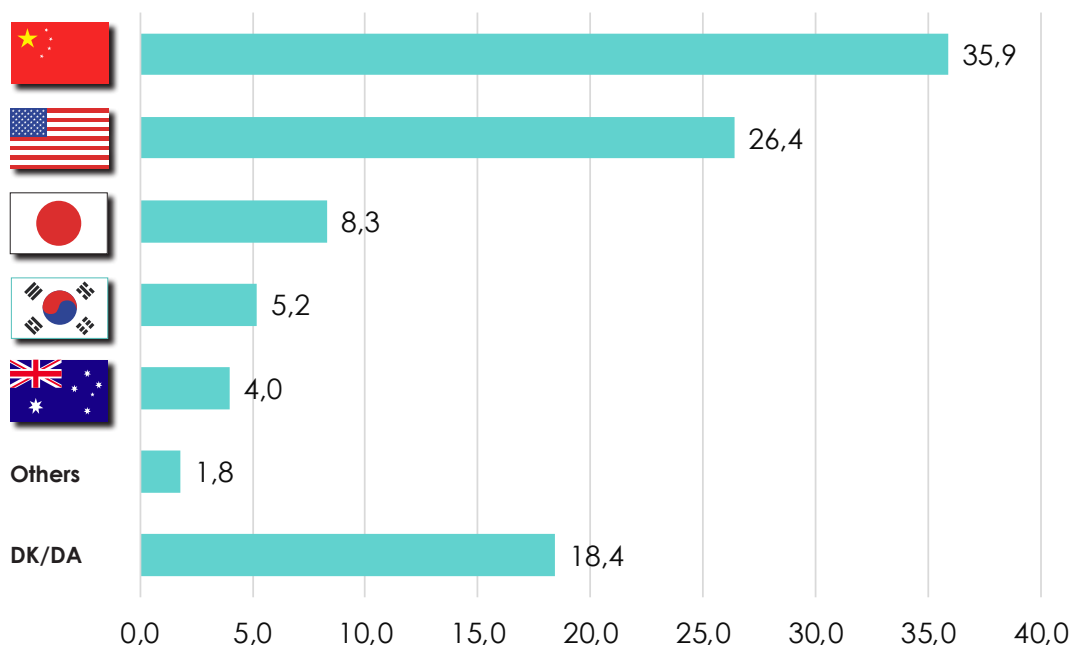
C.4 Country's Perceived Influence in the Region

Regarding major powers' influence in Southeast Asia, more people rank China as having either the largest or second-largest influence in the region compared to the U.S. and Japan. This clearly indicates that most of the public views China's influence in the region as predominant.

THREE COUNTRIES WITH BIGGEST INFLUENCE IN SOUTHEAST ASIA

How would you rank these five countries in terms of their influence in Southeast Asia? **Please rank three countries with biggest influence in Southeast Asia...(%)**

Rank 1

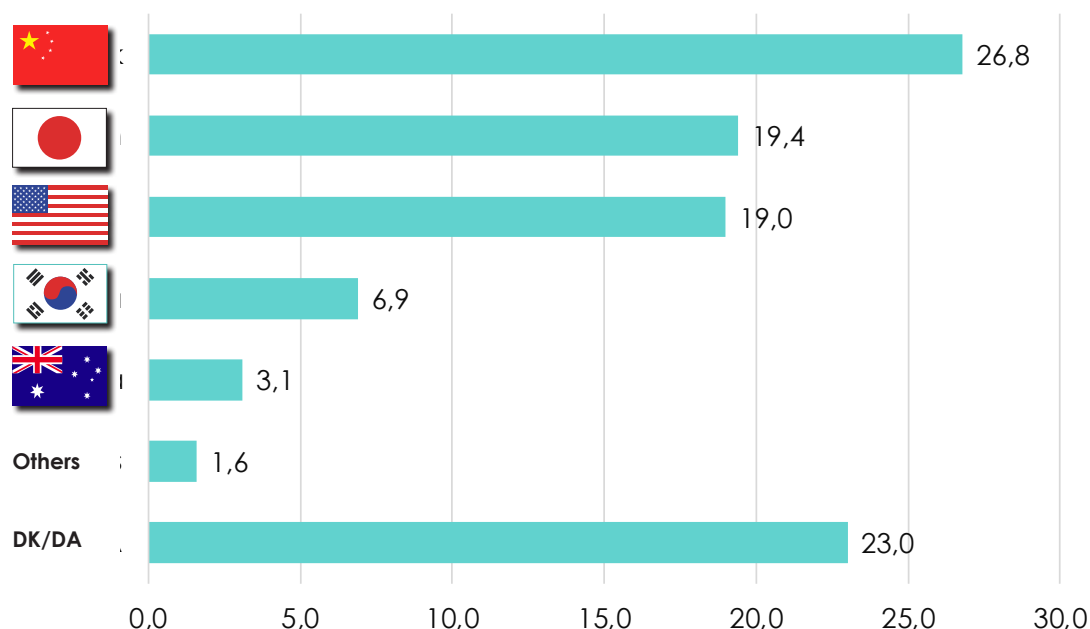


Among the public, China's considerable influence in the region is likely to be viewed in a more positive light, compared to Japan or the U.S. primarily due to the country's perceived contribution to the region's economies. On the other hand, the U.S. is likely to be seen as presenting a more considerable threat to the region compared to China, Australia, or Japan.

THREE COUNTRIES WITH BIGGEST POSITIVE INFLUENCE IN SOUTHEAST ASIA

How would you rank these five countries in terms of their positive influence in Southeast Asia?
Please rank three countries with the **biggest positive influence in Southeast Asia...**(%)

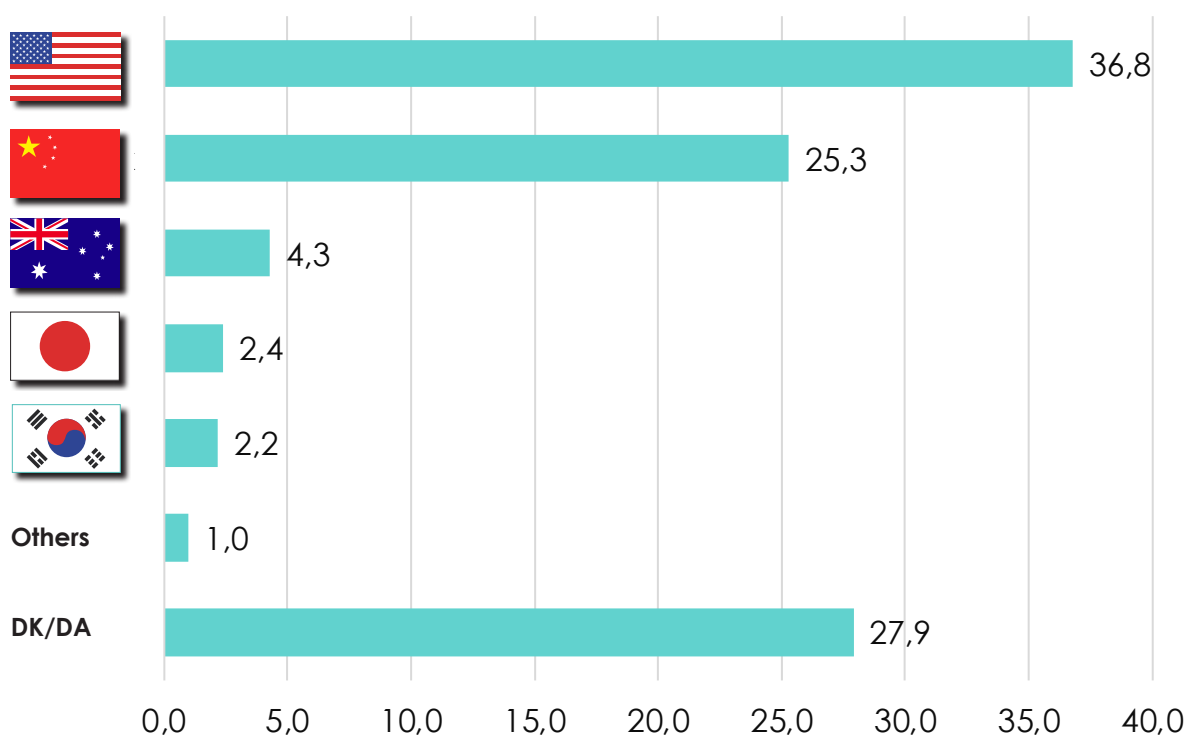
Rank 1



THREE COUNTRIES WHICH PRESENTS BIGGEST THREAT IN SOUTHEAST ASIA

How would you rank these five countries in terms of their threat in Southeast Asia?
Please rank three countries with **biggest threat in Southeast Asia....**(%)

Rank 1

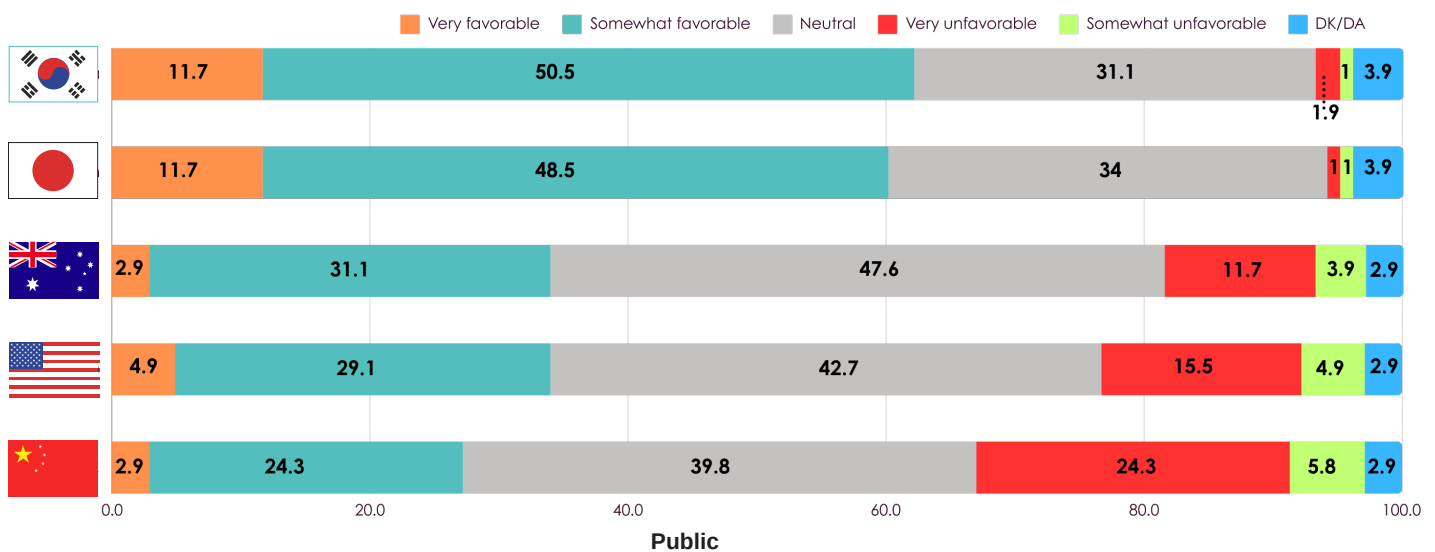


A much larger share of the public holds favourable opinions of South Korea and Japan compared to the other major powers. Both countries also receive the fewest negative evaluations, with fewer than 8 percent of the public expressing unfavourable views of them. On the other hand, the U.S. and China receive the most negative evaluations compared to the other major powers. However, among these two, China receives a slightly more positive evaluation than the U.S. Moreover, Australia receives a few positive evaluations from the public, with nearly 70 percent expressing neutral feelings about the country.

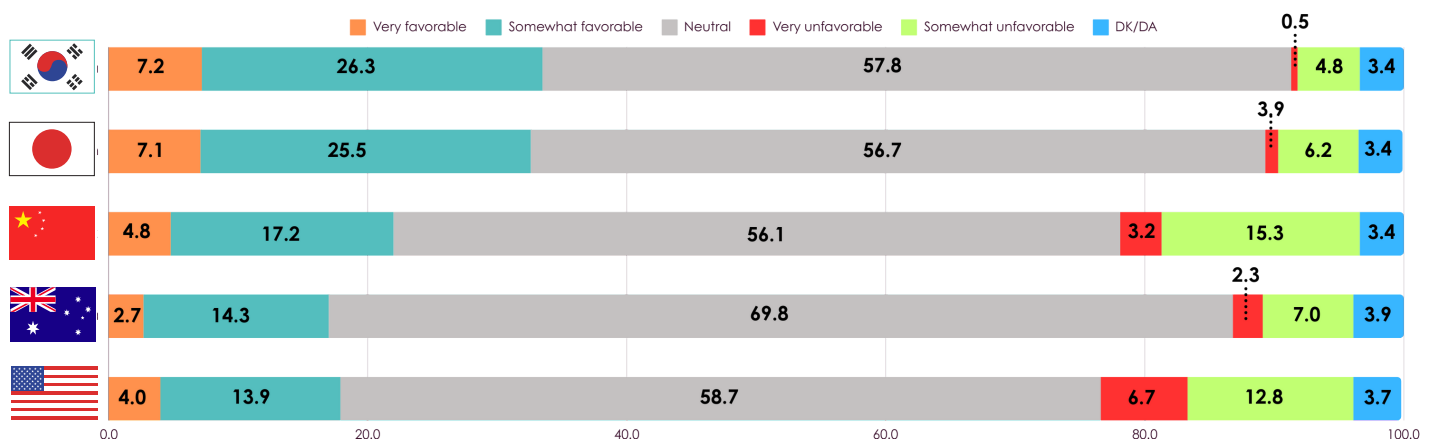
FAVORABILITY OF 5 MAJOR COUNTRIES

I will read the names of the following countries. Please tell me if you have a very unfavorable, somewhat unfavorable, neutral, somewhat favorable, or very favorable opinion of...?...(%)

Elite



Public



A similar pattern of favourability toward South Korea and Japan is also evident among the elite respondents. Among the elites, China, but not the U.S., receives the most negative evaluation. Additionally, China receives significantly fewer positive evaluations compared to the U.S. Even Australia receives more positive evaluations from the elite respondents compared to China.

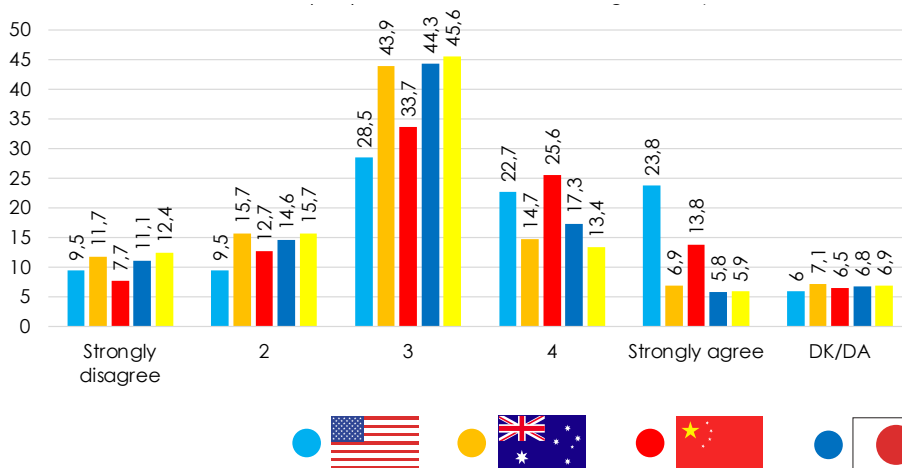
It is important to note, however, that a substantial majority of the public expresses neutral feelings toward all the major powers under consideration. In other words, this group do not lean towards either positive or negative evaluations of the major powers. Still, this situation is not reflected among elite respondents. Elite respondents tend to have more polarized views—either favourable or unfavourable—of the major powers.

Indonesians appear to recognize more differences than similarities in the foreign policy behaviour of major powers.

A. COUNTRY'S REPUTATION (FOREIGN MEDDLING)

Thinking about the international behavior of the major countries in the world, to the best of your knowledge, to what extent do you agree with the statements regarding the reputation of major countries below? Please indicate in the scale of 1 to 5, where 1 means "strongly disagree" and 5 means "strongly agree"....(%)

"In general [COUNTRY] interferes in the affairs of other countries"



Country	Mean	CI 95%	
		Lo	Up
USA	3.444	3.348	3.540
CHINA	3.268	3.182	3.355
JAPAN	2.916	2.836	2.995
AUSTRALIA	2.887	2.805	2.968
SOUTH KOREA	2.835	2.755	2.915

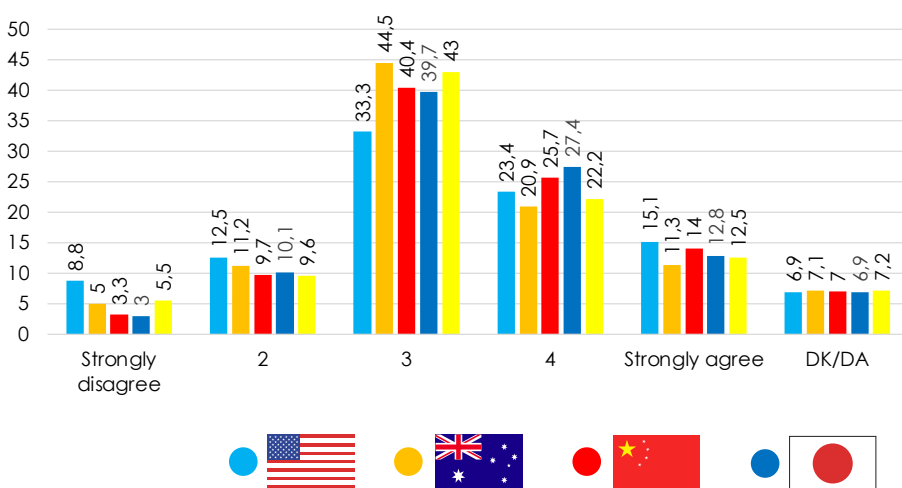
*DK/DA response is omitted when calculating mean value

USA and China have significantly higher mean scores than Japan, Australia and South Korea, meaning that the USA and China are more likely to be perceived as countries that often interfere in the domestic problems of other countries.

B. COUNTRY'S REPUTATION (PEACEFUL FORCE)

Thinking about the international behavior of the major countries in the world, to the best of your knowledge, to what extent do you agree with the statements regarding the reputation of major countries below? Please indicate in the scale of 1 to 5, where 1 means "strongly disagree" and 5 means "strongly agree"....(%)

"In general, [COUNTRY] contribute to peace and stability around the world"



Country	Mean	CI 95%	
		Lo	Up
CHINA	3.401	3.326	3.477
JAPAN	3.397	3.322	3.471
SOUTH KOREA	3.286	3.207	3.365
USA	3.252	3.162	3.341
AUSTRALIA	3.240	3.163	3.317

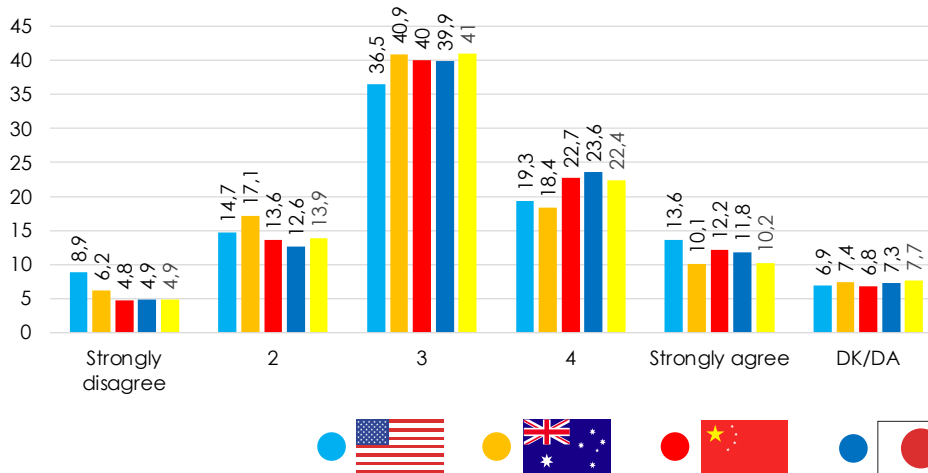
*DK/DA response is omitted when calculating mean value

The mean value of the five countries is above 3, which means that these countries are considered likely to contribute to world peace and stability.

C. COUNTRY'S REPUTATION (MUTUALLY RESPECTFUL)

Thinking about the international behavior of the major countries in the world, to the best of your knowledge, to what extent do you agree with the statements regarding the reputation of major countries below? Please indicate in the scale of 1 to 5, where 1 means "strongly disagree" and 5 means "strongly agree"....(%)

"In making international policy decisions, [COUNTRY] take into account the interest of other countries like Indonesia"



Country	Mean	CI 95%	
		Lo	Up
JAPAN	3.267	3.188	3.345
CHINA	3.256	3.177	3.335
SOUTH KOREA	3.207	3.130	3.285
USA	3.151	3.062	3.239
AUSTRALIA	3.100	3.019	3.180

*DK/DA response is omitted when calculating mean value

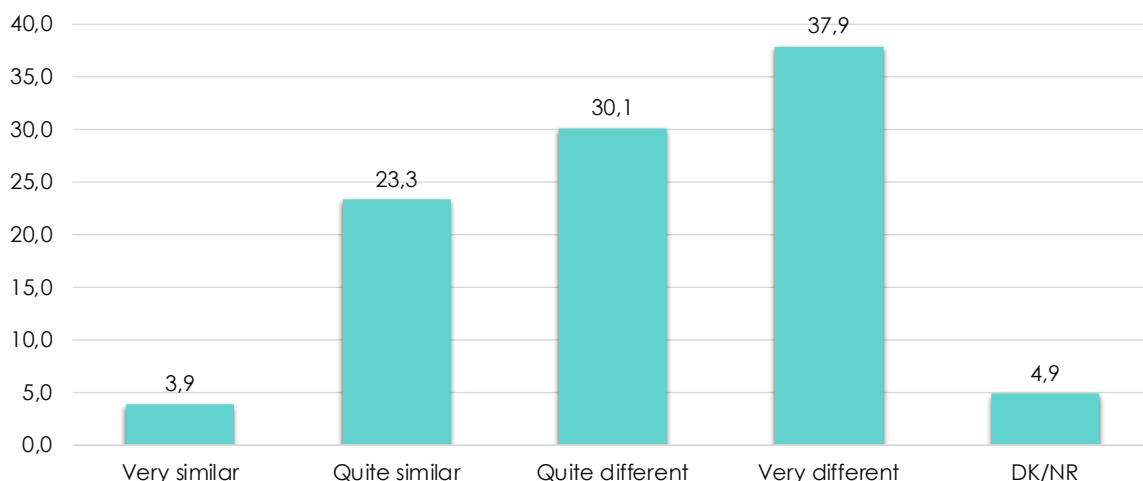
The mean value of the five countries is above 3, which means that these countries are assessed in formulating their foreign policies, usually these countries tend to consider the interests of other countries such as Indonesia.

They see the most pronounced difference in commitment to the principle of non-interference between China and the U.S. compared to Japan. With mean scores above three, China and the U.S. are more likely to be perceived as meddling in other countries' domestic affairs, whereas Japan is seen as respecting non-interference.

This pattern of recognizing differences than similarities is also manifested within the elite respondents. Approximately 68.0 percent see differences in how China and the U.S. conduct their foreign policy, whereas around 27 percent view similarities. Much more respondents see differences when comparing China's and Japan's foreign policy behaviour. Only 18.5 percent believe that both major powers take similar approaches while conducting their foreign policy.

SIMILARITIES OF FOREIGN POLICY IMPLEMENTATION BETWEEN CHINA AND THE UNITED STATES (ELITE SURVEY)

How would you rate the similarities or differences between China and the US in terms of how they have implemented their foreign policy?...(%)

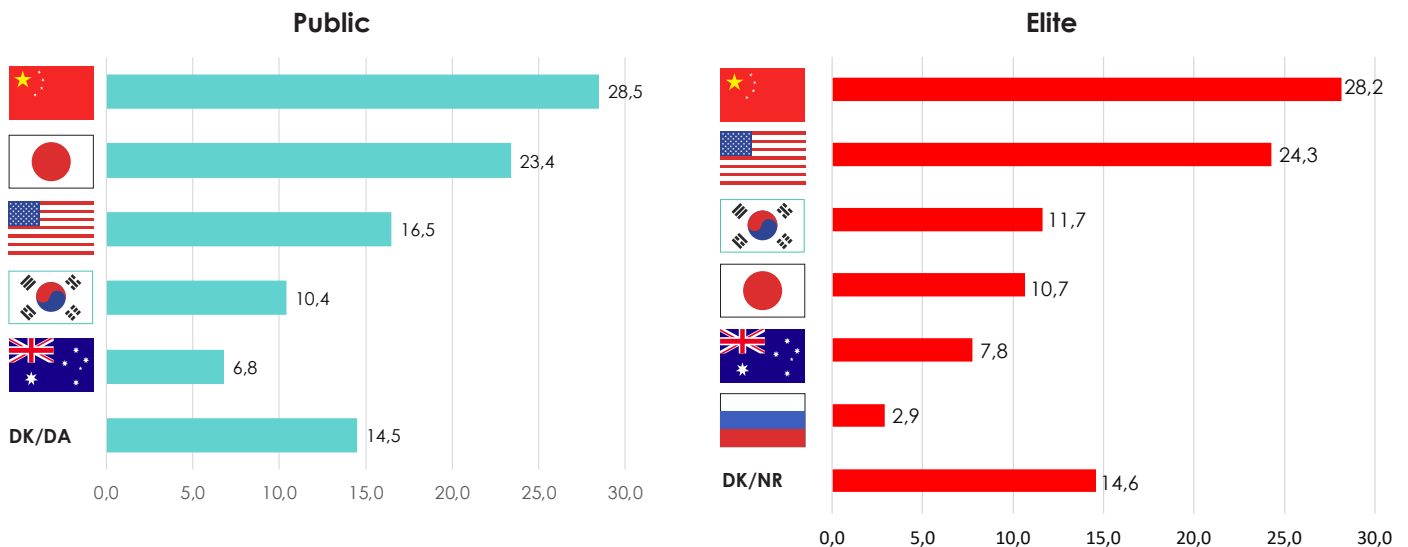


The majority, 68%, assess that the implementation of foreign policy between China and the United States is different.

The idea of Indonesia expanding cooperation with either China or Japan receives greater support from the Indonesian public, compared to doing the same with the U.S., South Korea, or Australia. Nevertheless, the highest level of public approval for China is specifically for the country to be Indonesia's economic partner. In contrast, Japan receives the strongest support from the public for expanding its partnership with Indonesia beyond economic affairs, to include political affairs, education, science and technology, and environmental protection.

PRIORITY COUNTRY TO BUILD COOPERATION & PARTNERSHIP

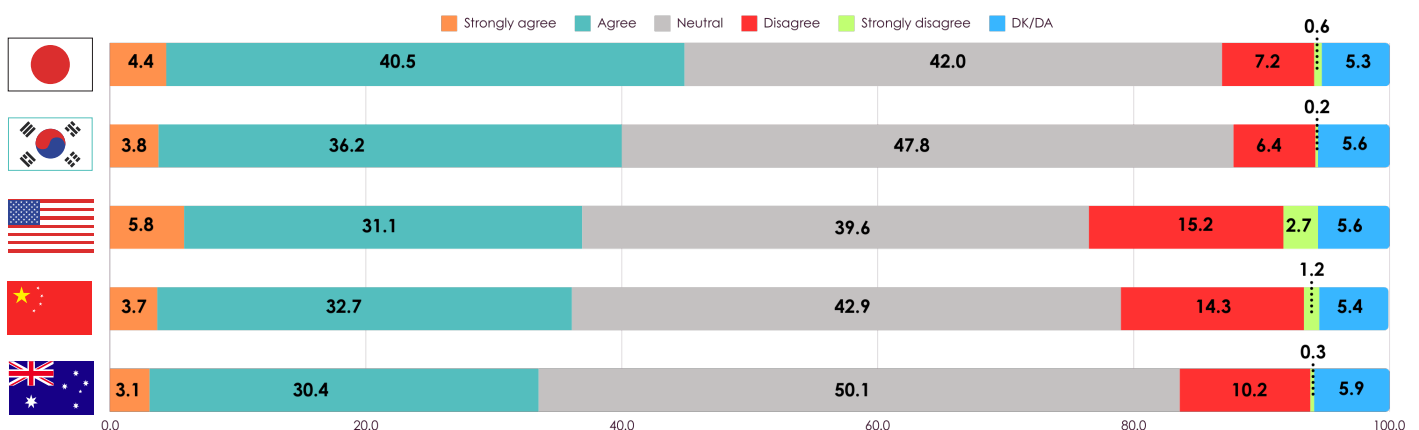
If the government is going to increase its cooperation and partnership in general with the following countries, with which countries should Indonesia increase cooperation?... (%)



The U.S. receives the strongest support from the public to be Indonesia's partner in military, defence, and security sectors, while South Korea receives the most support for partnerships in cultural, tourism, and creative industry sectors. Australia generally receives the least public support to be Indonesia's partner in all sectors except environmental protection. Even in this field, however, it is still outpaced by Japan and South Korea.

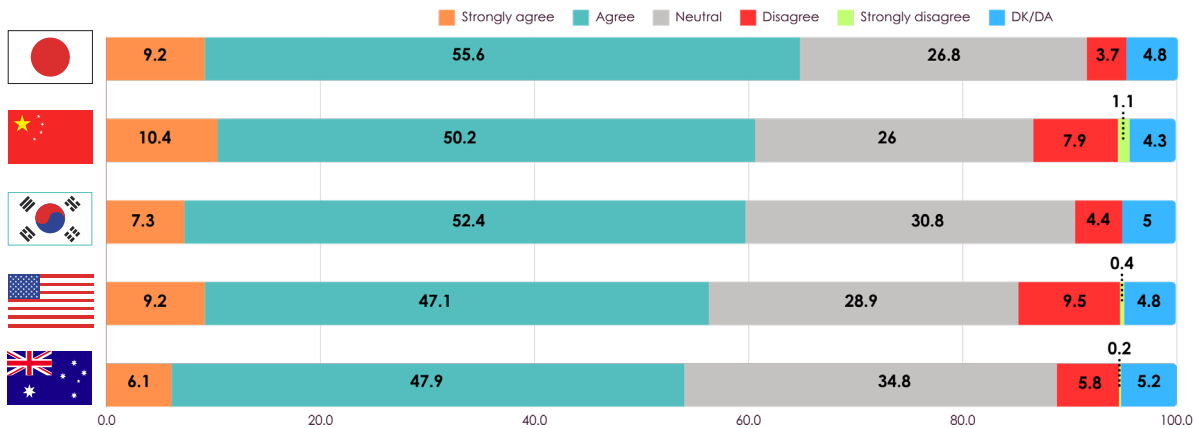
APPROVAL TO INCREASE [POLITICAL AND GOVERNMENT AFFAIRS] PARTNERSHIP WITH 5 MAJOR COUNTRIES

How much do you agree or disagree if Indonesia increases cooperation and partnership in **politics and government** with the following countries?... (%)



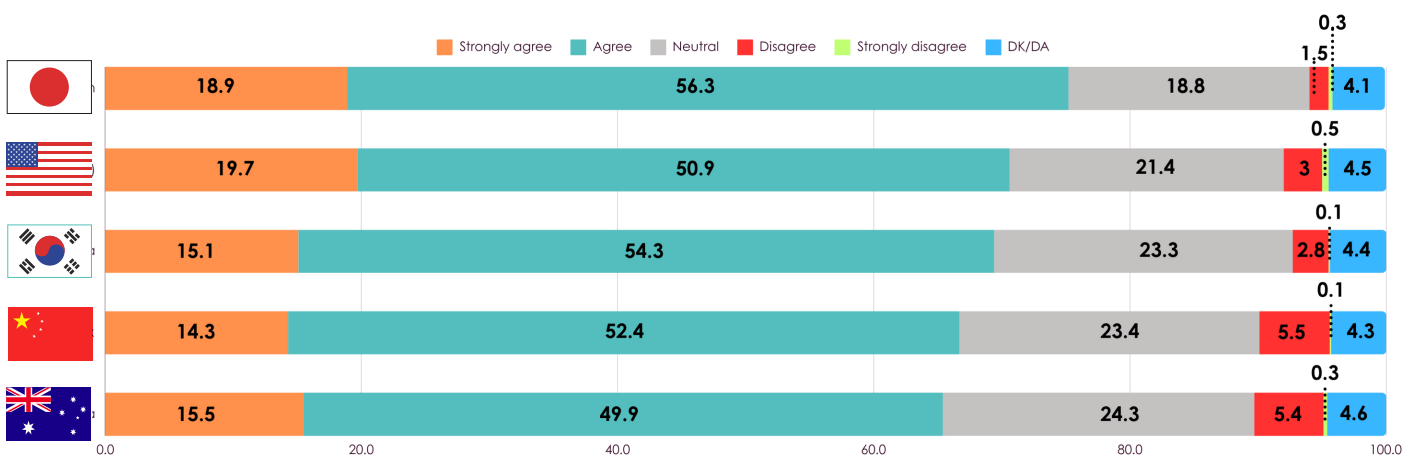
APPROVAL TO INCREASE [ECONOMICS AND BUSINESS] PARTNERSHIP WITH 5 MAJOR COUNTRIES

How much do you agree or disagree if Indonesia increases cooperation and partnership in **economics and business** with the following countries?... (%)



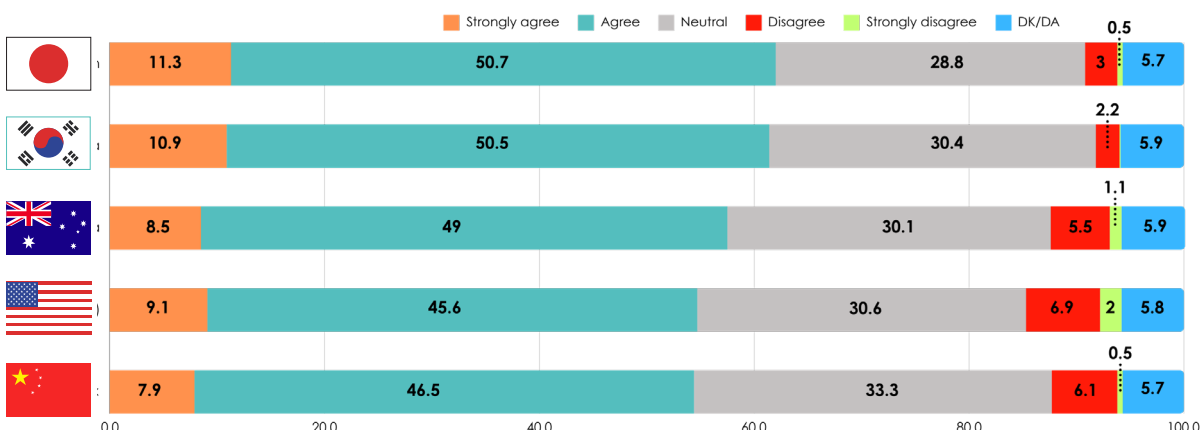
APPROVAL TO INCREASE [EDUCATION, SCIENCE, AND TECHNOLOGICAL] PARTNERSHIP WITH 5 MAJOR COUNTRIES

How much do you agree or disagree if Indonesia increases cooperation and partnership in **education, science, and technology** with the following countries?... (%)



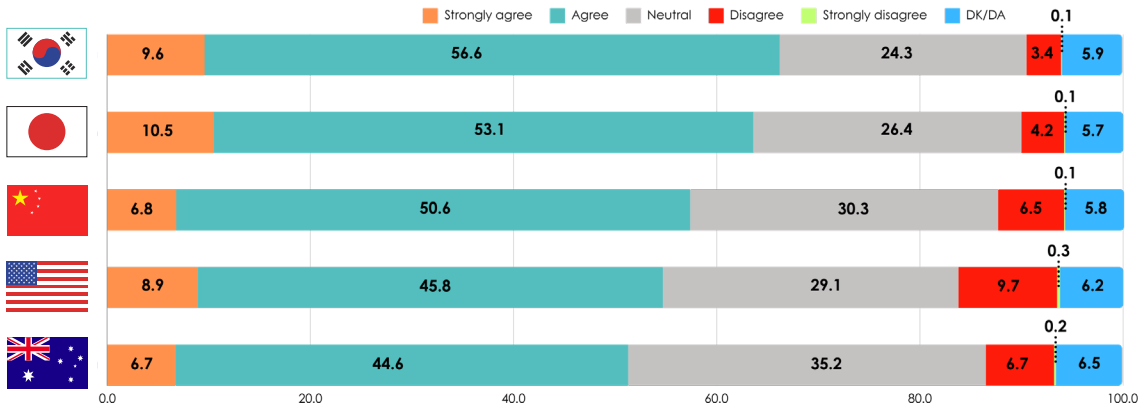
APPROVAL TO INCREASE [ENVIRONMENTAL PROTECTION] PARTNERSHIP WITH 5 MAJOR COUNTRIES

How much do you agree or disagree if Indonesia increases cooperation and partnership in **environmental protection** with the following countries?... (%)



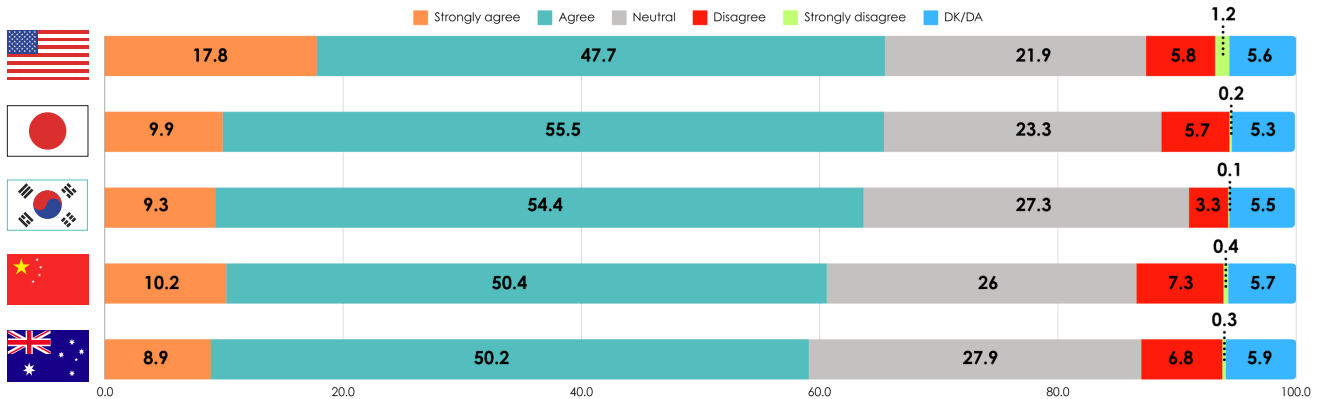
APPROVAL TO INCREASE [CULTURAL, TOURISM, AND CREATIVE INDUSTRY] PARTNERSHIP WITH 5 MAJOR COUNTRIES

How much do you agree or disagree if Indonesia increases cooperation and partnership in **culture, tourism, and creative industry** (music, film, dance, etc.) with the following countries?... (%)



APPROVAL TO INCREASE [MILITARY, DEFENSE, AND SECURITY] PARTNERSHIP WITH 5 MAJOR COUNTRIES

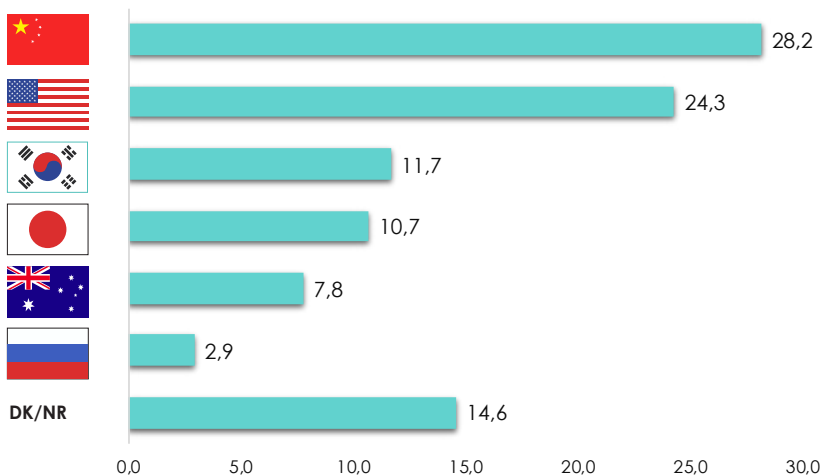
How much do you agree or disagree if Indonesia increases cooperation and partnership in **military, defense, and security issues** with the following countries?... (%)



On the other hand, the elite respondents give greater support for Indonesia to expand its cooperation with China or the United States compared to the other major powers. Most elite respondents favor the U.S. as Indonesia's partner in political matters, as well as in education, science, and technology. In the military, defence, and security sectors, even 62.1 percent of respondents prefer the U.S. as Indonesia's partner. China is most favored in the economic and business sectors, while South Korea is preferred in cultural, tourism, and creative industries.

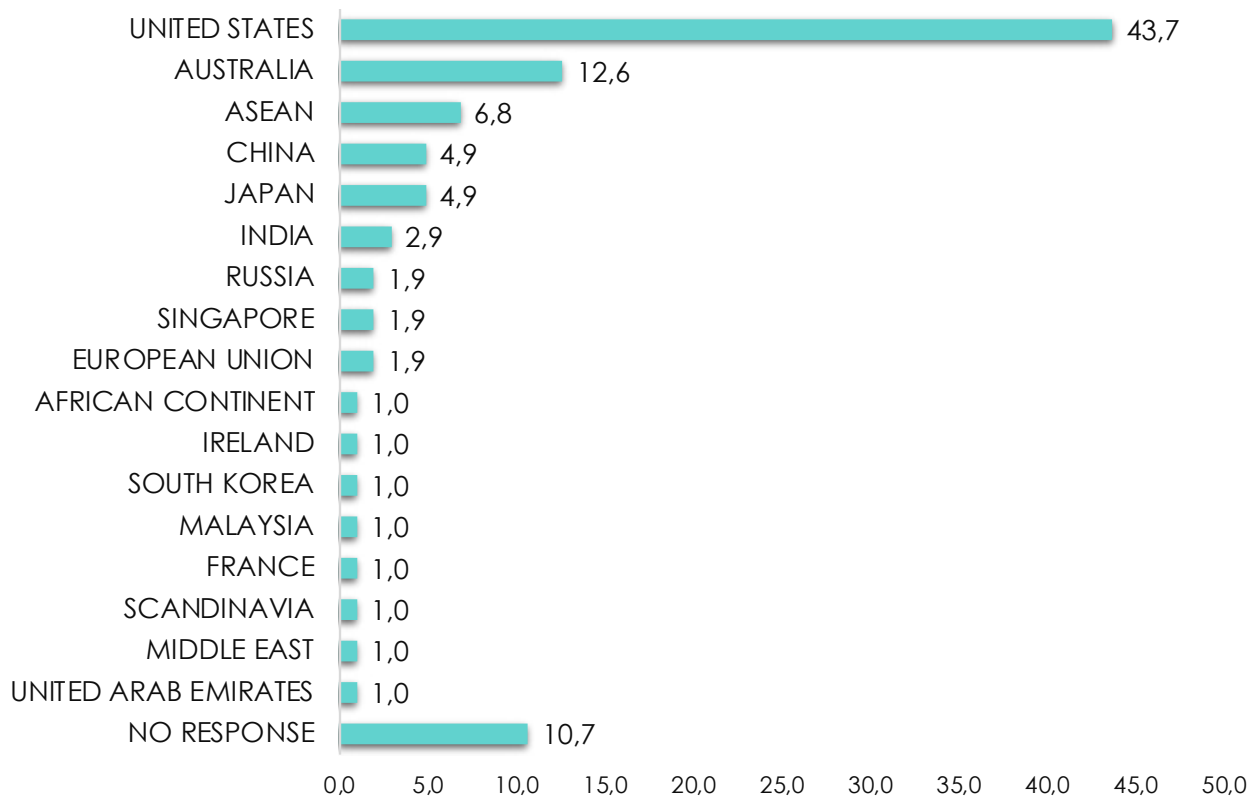
INDONESIA SHOULD INCREASE COOPERATION WITH WHICH COUNTRY? (ELIT SURVEY)

If the Indonesian government wants to increase cooperation and partnerships in general with the following countries, which country should Indonesia increase cooperation with?... %



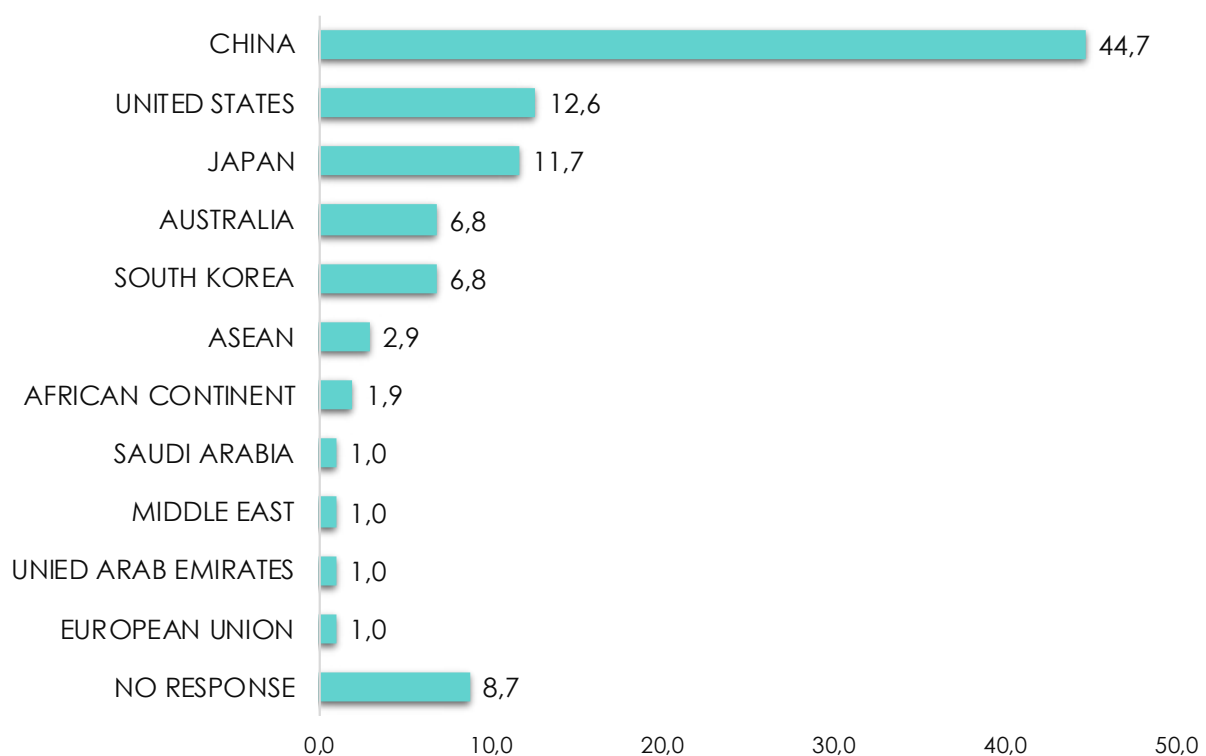
INDONESIA SHOULD INCREASE COOPERATION in POLITICS AND GOVERNMENT WITH WHICH COUNTRY? (ELIT SURVEY)

According to you, with which countries should Indonesia increase cooperation and partnership in politics and government?(Top of mind)... %



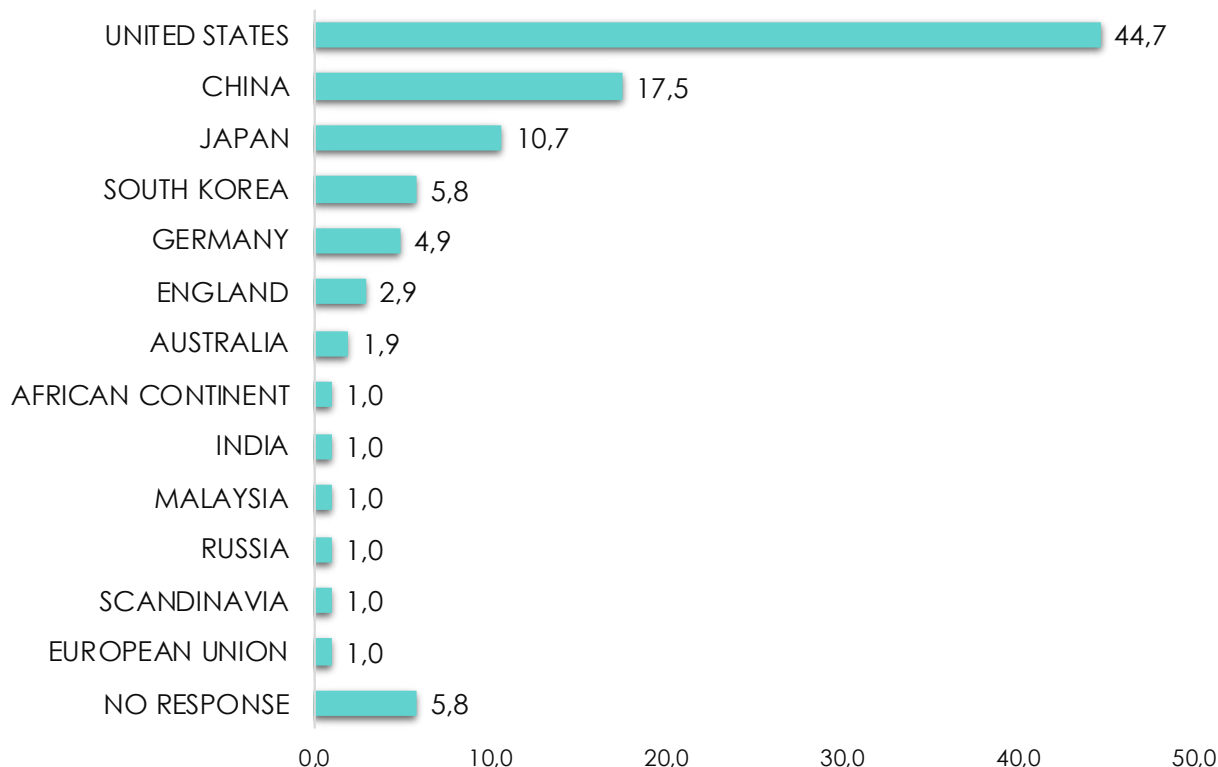
INDONESIA SHOULD INCREASE COOPERATION in ECONOMICS AND BUSINESS WITH WHICH COUNTRY? (ELIT SURVEY)

According to you, with which country should Indonesia increase cooperation and partnership in economics and business?(Top of mind)... %



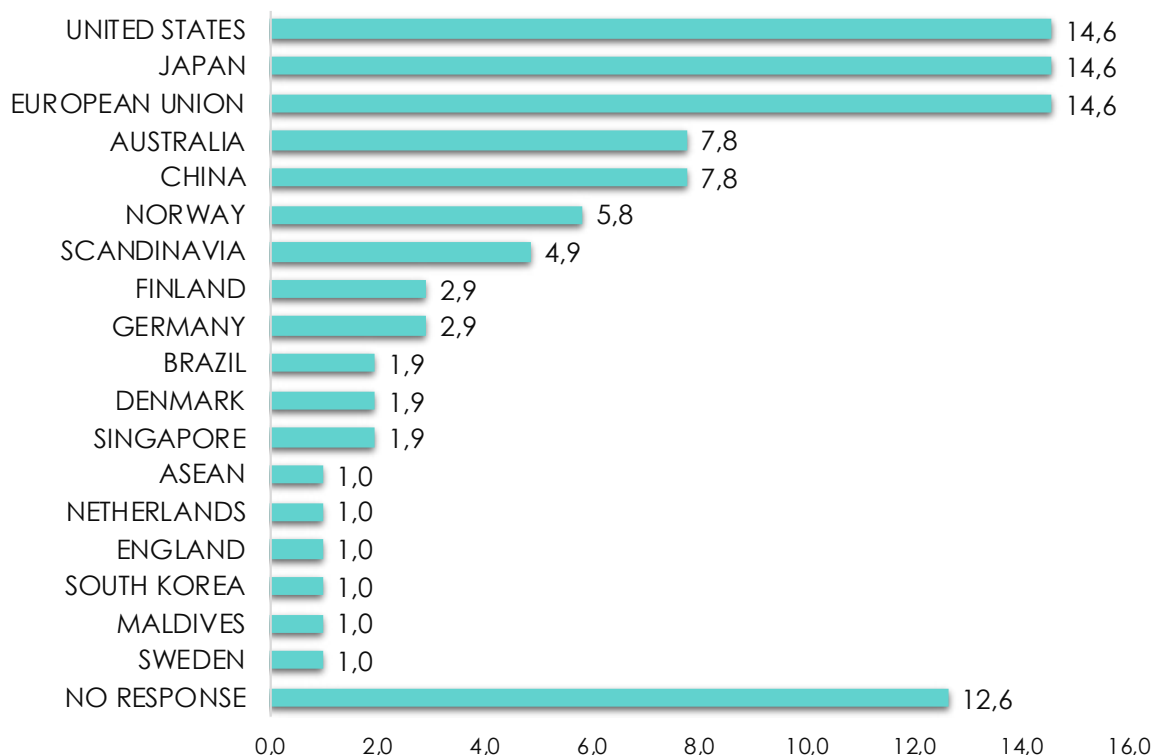
INDONESIA SHOULD INCREASE COOPERATION in EDUCATION, SCIENCE, AND TECHNOLOGY WITH WHICH COUNTRY? (ELIT SURVEY)

According to you, with which country should Indonesia increase cooperation and partnership in
the field of education, science, and technology?(Top of mind)... %



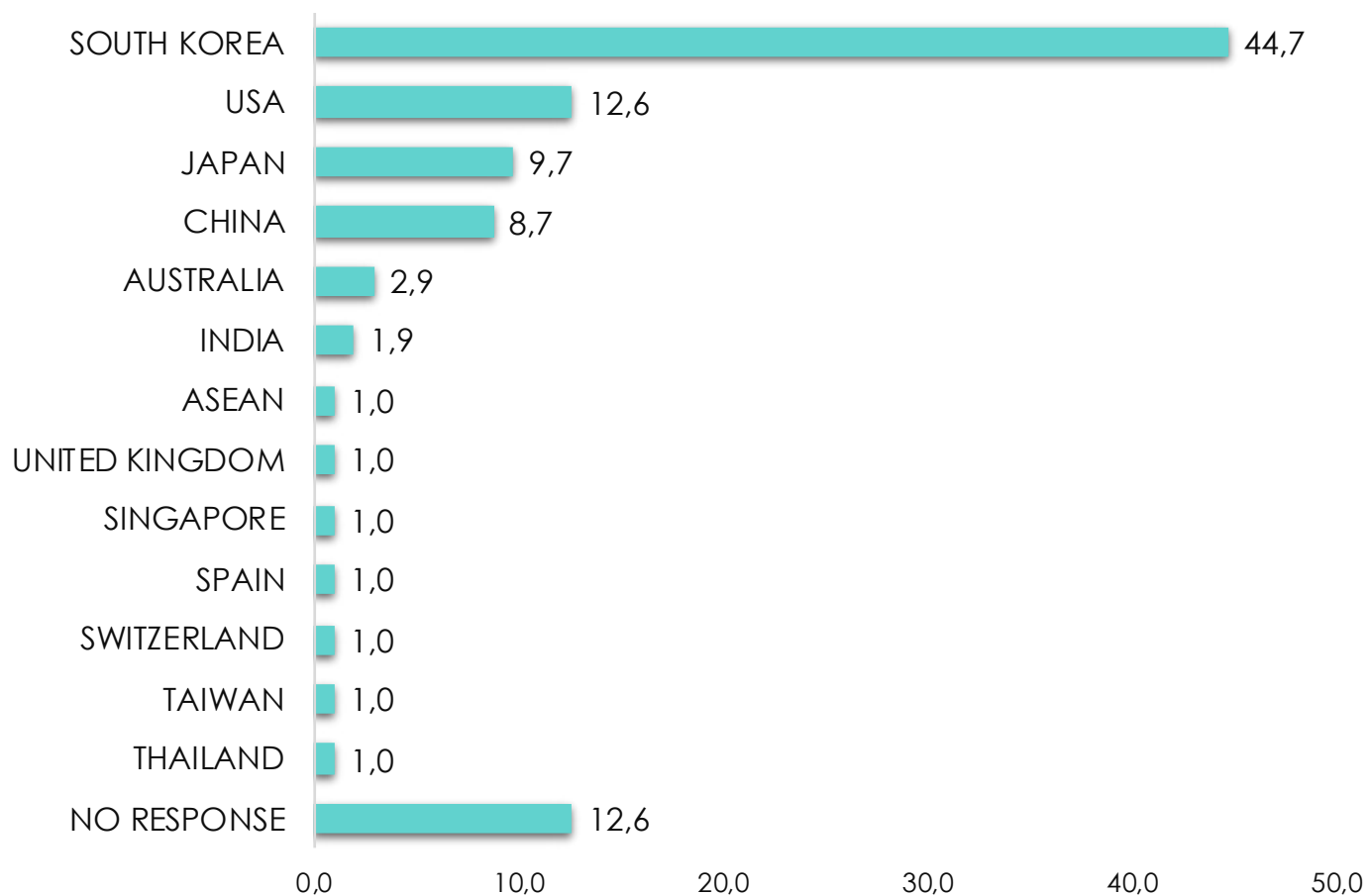
INDONESIA SHOULD INCREASE COOPERATION in ENVIRONMENTAL PROTECTION WITH WHICH COUNTRY? (ELIT SURVEY)

According to you, with which country should Indonesia increase cooperation and partnership
in the field of environmental protection and preservation?(Top of mind)... %



INDONESIA SHOULD INCREASE COOPERATION in TOURISM CULTURE AND CREATIVE INDUSTRY WITH WHICH COUNTRY? (ELIT SURVEY)

According to you, with which country should Indonesia increase cooperation and partnership in
the field of culture, tourism and creative industries (music, film, dance, etc.)?(Top of mind)... %



D. Indonesian's Views of China

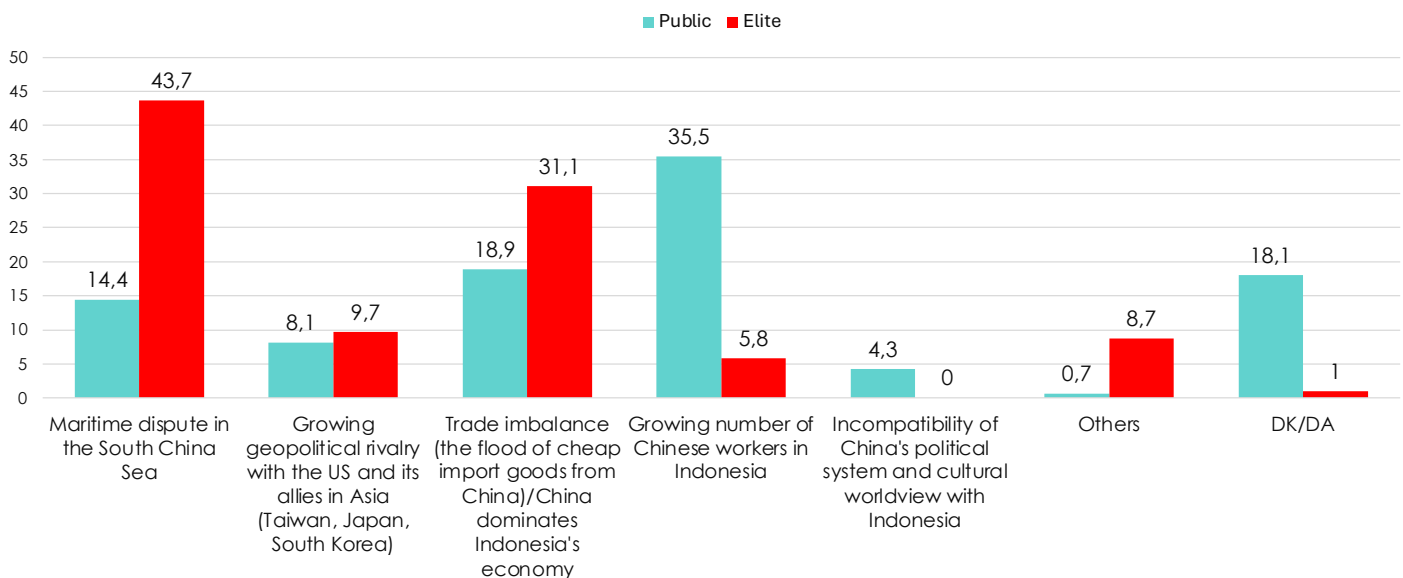
D.1 Perceived Threats and Opportunities from China

Regarding perceived threats from China, more than half of Indonesians are less concerned about China's influence on geopolitical dynamics and more worried about its impact on Indonesia's economy. They view China as a threat primarily due to the influx of Chinese workers and cheap manufactured products.

Specifically, on the issue of workers, 66.8 percent believe these workers take away job opportunities from Indonesians, viewing their presence as detrimental.

POTENTIAL RISK FACTOR IN INDONESIA-CHINA BILATERAL RELATIONSHIP IN THE FUTURE

What do you consider to be the biggest risk factors that could lead to issues in Indonesia-China relations in the future? ... (%)

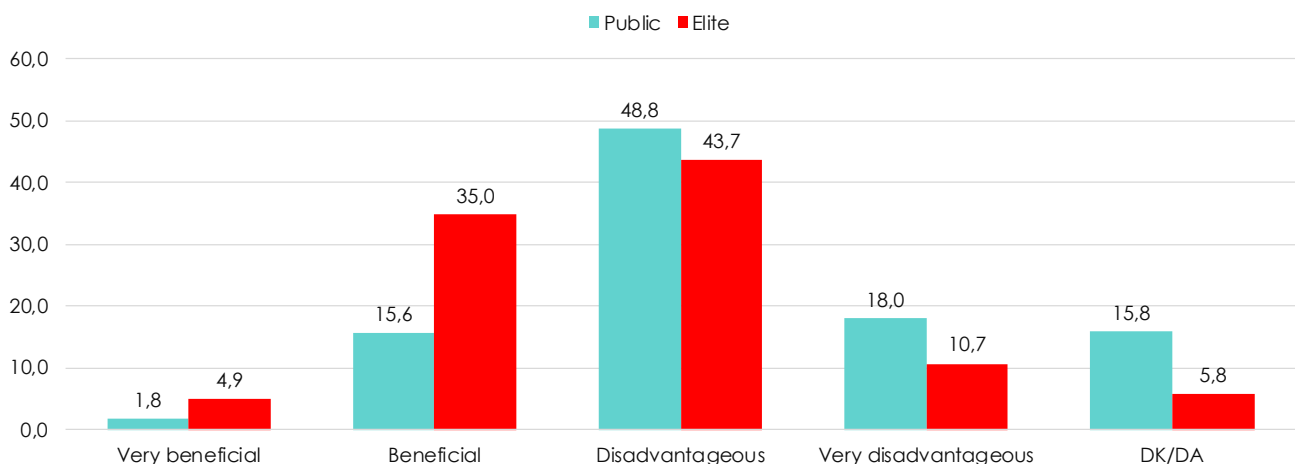


On the other hand, two contrasting tendencies emerge among elite respondents compared to the public. Firstly, the majority of elite respondents perceive threats from the geopolitical dynamics involving China. Approximately 43.7 percent and 9.7 percent identify the maritime dispute in the South China Sea and the deterioration of East Asian regional dynamics, respectively, as issues potentially harming Indonesia and its relations with China.

Secondly, the proportion of elite respondents perceiving threats from China is lower than that of the public. Around 54 percent believe that the influx of Chinese workers in infrastructure projects in Indonesia is detrimental to the country.

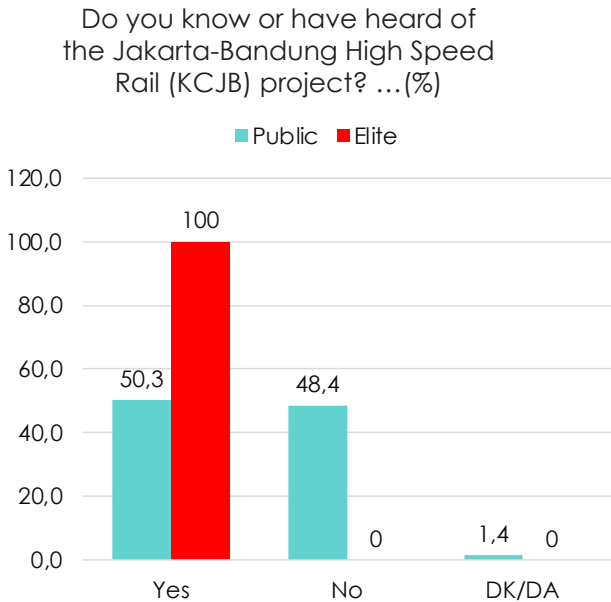
PERCEPTION ON CHINESE WORKERS IN INFRASTRUCTURE PROJECTS

To build various Chinese infrastructure projects in Indonesia, a number of workers were imported from China. In your opinion, will bringing in workers from China to build infrastructure projects be profitable or disadvantageous for Indonesia? ... (%)

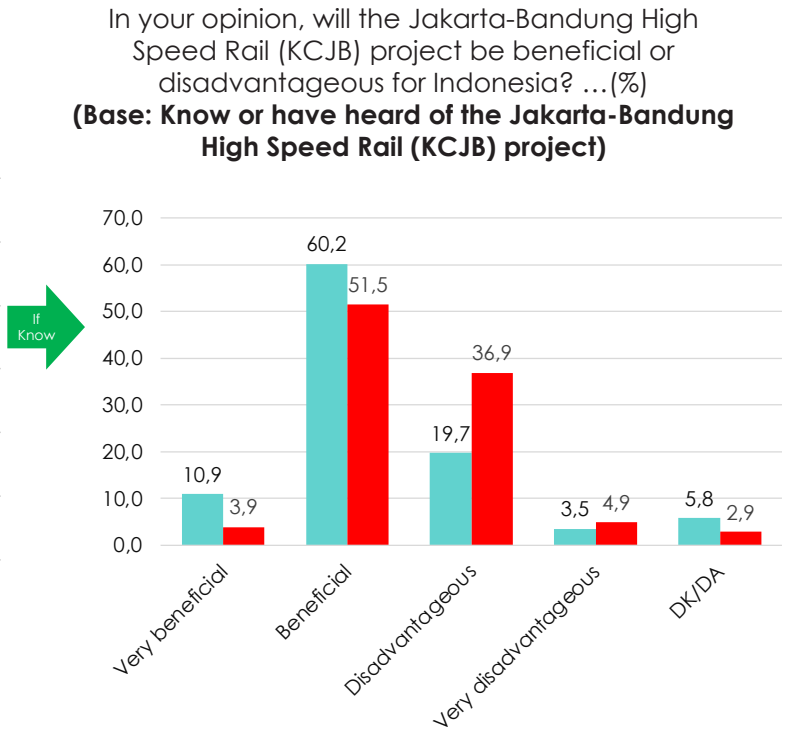


How Indonesians evaluate the Jakarta-Bandung High-Speed Railway project reveals the opportunities they see from China. Notably, public awareness about this project, a landmark for China's global engagement and bilateral relations with Indonesia, is relatively low. Only around half of Indonesians know or have heard about the project, and approximately 71.1 percent of them believe it has created benefits for the country. In other words, only about 36 percent of Indonesians are both aware of and evaluate this project positively. For these individuals, the project represents an opportunity for infrastructure upgrades, technological and knowledge transfer, job creation, and further collaboration in other sectors.

JAKARTA-BANDUNG HIGH SPEED RAIL (KCJB)



Around 50.3% know or aware of KCJB, of those who know the majority, 71.1%, think that the Jakarta-Bandung High Speed Rail (KCJB) project will be beneficial for Indonesia.



The proportion of those who perceive opportunities in China is higher among elites than the general public. All elite respondents are aware of the Jakarta-Bandung HSR project, with 55.4 percent evaluating it positively.

E. Categorical Perspectives on Some Key Issues

As mentioned earlier, most of the Indonesian public expresses neutral feelings toward the major powers under consideration. However, favorability varies among generational groups, particularly regarding the U.S., China, Japan, and South Korea. Gen-Z generally has lower favorability toward the U.S. compared to the three Asian countries. In contrast, Millennials and Gen-Z show slightly higher favorability toward China, while older generations tend to view China less favorably. Notably, the favorability levels for the U.S. and China remain below those for Japan and South Korea across all generational categories. The highest levels of favorability for both Japan and South Korea are found among Gen-Z.

FAVORABILITY OF 5 MAJOR COUNTRIES BY DEMOGRAPHICS AND ZONE

	BASE	Very+ Somewhat unfavorable	Neutral	Somewhat+ Very favorable	DK/NA	Very+ Somewhat unfavorable	Neutral	Somewhat+ Very favorable	DK/NA
GENERATION									
Gen Z (1997-2012)	21,1	15,0	62,2	20,5	2,3	4,7	76,1	16,9	2,3
Millennials (1981-1996)	35,8	19,1	60,4	18,7	1,8	8,0	73,6	16,5	1,9
Generation X (1965-1980)	26,9	26,3	54,5	15,7	3,5	14,4	63,7	18,1	3,9
<=Baby Boomers (<=1964)	16,3	5,6	57,4	16,9	10,1	9,5	63,5	16,3	10,7
GENERATION	BASE	Very+ Somewhat unfavorable	Neutral	Somewhat+ Very favorable	DK/NA	Very+ Somewhat unfavorable	Neutral	Somewhat+ Very favorable	DK/NA
Gen Z (1997-2012)	21,1	15,8	58,0	23,8	2,3	6,1	48,0	43,6	2,3
Millennials (1981-1996)	35,8	17,6	57,4	23,4	1,6	5,4	62,5	30,6	1,6
Generation X (1965-1980)	26,9	23,0	53,2	20,5	3,4	7,3	58,9	30,4	3,4
<=Baby Boomers (<=1964)	16,3	16,8	55,6	18,9	8,7	12,6	52,0	26,7	8,7
GENERATION	BASE	Very+ Somewhat unfavorable	Neutral	Somewhat+ Very favorable	DK/NA				
Gen Z (1997-2012)	21,1	42,4	58,9	48,8	2,3				
Millennials (1981-1996)	35,8	3,1	62,7	32,6	1,6				
Generation X (1965-1980)	26,9	5,6	62,7	28,2	3,5				
<=Baby Boomers (<=1964)	16,3	8,0	58,9	24,3	8,7				

Preferences for Indonesia's cooperation partners vary across generational categories. Gen Z shows a strong preference for cooperation with Japan, with 32.6 percent expressing this view. In contrast, Millennials, Gen X, and Baby Boomers demonstrate a greater preference for cooperation with China, with 28.5 percent, 28.4 percent, and 30.1 percent, respectively. Regarding the Jakarta-Bandung HSR, awareness of and perceived benefits from the project are highest among Gen Z and Millennials, while they are lower among Gen X and Baby Boomers.

PRIORITY COUNTRY TO BUILD COOPERATION & PARTNERSHIP BY DEMOGRAPHICS AND ZONE

	BASE						DK/DA
GENDER							
Male	50,6	16,5	6,5	30,2	24,7	10,1	12,1
Female	49,4	16,5	7,2	26,7	22,0	10,7	16,9
AGES							
<= 21 y.o	11,5	19,9	6,4	23,0	28,4	16,6	5,7
22 - 25 y.o	8,5	13,4	3,9	36,3	34,3	8,6	3,4
26 - 40 y.o	32,3	17,4	8,0	25,2	19,9	13,7	15,8
41 - 55 y.o	27,4	14,6	8,4	29,3	20,6	9,7	17,4
> 55 y.o	20,2	16,7	4,2	32,6	25,2	3,1	18,2
GENERATION							
Gen Z (1997-2012)	21,1	16,3	5,1	27,2	32,6	14,2	4,5
Millennials (1981-1996)	35,8	17,9	8,4	28,5	17,5	12,3	15,3
Generation X (1965-1980)	26,9	14,3	7,7	28,4	24,1	8,7	16,8
<=Baby Boomers (<=1964)	16,3	16,9	4,2	30,1	23,0	3,9	21,8

Concerns about the increasing number of Chinese workers vary across generations, occupations, and regions. Among generational groups, Gen X exhibits the highest level of concern at 38.9 percent, followed closely by Millennials at 36.8 percent. In terms of occupation, entrepreneurs express the greatest concern at 42.8 percent, followed by uneducated/blue-collar workers at 40.2 percent, and white-collar workers at 38.2 percent. Regionally, the highest levels of concern are found in Sulawesi at 55.5 percent, closely followed by Banten at 55.2 percent. Sumatra shows a concern level of 42.6 percent, while West Java has a level of 40.9 percent.

POTENTIAL RISK FACTOR IN INDONESIA-CHINA BILATERAL RELATIONSHIP IN THE FUTURE BY DEMOGRAPHICS AND ZONE

	BASE	Maritime dispute in the South China Sea	Growing geopolitical rivalry with the US and its allies in Asia (Taiwan, Japan, South Korea)	Trade imbalance (the flood of cheap import goods from China)	Growing number of Chinese workers in Indonesia	Incompatibility of China's political system and cultural worldview with Indonesia	Others	DK/DA
GENERATION								
Gen Z (1997-2012)	21,1	13,0	18,6	17,9	31,7	8,1	1,3	9,4
Millennials (1981-1996)	35,8	15,5	6,2	23,6	36,8	2,9	0,7	14,4
Generation X (1965-1980)	26,9	14,6	4,9	16,6	38,9	3,3	0,3	21,3
<=Baby Boomers (<=1964)	16,3	13,5	4,1	13,5	31,8	4,0	0,9	32,3

		Maritime dispute in the South China Sea	Growing geopolitical rivalry with the US and its allies in Asia (Taiwan, Japan, South Korea)	Trade imbalance (the flood of cheap import goods from China)	Growing number of Chinese workers in Indonesia	Incompatibility of China's political system and cultural worldview with Indonesia	Others	DK/DA
	BASE							
GENERATION								
Farmers/Livestock Breeders/Fishermen	15,2	16,6	4,1	13,6	31,6	4,6	0,5	29,0
Unskilled laborers, Workshops, Public transport drivers, Security guard, Food stall, Temporary work, unemployed	24,2	16,9	7,2	13,8	40,2	5,5	1,0	15,3
Wholesalers, entrepreneurs	8,8	19,0	3,4	14,7	42,8	2,8	0,0	17,4
Employees (Civil/Private), Teachers/lecturers, Professionals	9,4	21,5	13,6	22,1	38,2	1,8	0,0	2,8
Housewife	28,2	8,8	6,5	24,0	37,0	1,9	0,0	21,8
Still in school/ university	7,6	0,7	29,7	14,6	23,0	14,2	3,6	14,3
Others	6,7	23,6	1,8	33,4	20,3	3,5	2,1	15,4
ZONA								
SUMATERA	21,7	15,1	10,0	15,7	42,6	2,9	1,5	12,2
BANTEN	4,5	9,1	14,1	14,4	55,2	0,0	0,0	7,2
DKI	4,0	15,5	1,0	37,2	30,8	7,9	0,0	7,6
JABAR	18,3	12,0	4,3	17,2	40,9	2,7	0,0	22,8
JATENG DIY	15,2	18,2	14,6	20,5	27,2	8,1	0,0	11,3
JATIM	15,4	23,5	5,9	23,2	24,3	7,3	0,9	14,9
BALI NUSA	5,7	8,0	16,7	9,6	22,8	0,0	0,0	42,9
KALIMANTAN	6,0	8,2	1,1	30,3	36,0	3,5	4,6	16,4
SULAWESI	6,6	4,3	5,0	10,0	55,5	3,3	0,0	22,0
MALUKU PAPUA	2,5	10,8	0,0	16,9	0,6	1,8	0,0	69,8

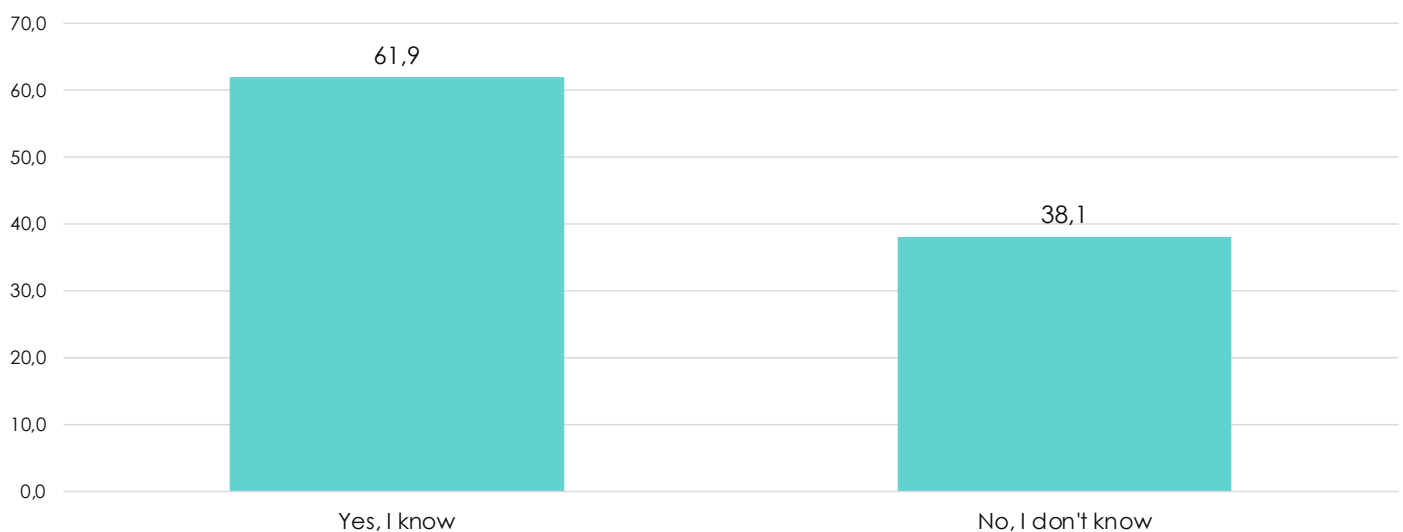
F. Indonesians' View on Selected Regional and International Issues

F.1 On ASEAN

When asked about ASEAN, a great majority of Indonesians are familiar with the organization. Among those who know about ASEAN, only 11.3 percent doubt its influence. Additionally, most people think it is unlikely that ASEAN will disband in the future. One reason for this belief is that respondents perceive ASEAN member countries as growing closer to one another. A significant number of both public and the elite respondents believe that external forces, particularly China and the United States, have a major influence on ASEAN. Most Indonesians and elite respondents believe that neither China nor the US should play a larger role in ASEAN.

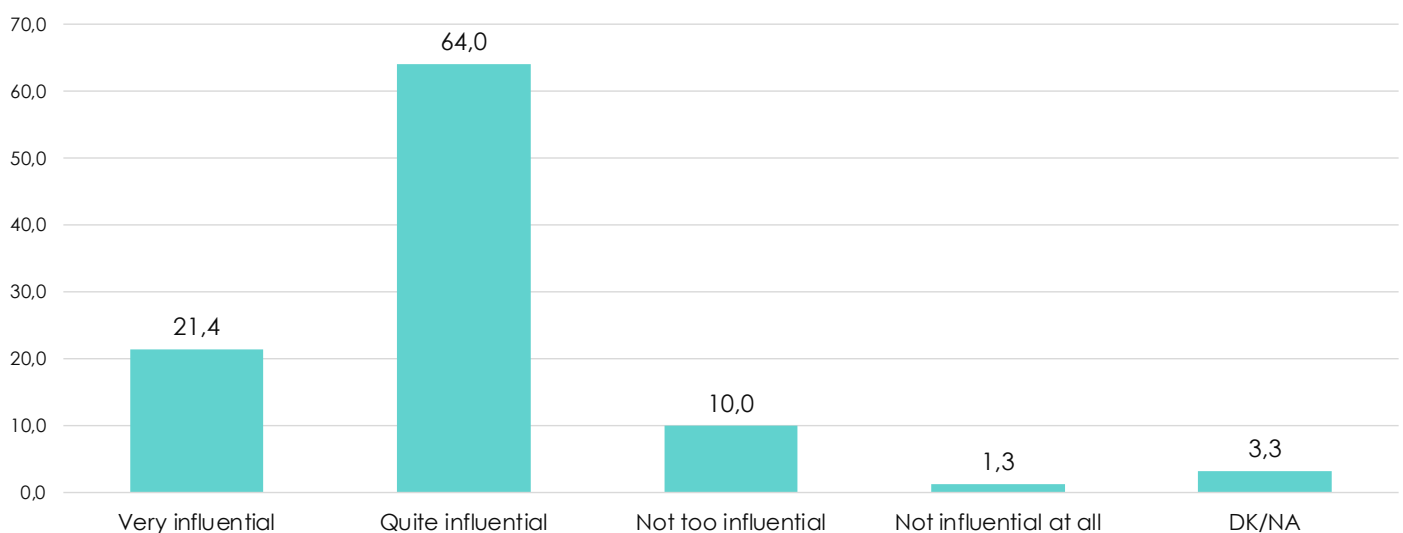
ASEAN

Do you know or have you heard about ASEAN?... (%)



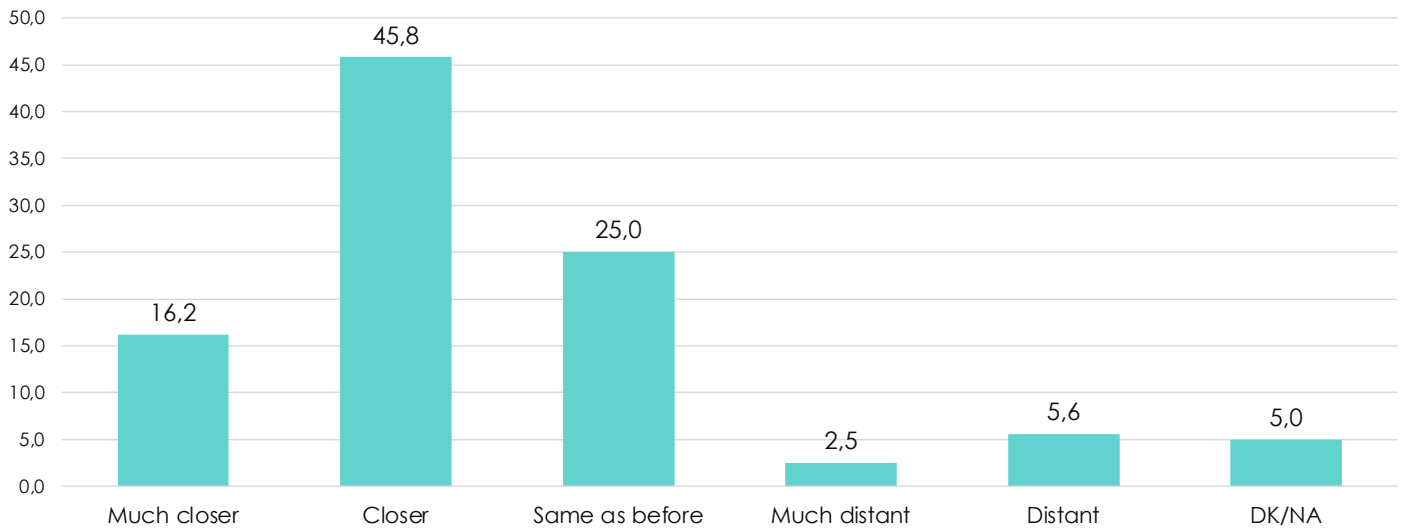
ASEAN INFLUENCE ON THE WORLD TODAY [Base: Know ASEAN]

According to you, how big is ASEAN's influence on the world today?... (%)



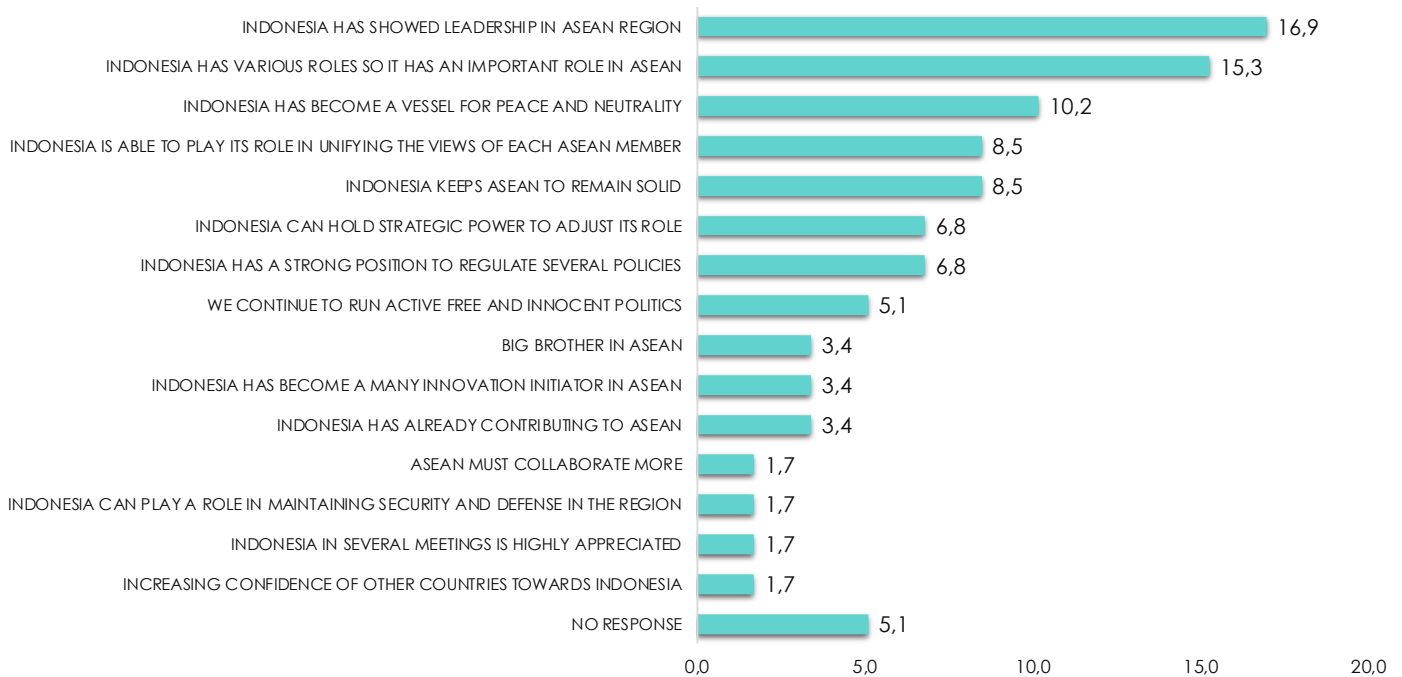
RELATIONS BETWEEN ASEAN COUNTRIES [Base: Know ASEAN]

In the last three years, have relations between ASEAN countries become closer or more distant?... (%)



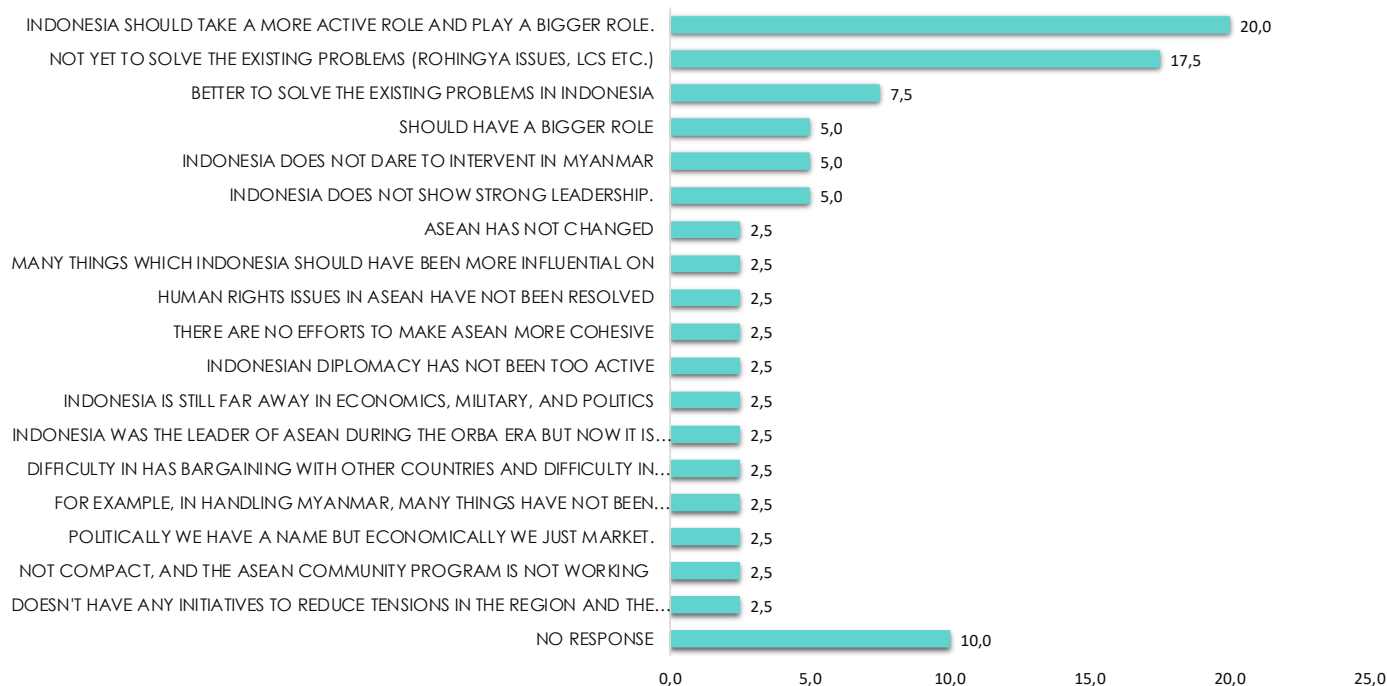
REASON FOR SATISFACTION OF INDONESIA'S POSITION IN ASEAN

[BASE: ANSWERING SATISFIED]



REASONS FOR DISSATISFACTION OF INDONESIA'S POSITION IN ASEAN

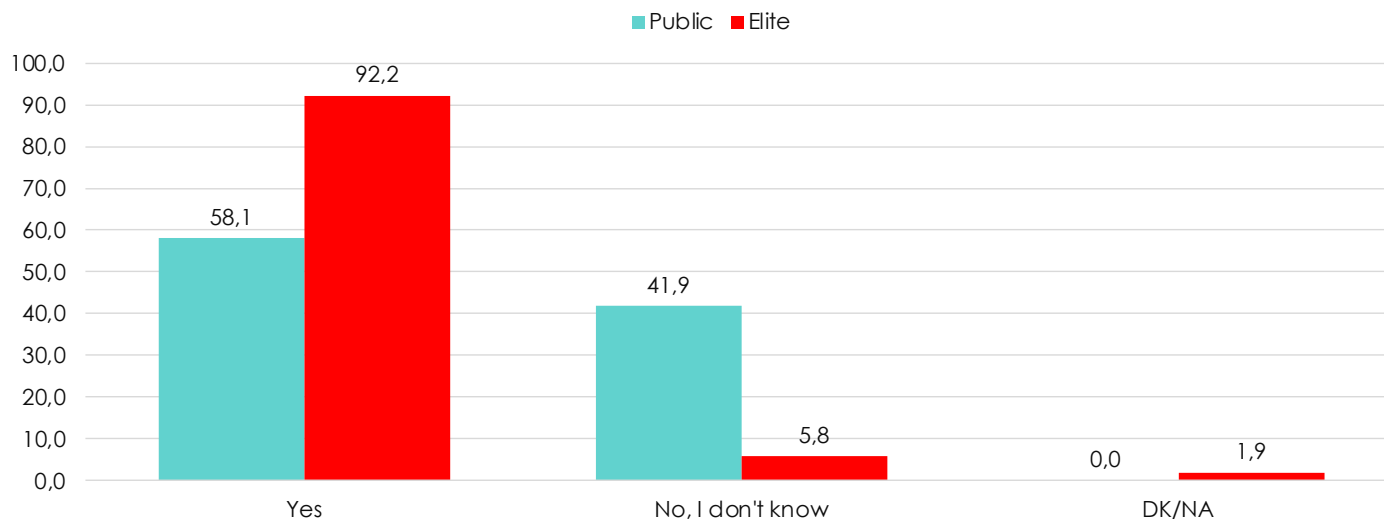
[BASE: ANSWERING DISSATISFIED]



FOREIGN INTERFERENCE IN ASEAN

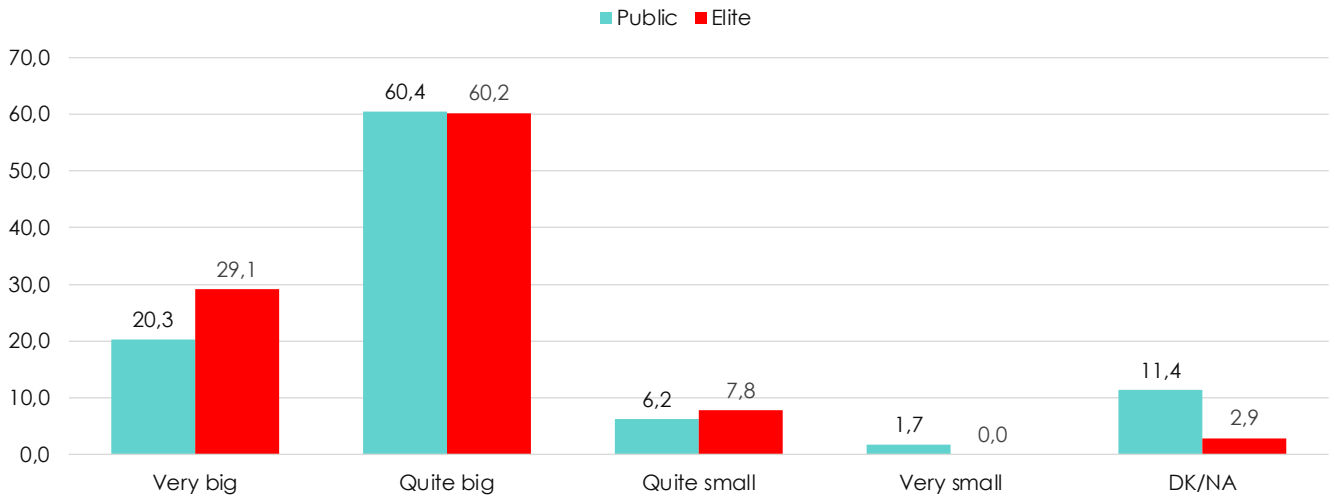
[Base: Know ASEAN]

In your opinion, are there external forces that influence ASEAN?... (%)



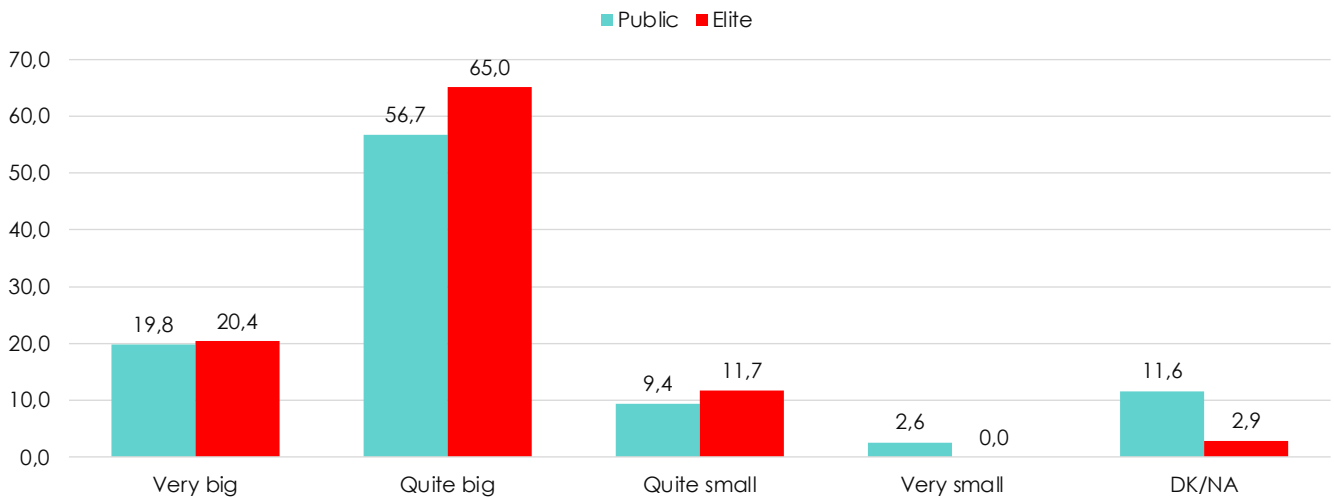
PERCEPTION OF CHINA'S INFLUENCE IN ASEAN [Base: Know ASEAN]

How big is China's influence toward ASEAN?...(%)



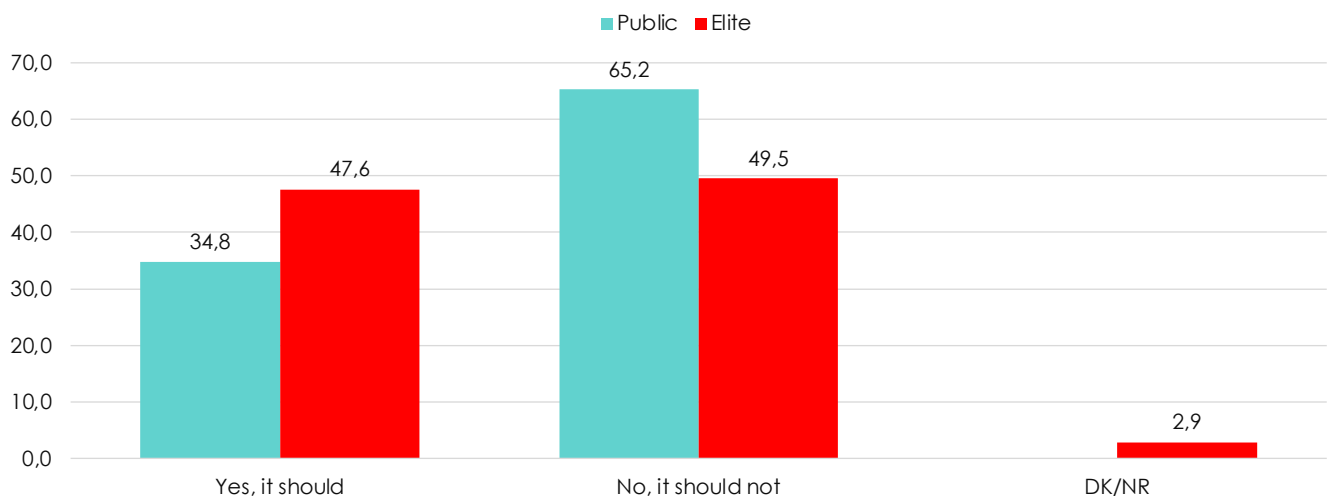
PERCEPTION OF US INFLUENCE IN ASEAN [Base: Know ASEAN]

How big is US's influence toward ASEAN?...(%)



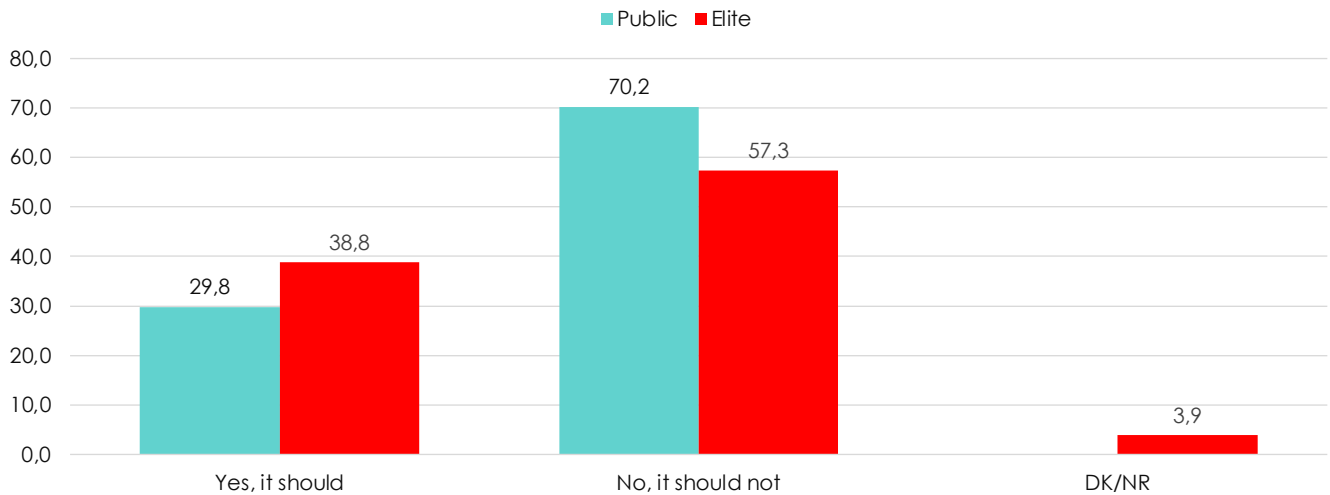
SHOULD CHINA HAVE BIGGER ROLE IN ASEAN? [Base: Know ASEAN]

Should China have a bigger role in ASEAN?...(%)



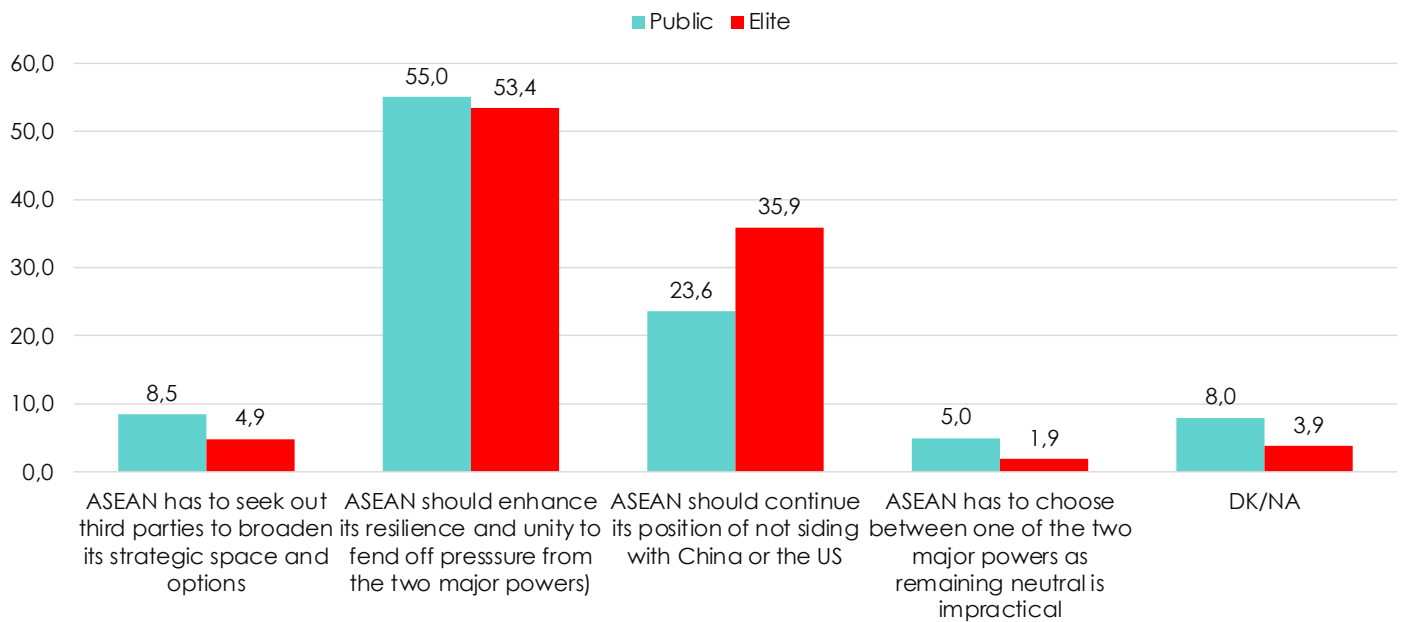
SHOULD US HAVE BIGGER ROLE IN ASEAN ? [Base: Know ASEAN]

Should the US have a bigger role in ASEAN?...(%)



ASEAN BETWEEN CHINA AND US COMPETITION [Base: Know ASEAN]

ASEAN is caught in the crossfire as Beijing (China) and Washington (AS) compete for influence and leadership in Southeast Asia. How should ASEAN best respond??...(%)

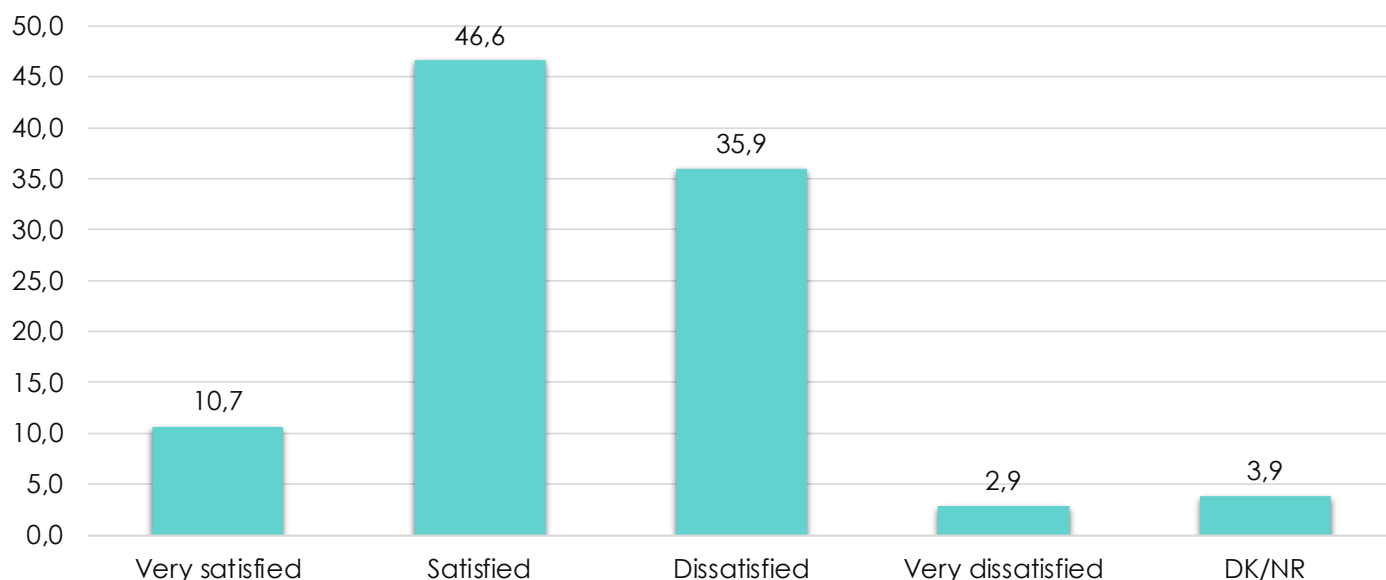


It should be noted, however, that elite respondents are in fact divided on whether China should have a larger role in ASEAN, with 49.5% opposed and 47.6% in favor. Most of those who are in favor believe that China is ASEAN's top trading partner and therefore should play a larger role in economy and investment sectors. On the other hand, among the elite respondents, only 38.8 percent support the notion that the U.S. should play a larger role in ASEAN.

When asked about ASEAN's performance amidst China and United States rivalry, more than half of the public and elites think that 'ASEAN should enhance its resilience and unity to fend off pressure from the two major powers.' A significant majority of the public (77.3%) and nearly half of the elites (46.6%) are satisfied with Indonesia's position within ASEAN. Among those elites who are satisfied, most believe Indonesia has demonstrated strong leadership in the organization. Conversely, many elites who are dissatisfied feel that Indonesia should be more active and play a greater role.

INDONESIA'S POSITION IN ASEAN IN THE LAST THREE YEARS (ELITE SURVEY)

What do you think about Indonesia's position in ASEAN in the last three years?
Are you very satisfied, satisfied, dissatisfied, or very dissatisfied?... (%)



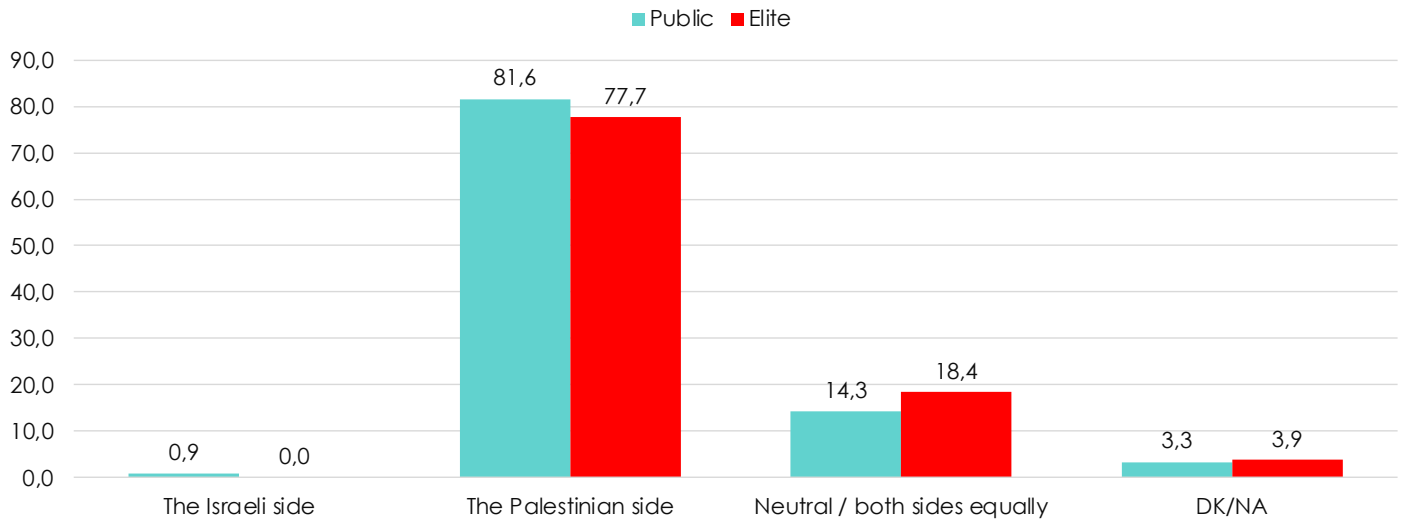
The majority feel satisfied/very satisfied with Indonesia's position in ASEAN in the last three years.

When asked how Indonesia could contribute more to ASEAN, the most common suggestion was to enhance and nurture relations between ASEAN member states. Additionally, 20.4% of elites believe that economic interests are a key factor in ASEAN's unity.

Regarding the Palestine-Israel conflict, fewer than 1 percent of Indonesians are on the Israel's side, and none of the elite respondents are in favor of Israel. The proportion of elite respondents who are neutral or sympathetic to both sides is larger compared to the general public. When asked about the role of the U.S. in the conflict, 75.7 percent of elite respondents view it negatively. When asked about the role of China in restoring Iran-Saudi Arabia relations, most elite respondents (48.6 percent) view it positively.

ISRAEL-PALESTINIAN CONFLICT

What is your view on the Israel-Palestine conflict? Which side in the Israeli-Palestinian conflict do you sympathize with more?... (%)

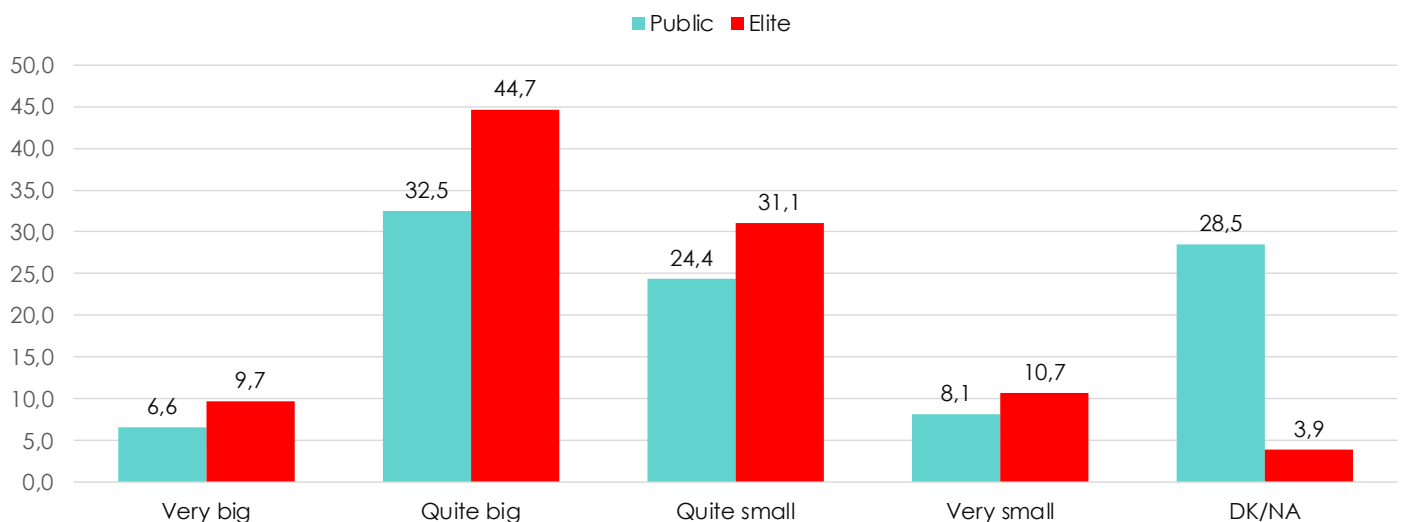


F.3 Taiwan Issue

Regarding the situation in Taiwan, approximately 40 percent of the public and over half of the elite respondents believe that tensions between China and Taiwan have a significant influence on Indonesia. Additionally, a much larger percentage of both groups are concerned about the situation and believe that the likelihood of war is high. However, it should be noted that a moderate proportion of the public either chose 'do not know' or did not answer questions on this issue.

TAIWAN ISSUE

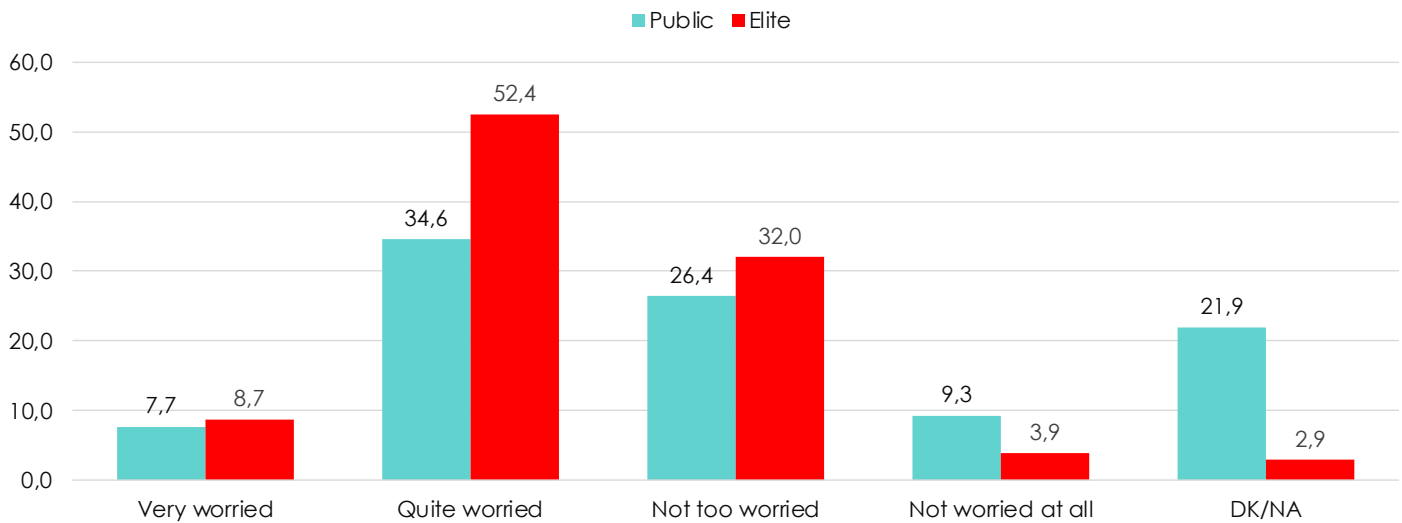
How much influence does the situation in Taiwan have on Indonesia?... (%)



More people think that tensions between Taiwan and China have quite/very big influence on Indonesia.

CHINA – TAIWAN TENSION

How worried are you about the tensions between China and Taiwan?... (%)

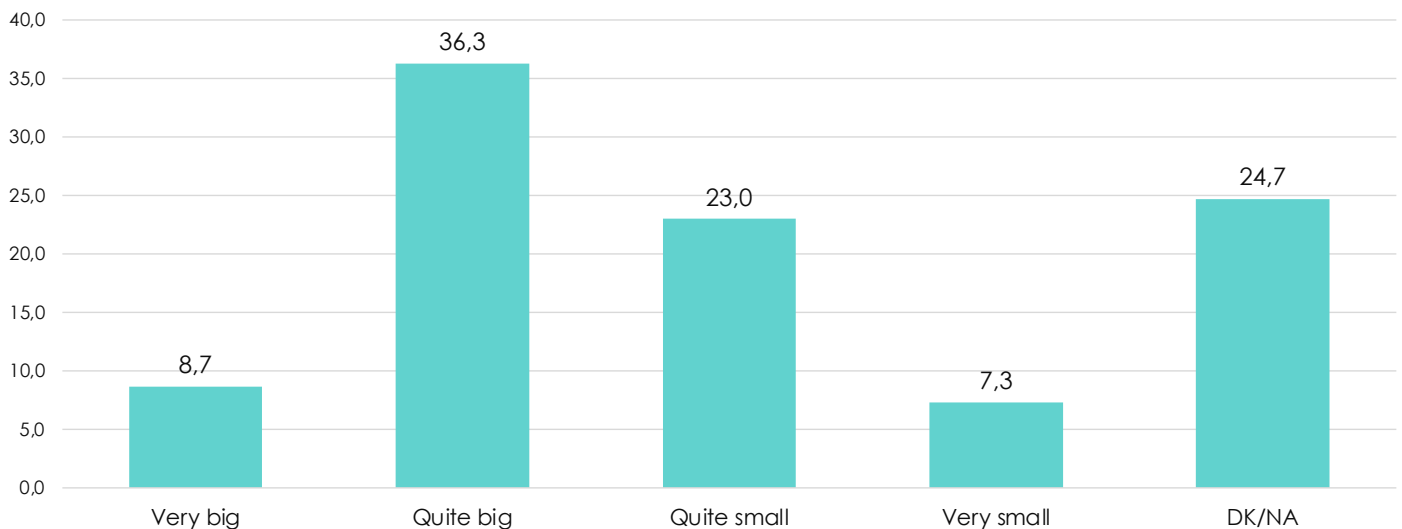


F.4 On Russia-Ukraine War

Forty five percent of the public believe that the Russia-Ukraine conflict has a significant influence on Indonesia; Half of the public are concerned about the conflict. When asked whether the Russia-Ukraine conflict is similar to the situation in Taiwan, most of Indonesians chose 'do not know' or did not answer the question.

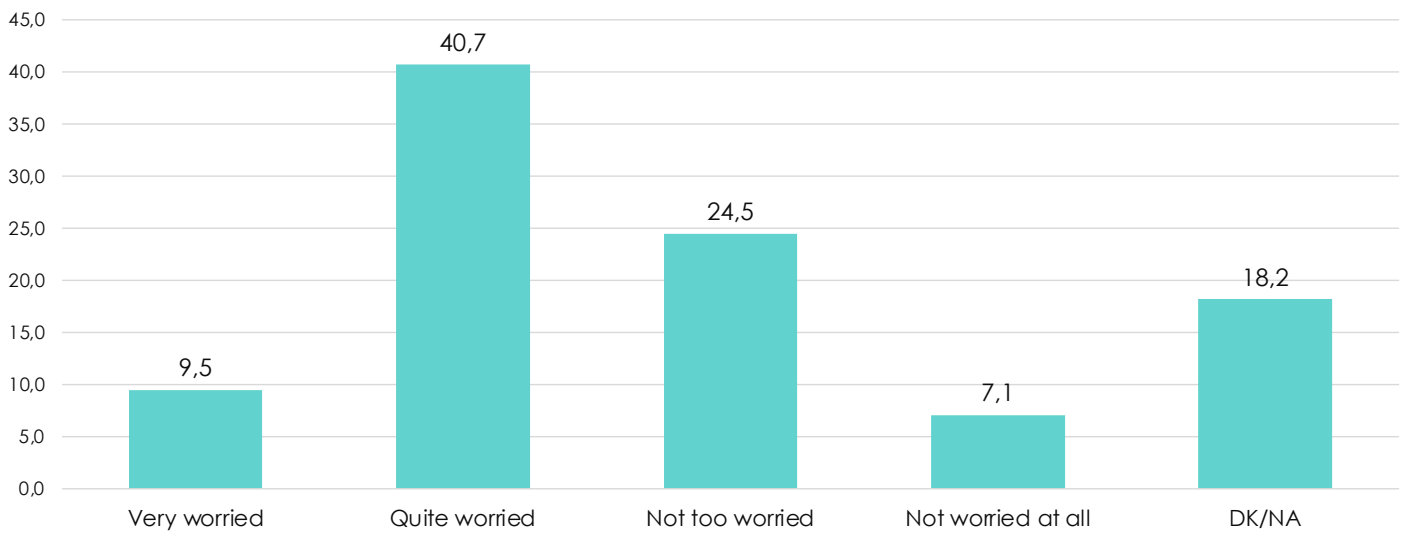
RUSSIA-UKRAINE WAR EFFECT ON INDONESIA

How much influence does the war between Russia and Ukraine have on Indonesia?... (%)



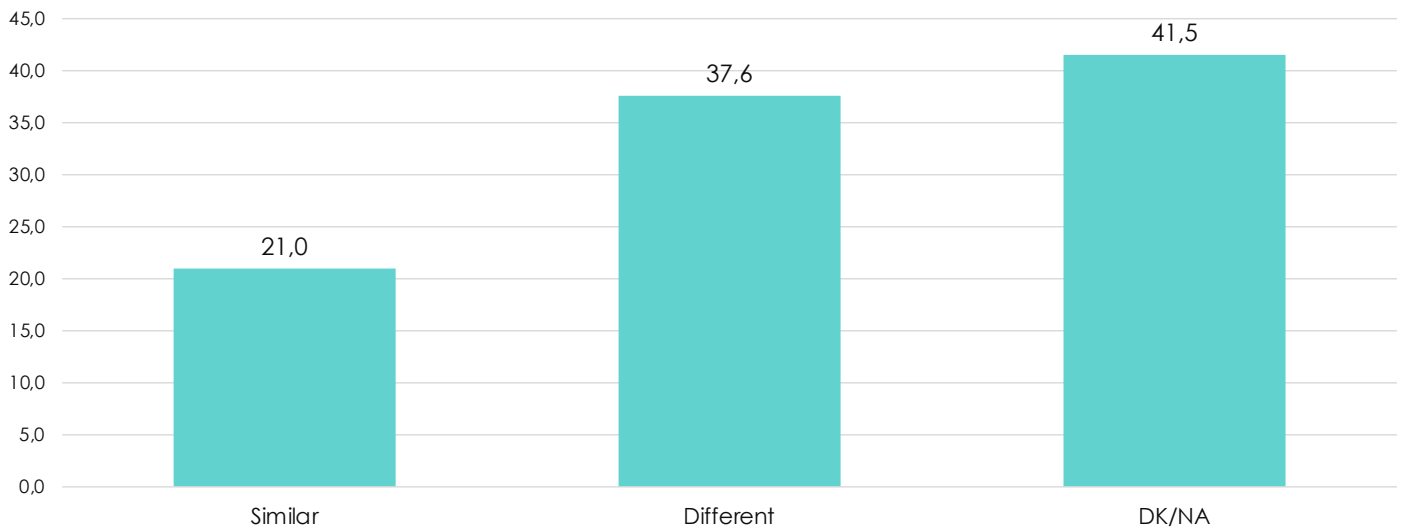
RUSSIA-UKRAINE WAR

How worried are you about the tensions between Russia and Ukraine?... (%)



SIMILARITY OF RUSSIA-UKRAINE AND CHINA-TAIWAN SITUATION

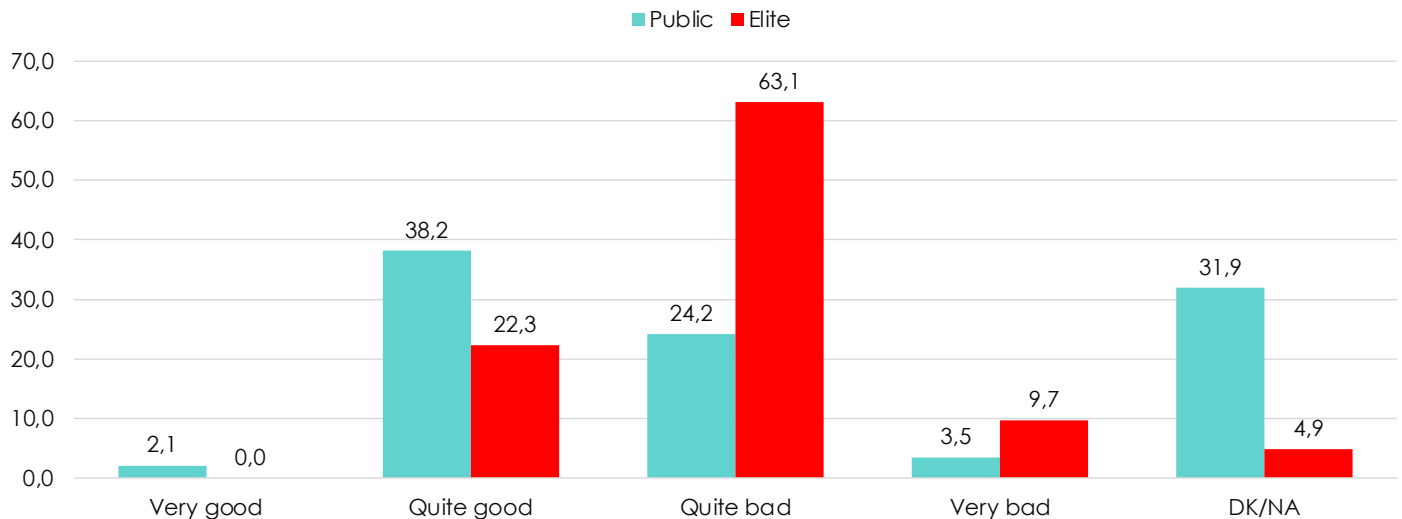
In your opinion, is the war between Russia and Ukraine the same as the situation between China and Taiwan?... (%)



A vast majority of elite respondents believe that Sino-U.S. relations have been poor over the last five years, while most of the public view them as good. However, it should be noted that a somewhat high percentage of the public chose 'do not know' or did not provide an evaluation on this matter. When asked what they think will happen in the future, 48.5 percent of the elite respondents think that the US-China relationship will remain the same for the next five years. On the other hand, most of the public chose 'do not know' or did not provide any prediction on this matter.

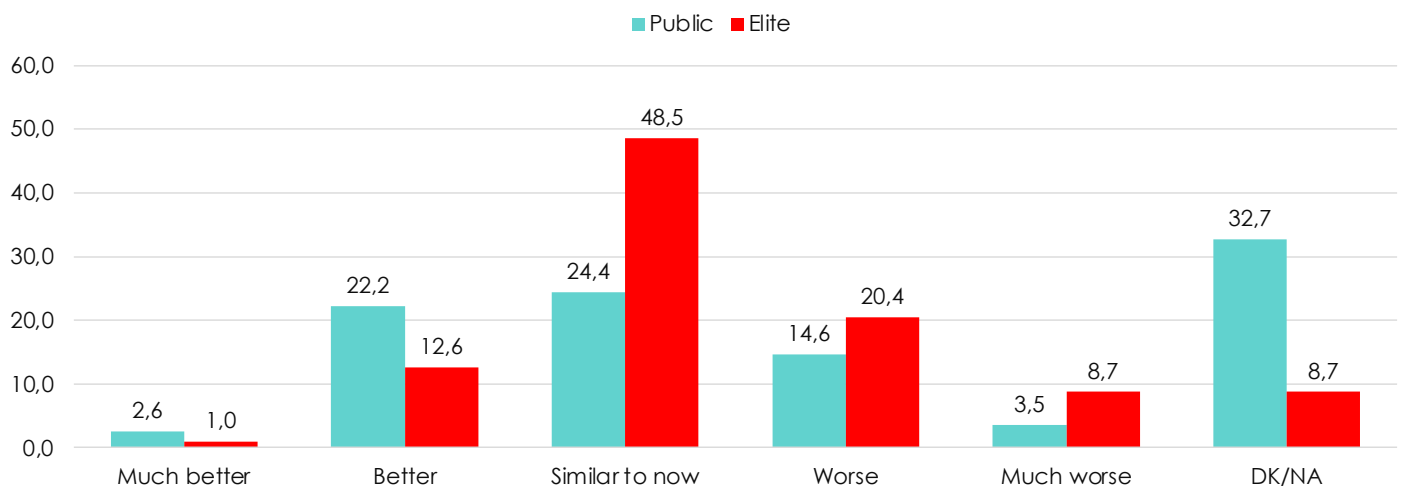
PERCEPTION ON US-CHINA RELATIONS IN THE LAST 3 YEARS

In your opinion, what are the state of relations between China and America in the last three years?...(%)



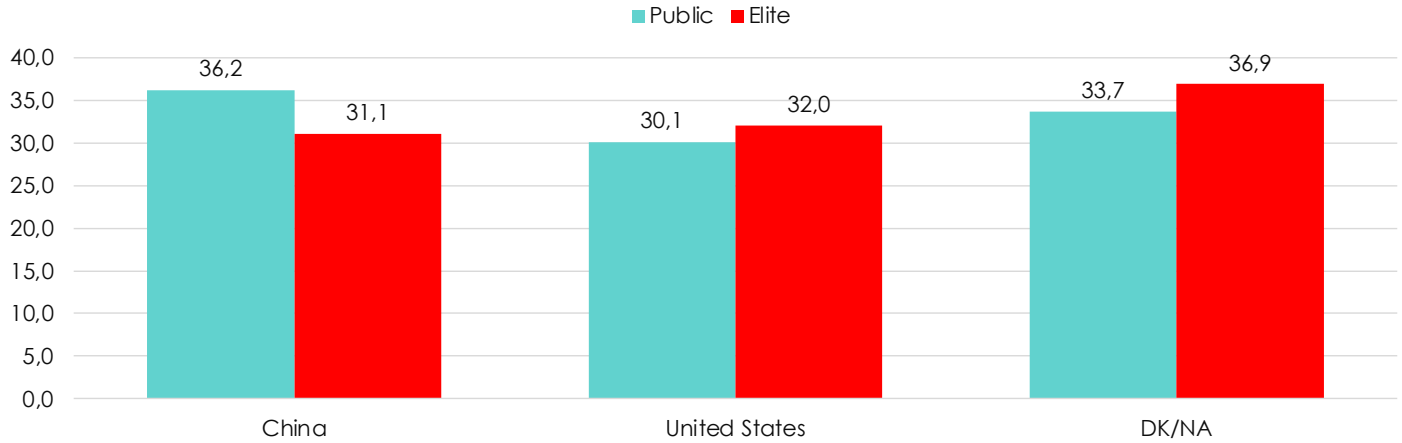
PERCEPTION ON US-CHINA RELATIONS IN THE NEXT 3 YEARS

In the next three years, what will the relationship between China and America be like in the next three years?...(%)



INDONESIA BETWEEN CHINA-US RIVALRY

If Indonesia were forced to align itself with one of the two strategic rivals, which should it choose?... (%)



G. Conclusion

Indonesians, both the public and the elite respondents, hold distinct views of the major powers examined in this study. The U.S. is primarily recognized for its military strength, while China is noted for its economic power. Japan and South Korea are valued for their cultural appeal and technological advancements, which reflect their strong influence through soft power. In contrast, Australia stands out as the country towards which Indonesians have relatively weaker impressions, indicating the absence of a clear or stereotypical image.

When it comes to strategic issues, Indonesians primarily focus on the U.S. and China. These two great powers are seen as the most influential in relation to Indonesia. China is viewed as having the greatest impact on Indonesia's economy, while the U.S. is regarded as a key player in its political, military, and diplomatic affairs. In this regard, it is understandable why the two great powers also receive the most negative evaluations, especially among the public.

When Indonesians consider sources of both threats and opportunities, the U.S. and China stand out prominently. China's position is particularly interesting: while many Indonesians see it as a threat, a significant number also regard China as Indonesia's closest ally. On the other hand, while the U.S. is still seen by many as the biggest threat, fewer Indonesians consider it an ally. These findings partially support Daniel Novotny's argument about Indonesians' ambivalent views toward the U.S. and China, particularly among foreign policy elites. However, they also diverge from his findings, as it now seems the U.S., rather than China, lacks the "love" aspect in Indonesians' complex love-hate relationship with both powers. This shift indicates changing trends in how Indonesians view these two great powers.

Moreover, China's distinctive foreign policy approaches are more likely to stand out when compared to Japan, rather than to the U.S. Consequently, China's foreign policy might be viewed more positively or negatively depending on how it contrasts with Japan's policies, rather than with those of the U.S. It is also important to note that favorability toward the major powers under consideration varies across generational groups. This study finds that younger generations, particularly Gen Z, hold a more favorable view of Japan and South Korea compared to the U.S. and China. They also express a strong preference for Indonesia to expand cooperation with Japan rather than with the other major powers.

In light of this, it can be inferred that, in competing for influence among Indonesians, especially among the younger generations, the U.S. and China may need to compete more with Japan than only with each other. This preference for or favorability toward Japan and/or South Korea over either the U.S. or China could make Indonesia's relations with these major powers more complex, especially in the context of the perceived strategic rivalry between the U.S. and China.

