

Close Bilaterally, Wary Globally: The Dual Structure of Indonesian Attitudes toward China from 2019 to 2026

Wenqi Liao

Guilin Medical University

Liang Cao

709309564@qq.com

Guangxi Polytechnic of Construction

Article

Keywords: Indonesian attitudes toward China, ISEAS survey methodology, Bilateral relations expectations, Global trust deficit, Economic dependence and sovereignty

Posted Date: October 21st, 2026

DOI: <https://doi.org/10.21203/rs.3.rs-10691457/v1>

License:   This work is licensed under a Creative Commons Attribution 4.0 International License. [Read Full License](#)

Additional Declarations: No competing interests reported.

Abstract

Indonesian elite opinion toward China is widely portrayed as volatile, with approval reportedly swinging from 19 per cent in 2019 to 58 per cent in 2021, collapsing to 29 per cent in 2022, and rebounding above two-thirds by 2025. This article argues that such volatility is largely illusory and that beneath it lies a stable, analytically important structure. Drawing on successive waves of the ISEAS–Yusof Ishak Institute State of Southeast Asia survey and benchmarking Indonesia against the regional ASEAN mean, we show that Indonesian elites hold two separable attitudes toward China: sustained optimism about the bilateral relationship, and persistent caution about China's global conduct — a configuration we term "close bilaterally, wary globally." These attitudes reflect opposing forces: deepening economic interdependence, epitomised by the Whoosh high-speed railway and the nickel hilirisasi strategy, lifts bilateral expectations, while recurring North Natuna Sea frictions suppress global trust. A single genuine movement, a temporary convergence toward regional wariness in 2023, reveals that bilateral optimism is benefit-sensitive rather than unconditional. The article's principal contribution is substantive: bilateral goodwill and global trust are distinct goods that Chinese economic engagement does not automatically bundle together — a pattern extending to dependent middle powers across Southeast Asia.

1. Introduction

China's growing presence in Southeast Asia has made public attitudes toward Beijing a subject of sustained scholarly and policy interest. Indonesia occupies a distinctive position within this debate: as ASEAN's largest economy, a founding voice of non-alignment, and an increasingly consequential swing state between Beijing and Washington, how Indonesian elites and the public view China carries profound regional significance.

A prevailing narrative in contemporary policy discourse characterizes Indonesian attitudes toward China as erratic and highly volatile. A superficial reading of longitudinal data from the authoritative State of Southeast Asia survey appears to confirm this view, showing public sentiment swinging wildly—from extreme lows to massive surges and sharp collapses—between 2019 and 2026. This paper challenges this conventional wisdom. We argue that this apparent volatility is largely a measurement artifact driven by an overlooked methodological inconsistency: the survey instrument systematically alternates across waves between a "global trust" frame and a "bilateral relations expectation" frame. Treating these raw readings as a single, continuous time series confounds instrument switching with genuine attitudinal shift.

By disaggregating the data along these two distinct dimensions and benchmarking Indonesia against a consistent regional average, this study reveals that what appears to be volatility is a stable, dual-structure perception. Specifically, while Indonesian elites exhibit a persistent deficit in their value-based trust toward China as a global actor—driven by underlying sovereignty and security anxieties—they simultaneously display an extraordinary, above-average pragmatic optimism regarding the concrete bilateral relationship. Furthermore, utilizing a quantitative panel regression alongside qualitative process tracing, we demonstrate that this pragmatic optimism is structurally grounded in deep economic integration and bilateral trade expansion, rather than inherent national exceptionalism. Ultimately, our findings caution against uncritically pooling longitudinal survey data and reveal that while economic gravity binds bilateral interests, it does not automatically generate normative trust in a partner's global conduct.

2. Literature Review

The study of public attitudes toward major external powers, particularly China, draws fundamentally upon the broader literature on soft power and economic statecraft. In Joseph Nye's classical formulation, soft power rests on attraction rather than coercion, operating through the appeal of a country's culture, political values, and legitimate foreign policies. Over the past decade, efforts by rising powers to cultivate regional influence in Southeast Asia have heavily relied on a hybrid approach: blending traditional cultural diplomacy with massive economic statecraft (such as large-scale infrastructure initiatives) and, more recently, public goods provision like health diplomacy during the COVID-19 pandemic. However, a substantial body of critical work questions the extent to which these material investments actually translate into genuine normative attraction. Scholars increasingly argue that economic inducements are better understood as a distinct "currency of influence" rather than soft power proper, and cross-national evidence frequently finds little to no measurable association between the density of cultural outreach (e.g., Confucius Institutes) and an external power's overall favorability. This ongoing debate highlights a theoretical tension: can material interdependence organically generate value-based trust?

Beyond abstract soft power, empirical explanations of Southeast Asian attitudes toward China generally cluster around three tangible factors: economic dependence, security and sovereignty concerns, and domestic political dynamics. On the economic front, trade and investment ties are often theorized to generate goodwill by binding material interests. Yet, this literature also acknowledges a

"dependency dilemma": economic presence can rapidly breed public resentment when flagship projects are perceived as extractive, debt-laden, or exclusionary of the local labor force. Concurrently, on the security front, maritime disputes and perceived assertiveness in territorial claims can sharply depress favorable views, sometimes entirely overriding the goodwill generated by economic cooperation. Furthermore, domestic variables—including leadership orientation, electoral cycles, and pre-existing ethnic or religious cleavages—act as a prism, shaping how foreign-policy developments register in local public opinion.

Indonesia presents all three of these factors in an exceptionally acute form, making it a critical case study. As a major trading and investment partner anchored by highly visible infrastructure projects (such as the high-speed rail and nickel downstreaming), yet simultaneously facing recurrent maritime sovereignty standoffs in the Natuna Sea, Indonesia embodies the region's structural contradictions. Combined with complex domestic identity politics that give the bilateral relationship a distinctive and often volatile charge, Indonesia serves as an unusually complete laboratory for observing how competing economic and security logics interact to shape public sentiment.

Despite these nuanced theoretical debates, a significant methodological blind spot persists in how regional attitudes are empirically tracked. A long tradition in survey methodology documents how question wording, framing, and response scales profoundly shape measured attitudes, with even minor semantic changes capable of moving top-box approval percentages by double digits. Astonishingly, this rigorous methodological skepticism is rarely brought to bear on multi-year regional surveys of attitudes toward external powers. Studies that pool successive waves of longitudinal data typically treat a single "favorability" or "sentiment" figure as perfectly comparable across years, failing to account for instrument alternation.

The gap this paper addresses is therefore twofold. First, theoretically, the existing literature has largely treated public attitudes toward China as a unidimensional construct (e.g., a simple spectrum from "pro-China" to "anti-China"). This oversimplification obscures the possibility that evaluations of bilateral pragmatic relations and global normative trust can completely diverge within the same population. Second, methodologically, previous studies have generally failed to handle survey question alternation, risking the severe misinterpretation of measurement artifacts as substantive geopolitical shifts.

To bridge these gaps, this paper moves beyond unidimensional assumptions. Drawing on the distinct logic of economic interest-binding versus sovereignty-based vigilance, the following section establishes a novel "two-mechanism analytical framework." By disaggregating survey dimensions and employing both econometric modeling and process tracing, we seek to separate genuine attitudinal structures from methodological illusions, offering a more precise anatomy of Indonesian and Southeast Asian perceptions.

3. Analytical Framework

3.1 The dual structure of attitudes

The analytical framework of this study departs from the conventional unidimensional approach by proposing that elite attitudes toward a major external power comprise at least two distinct evaluative dimensions rather than a single monolithic construct.

The first is a bilateral relations dimension: how elites anticipate the utilitarian trajectory of their own country's direct interactions with that power. This is captured by the ISEAS "relations-expectation" item, which asks whether respondents expect bilateral relations to improve, remain stable, or worsen over the next three years, fielded in every wave from 2020 to 2026. The second is a global normative trust dimension: how far elites trust that power to act responsibly within the broader international system. This is measured by the ISEAS "do the right thing" item, which asks how confident respondents are that the country in question will contribute constructively to global peace, security, prosperity, and governance, fielded in 2019 and in every wave from 2021 to 2026. Crucially, both items were administered in parallel within the same instrument from 2021 onward, yielding six consecutive years of paired observations within identical respondent pools. This parallel structure is what permits the dual-series design: rather than inferring dimensionality from theory alone, we can observe the two evaluations diverging, converging, or moving independently within the same samples in the same years.

These two dimensions are conceptually distinct in ways that are highly consequential for interpreting public opinion. A respondent may reasonably expect her country's dealings with an external partner to thrive — because the economic relationship is dense, mutually beneficial, and anchored in highly visible infrastructure projects — while simultaneously remaining skeptical about whether that same partner will behave responsibly as a global actor. The bilateral dimension is primarily driven by pragmatic, tangible interests shaped by trade flows and investment; the global trust dimension reflects a more abstract, value-based judgment regarding strategic intentions

and adherence to international norms. These are related but separable psychological evaluations, and conflating them into a single aggregate "favorability" score obscures the structural complexity of regional attitudes rather than illuminating it.

The Indonesian data bear this out with unusual clarity. Across all seven waves in which the relations item was fielded, Indonesia's expectation of improving ties exceeded the ASEAN-9 mean, with deviations ranging from + 2.8 to + 18.5 percentage points (Table 2, Panel A). On the trust item, by contrast, Indonesia tracked the regional mean closely — within ± 5 points in six of seven waves — with 2024 (+ 9.2) as the sole, short-lived exception (Panel B). Had the two items been treated as interchangeable indicators of a single attitude toward China, this divergence — persistent, sizeable, and dimension-specific — would have been invisible.

The two instruments also differ in response architecture, which is why this study compares within-instrument deviations from the regional mean rather than raw levels across instruments. The relations item offers a symmetric five-point scale with a substantive midpoint capturing stability. The trust item incorporates an explicit "no comment" middle category, which absorbs roughly a fifth to a quarter of Indonesian respondents in any given wave, mechanically compressing the top-two-box share independently of any genuine shift in sentiment. Raw top-box percentages from the two items are therefore not comparable in level. Deviation scores neutralize this artifact: because the same response architecture applies to all nine countries within a wave, each country's distance from the ASEAN-9 mean is unaffected by the absolute effect of the middle category.

A final measurement caution concerns aggregation. The headline figures published in the survey reports are pooled respondent-level proportions whose country composition shifts across waves and incorporates Timor-Leste from 2026. All regional benchmarks in this study are computed as unweighted means over a fixed nine-country set, ensuring that longitudinal comparisons reflect attitudinal change rather than compositional drift. The discrepancy between the two aggregation methods reaches 4.9 percentage points in some waves — large enough, if ignored, to generate the appearance of geopolitical movement out of purely methodological artifact.

3.2 Two Mechanisms Underpinning Two Dimensions

The framework proposes that the two dimensions are driven predominantly by distinct causal forces, each operating through a separate mechanism. Identifying which mechanism acts upon which dimension is essential for interpreting the pattern of Indonesian responses across survey waves.

Economic dependence operates chiefly on the bilateral dimension through a logic of interest-binding. Visible infrastructure projects, expanding trade flows, and inward investment anchor elites' material expectations to tangible national benefits. When the economic relationship is sufficiently dense and its returns are perceived as broadly positive, respondents have structurally grounded reasons to anticipate continued gains, sustaining bilateral optimism even as broader geopolitical anxieties persist. This mechanism is most legible where flagship projects are publicly salient and where the partner's economic footprint is large relative to the domestic economy — conditions that, as Section 4 demonstrates, Indonesia satisfies to an exceptional degree.

Security and sovereignty concerns, by contrast, operate chiefly on the global normative trust dimension. Maritime confrontations, perceptions of regional assertiveness, and anxieties about a partner's conduct in multilateral institutions bear less on whether the bilateral relationship will continue to deliver material benefits than on whether that partner can be trusted as a responsible actor within the broader international order. A country may simultaneously benefit from and remain wary of the same external power — extracting economic gains through the bilateral channel while doubting the partner's commitment to rules-based norms at the global level. This decoupling is precisely what the dual-structure framework is designed to capture, and it implies that favorable bilateral expectations and global trust deficits are not contradictory findings requiring reconciliation but structurally coherent outcomes of two mechanisms acting on two distinct attitudinal objects.

If this mapping is empirically correct, the observable signature is a country that runs consistently above the regional mean on the bilateral dimension while tracking near or below that mean on the global trust dimension. The gap between these two readings is neither noise nor attitudinal inconsistency; it is the imprint of competing mechanisms operating on separable evaluative targets. Indonesia's data conform to this signature with a precision that is difficult to attribute to chance: its mean bilateral deviation across 2020–2026 is + 9.3 percentage points, while its mean trust deviation across the same period is – 0.8 points.

3.3 Guiding Propositions

To unpack the dual structure identified above, this study employs a mixed-methods design. The structural validity of the measurement framework and the baseline effect of economic integration on bilateral optimism are assessed through a quantitative panel model estimated across the nine-country ASEAN sample, while the deep causal mechanisms specific to Indonesia are explored through

qualitative process tracing, detailed in Section 5. The analysis is organized around three theoretical propositions that bridge the framework to the empirical evidence.

Proposition 1

holds that on the bilateral dimension, Indonesia consistently exceeds the ASEAN-9 mean across all available waves, reflecting the interest-binding effect of economic dependence. The prediction is not merely that Indonesia scores above average in isolated years, but that the advantage is structurally stable across the full 2020–2026 period, persisting through variation in bilateral events that might otherwise produce fluctuation.

Proposition 2

holds that on the global normative trust dimension, Indonesia tracks near the ASEAN-9 mean rather than exceeding it, reflecting the absence of a systematic trust premium despite strong bilateral optimism. The prediction is not that Indonesia falls consistently below the mean — the data show deviations within ± 5 points across most waves — but that bilateral optimism does not translate into above-average global trust, confirming the decoupling logic at the heart of the dual-structure framework. The single documented exception, a +9.2 deviation in 2024, reverted fully by 2025 (–2.4), consistent with a transient rather than structural shift.

Proposition 3

holds that the contraction in Indonesia's bilateral optimism advantage observed in the 2023 wave — from +7.0 in 2021 to +2.6 in 2022, recovering to +4.4 in 2023 before surging to +16.8 in 2024 — corresponds to identifiable real-world developments and represents a genuine attitudinal movement that survives correction for measurement artifacts. This proposition motivates the process-tracing exercise in Section 5, which seeks to link the 2023 contraction to specific bilateral developments and its subsequent recovery to the visible delivery of flagship economic benefits.

4. Data and Methods

4.1 Data Source

The primary dataset for this study comprises eight annual waves of The State of Southeast Asia survey, published by the ISEAS–Yusof Ishak Institute and spanning the period 2019 to 2026. The survey stands as one of the most authoritative elite opinion projects in the region, polling a consistent category of "informed respondents" drawn from academia, business, government, civil society, and the media across all ten ASEAN member states. Because respondents occupy structurally influential positions within their respective national contexts, the survey is widely treated as a reliable indicator of elite-level strategic and economic orientations rather than mass public opinion.

While the survey covers the full ASEAN membership, the empirical analysis centers on Indonesia as the primary unit of observation, benchmarked against a nine-country ASEAN mean. To anchor the comparative interpretation, Vietnam and Cambodia are additionally foregrounded as contrasting reference cases. The two countries represent opposing poles of the regional spectrum in their orientations toward China: Vietnam exemplifies persistent strategic vigilance rooted in territorial dispute and historical memory, while Cambodia represents deep political and economic alignment that consistently produces the region's most favorable China scores. Positioning Indonesia against these two poles — rather than against the aggregate mean alone — provides a more calibrated scale for assessing the degree and consistency of Indonesia's bilateral optimism and global trust deficit, and guards against conflating Indonesia's middling global trust scores with either strategic hostility or uncritical alignment.

4.2 Key Analytical Indicators

To track the evolution of elite perceptions toward China across the eight survey waves, this study extracts and synthesizes a set of core indicators organized under three thematic headings. The specific survey items and their question formats are detailed in Table 1. A central methodological consideration concerns the variation in the survey's primary question format for gauging overall sentiment toward China. Across the eight waves, the survey alternates between two distinct framing paradigms.

The first is the Trust/Confidence format, fielded in 2019, 2022, 2024, and 2026, in which respondents were asked how confident they are that China will "do the right thing" in global or regional affairs. This format constitutes a direct measure of perceived reliability and normative goodwill, probing respondents' value-based assessment of China as a responsible state actor in the international system.

The second is the Relations Expectation format, fielded in 2020, 2021, 2023, and 2025, in which respondents were asked to assess the likely trajectory of their country's bilateral relationship with China over the following three years — whether it would improve, remain stable, or worsen. This format captures a more pragmatic, forward-looking evaluation of bilateral trends, one that is more susceptible to short-term event dynamics and utilitarian calculations about material interests.

Crucially, this study does not treat this alternation as a data limitation to be corrected. Rather, the alternation itself serves as the analytical pivot. The two formats do not measure the same underlying construct: the Trust/Confidence items tap the global normative trust dimension identified in the framework, while the Relations Expectation items tap the bilateral relations dimension. By making this distinction explicit — rather than pooling the two series into a single favorability index — the analysis is able to separate value-based trust from utilitarian expectation, and thereby reveal the dual structure that an undifferentiated reading would obscure.

Across the three themes, data availability varies by wave. Dashes in Table 1 indicate survey waves in which the corresponding item was either not fielded or was substantially reformulated, rendering direct cross-wave comparison unreliable. Specifically, the "Revisionist Power" indicator under Theme 2 was discontinued after 2022, precluding longitudinal tracking beyond that point; and the economic/political influence concern item under Theme 3 was reformulated between 2025 and 2026, breaking the comparability of the final wave.

Table 1
Key Analytical Indicators and Corresponding Items in The State of Southeast Asia Survey

Theme	Core Indicator	2019	2020	2021	2022	2023	2024	2025	2026
1a: Bilateral Expectations	Relations with China in next 3 years	—	Q34	Q34	Q27	Q33	Q33*	Q34	Q33
1b: Generalised Trust	Confidence China will "do the right thing"	Q25	—	fielded*	Q34	Q38	Q38	fielded*	Q37
2: China's Role	View China as "Revisionist Power"	Q17	Q32	Q33	Q26	—	—	—	—
3: Specific Concerns	What could worsen positive impression	Q20	Q35	Q35	Q28	Q34	Q34*	Q34A	Q33A

(Notes: Bold = verified against original report pages. * = fielded but question number not verified from original pages; values recovered from retrospective columns of the adjacent wave's report (retrospective columns validated cell-by-cell against original reports for 2021, 2022, 2023, and 2025). = not located in the corresponding report. = carried over from earlier compilation, unverified in this audit.; Note on Theme 3 comparability: From 2025, the question format changed from "check 2 responses" to "choose 1 response," and the option set was revised (items on "growing economic dominance" and "tacit support for Russia's invasion of Ukraine" removed). Percentages are therefore not comparable across the 2024/2025 break; valid adjacent-year comparisons are limited to 2022–2023 and 2025–2026.; Note on question numbering: Question numbers are not stable across waves; identical numbers refer to different questions in different years. All citations in text reference year + question number jointly.)

4.3 The Core Methodological Move: Disaggregate, then Benchmark

The analysis proceeds in two steps. First, it disaggregates the data, refusing to treat the eight annual readings as a single, undifferentiated time series. Instead, we split them into two dimension-specific series—one for "Trust/Confidence" (2019, 2022, 2024, 2026) and one for "Relations Expectation" (2020, 2021, 2023, 2025)—and analyze each separately.

Second, within each wave, it benchmarks Indonesia by computing its deviation from the ASEAN mean. This mean is calculated using a fixed set of nine countries (Indonesia, Philippines, Cambodia, Laos, Malaysia, Myanmar, Thailand, Singapore, Vietnam) to ensure consistency. Brunei and Timor-Leste are excluded so that the mean is computed on a constant country set, undistorted by changing composition.

Benchmarking against the wave-specific regional mean is the key to a clean comparison. Whatever question format is used in a given wave, and whatever period-specific mood prevails, applies to all countries in that wave. Subtracting the regional mean therefore removes the common "format-and-period effect" and isolates Indonesia's position relative to its peers. This is the descriptive analogue of using year fixed effects in a panel regression model.

Table 2 reports these nine-country means and Indonesia's deviations. The results reveal a striking pattern that forms the empirical core of this paper. On the trust/confidence dimension, Indonesia's deviations from the ASEAN mean are consistently negative (except for one small positive deviation), indicating a persistent trust deficit relative to the region. In contrast, on the relations expectation

dimension, its deviations are large and uniformly positive, showcasing a pragmatic optimism that significantly exceeds the regional norm. This stark divergence is the central puzzle this paper seeks to explain.

Table 2
Panel A: Relations("next three years" top-2 = Improve + Improve Significantly, Note: This item was not included in the 2019 survey)

Country	2020 (%)	2021 (%)	2022 (%)	2023 (%)	2024 (%)	2025 (%)	2026 (%)
Brunei	66.0	57.6	73.6	51.7	53.3	59.1	65.2
Cambodia	69.2	80.8	84.0	77.6	65.1	59.3	60.0
Indonesia	54.0	58.1	53.4	41.3	68.3	67.8	66.1
Laos	78.3	62.5	84.1	28.0	68.2	68.9	68.4
Malaysia	42.9	39.4	37.7	38.8	65.3	63.8	61.9
Myanmar	25.8	38.4	10.3	22.6	24.8	34.5	48.7
Philippines	29.2	20.9	27.8	28.2	14.4	12.6	19.4
Singapore	39.1	36.0	22.1	30.7	45.4	45.8	43.0
Thailand	54.1	50.4	46.2	43.0	59.2	54.6	45.6
Vietnam	5.9	5.4	26.4	25.0	50.5	36.8	43.4
ASEAN-10 Mean	46.45	45.95	46.56	38.69	51.45	50.32	52.17

Table 2
Panel B: Trust("do the right thing" top-2 = Confident + Very Confident, Note: This item was not included in the 2020 survey)

Country	2019 (%)	2021 (%)	2022 (%)	2023 (%)	2024 (%)	2025 (%)	2026 (%)
Brunei	26.6	24.2	17.0	60.9	15.6	50.3	55.5
Cambodia	20.9	26.9	74.0	53.7	31.8	41.2	55.0
Indonesia	19.1	16.3	29.0	22.3	34.0	34.2	36.0
Laos	41.3	30.0	25.0	43.9	32.6	66.2	60.7
Malaysia	25.0	25.6	37.0	29.0	32.0	31.7	36.1
Myanmar	21.2	12.1	1.7	7.9	8.5	34.0	41.8
Philippines	11.2	10.5	8.8	21.3	13.9	16.0	15.2
Singapore	21.1	23.4	16.3	27.9	25.6	28.5	36.6
Thailand	24.1	16.0	34.2	24.4	33.8	42.3	39.8
Vietnam	5.6	4.6	24.3	4.4	20.0	21.9	27.2
(Reference) ASEAN-10 Mean	21.61	18.96	26.73	29.57	24.78	36.63	40.39

4.4 Econometric Specification

To complement the qualitative propositions, this study estimates a panel model across the nine-country ASEAN sample. Because both sentiment items are fielded in parallel from 2021 onward, each country-year contributes two observations — one per dimension — and the question-type effect is identified within country-years rather than across them. This within-wave identification is considerably stronger than a design relying on cross-year variation, where question effects would be confounded with period shocks.

The model tests three hypotheses. The first is a construct gap: relations-expectation items systematically yield higher top-two-box scores than trust items, partly reflecting response architecture — the trust item's explicit "no comment" category mechanically compresses its top-two-box share — and partly reflecting genuine construct differences. The second is Indonesian specificity: Indonesia's gap between the two dimensions is significantly larger than that of its regional peers, meaning its bilateral optimism

premium is not merely a rescaled version of a common cross-item level difference. The third is an economic underpinning: bilateral trade volume is a general positive correlate of sentiment, operating primarily on the relations dimension.

The unit of observation is the country-dimension-year triple. Let *Sentiment_idt* denote the top-two-box percentage for country *i* on dimension *d* in year *t*, where $d \in \{\text{Trust, Relations}\}$. The estimating equation is:

$$\text{Sentiment_idt} = \beta_0 + \beta_1 \text{Trade_it} + \beta_2 \text{Relations_d} + \beta_3 \text{Indonesia_i} + \beta_4 (\text{Indonesia_i} \times \text{Relations_d}) + \lambda_t + \varepsilon_{idt} \quad (1)$$

Trade_it is total bilateral trade volume between country *i* and China in year *t* (100 billion CNY). *Relations_d* is a dummy equal to 1 if the observation derives from the relations-expectation item and 0 if from the trust item; crucially, this variable is indexed by dimension *d* rather than year *t*, because both items are fielded within the same wave from 2021 onward and question type therefore varies within country-years, not across them. *Indonesia_i* is a dummy equal to 1 for Indonesia and 0 for the eight remaining benchmark countries, which jointly form the reference group. λ_t denotes year fixed effects, absorbing wave-specific shocks — pandemic mood, sampling adjustments, regional headline events — common to all countries and both dimensions.

The coefficients carry distinct interpretations. β_2 captures the average within-country-year difference between relations and trust scores for the reference group, net of year effects; a positive, significant estimate establishes that the two items sit at structurally different levels, though this coefficient deliberately conflates response-architecture effects with genuine construct differences and is not interpreted as a pure measurement artifact. β_3 measures Indonesia's deviation from the reference group on the trust dimension; given the patterns in Panel B, the expectation is that it is small and statistically indistinguishable from zero, indicating no structural trust deficit but simply the absence of a premium. β_4 is the coefficient of central interest: it measures how much larger Indonesia's relations-minus-trust gap is relative to the same gap among its peers. Because the comparison is made within country-years, β_4 is identified as a difference-in-differences estimate purged of both period shocks and common cross-item level effects; a positive, significant estimate constitutes the formal test of the dual-structure thesis. β_1 captures the marginal association of trade volume with sentiment; an extension replaces this single slope with dimension-specific interactions (*Trade* × *Relations*), testing whether economic ties bind bilateral expectations specifically rather than sentiment generally — the sharper implication of the interest-binding mechanism.

With nine countries, two dimensions, and six paired waves plus unpaired 2019 and 2020 observations, the sample is small ($N \approx 110$). Standard errors are clustered by country, and inference is treated as descriptive-corroborative rather than conclusive. The model complements, rather than replaces, the deviation analysis presented in Table 2.

4.5 Variable Construction and Sources

This section documents the construction of each variable entering Eq. (1) and the auxiliary robustness analysis, together with their sources.

Dependent variable. The outcome, *Sentiment_idt*, is the top-two-box percentage for country *i* on dimension *d* in year *t*, extracted directly from the annual State of Southeast Asia reports (2019–2026). For the relations dimension, the top-two-box combines "Improve" and "Improve Significantly" on the three-year bilateral trajectory item; for the trust dimension, it combines "Confident" and "Very Confident" on the "do the right thing" item. Because the two items are drawn from the same instrument and identical respondent pool within each wave, the two dimension-specific series are directly comparable within country-years, which is the property the within-wave identification in § 4.4 relies upon.

Economic covariate. *Trade_it* is the total annual bilateral trade volume (imports plus exports) between country *i* and China, denominated in 100 billion CNY. Values are compiled for all nine ASEAN economies across 2018–2025 and enter the model as the continuous economic control. Trade is expressed in CNY because the underlying customs series are reported on that basis; no conversion is applied within Eq. (1), since the coefficient β_1 is estimated on a common currency scale across all country-years.

Trade-dependence ratio (robustness). To test whether Indonesia's above-average relations disposition merely reflects material dependence on China, we construct a trade-dependence ratio separate from the regression: bilateral trade with China, converted to USD, divided by each country's USD GDP. Conversion applies China's National Bureau of Statistics annual average USD/CNY exchange rate as a single source across all country-years (6.6174, 6.8985, 6.8976, 6.4515, 6.7261, 7.0467, 7.1217, and 7.1429 for 2018 through 2025 respectively), avoiding the denominator inconsistency that would arise from mixing rate sources. GDP figures (USD, current prices) are compiled for the same nine economies and eight years. Using a single rate source ensures the numerator and the cross-country benchmark are placed on a uniform basis.

The robustness result. Indonesia's trade-dependence ratio rises from 7.4% (2018) to 11.6% (2025), yet remains 16 to 23 percentage points below the nine-country regional benchmark in every year. In material terms Indonesia is less trade-dependent on China than its regional peers, even as its relations disposition runs well above the regional mean (Table 2, Panel A). The more China-dependent economies – Vietnam (48–62%), Malaysia (30–50%), Laos (19–54%), and Cambodia (22–44%) – do not exhibit correspondingly higher bilateral optimism. This asymmetry indicates that Indonesia's positive relations disposition is not a downstream reflection of trade exposure, and it reinforces the Construct Gap interpretation advanced in § 4.4: the dimension-specific divergence cannot be reduced to material interest.

Leverage and outlier diagnostics. Two cases receive dedicated checks. Contrary to the a priori concern that Singapore's entrepôt trade would inflate the regional benchmark, Singapore's ratio (19–26%) sits below the panel mean throughout; excluding it widens rather than narrows Indonesia's negative gap (e.g., 2022: –22.9 to –24.7 percentage points), so it is not a high-leverage observation in ratio terms. A leave-one-out check on Myanmar – the smallest and most volatile economy in the panel, whose GDP records the 2021–2022 political disruption as a double trough – shifts both the benchmark and Indonesia's deviation by less than one percentage point in every year. The robustness result is insensitive to both.

Excluded covariates. Foreign direct investment is not included. FDI series for the panel are reported on a net-inflow basis that produces negative country-years (e.g., Thailand 2020), a construct that is neither dimensionally comparable to gross bilateral trade nor separable from the trade channel it is highly collinear with. Including it would require a separate definitional treatment without adding identifying information beyond the trade covariate already in the model. Table 3 reports the full country-year matrix of trade-dependence ratios. Indonesia's persistently negative deviation – ranging from –15.9 to –22.9 percentage points across the eight years – establishes that its above-regional-mean relations disposition (Table 2, Panel A) emerges despite, not because of, material dependence on China trade.

Table 3
Trade Dependence on China, 2018–2025 (Bilateral Trade as % of GDP)

2018	Indonesia	Philippines	Cambodia	Laos	Malaysia	Vietnam	Thailand	Singapore	Myanmar	Regional Mean [⊠]
	7.39	5.92	22.23	19.13	30.17	47.62	17.20	21.80	22.35	23.30
2019	7.13	5.36	25.67	20.90	33.97	48.48	16.86	23.89	24.89	25.00
2020	7.44	5.36	27.53	18.90	39.07	55.56	19.81	25.51	23.97	26.96
2021	10.44	6.29	36.52	22.94	46.71	62.45	25.72	21.08	27.75	31.18
2022	11.16	5.63	38.72	36.11	48.86	55.45	26.57	21.55	39.45	34.04
2023	10.14	4.45	34.90	44.86	47.75	52.94	24.36	21.13	31.23	32.70
2024	10.57	4.18	38.42	49.82	50.17	54.65	25.27	19.35	21.95	32.98
2025	11.63	3.45	43.54	54.19	40.69	57.62	26.61	19.78	23.84	33.71
Indonesia's Deviation from Regional Mean										
2018	–15.91									
2019	–17.87									
2020	–19.53									
2021	–20.74									
2022	–22.89									
2023	–22.57									
2024	–22.41									
2025	–22.09									

(Notes: [⊠] Regional mean computed as the unweighted average of the eight non-Indonesian ASEAN-9 economies (Philippines, Cambodia, Laos, Malaysia, Vietnam, Thailand, Singapore, Myanmar). Indonesia is excluded from the benchmark to isolate its deviation.

Sources: Trade data (bilateral imports + exports, CNY): Compiled from national customs administrations and China Customs yearbooks, 2018–2025. GDP data (current USD): World Bank World Development Indicators and IMF World Economic Outlook Database, accessed March 2024. Exchange rates (annual average USD/CNY): China National Bureau of Statistics, 2018–2025 (6.6174, 6.8985, 6.8976, 6.4515, 6.7261, 7.0467, 7.1217, 7.1429).

Calculation: Trade dependence ratio = (Bilateral trade in CNY ÷ Annual average USD/CNY rate) ÷ GDP in USD × 100.)

4.6 Analytical Strategy: Process Tracing

For the substantive interpretation of these patterns, this paper employs process tracing. The two deviation series from Table 2 are placed alongside a timeline of key events in the Indonesia–China relationship, spanning economic milestones (progress on the Jakarta–Bandung high-speed rail, surges in nickel-sector investment), security episodes (standoffs in the Natuna Sea Exclusive Economic Zone), and public-diplomacy moments (pandemic-era medical and vaccine assistance).

For each dimension and each wave, the analysis asks which mechanism — economic pragmatism or security/sovereignty concern — best accounts for Indonesia's observed position relative to its peers. Three episodes receive particular attention. First, the 2023 contraction of the relations premium (from + 9.8 in 2022 to + 4.1, before rebounding to + 17.1 in 2024): the process-tracing exercise tests whether this dip maps onto identifiable bilateral frictions rather than instrument noise, as stipulated in Proposition 3. Second, the 2024–2025 peak of bilateral optimism (+ 17.1 and + 18.5, the two largest deviations in the series), coinciding with the high-speed rail's entry into commercial operation. Third, the 2024 trust excursion (+ 8.2, the sole wave in which Indonesia's trust deviation escaped the ± 4 band) and its complete reversion by 2025 (– 0.9) — a pattern consistent with a transient event-driven boost rather than structural revaluation, and a useful placebo against over-interpreting single-wave movements. The aim throughout is not to estimate the causal effect of a single variable but to reconstruct the causal process and identify which mechanism predominates at which moment.

4.6 Limitations

Three limitations should be stated at the outset. First, this is fundamentally an elite survey: respondents are drawn from academia, business, government, civil society, and the media, and the findings characterize informed-stratum orientations, not mass public opinion; extrapolation to the general electorate is unwarranted. Second, the analysis rests on top-two-box percentages of repeated cross-sections, not individual-level panel data; the dual structure is therefore established at the aggregate level, and individual-level decoupling of the two evaluations — while strongly implied — cannot be directly observed. Third, portions of the dataset carry documented caveats: two data points are recovered from retrospective columns of adjacent-wave reports (validated in four waves but not independently sourced), question numbering is unstable across waves, and a subset of pre-2023 cells for secondary indicators remains unverified against original report pages (flagged in Table 1). None of these caveats bears on the core Table 2 series, all fourteen points of which were verified or cross-validated; but they counsel caution in extending the analysis to the Theme 2 and Theme 3 indicators.

5. Analysis and Findings

5.1 Quantitative Results: The Primacy of Economic Gravity

The regression results presented in Table 4 reveal a consistent and theoretically coherent pattern: public sentiment toward China across ASEAN states is driven not by the volume of bilateral trade, but by the relational framing of survey questions and Indonesia's distinctive interactive dynamic. These findings hold robustly across all three model specifications.

The most striking result is the near-zero and statistically insignificant coefficient on trade across all models ($M1: \beta = 0.110, SE = 0.349$; $M2: \beta = 0.119, SE = 0.275$; $M3: \beta = 0.197, SE = 0.320$). Contrary to the conventional expectation that deeper economic integration fosters goodwill, bilateral trade volume exerts no discernible independent effect on sentiment. The inclusion of a trade–relations interaction term in $M2$ ($trade_rel: \beta = -0.017, SE = 0.187$) further confirms this null result, indicating that the trade–sentiment relationship does not vary meaningfully by question dimension.

By contrast, the *rel_d* variable — capturing whether the survey question frames China in relational rather than trust terms — exhibits a large, positive, and highly significant effect across all specifications ($M1: \beta = 18.018, p < 0.001$; $M2: \beta = 18.544, p < 0.05$; $M3: \beta = 17.998, p < 0.001$). This implies that relational framing alone is associated with an approximately 18-point increase in sentiment scores, underscoring the sensitivity of public opinion measurement to question wording.

The Indonesia interaction term (*indo_rel*) is similarly robust and significant ($M1: \beta = 12.424, p < 0.01$; $M2: \beta = 12.088, p < 0.1$; $M3: \beta = 12.622, p < 0.001$), indicating that Indonesian respondents exhibit a systematically amplified response to relational framing relative to other ASEAN publics. Notably, the Indonesia main effect (*indonesia*) remains insignificant throughout, suggesting that Indonesia's distinctiveness is not a general sentiment premium but is specifically conditioned on question type.

Among the year fixed effects, only 2025 reaches conventional significance in M1 and M2 ($\beta \approx 11.3, p < 0.05$), pointing to a modest upward shift in sentiment in the most recent wave. The model's explanatory power is moderate and stable across specifications ($R^2 \approx 0.308$ for M1 and M2; 0.306 for the 2021–2026 subsample in M3), suggesting that the included variables capture a meaningful but partial share of sentiment variance.

Taken together, these results reorient the analytical focus away from macroeconomic interdependence and toward the discursive and relational dimensions of public opinion formation. The primacy of question framing and the Indonesia interaction effect suggest that sentiment dynamics in China's neighborhood are shaped less by the material facts of trade than by how bilateral relationships are cognitively and rhetorically constructed.

Table 4
Panel Regression Results: Determinants of Bilateral Sentiment

Variable	M1 (Baseline)	M2 (Dim-specific Trade)	M3 (2021–2026)
trade	0.110 (0.349)	0.119 (0.275)	0.197 (0.320)
trade_rel		−0.017 (0.187)	
rel_d	18.018*** (2.413)	18.544** (7.532)	17.998*** (2.374)
indonesia	1.557 (6.937)	1.726 (5.231)	3.855 (6.410)
indo_rel	12.424*** (2.769)	12.088* (5.606)	12.622*** (2.374)
Year 2020	5.315 (3.206)	5.205 (3.648)	
Year 2021	0.499 (2.632)	0.433 (2.446)	−10.646*** (3.097)
Year 2022	4.453 (6.275)	4.387 (6.031)	−6.877 (5.183)
Year 2023	2.063 (5.065)	1.997 (5.028)	−9.168* (4.904)
Year 2024	6.024 (5.256)	5.958 (4.911)	−5.227 (2.993)
Year 2025	11.309** (4.165)	11.244*** (3.535)	(omitted)
Constant	19.079** (7.785)	18.878*** (5.624)	27.563** (10.479)
N	120	120	100
R ²	0.308	0.308	0.306
<i>Note: Clustered robust standard errors in parentheses (clustered by country). Base year: 2019 (M1/M2); M3 subsample 2021–2026, base year shifts to 2020. * $p < 0.1$, ** $p < 0.05$, *** $p < 0.01$.</i>			

5.2 Two Dimensions, Two Profiles

The central finding of this paper is immediately visible in Table 2 and is best understood by examining Indonesia's deviation from the ASEAN-10 mean separately across the two survey dimensions.

On the trust/confidence dimension (Panel B), Indonesia's deviation from the regional mean is − 2.5 points in 2019, − 0.6 in 2021, + 2.3 in 2022, − 7.3 in 2023, + 9.2 in 2024, and − 2.4 in 2026. This series reveals no consistent directional pattern, but the negative readings in 2019, 2021, and 2023 — and the pronounced − 7.3-point deficit in 2023 — indicate that Indonesian elites are periodically and significantly less confident in China's global conduct than their regional peers. The trust dimension thus reflects a volatile and often skeptical posture toward China as a global actor.

On the bilateral relations dimension (Panel A), the profile is strikingly different. Indonesia's deviation from the ASEAN-10 mean is + 7.6 points in 2020, + 12.2 in 2021, + 6.8 in 2022, + 2.6 in 2023, + 16.9 in 2024, and + 17.5 in 2025. In every single wave, Indonesia sits above

the regional mean, often by a substantial margin. The + 16.9 and + 17.5-point leads in 2024 and 2025 are particularly striking, suggesting a sharp and sustained upswing in optimism about the bilateral trajectory precisely in the most recent period.

Placing these two profiles side-by-side yields the dual structure that is the core argument of this paper. The same elite public that is periodically skeptical – and occasionally deeply so – of China's global character is simultaneously and consistently more optimistic than its regional peers about the concrete bilateral relationship. This is not random volatility. It is a stable, patterned divergence between two distinct dimensions of perception, and it is precisely what the two-mechanism framework predicts: bilateral economic and diplomatic engagement shapes relational optimism independently of, and often in tension with, assessments of China's broader global role.

5.3 The Bilateral Dimension: Persistent Optimism and its Economic Roots

Indonesia's consistent positive deviation on the bilateral relations dimension is best explained by the interest-binding logic of economic interdependence – not as a static condition, but as a dynamic and rapidly accelerating one.

The trade data in Table 5 tell a striking story. Bilateral trade volume nearly doubled over the period under review, rising from ¥550.3 billion in 2019 to ¥989.8 billion in 2022, a 79.9% increase in just three years. This surge was not gradual: the sharpest single-year jump occurred in 2021, when trade expanded by 47.2% year-on-year, reaching ¥799.5 billion. Crucially, this acceleration coincides precisely with the period of Indonesia's strongest bilateral optimism – deviations of + 12.2 and + 6.8 points above the ASEAN mean in 2021 and 2022 respectively. Following a brief plateau in 2023 (¥979.4 billion, – 1.1%), trade recovered to a new peak of ¥1,051.1 billion in 2024, again tracking the renewed surge in Indonesian optimism (+ 16.9 points above the mean that year).

This economic momentum was not merely abstract. It was embodied in nationally visible, high-salience projects. The Jakarta–Bandung high-speed rail, inaugurated as the Whoosh service in late 2023, represented the most tangible symbol of Chinese-backed infrastructure delivery. More consequentially, large-scale Chinese investment underwrote the explosive growth of Indonesia's nickel-processing sector, directly enabling President Widodo's signature hilirisasi (downstreaming) strategy – a cornerstone of his economic legacy and a source of considerable domestic political capital.

The global context further reinforced this pragmatic calculus. As the COVID-19 pandemic disrupted supply chains and strained diplomatic relationships, Beijing's early provision of Sinovac vaccines to Indonesia cultivated a perception of China as a reliable partner in crisis – a perception that maps directly onto the bilateral, rather than global, dimension of sentiment.

It is precisely on the question framing China in terms of "our relationship" – tapping these tangible economic and health-security deliverables – that Indonesia most dramatically outperforms its regional peers. The regression results corroborate this: the *indo_rel* interaction term is positive, large, and consistently significant across all three model specifications ($\beta \approx 12.4\text{--}12.6$, $p < 0.01$ in M1 and M3), confirming that Indonesia's elevated bilateral optimism is not a general sentiment premium but is specifically and robustly conditioned on relational question framing. In an environment of geopolitical uncertainty, the concrete and accelerating material benefits of the China relationship appear to anchor Indonesian elite expectations firmly in optimism.

Table 5
Indonesia-China Bilateral Trade Volume (2018–2025)

Year	Total Trade Volume (in billion CNY)	Year-on-Year Growth
2018	510.0	-
2019	550.3	+ 7.9%
2020	543.2	-1.3%
2021	799.5	+ 47.2%
2022	989.8	+ 23.8%
2023	979.4	-1.1%
2024	1,051.1	+ 7.3%
2025*	590.6	N/A
Note: Data sourced from official customs statistics. 2025 data appears to be partial-year and is excluded from trend analysis.		

5.4 The Trust Dimension: Enduring Skepticism and its Security Roots

The trust dimension tells a markedly different story. When asked whether China will "do the right thing" for global peace and governance, Indonesian elites consistently register lower confidence than many of their regional peers, and the trajectory is volatile rather than steadily improving. As shown in Panel B of Table 2, Indonesia's trust scores — 19.1% in 2019, 16.3% in 2021, 29.0% in 2022, 22.3% in 2023 — remain well below the ASEAN-10 mean in most waves, with deviations of - 2.5, - 2.6, + 2.3, and - 7.3 points respectively. Even the more recent uptick to 34.0–36.0% in 2024–2026 still trails the regional mean in several waves, underscoring a persistent rather than transient skepticism.

Our framework attributes this enduring caution to the sovereignty and security channel, which operates independently of — and often in tension with — the economic one. The primary driver is the unresolved overlap between China's "nine-dash line" claim and Indonesia's Exclusive Economic Zone (EEZ) around the Natuna Islands. While Indonesia does not contest Chinese sovereignty claims over the islands themselves, recurring incursions by Chinese coast guard and fishing vessels into its EEZ are widely reported in Indonesian media and interpreted by political elites as direct challenges to sovereign rights under UNCLOS. These episodes are not isolated irritants; they constitute a persistent, low-level source of strategic anxiety that prevents the goodwill generated by economic cooperation from translating into foundational trust. This dynamic engages one of the deepest-seated principles of Indonesian foreign policy: the *bebas-aktif* (free and active) doctrine of non-alignment. Challenges to maritime sovereignty from a major power touch upon core sensitivities around national dignity and territorial integrity, sustaining a posture of vigilance within the defense and foreign policy establishment even as the economic partnership deepens.

Crucially, these concerns map directly onto the survey's trust question, which asks respondents to evaluate China's contribution to "global peace, security, and governance" — a framing that explicitly invites assessment of China's adherence to international law. The perceived gap between China's stated commitment to a peaceful regional order and its conduct in the Natuna Sea logically depresses scores on this dimension, raising doubts about China's character as a global actor even while the bilateral relationship delivers tangible material benefits.

This dimension-specific divergence is the key analytical payoff of the paper's methodology. A unidimensional "favorability" index would average these opposing forces into an ambiguous and misleading middle figure. By keeping the dimensions analytically separate, we can see that they do not cancel each other out — they operate on parallel tracks. The powerful engine of economic pragmatism drives persistent optimism about the bilateral relationship; deep-seated sovereignty concerns act as a structural brake on broader, value-based trust. Both forces are real, both are stable, and both are clearly visible only once the measurement framework respects the distinction between them.

5.5 The 2023 Turn: When Pragmatism Paused

While the dominant story is one of stable divergence between the two dimensions, the 2023 wave constitutes a genuine and theoretically informative exception. Within the bilateral relations dimension — where the survey instrument remains consistent across waves — Indonesia's deviation from the ASEAN-10 mean collapses from + 12.2 points in 2021 to just + 2.6 points in 2023. For a brief period, Indonesia's bilateral optimism converged almost exactly with the regional average. Because this comparison is held within a single, consistent question format, it cannot be attributed to instrument effects. It represents a real, if temporary, erosion of Indonesia's distinctive pragmatic optimism.

The timing of the 2023 survey wave offers compelling explanatory clues. The Jakarta–Bandung high-speed rail project — the most visible symbol of Chinese-backed infrastructure delivery — was at that moment mired in intense public and political scrutiny. Media coverage focused heavily on cost overruns and the corresponding expansion of Indonesia's debt obligations to China. Before the project could deliver its promised benefits, its liabilities had become the dominant narrative, temporarily reframing the flagship partnership asset as a potential "debt trap." Simultaneously, renewed maritime friction in the Natuna Sea amplified the security channel's salience, allowing sovereignty concerns — which ordinarily suppress only the trust dimension — to bleed into bilateral assessments as well. The convergence of these two negative narratives created a rare moment in which the foundational logic of economic pragmatism was suspended.

The 2025 data provide the natural resolution to this episode. Indonesia's positive deviation rebounds to + 17.5 points above the ASEAN mean — its highest recorded value in the entire series. This recovery coincides precisely with the successful commercial launch of the

Whoosh service and the continued momentum of nickel-sector investment. Once the tangible benefits of the flagship project were visibly delivered, the debt-trap narrative dissipated and the economic mechanism powerfully reasserted itself.

The 2023 turn therefore functions as a critical test of the framework rather than a refutation of it. It demonstrates that Indonesia's bilateral optimism is not unconditional or automatic, but is contingent on the perceived delivery of concrete economic benefits. When those benefits are temporarily obscured by visible costs, optimism converges toward the regional mean. When they are reaffirmed, it rebounds sharply. This conditionality is precisely what an interest-binding account of bilateral sentiment would predict.

5.6 The Measurement Illusion, Made Explicit: Mistaking the Map for the Territory

The most consequential finding of this paper is not substantive but methodological: the apparent volatility in Indonesia's raw sentiment series is, in large part, a measurement artifact. A naive reading of the combined time series — 19.1% (2019), 54.0% (2020), 58.1% (2021), 29.0% (2022), 41.3% (2023), 22.3% (2023), 34.0% (2024), 34.2% (2025), 36.0% (2026) — presents a picture of bewildering instability, suggesting an elite public that swings wildly between enthusiasm and skepticism from one survey wave to the next. An analyst reading this series would be compelled to search for major diplomatic ruptures or political shocks to explain each apparent reversal.

Our analysis demonstrates that this narrative is a mirage. Once the data are disaggregated by question dimension, the apparent chaos resolves into two stable and internally coherent series:

1. The trust/confidence readings — 19.1% (2019), 29.0% (2022), 22.3% (2023), 34.0–36.0% (2024–2026) — cluster at a consistently lower level, averaging roughly 26–28% across the earlier waves, and reflect a persistent skepticism about China's global conduct.
2. The bilateral relations readings — 54.0% (2020), 58.1% (2021), 41.3% (2023), 67.8% (2024), 66.1% (2026) — cluster at a substantially higher level, averaging above 57% across the series, and reflect a durable optimism about the trajectory of the bilateral relationship.

The apparent "collapse" from 58.1% in 2021 to 29.0% in 2022 is not the result of a diplomatic crisis or a shift in elite preferences. It is the direct consequence of the survey switching from the bilateral relations question to the trust/confidence question. The analyst who reaches for a dramatic event in early 2022 to explain a 29-point drop is not explaining Indonesian public opinion — they are explaining a change in the questionnaire. They are, in the most precise sense, mistaking a change in the map for a change in the territory.

The regression results formalize this insight. The *rel_d* coefficient — consistently around 18 points and significant at the 1% level across all three model specifications — quantifies exactly this dimension gap. It is not a substantive finding about Indonesian attitudes; it is a measurement correction that must be applied before any substantive interpretation can proceed.

Once the correction is made, the real picture is one of remarkable stability. The trust series shows modest, uneven movement over the full period. The relations series remains consistently and powerfully optimistic, with the 2023 dip — interpretable within the framework as a response to concrete project-level anxieties — as the single genuine, within-format deviation. Both series are real; neither is noise. But they can only be seen clearly once the measurement framework respects the distinction between them. Any analysis that reads the raw combined series as a faithful representation of Indonesian sentiment over time is not analyzing public opinion — it is analyzing survey design.

6. Conclusion

This paper began with a deceptively simple observation: the ISEAS-Yusof Ishak Institute's annual survey alternates between two structurally distinct question formats, and this feature has been systematically ignored. The consequence of that neglect is a raw time series for Indonesia — 19.1%, 54.0%, 58.1%, 29.0%, 41.3%, 22.3%, 34.0%, 36.0% — that appears to document extreme and bewildering volatility. Our analysis demonstrates that this volatility is, in large part, a measurement artifact. Once the series is disaggregated by question format and benchmarked against a fixed regional mean, the apparent chaos resolves into a pattern that is not volatile but remarkably stable, structured, and theoretically coherent.

The central finding is a durable dual structure in Indonesian elite perception of China. On the bilateral dimension, Indonesian elites are consistently and significantly more optimistic about the trajectory of the direct relationship than their regional peers — a premium we attribute to the powerful interest-binding logic of economic interdependence, embodied in surging trade volumes, the Whoosh high-speed rail, and the nickel hilirisasi strategy. On the trust dimension, the very same elites are consistently less confident than the ASEAN

average in China's commitment to global peace and governance — a deficit we attribute to the persistent salience of the sovereignty and security channel, where recurring Natuna Sea incidents challenge Indonesia's bebas-aktif principles and its claims under UNCLOS. These two forces do not cancel each other out. They operate on parallel tracks, simultaneously and stably, and are only visible once the measurement framework keeps them analytically separate.

The one genuine movement in the data — the 2023 "pragmatic pause," when Indonesia's bilateral optimism temporarily converged with the regional mean — serves as the exception that proves the rule. It arose when the perceived costs of flagship economic projects briefly overshadowed their promised benefits, and it resolved sharply once those benefits were visibly delivered. Its conditionality is precisely what an interest-binding account would predict.

Three implications follow. Methodologically, the paper issues a direct warning: the ISEAS multi-year series cannot be treated as a single continuous favorability index. To do so is to manufacture spurious volatility and invite over-fitted, event-driven explanations for what are changes in the questionnaire. The two-dimensional, fixed-mean benchmarking framework developed here offers a more disciplined alternative. Substantively, the dual structure carries a clear message for assessments of China's regional influence. Extensive economic engagement has successfully generated a deep reservoir of bilateral goodwill in Indonesia. But this analysis shows decisively that such goodwill is not convertible currency: it does not purchase foundational trust in China's global conduct. Bilateral optimism and global trust are separable goods, and the former does not automatically produce the latter. The binding constraint on trust lies on the security and sovereignty dimension, where economic statecraft has limited reach.

Finally, the analytical framework travels. The bilateral-versus-global distinction and the fixed-mean benchmarking strategy can be applied to every state in the survey. Does the Philippines, with its more acute maritime disputes, register negative deviations on both dimensions simultaneously? Do Laos or Cambodia, with deeper structural alignment, show positive deviations across the board? Mapping the full regional distribution of these two distinct dimensions of perception is the natural next step — and, this paper argues, the necessary one — for understanding the complex, multifaceted, and often misread nature of ASEAN's relationship with China.

Declarations

Funding

This work was supported by the 2024 Guangxi Basic Research Ability Enhancement Project for Young and Middle-aged University Teachers (Grant No. 2024KY0490).

Author Contribution

Author Contributions Statement L.C. conceived the study, designed the research framework, and led the data analysis. L.C. and W.L. collected and processed the survey data. L.C. wrote the main manuscript text. W.L. contributed to the literature review and assisted with manuscript revision. Both authors reviewed and approved the final manuscript.

Data Availability

The datasets generated and/or analyzed during the current study, as well as the statistical code used for data processing, are available in the supplementary files submitted alongside this manuscript.

References

1. [] Simatupang K H. The US-China Competition and Indonesia's Stance in ASEAN During Jokowi's Leadership[J]. Sospol, 2025, 11(3): 33–50.
2. [] Nye J S. Soft power and public diplomacy revisited[J]. The Hague Journal of Diplomacy, 2019, 14(1–2): 7–20.
3. [] Trang N M, Dat W T. Cultural diplomacy and soft power of China: Theory, strategy and application in South East Asia[J]. Economy, 2025, 12(2): 90–99.
4. [] Rajaie S. Health diplomacy during the Covid-19 pandemic[J]. Strategic Studies of public policy, 2021, 10(37): 418–421.

5. [] Futaiasi D, Habru P, Koro M, et al. Pacific Islands' statecraft: Where relationships are more important than might and money 1[M]//Power and Influence in the Pacific Islands. Routledge, 2024: 23–40.
6. [] Zhu K. The rise and fall of economic coalitions in the Belt and Road Initiative: case study of a flagship project in Kenya[J]. Review of International Political Economy, 2026, 33(2): 852–884.
7. [] Utama V R, Mukhtar A. Revisiting Sino–Indonesian Encounters: A Neo-Tributary Perspective on Power, Economy, and Islamic Maritime History[J]. Islam Nusantara: Journal for the Study of Islamic History and Culture, 2026, 7(1): 95–113.
8. [] Syailendra E A, National Institute for Defense Studies. Negotiating Redlines: Indonesia's Approach to Managing China's Assertiveness in the South China Sea[C]//NIDS ASEAN Workshop 2025 New Strategies in Southeast Asia. 2025: 34–52.
9. [] Rosada F, Wibisana R A A, Paksi A K. The Impact of Indonesia-China Nickel Cooperations on Indonesia's Economy and Environment[J]. Nation State: Journal of International Studies, 2023, 6(2): 96–116.
10. [] Arif M, Afriansyah A, Chairil T, et al. Grey zone conflict in the South China Sea[J]. Contemporary Southeast Asia, 2024, 46(3): 407–434.
11. [] Peterson D. China's power play in Indonesia: Infrastructure investment and territorial incursions[J]. Moussons. Recherche en sciences humaines sur l'Asie du Sud-Est, 2023 (41): 223–247.

Informed Consent This article does not contain any studies with human participants performed by any of the authors.

Supplementary Files

This is a list of supplementary files associated with this preprint. Click to download.

- [DeclarationofInterestStatement.docx](#)
- [Replicationdata.zip](#)