Building the Future:
Development Partnerships of the U.S. and Japan in Southeast Asia

Brief

March 2026

Divya Mathew, Bryan Burgess
and Jonathan A. Solis

AIDDATA
A Research Lab at William & Mary

Acknowledgments

This policy brief was prepared by Divya Mathew, Bryan Burgess, and Jonathan A. Solis. John Custer, Sarina Patterson, and Sam Gruber supported this publication's layout, editing, and visuals. The cover design is by Sarina Patterson; the cover image is by nutta via Adobe Stock, used under the Standard license. Ana Horigoshi and Kesley Marshall provided data and visualizations from AidData's 2024 *Listening to Leaders* survey; we thank the survey participants from 148 countries and territories for sharing their invaluable insights on development partner performance. The findings and conclusions of this report are those of the authors alone and do not necessarily reflect the views of our funders and partners.

Citation

Mathew, D., Burgess, B. and J. A. Solis. 2026. *Building the Future: Development Partnerships of the U.S. and Japan in Southeast Asia*. Policy Brief. AidData at Williams & Mary.

Table of Contents

Introduction

Southeast Asia occupies a pivotal position in the contemporary geopolitical landscape, functioning as a critical hub for global maritime trade and a focal point of strategic competition among major powers. The region's rapid economic expansion and demographic growth have generated rising demands for infrastructure, energy and raw materials for development. Over the past two and a half decades, the United States (U.S.), Japan and China have played significant and distinct roles as development partners to the region, channeling financial and technical resources to support national priorities. At the same time, governments in the region have navigated a complex, crowded and competitive marketplace for development financing, balancing diverse sources of support as they pursue their own development agendas.

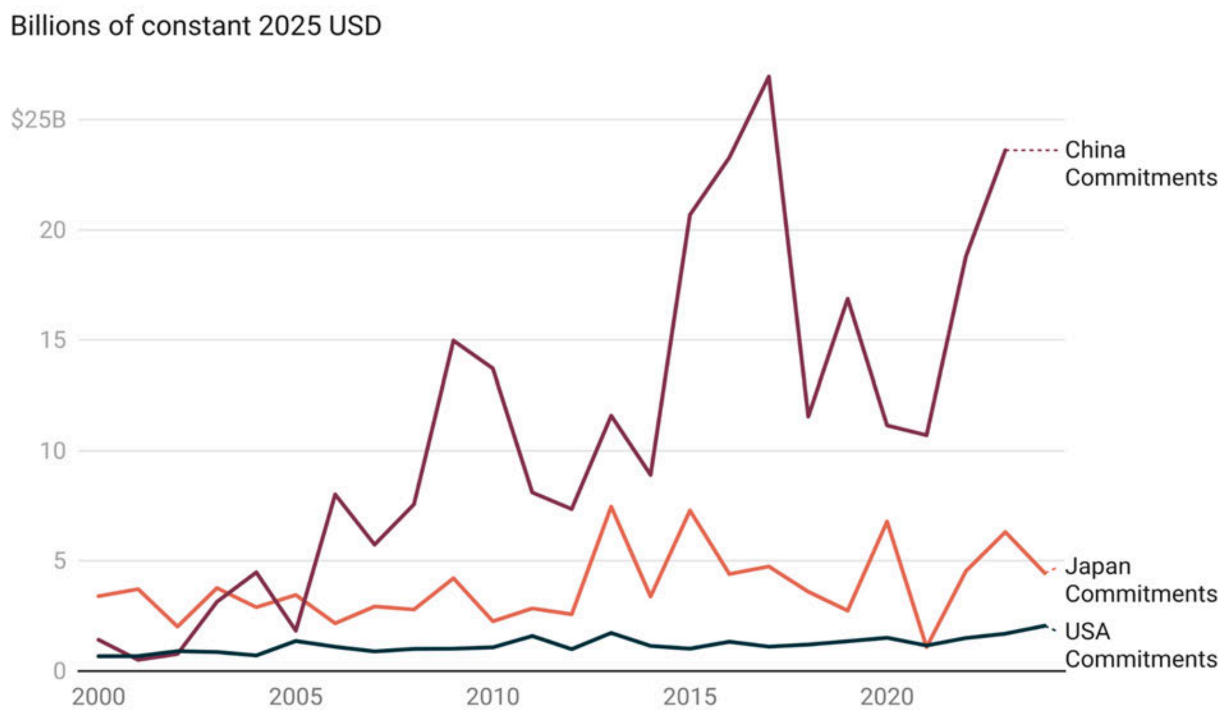
These regional dynamics are unfolding against the backdrop of major global shifts in the international development finance landscape. With the reauthorization of the U.S. International Development Finance Corporation (DFC) and the renewed emphasis on securing economic competitiveness in the Indo-Pacific region (White House, 2025), there is momentum in Washington to explore, forge, and grow partnerships in Southeast Asia. Japan has historically prioritized development across Asia and has deepened its engagement with Southeast Asia in particular since 2012 (Mathew & Custer, 2023; Sakaki, 2025). Meanwhile, Indo-Pacific economies have evolved from traditional aid recipients into indispensable trade partners for advanced economies (Burgess et al., 2024). The region's centrality to global supply chains, particularly in electronics, critical minerals, and energy, combined with its control over strategic maritime chokepoints such as the Strait of Malacca, has placed it at the core of economic security debates (Pitakdumrongkit, 2023). Demographics reinforce this trajectory as Southeast Asia's large, young, and increasingly urban populations are reshaping labor markets, consumption patterns, and long-term development needs.

How the United States, Japan, and China engage the region—what they finance, how they are perceived, and where their priorities converge or diverge—is critical knowledge during this pivotal moment for foreign and international development policy, as the changing landscape offers an opportunity to re-assess future finance offerings. This brief draws on historical data from the past quarter century in Southeast Asia[1] to provide a comparative analysis of the official finance portfolios, sectoral priorities, and public and elite perceptions of these three major partners. These data points can inform an evidence-based conversation about the future of financing for development in the region. The brief concludes with policy recommendations for strengthening future development partnerships in Southeast Asia as the region's strategic significance continues to grow, and a summary of key themes from AidData's panel discussion held in Washington DC on March 26, 2026.

[1] Eleven countries are included in the data analysis. They are Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor- Leste, and Vietnam—all current members of the Association of Southeast Asian Nations (ASEAN).

U.S., Japan and China in Southeast Asia, 2000-2024

Figure 1a. Official financing from the U.S., Japan and China to Southeast Asia



Notes: This figure displays the annual official finance commitments from the U.S., Japan and China to Southeast Asia. Data for Japan and the U.S. is available through 2024, while data for China is available through 2023. Sources: OECD CRS, AidData's China Global Loans and Grants Dataset, Version 1.0, with calculations by AidData.

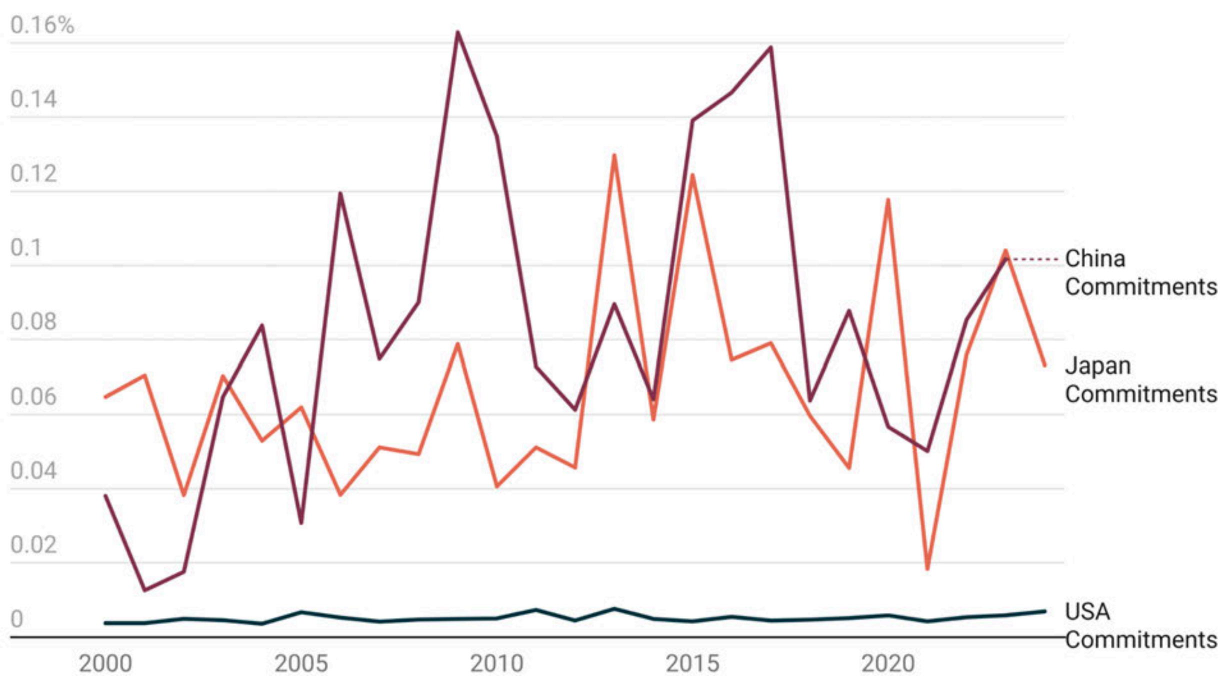
Over the last two decades, the United States, Japan and China provided $387.3 billion[2] in official finance to 11 Southeast Asian economies. Figure 1a illustrates the evolution of financial flows from the U.S. and Japan to Southeast Asia between 2000 and 2024 and from China to the region from 2000 to 2023, drawing on data from the OECD Creditor Reporting System and AidData's China Global Loans and Grants Dataset, Version 1.0. The timeline reveals three distinct patterns of engagement. First, China emerges as the largest and most volatile provider of official finance in the region, providing over two-thirds of the total financial flows during this period ($261.7 billion; 67.5%) with dramatic surges beginning in 2006 that quickly outpaced Japan and the United States. Next, Japan maintains a substantial and steady presence, consistently providing higher levels of bilateral government-backed financing than the U.S., totaling $95.8 billion from 2000 to 2024. Third, the United States remained the smallest and

[2] All references to dollar values in this brief are in constant 2025 U.S. dollars.

most stable of the three, providing 7.6% of the total official finance flows from these three financiers to Southeast Asia.

The uptick in Chinese financing begins before the formal launch of the Belt and Road Initiative (BRI) in 2013, decisively breaking away from Japan and the U.S. from 2006 onwards. Its dynamic rise is marked by steep increases–such as in 2009 and 2015 to 2017, followed by sharp contractions in 2011 and 2018. A post-COVID rebound in Chinese financing appears in 2022 and 2023. Japan's financial flows to Southeast Asia also fluctuate. Notably, Japanese financing nearly converged to Chinese levels in 2013, coinciding with Beijing's announcement of the BRI. Like China, Japan experienced a post-COVID dip in financing in 2021 but recovered in 2022. U.S. assistance, by contrast, follows a relatively smooth trajectory, with incremental increases but consistently lower volumes than its two comparators. There is no suggestion of a COVID-related contraction in U.S. official financing to the region.

Figure 1b. Official financing from the U.S., Japan and China to Southeast Asia, as a percent of the financier's GDP



Notes: This figure displays the share of annual GDP that the U.S., Japan and China committed to Southeast Asia, per year. Data for Japan and the U.S. is available through 2024, while data for China is available through 2023. Sources: OECD CRS; AidData's China Global Loans and Grants Dataset, Version 1.0; and World Bank GDP, with calculations by AidData.

The topline volume of official finance tells only part of the story. When each financier's commitments are assessed relative to the size of its own economy, a variation in effort and revealed priority is highlighted. Both Japan and China assign a noticeably larger share of their

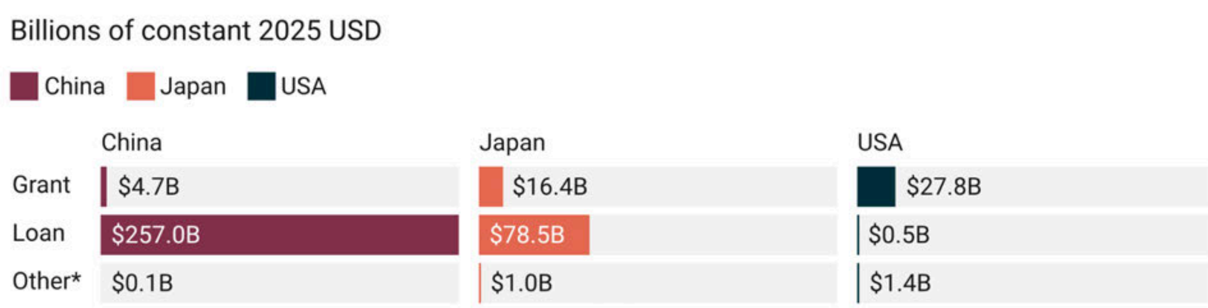
GDP to official finance in Southeast Asia than the United States. Although the percentages appear small in macroeconomic terms, they reveal meaningful differences in financier behavior.

Japan and China distribute a largely comparable share of their GDP to Southeast Asian countries and appear to place a similar strategic emphasis, relative to their own economic size, on the region. Japan periodically matched China on this metric and even surpassed it in the early 2000s as well as 2013, 2020 and 2023. Despite Japan's smaller absolute flows, Tokyo occasionally commits official finance to Southeast Asia at levels that rival Beijing's when measured as a share of national output.

China's and Japan's proportional commitment in Southeast Asia fluctuated sharply. Chinese financing as a share of GDP peaked notably in 2009 and 2016, each followed by steep declines. China's assistance ranged between roughly 0.05% and 0.16% of GDP in most years, placing it well above U.S. levels over the same time period. The United States devoted the smallest share of its economy to official finance in Southeast Asia, rarely exceeding 0.01% of GDP, in comparison to the proportional financial commitments of the two Asian comparators.

Financial instruments in the portfolios

Figure 2. Composition of official financing portfolios of the U.S., Japan and China, 2000-2023/4



Notes: This figure displays the total value of official financing commitments via grants and loans from the U.S., Japan, and China to Southeast Asia. The "other" category (which makes up less than 5% of each portfolio) includes debt rescheduling, equity investment, other official flows, and private sector instruments. Data for Japan and the U.S. is available through 2024, while data for China is available through 2023. Loans include those offered on both concessional terms (i.e., below market rate), and non-concessional terms (i.e., at or above market rate). Sources: OECD-CRS and AidData's China Global Loans and Grants Dataset, Version 1.0.

While the volume of official finance that the United States, Japan and China provide to Southeast Asia varies considerably, Figure 2 reveals that the composition of their financing also diverges. Each of these three financiers employs a distinct mix of financial instruments. The United States overwhelmingly favors grants, making up over 93% of its official finance portfolio to the region. China, by contrast, relies predominantly on loans–often at or near market value. Japan's portfolio tilts more towards the Chinese model than the American one, though it is more diversified than either. Over 81% of Japanese official finance to Southeast Asia is issued in the form of loans, including both at and below the market rate as well as 17.1% given as grants. The United States stands out as the most generous provider of grant-based financing, providing over half (56.8%) of the grants provided by these three financiers, totaling $27.8 billion to Southeast Asia over the 25 years. Japan follows with $16.4 billion in grants. China provides 9.6% of the grants provided by the three comparators, totaling $4.7 billion in the same time period.

Revealed priorities: Where do the U.S., Japan and China focus their official financing in Southeast Asia?

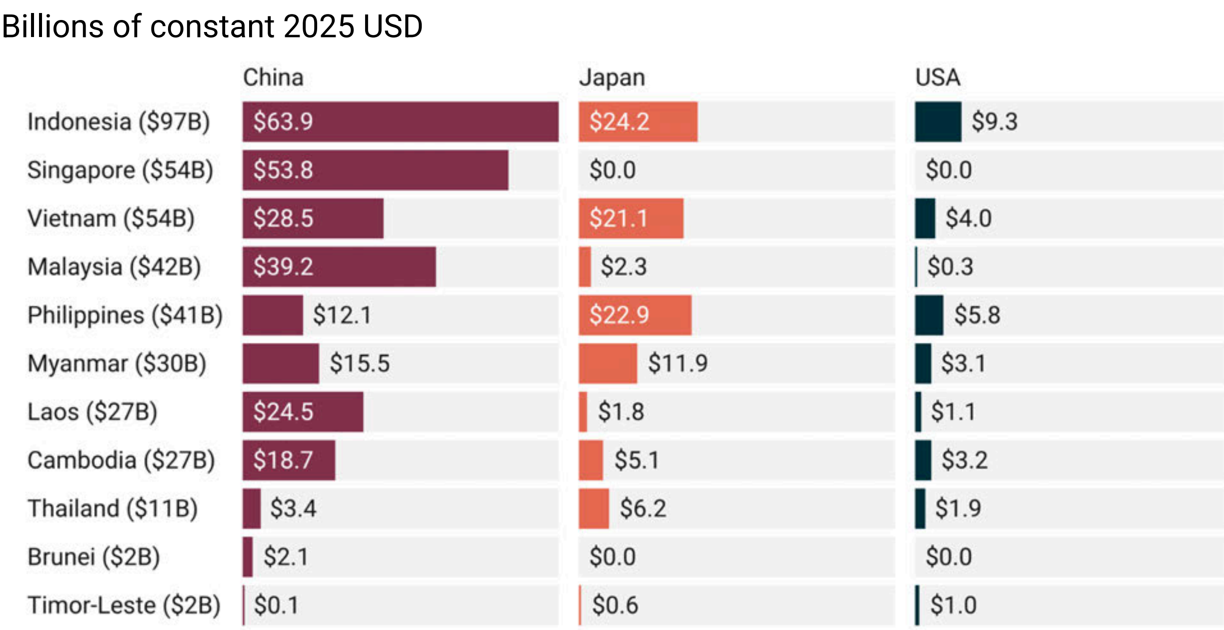
Geography

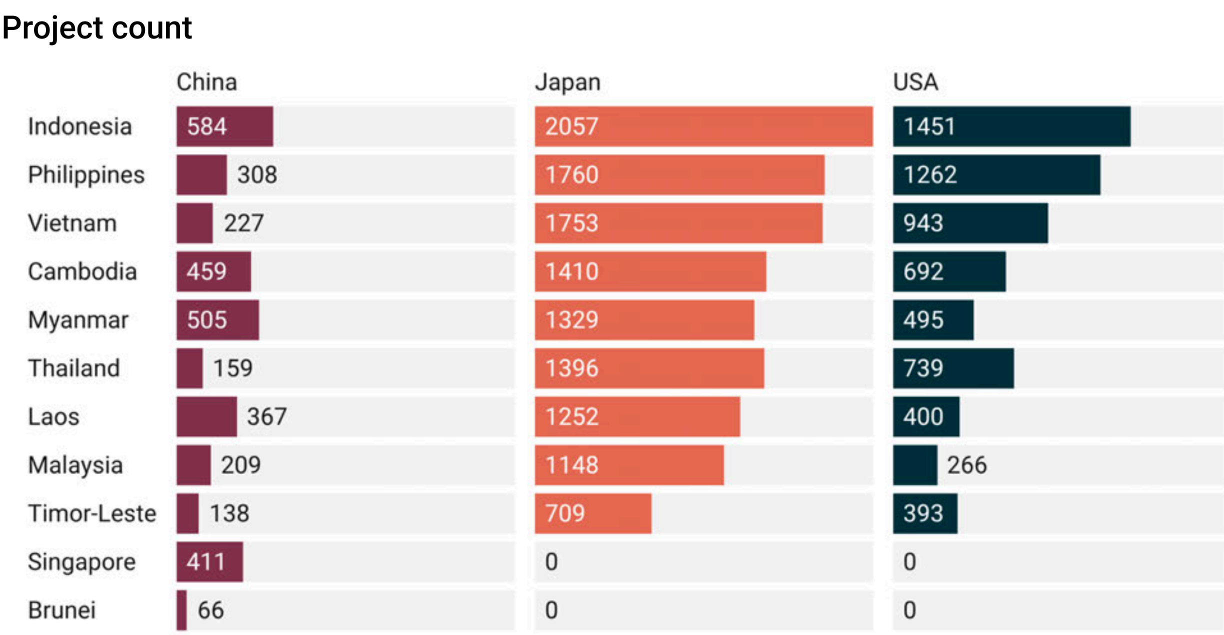
Across the Southeast Asia region, the U.S., Japan and China broadly prioritized the same set of countries—those with large populations. Indonesia attracted the highest volume of funding from all three financiers—$63.9 billion from China spread across 584 projects, $24.2 billion over 2,057 projects from Japan and $9.3 billion across 1,451 projects from the United States. The Philippines ($5.8 billion from the U.S. and $22.9 billion from Japan) and Vietnam ($4 billion from the U.S. and $21.1 billion from Japan) followed in second and third place, respectively, among countries receiving the highest volumes of funding from both the U.S. and Japan. In China's case, Singapore and Malaysia rounded out the list of top-three recipients. Brunei and Singapore receive funding exclusively from China.[3]

Comparing the three financiers, China outspent the others in all countries in Southeast Asia except the Philippines, Thailand and Timor-Leste where Japan took the top position between 2000 and 2024. Japan also stood out as the most active funder in the region, implementing 12,814 projects during the time period, followed by the United States' 6641 projects and China's 3433 projects.

[3] Brunei and Singapore are not eligible for ODA, and therefore not included in the OECD CRS data.

Figure 3. Official financing from the U.S., Japan and China, by commitment value and project count





Notes: These figures display the total commitment values and unique projects directed to Southeast Asia by the U.S., Japan and China. Data for Japan and the U.S. is available from 2000-2024, while data for China is available from 2000-2023. Brunei and Singapore are not eligible for official development assistance (ODA) and are therefore not included in the OECD CRS data. Sources: OECD CRS and AidData's China Global Loans and Grants Dataset, Version 1.0.

Recipient country income level

When comparing U.S., Japanese and Chinese engagement with Southeast Asian countries across income groups, China emerged as the dominant provider of official finance between 2000 and 2023 (Figure 4a). Whether directed to countries in the low-income, lower-middle-income, or upper-income[4] category, China's official finance commitments exceeded those of Japan and the United States by a wide margin. The greatest concentration of Chinese official financing flows was to lower-middle-income countries, totaling over $123 billion. However, China also stands out for its willingness to finance countries further up the income ladder, committing substantial resources ($108 billion) to upper-income economies in the region.

Japanese bilateral official finance in Southeast Asia is more targeted, heavily directed toward lower-middle-income countries ($68 billion), while engagement at the lower and upper ends of the income spectrum was more limited ($15.9 billion and $7.8 billion, respectively). The United States provided more modest levels of official finance across all income categories, but mirrored Japan in focusing on lower-middle-income countries ($21.2 billion). Unlike China, the United States committed relatively little to upper-income economies, and its engagement with low-income countries remained lean.

However, when financial commitments with a commercial intent are excluded, and the three financiers are compared on the basis of their development financing commitments (Figure 4b), the relative rankings no longer hold for lower-middle income countries. Japan outspends China on development finance to lower-middle income countries in Southeast Asia between 2000 and 2023. Even in the upper and low income categories, China's total development financing offer reduces substantially when compared to its total official financing commitments. Across the three income categories, China's development finance ranged between 50% to 66% of its official finance portfolio.

[4] The upper-income category combines high-income and upper-middle-income countries to emphasize the more meaningful contrast between upper-income countries and low- or lower-middle-income countries. Upper-income countries generally exhibit higher state capacity, stronger institutions, and greater integration into global markets. Considered separately, the high-income group includes 48 observations and the upper-middle-income group includes 41; combined, they form a more stable category with 89 observations. Using a three-tier classification also improves interpretability with minimal loss of variation. Note that Timor-Leste is not observed in 2000.

Figure 4a. Official financing from the U.S., Japan and China to Southeast Asia by recipient country income level, 2000-2023

In billions of constant 2025 USD

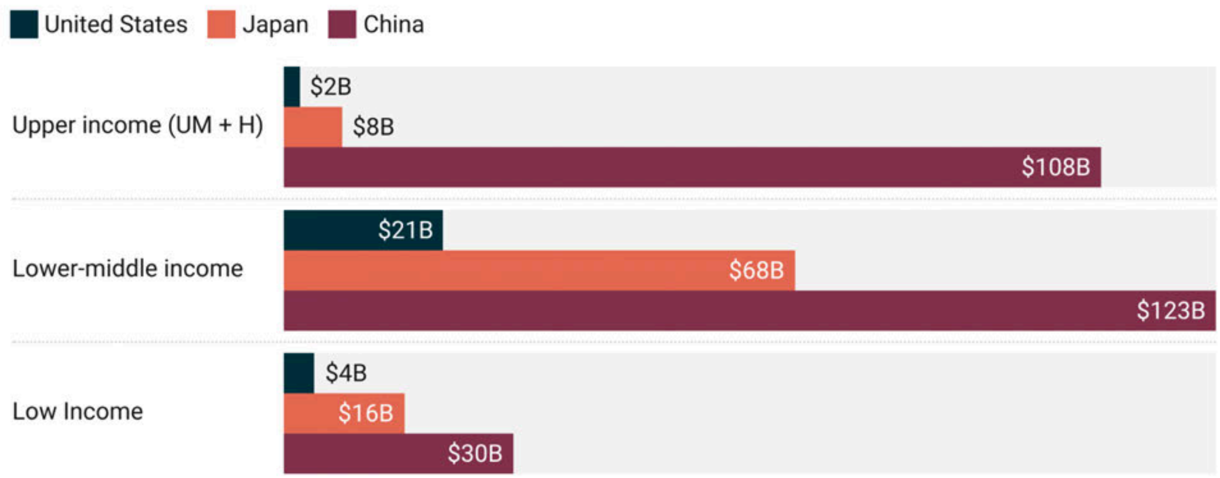
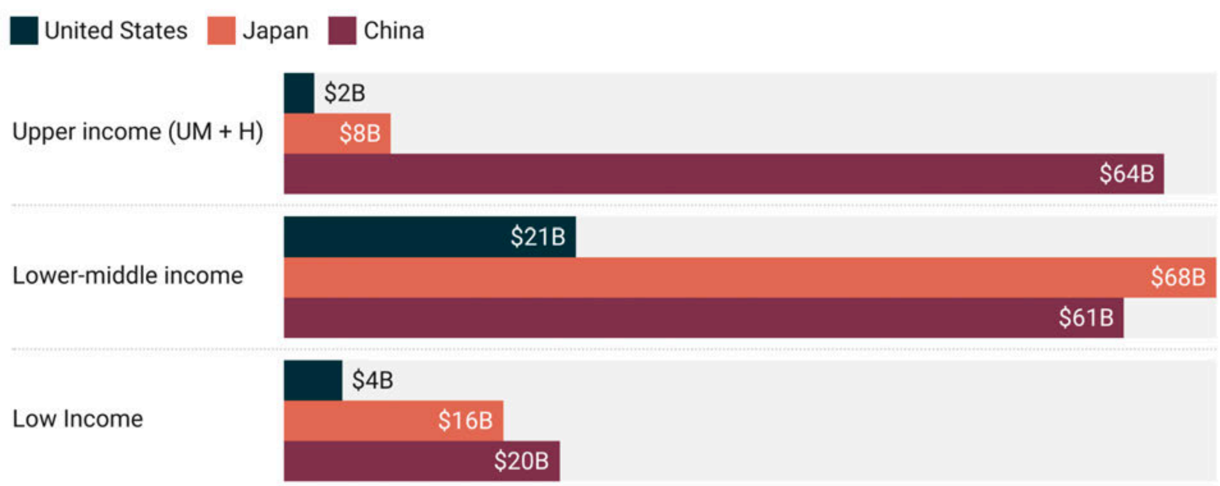


Figure 4b. Development financing from the U.S., Japan and China to Southeast Asia by recipient country income level, 2000-2023

In billions of constant 2025 USD



Notes: Figures 4a and 4b display official financing (including commitments with commercial intent) versus development financing (excluding commitments with commercial intent), respectively, from the U.S., Japan and China to 11 Southeast Asian countries, aggregated by income level. For comparability, the analysis is limited to 2000–2023 to align with China's data coverage. To account for country income categories changing over time, totals are calculated at the country-year level by assigning countries to the appropriate World Bank income classification for that specific year. Sources: OECD CRS; AidData China Global Loans and Grants Dataset, Version 1.0; and World Bank income categories.

Sectors: Where does funding converge and diverge?

Table 1. Top three sectors for official financing from the U.S., Japan and China in Southeast Asia, 2000-2023/4

	United States	Japan	China
1.	Government & civil society: **$5.8 B**, 19.5% of portfolio	Transport and storage: **$42.6 B**, 44.2% of portfolio	Energy: **$69.8 B**, 26.7% of portfolio
2.	Population & reproductive health: **$3.6 B**, 12.4% of portfolio	Energy: **$9.4 B**, 9.8% of portfolio	Industry, mining, construction: **$59.6 B**, 22.7% of portfolio
3.	Emergency response: **$2.5 B**, 8.5% of portfolio	General budget support: **$7.0 B**, 7.3% of portfolio	Banking and financial services: **$46.4 B**, 17.7% of portfolio

Notes: This table displays the top three sectors based on total value of commitments from the U.S., Japan and China to Southeast Asia, from 2000-2023/2024. Sectors are derived from the OECD CRS DAC classification system. Data for Japan and the U.S. is available through 2024, while data for China is available through 2023. For the complete list of sectors, see Figure A5 in the Technical Appendix. Sources: OECD CRS, AidData China Global Loans and Grants Dataset, Version 1.0.

Distinct sectoral profiles characterize U.S., Japanese, and Chinese official financing across the region. Almost half (44.4%) of Japan's total funding to the region was devoted to transport and storage infrastructure, totaling $42.6 billion over the period. Other sectors that received prioritized support from Japan include Energy ($9.4 billion, 9.8%), general budget support ($7.04 billion, 7.3%) and water supply and sanitation ($6.5 billion, 6.8%). Social sectors also feature in Japan's portfolio, although at lower levels: education ($2.8 billion, 3%), health ($2.1 billion, 2.2%) and government and civil society ($1.1 billion, 1.2%).

The United States exhibits a strikingly different portfolio, with a concentration in governance, social sectors and humanitarian assistance. Government and civil society is the single largest U.S. sector, totaling $5.8 billion and representing 19.6% of its funding to Southeast Asia from 2000 to 2024. Emergency response ($2.5 billion, 8.5%), health ($2.5 billion, 12.4%) and education ($1.9 billion, 6.4%) were other priority sectors for U.S. financing. Comparatively, the United States allocates little to large-scale infrastructure during this time period: transport and storage accounts for just $1.02 billion (3.4%), and energy for $486 million (1.6%).

China's portfolio stands apart for its emphasis on commercially oriented infrastructure and production sectors. Energy is the largest Chinese-funded sector by a wide margin, totaling $69.8 billion and accounts for over a quarter (26.7%) of its financing in Southeast Asia. Industry, mining and construction ($59.6 billion, 22.7%) and transport and storage ($45.45 billion, 17.4%) follow closely behind. China also channels substantial resources into communications

($13.58 billion, 5.2%) and banking and financial services ($46.35 billion, 17.7%), reflecting its role in financing digital infrastructure, industrial parks, and state-linked commercial ventures. Social sectors receive comparatively limited support: health ($2.21 billion, 0.85%), education ($346 million, 0.13%), and government and civil society ($497 million, 0.19%).

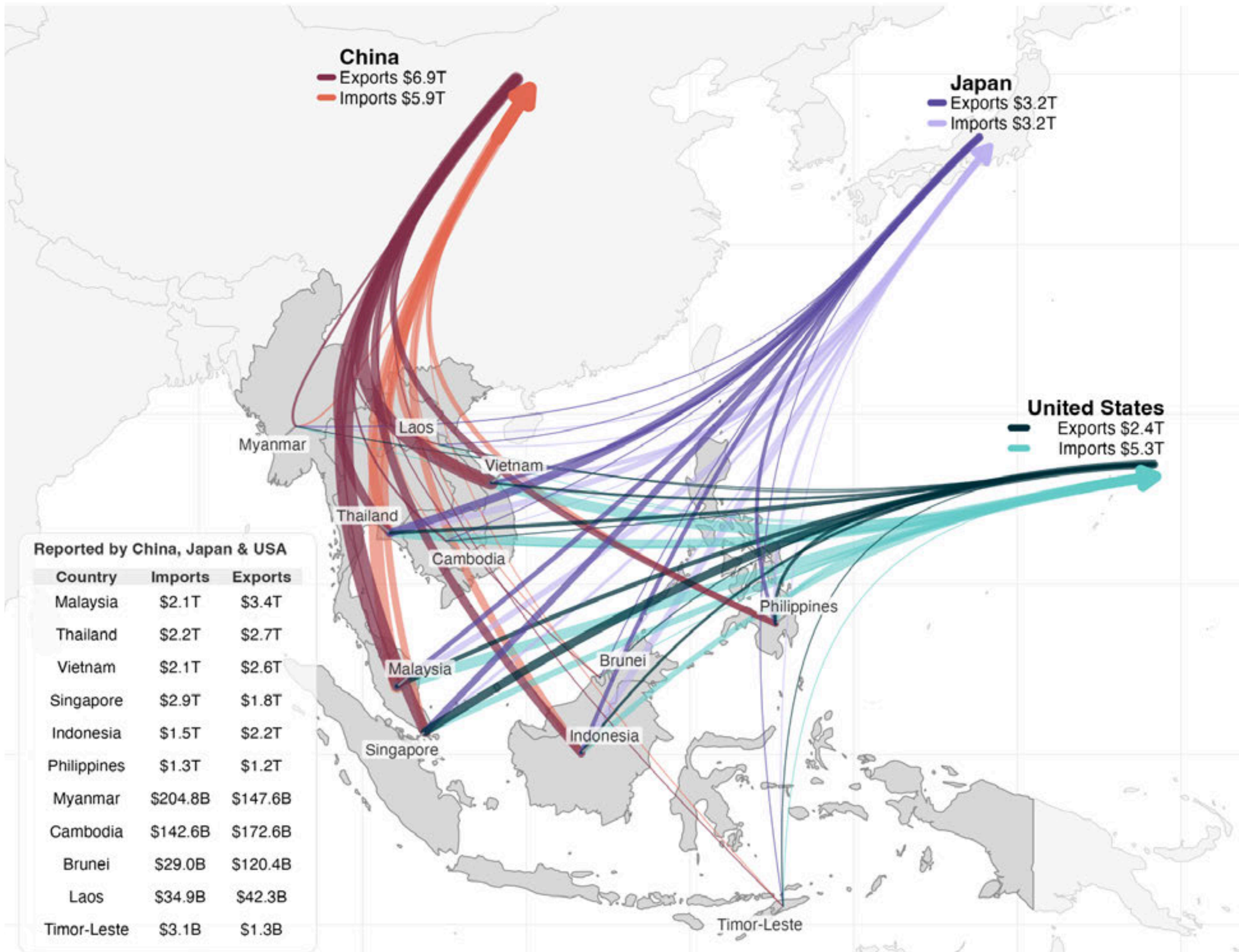
Balance of trade

The United States, Japan and China conducted approximately $27 trillion in total trade with Southeast Asia from 2000 to 2024. Among the three, China accounted for the largest share in the total value of exports to the region ($6.9 trillion) and imports from it ($5.9 trillion). The U.S. had a comparatively lower value in exports ($2.4 trillion), however, its import levels ($5.3 trillion) were close to China's. Japan achieved near equilibrium in its balance of trade, exchanging $3.2 trillion in exports and imports with Southeast Asia.

Singapore ($2.9 trillion), Thailand ($2.2 trillion), Malaysia ($2.1 trillion), Vietnam ($2.1 trillion) and Indonesia ($1.5 trillion) emerged as the top five exporters to the U.S., Japan and China combined. These countries were also top importers from the U.S., Japan and China between 2000 and 2024, although the rankings differ slightly: Malaysia ($3.4 trillion), Thailand ($2.7 trillion), Vietnam ($2.6 trillion), Indonesia ($2.2 trillion) and Singapore ($1.8 trillion).

Figure 5. Trade between Southeast Asia and the U.S., Japan and China, 2000-2024

In constant 2025 USD

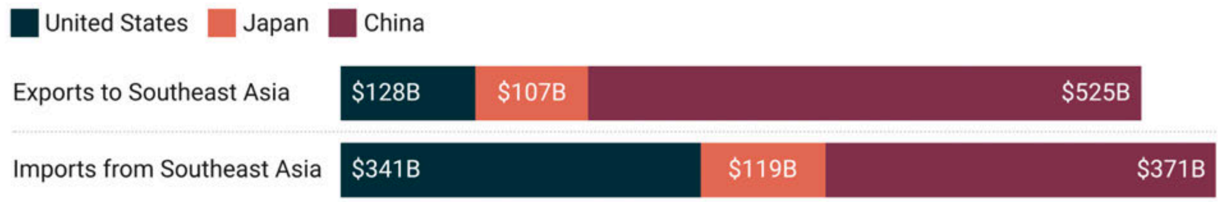


Country	Imports	Exports
Malaysia	$2.1T	$3.4T
Thailand	$2.2T	$2.7T
Vietnam	$2.1T	$2.6T
Singapore	$2.9T	$1.8T
Indonesia	$1.5T	$2.2T
Philippines	$1.3T	$1.2T
Myanmar	$204.8B	$147.6B
Cambodia	$142.6B	$172.6B
Brunei	$29.0B	$120.4B
Laos	$34.9B	$42.3B
Timor-Leste	$3.1B	$1.3B

Notes: This figure displays the total trade flows in goods (cumulative imports and exports; totals exclude services) between the U.S., Japan, China and Southeast Asia from 2000-2024. The inset table provides the Southeast Asian country-level totals for imports and exports with the U.S., Japan and China combined, over the same time period. Sources: United Nations Statistics Division (UNSD), UN Comtrade Database.

Figure 6. 2024 Trade between Southeast Asia and the U.S., Japan and China

In billions of constant 2025 USD



Notes: This figure displays the total value of bilateral trade (imports and exports) between Southeast Asia and the U.S., Japan and China in 2024. Source: Organization of Economic Complexity.

Figure 6 illustrates the total bilateral trade between the 11 Southeast Asian countries with Japan, the U.S. and China, in 2024 alone. China stands out as the region's dominant trading partner that year. Its exports, approximately $525 billion, far exceed those of both the United States and Japan, while its imports from the region, at roughly $371 billion, also surpass both comparators, but to a lesser degree. Despite this large volume, China's trade imbalance with the region is moderate relative to the United States, with a gap of roughly $154 billion between exports and imports.

The United States had the largest trade imbalance with Southeast Asia among the three comparators in 2024. U.S. imports from the region, approximately $340 billion, are more than double its exports to the region, which total around $127 billion. Notably, U.S. imports from Southeast Asia nearly rival China's import levels. This asymmetry highlights the distinct nature of the U.S.–Southeast Asia trade relationship, driven more by consumption than by participation in regional supply chains.

Japan maintains a smaller and more balanced trade profile with Southeast Asia. Japanese exports to ASEAN total roughly $107 billion, while imports amount to about $119 billion, resulting in a relatively narrow trade gap. Although Japan's overall trade volume is well below China's in 2024, its reciprocal trade relationship reinforces its reputation as a reliable economic partner.

Table 2a. Top 10 products exported from the U.S., Japan, and China to Southeast Asia in 2024

In billions of constant 2025 USD

	United States		**Japan**		**China**	
	Commodity	Value	Commodity	Value	Commodity	Value
1.	Electrical machinery and equipment	$24.77	Electrical machinery and equipment	$19.06	Electrical machinery and equipment	$150.24
2.	Mineral fuels and oils	$17.77	Machinery and mechanical appliances	$15.93	Machinery and mechanical appliances	$81.29
3.	Machinery and mechanical appliances	$17.08	Vehicles	$10.81	Plastics and articles thereof	$29.91
4.	Aircraft	$10.59	Commodities not specified according to kind	$10.62	Commodities not specified according to kind	$21.13
5.	Optical and photographic equipment	$6.35	Iron and steel	$9.57	Iron and steel	$20.68
6.	Jewellery and precious metals	$5.53	Plastics and articles thereof	$4.11	Iron or steel articles	$20.50
7.	Plastics and articles thereof	$4.00	Optical and photographic equipment	$4.09	Vehicles	$20.08
8.	Commodities not specified according to kind	$3.98	Jewellery and precious metals	$3.63	Furniture	$19.38
9.	Oil seeds and oleaginous fruits	$3.39	Copper and articles thereof	$2.90	Mineral fuels and oils	$18.18
10.	Pharmaceutical products	$2.92	Ships, boats and floating structures	$2.00	Organic chemicals	$11.64

Notes: This table displays the ten largest commodities categories (by total value) of exports from the U.S., Japan and China to Southeast Asia in 2024. Commodities are aggregated according to Harmonized System 2-digit commodity categorization Source: UN Comtrade Database.

Table 2b. Top 10 products imported by the U.S., Japan, and China from Southeast Asia in 2024

In billions of constant 2025 USD

	United States		**Japan**		**China**	
	Commodity	Value	Commodity	Value	Commodity	Value
1.	Electrical machinery and equipment	$113.36	Electrical machinery and equipment	$24.78	Electrical machinery and equipment	$118.58
2.	Machinery and mechanical appliances	$64.78	Mineral fuels and oils	$15.93	Mineral fuels and oils	$79.44
3.	Furniture	$22.12	Machinery and mechanical appliances	$9.83	Machinery and mechanical appliances	$42.73
4.	Pharmaceutical products	$15.87	Wood and articles of wood; wood charcoal	$4.25	Iron and steel	$16.70
5.	Apparel and clothing accessories; knitted or crocheted	$15.15	Apparel and clothing accessories; knitted or crocheted	$4.14	Fruit and nuts, edible	$11.75
6.	Optical and photographic equipment	$13.94	Optical and photographic equipment	$4.05	Rubber and articles thereof	$10.61
7.	Footwear	$13.26	Plastics and articles thereof	$4.03	Plastics and articles thereof	$9.31
8.	Rubber and articles thereof	$12.48	Apparel and clothing accessories; not knitted or crocheted	$3.98	Ores, slag and ash	$8.94
9.	Apparel and clothing accessories; not knitted or crocheted	$11.12	Vehicles	$3.42	Optical and photographic equipment	$8.17
10.	Commodities not specified according to kind	$10.50	Jewellery and precious metals	$3.25	Copper and articles thereof	$7.95

Notes: This table displays the ten largest commodities categories (by total value) of imports by the U.S., Japan and China from Southeast Asia in 2024. Commodities are aggregated according to Harmonized System 2-digit commodity categorization Source: UN Comtrade Database.

Comparing the goods traded between the U.S., Japan and China with Southeast Asia, electrical machinery and equipment, which includes Integrated circuits, telephones, and other electronic consumer products emerged at the top of the list of both exports and imports in 2024. While China leads the exports in this category ($150.2 billion) followed by the United States ($24.8 billion) and Japan ($19.1 billion), when comparing the total imports of electrical equipment, the gap between China ($118.6 billion) and the U.S. ($113.4 billion) diminishes.

Mineral fuels and oils, which includes petroleum and gas, are another key commodity traded between the three financiers and the Southeast Asia region and were the second-largest import from Southeast Asia for both China and Japan. Collectively, the 11 countries of Southeast Asia exported over $95 billion worth of oil resources to China and Japan in 2024, while the U.S. and China combined exported almost $36 billion to the region.

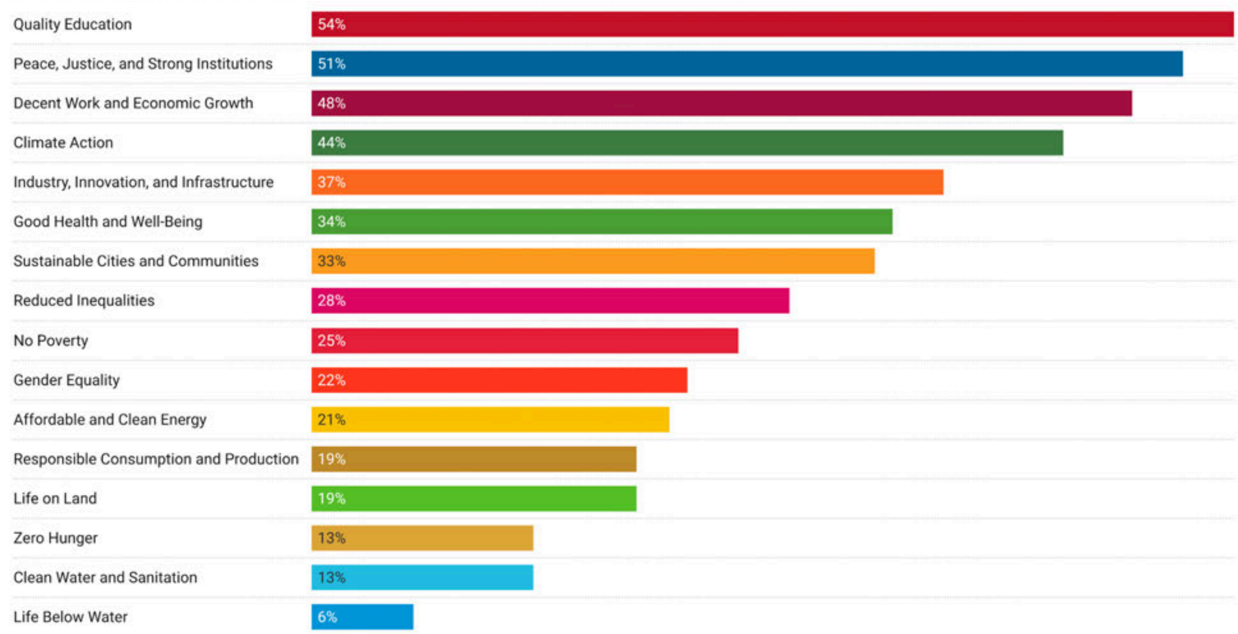
The basket of commodities imported by the U.S. from Southeast Asia in 2024 included consumer goods like furniture, clothing and optical and photographic equipment. In comparison, China imported more raw materials or intermediate commodities, ranging from iron and steel to ores and oils, as well as food including fruit and nuts. Japan had a blend of imports in 2024, with its top ten list including both primary commodities as well as finished goods for the consumer market.

Perceptions of the U.S., Japan and China

Southeast Asian elite perceptions on development and partners

Figure 7. Which development goals were top priorities for leaders in Southeast Asia in 2024?

Percentage of respondents who selected a goal as one of the top 6 most important problems for their country



Notes: This figure displays the percentage of Southeast Asian leaders who selected a goal as one of the six most important problems for their country to solve from the list of 17 United Nations Sustainable Development Goals in 2024. All data is weighted; see the Technical Appendix of the Listening to Leaders 2025 report for more details (Custer et al. 2025). Source: AidData's 2024 Listening to Leaders Survey.

Using data from AidData's 2024 *Listening to Leaders (LtL)* Survey, when asked to identify their top six development priorities among the Sustainable Development Goals (SDGs), leaders in government, the private sector, civil society, media, and universities across Southeast Asia[5] identified Quality Education (SDG 4, 54%), Peace, Justice and Strong Institutions (SDG 16, 51%) and Decent Work (SDG 8, 48%) as their top priorities. This finding is aligned with global trends, as over 50% of leaders surveyed consistently identified better schools, strong institutions and more jobs as top development priorities in the 2017, 2020 and 2024 waves of the *Listening to Leaders* survey.

[5] Excludes Brunei and Singapore. AidData's *Listening to Leaders* flagship survey has been fielded in low- and middle-income countries since 2014.

Figure 8. The 10 most active, influential, and helpful development partners from 2020-2024, according to leaders in Southeast Asia

Footprint

Development Partner	Percent of Respondents
World Bank	54.5%
UNDP	43.6%
ADB	41.9%
USA	41.4%
Australia	37.3%
UNICEF	35.4%
WHO	31.9%
Japan	30.7%
Germany	30.1%
EU	28.4%

Influence

Development Partner	Percent of Respondents
UNESCO	90.5%
Japan	89.6%
IMF	87.9%
USA	85.5%
South Korea	85.4%
EU	84.3%
World Bank	83.8%
ADB	83%
UNICEF	81%
WHO	79.6%

Helpfulness

Development Partner	Percent of Respondents
South Korea	97.3%
UN ILO	92.4%
UNDP	91.4%
FAO	91%
ADB	89.1%
Germany	89.1%
UNESCO	88.4%
USA	88.4%
World Bank	86.2%
EU	86%

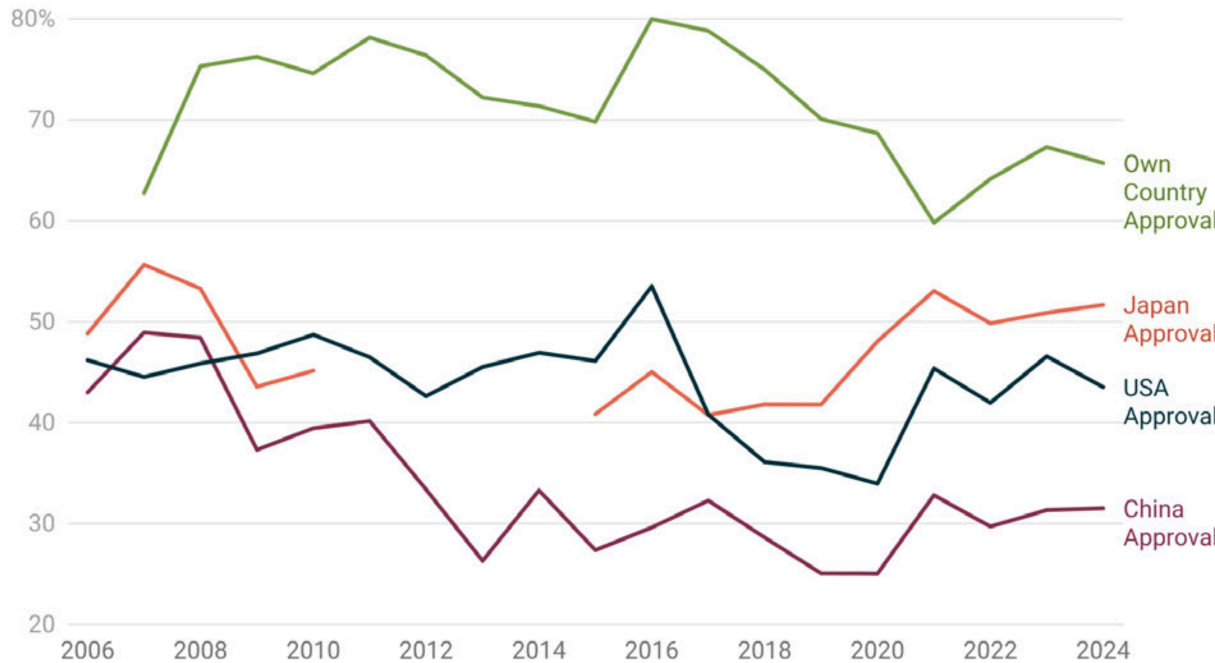
Notes: "Footprint" represents the percentage of Southeast Asian leaders who reported receiving advice or assistance from a development partner during the period from 2020 to 2024. "Influence" and "helpfulness" show the top 10 development partners rated as quite or very influential or helpful, respectively, by Southeast Asian leaders in 2024 who reported receiving advice or assistance from them. Only development partners with a sample size of 30 respondents or more were included. Percentages take into account non-response weights. Source: AidData's 2024 Listening to Leaders Survey.

The Listening to Leaders survey provides three indicators that shed light on a development partner's footprint, its perceived influence on domestic development policies, and its perceived helpfulness in implementing development projects. In the 2024 survey wave, respondents from Southeast Asia placed both the United States and Japan among the top ten development partners on the footprint and influence metrics. On footprint, the United States ranks fourth overall and Japan eighth. When focusing only on bilateral financiers, the United States rises to the top position, followed by Australia and Japan.

Perceptions of influence reveal a similar pattern. Japan ranks second overall, following closely behind UNESCO, while the U.S. ranks fourth. Among bilateral financiers, Japan takes the top spot, and the U.S. ranks second, followed by South Korea. On perceived helpfulness, the U.S. again appears among the top ten development partners, ranking eighth overall. China does not feature among the top ten on any of the three indicators. This divergence suggests that large financial commitments alone do not necessarily translate into perceived influence or operational helpfulness in the eyes of those who make and shape policy in Southeast Asia.

Public perceptions of the U.S., Japan and China in Southeast Asia

Figure 9. Public approval in Southeast Asia of major powers versus own country's government, Gallup World Poll



Notes: This figure shows the percentage of respondents in Southeast Asia who approved of the job performance of their own government or that of a selected foreign power. Responses are shown separately for respondents' own government (purple), China (red), Japan (yellow), and the U.S. (blue). Japan was not included as a response option in the Gallup survey from 2010 to 2015. All responses are weighted across nine Southeast Asian countries; Brunei and Timor-Leste were not included in the Gallup sample. See the appendix for further details on country-year missing data. Source: Gallup World Poll, 2006-2024.

Public opinion data from the Gallup World Poll reveals how Southeast Asian respondents view their own governments as well as the U.S., Japan and China between 2006 and 2024. Respondents consistently express higher approval of their own governments than of any external power. Domestic approval, however, dips noticeably around 2020, coinciding with the onset of COVID-19 and the associated economic and public-health disruptions. The decline in domestic approval is accompanied by a modest uptick in approval of the United States, China, and Japan, before domestic approval partially rebounds in the years that follow.

China experiences the sharpest and most sustained decline in approval across the series. From the late 2000s into the mid-2010s, approval of Chinese leadership fell from the mid-40 percent range to the mid-20s before stabilizing in subsequent years. This downward shift stands out not only for its magnitude but also for its persistence, suggesting a long-term erosion of China's standing among Southeast Asian publics despite its growing economic footprint in the region.

Although China's Belt and Road Initiative was launched in 2013, the timing does not correspond to a clear shift in popular perceptions of Chinese leadership. Approval remains relatively stable from 2013 onward, neither recovering from earlier declines nor falling further. While this stability does not preclude the possibility that approval might have deteriorated further in the absence of the BRI, the data do not indicate a positive inflection associated with the initiative's rollout.

Japan emerges as the most consistently approved external partner. Across nearly the entire period, where data is available, approval of Japanese leadership remains above that of both the U.S. and China. The United States follows a more variable trajectory. Approval of U.S. leadership rose sharply in the mid-2010s before declining toward the end of the decade. The lowest point in U.S. approval was in 2020, after which approval began to recover, reaching levels near 50 percent by 2024.

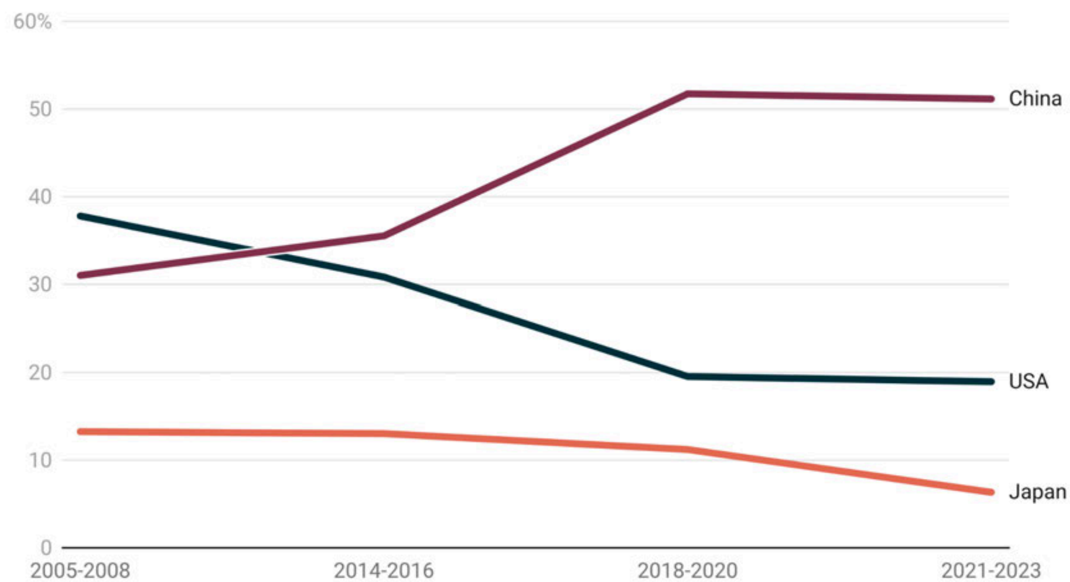
Data from the Asian Barometer Survey (ABS) reveals public opinion on influence[6] in Southeast Asia diverges from leaders' views captured in AidData's *Listening to Leaders* survey. In the earlier waves of the survey, roughly covering the period from 2005 to 2016, the U.S. and China were comparable in perceived influence among respondents (around 35%), with Japan trailing behind (13%). Beginning around 2018, these trajectories diverge: China's perceived influence rises, while perceptions of U.S. and Japanese influence decline. By the most recent wave, China is viewed as the most influential (over 50%) external actor of the three comparators.

Although China grew in perceived influence, Southeast Asian respondents were not equally attracted to Beijing's model of development. While Japan's perceived influence declines modestly over survey waves, its standing as a preferred development model remains relatively stable. Across survey waves, the U.S. model of development maintains a level that is broadly comparable to the way respondents perceive China, suggesting that influence and normative appeal do not always move in tandem.

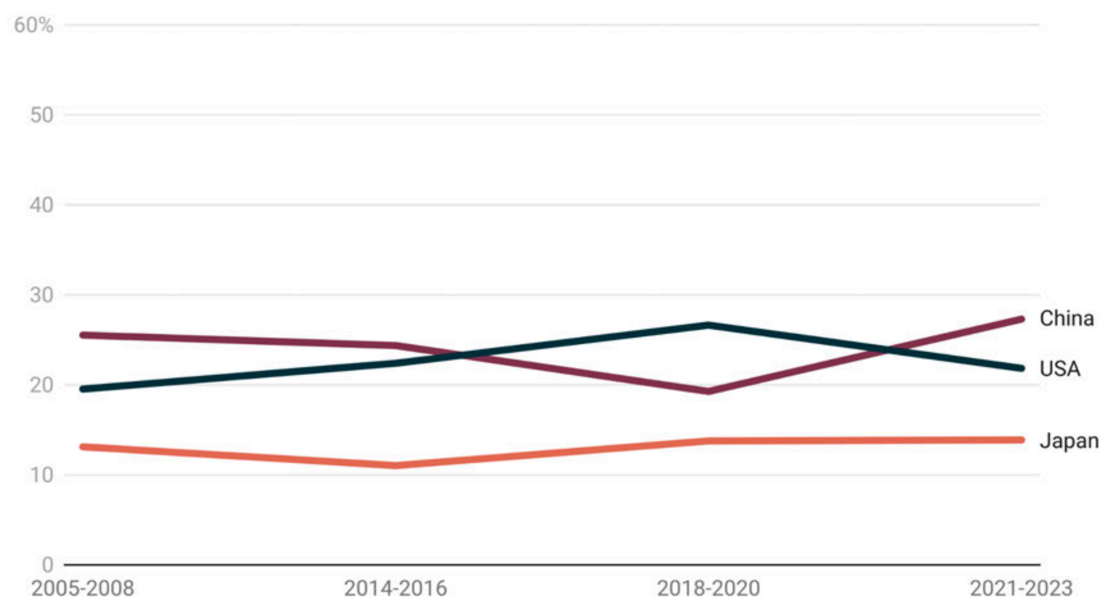
[6] Note that the ABS measure of influence differs from AidData's LtL survey. The ABS asks, "Which country has the most influence in Asia?" In contrast, LtL first identifies which development partners have provided advice or assistance for development, then follows up on how influential those specific partners were in shaping domestic development policy. For further details, see the appendix and the Listening to Leaders methodology.

Figure 10. Public perceptions in Southeast Asia of the most influential country versus their preferred model for future development

Perceived most influential country in Asia



Preferred model for future development



Notes: These figures show responses to two questions on the Asian Barometer Survey: "Which country has the most influence in Asia?" and "Which country should be a model for your own country's future development?". Responses for each question were aggregated using survey weights across all Southeast Asian countries included in each wave. Brunei, Laos, and Timor-Leste are not included in any survey wave, and other countries are not present in all waves. See the appendix for the list of countries surveyed in each wave. Source: Asian Barometer Survey, 2005-2023

Policy recommendations

- The U.S. and Japan can partner as force multipliers in Southeast Asia.
  Japan's infrastructure-heavy official finance portfolio makes it an ideal anchor for deeper U.S.-Japan coordination in Southeast Asia. Japan often matches or exceeds China's proportional effort relative to GDP, maintains a strong presence in lower-middle-income countries, and is consistently perceived as influential and helpful. U.S. policy should treat Japan as a force multiplier: co-financing major infrastructure with the Japan International Cooperation Agency (JICA), and aligning DFC operations with Japanese pipelines. This would allow the United States to collaborate with an already trusted regional infrastructure partner rather than building a parallel system from the ground up.

- Offer a credible alternative to volatile Chinese finance, not just a critique.
  China's official finance to Southeast Asia is both dominant and volatile, characterized by large surges and sharp contractions. At the same time, China's large financial footprint does not always translate into top-tier rankings on perceived influence or helpfulness among leaders, or the preferred development model in the region. The U.S. and Japan can avoid framing their offers solely in opposition to China and instead emphasize reliability, transparency, and long-term partnership. Rather than trying to replicate China's loan-heavy model, the U.S. and Japan can crowd in private capital for high-quality infrastructure, especially in energy transition, digital connectivity, and resilient transport, where U.S. firms and Japanese standards have a competitive edge.

- Align with domestic legitimacy: work with, not around, Southeast Asian governments.
  Public opinion data show that Southeast Asians consistently approve of their own governments at higher rates than any external power, even when domestic approval dips during crises like COVID-19. U.S. and Japanese foreign policy would benefit from treating this as a design principle – programs that visibly strengthen domestic institutions, deliver tangible local benefits, and respect national development strategies are more likely to enjoy local buy-in, endure political cycles and outlast geopolitical swings.

Key themes from a related panel discussion

To solicit feedback and insights from experts on U.S., Japanese, and Chinese foreign policy, financing, and Southeast Asian cooperation, AidData hosted a panel discussion on March 26th, 2026 at the William & Mary Washington Center in D.C. that previewed this policy brief. The panel examined how the three financiers differ in the scale, approach, and strategic narratives underpinning their official finance in Southeast Asia. Below are some key takeaways.

- The growing shift in focus of official and development financing—from recipient-country development needs to the strategic interests of the financiers—was noted by panelists and members of the audience, with the most emphasis placed on sectors offering economic security and geopolitical advantage to the financier. However, panelists noted that alignment with local authorities remains essential for the successful delivery and sustainable impact of financing—but it is only meaningful where credible partner governments and a minimum political stability exists, as weak institutions, corruption and criminality can undermine the outcomes of financing. Panelists observed that China's tolerance of illicit activity has worsened these governance challenges, while the U.S. and Japan have developed tools and historically built conditions into financing to mitigate them.

- Panelists discussed Japan's development posture in Southeast Asia, which places a "free and open" Indo-Pacific region at the center of its strategy, and noted Japan's shift from traditional official development assistance (ODA) toward a broader approach of "cooperation" in the region. While this repositioning reflects the evolving geoeconomics and heightened competition in Southeast Asia, experts emphasized that Japan's policies should not be reduced to "China containment." Japan's focus on promoting a rules-based international order may position it to serve as a bridge, amid growing distrust of external development actors.

- Southeast Asia's intra-regional economic resilience—particularly through ASEAN—was also highlighted, with one panelist noting that a more connected ASEAN is a more secure ASEAN. Experts discussed efforts to integrate financial systems and migration policies to facilitate deeper regional integration. Historically, the U.S., Japan, and China have contributed to developing the institutions and infrastructure that support this integration. While cross-financier coordination and cooperation has remained limited, participants suggested that such collaboration may become increasingly necessary for regional resilience in an era of constrained resources. Panelists and audience members reflected on the evolving nature of U.S. official financing—where historical patterns may not fully predict future priorities—and closed with a salient question: what value propositions do the U.S., Japan, and China offer to Southeast Asia moving forward?

References

Asian Barometer Survey. (2026) Asian Barometer Waves 3-6. Hu Fu Center for East Asia Democratic Studies, College of Social Sciences, National Taiwan University. Data used by permission. Retrieved from: https://www.asianbarometer.org/datar?page=d10.

AidData. 2025. China's Loans and Grants to Low- and Middle-Income Countries, Version 1.0. Retrieved from [www.aiddata.org/data/chinas-loans-and-grants-to-low-and-middle-income-countries-dataset-1-0]

Burgess, B., Mathew, D., Custer, S. & Custer, J. (2024). *Securing Prosperity, Building Resilience: U.S. Economic Partnership in the Indo-Pacific*. Williamsburg, VA: AidData at William & Mary. Retrieved from: www.aiddata.org/publications/securing-prosperity-building-resilience-us-economic-partnership-in-the-indo-pacific

Custer, S., Horigoshi, A., Boer, B., and K. Marshall. (2025). Listening to Leaders 2025: Development cooperation over a decade of disruption. Williamsburg, VA: AidData at William & Mary. Retrieved from: https://www.aiddata.org/publications/listening-to-leaders-2025-development-cooperation-over-a-decade-of-disruption

Gallup. (2025). Gallup World Poll, 2006-2024 [Data set]. Washington, DC: Gallup Inc.

Horigoshi, A., Custer, S., Marshall, K., and B. Burgess. (2025). Prioritizing Agenda 2030: How do Global South leaders navigate trade-offs and assess relevance? Analytical Brief. Williamsburg, VA: AidData at William & Mary. September 2025. Retrieved from: https://www.aiddata.org/publications/prioritizing-agenda-2030

Mathew, D. and Custer, S. 2023. Aid in the National Interest: How America's Comparators Structure their Development Assistance. Williamsburg, VA: AidData at William & Mary. Retrieved from: https://docs.aiddata.org/reports/Gates_Forum_2023/volume_04/Aid_in_the_National_Interest__How_Americas_Comparators_Structure_their_Development_Assistance.html

OEC. (2025). The Observatory of Economic Complexity (OEC) database. https://oec.world/

OECD (2026) CRS: Creditor Reporting System (flows). https://data-explorer.oecd.org/

Pitakdumrongkit, K. (2023). *Geoeconomic Crossroads: The Strait of Malacca's Impact on Regional Trade*. The National Bureau of Asia Research. Retrieved from: https://www. nbr. org/publication/geoeconomic-crossroads-the-strait-of-malaccas-impact-on-regional-trade

Sakaki, A. (2025). Japan in Southeast Asia: Countering China's growing influence (SWP Research Paper 2025/RP 01). Stiftung Wissenschaft und Politik. https://www.swp-berlin.org/publikation/japan-in-southeast-asia-countering-chinas-growing-influence

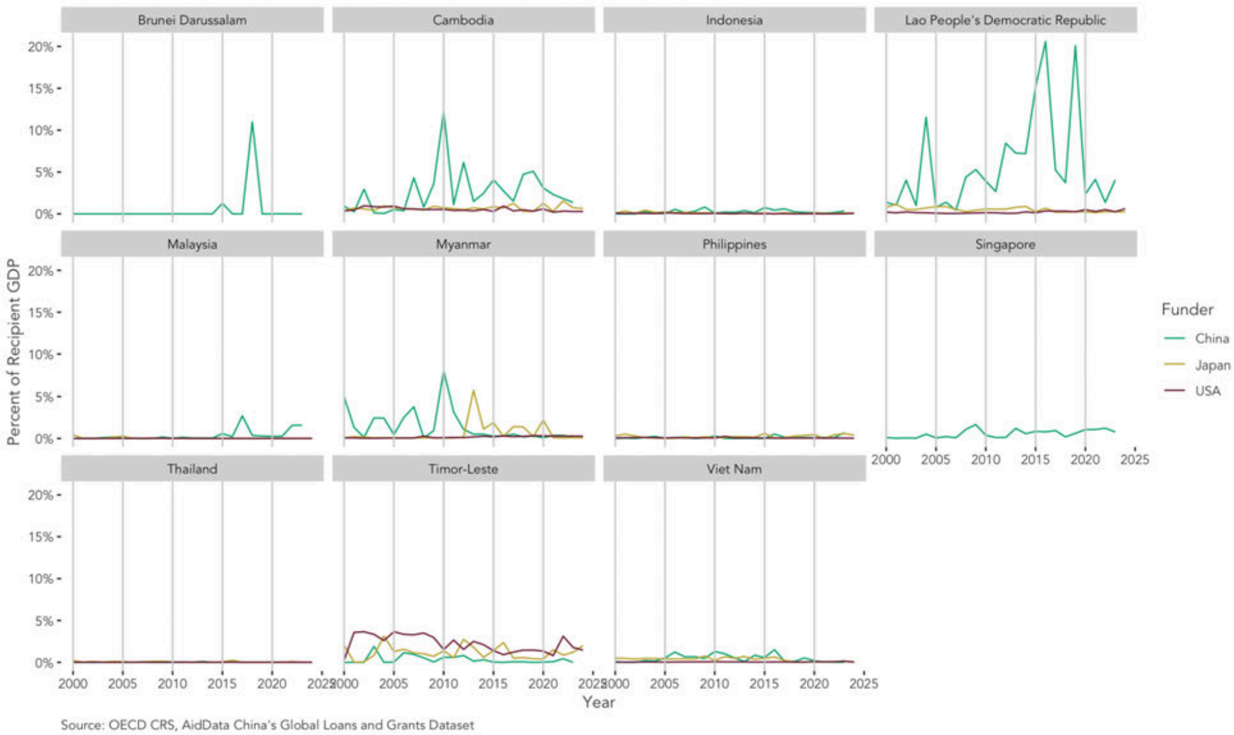
UN Comtrade. UN Statistics Division Trade Statistics Section. Accessed via: https://comtradeplus.un.org/TradeFlow

White House. (2025). *National Security Strategy of the United States of America*. Retrieved from: https://www.whitehouse.gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf

World Bank. (2025). World Bank country and lending groups (historical classifications). https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups

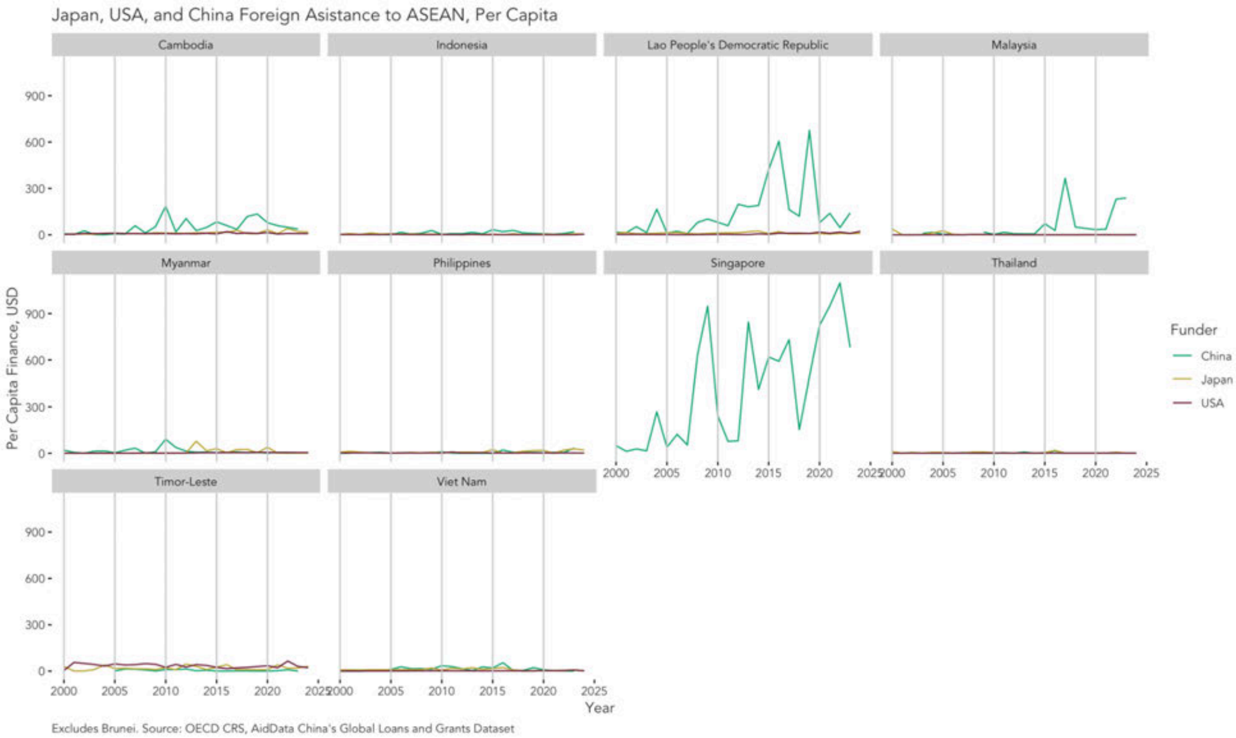
Appendix

Figure A1. U.S., Japan and China official financing commitments by country, as a share of recipient GDP, 2000-2023/4



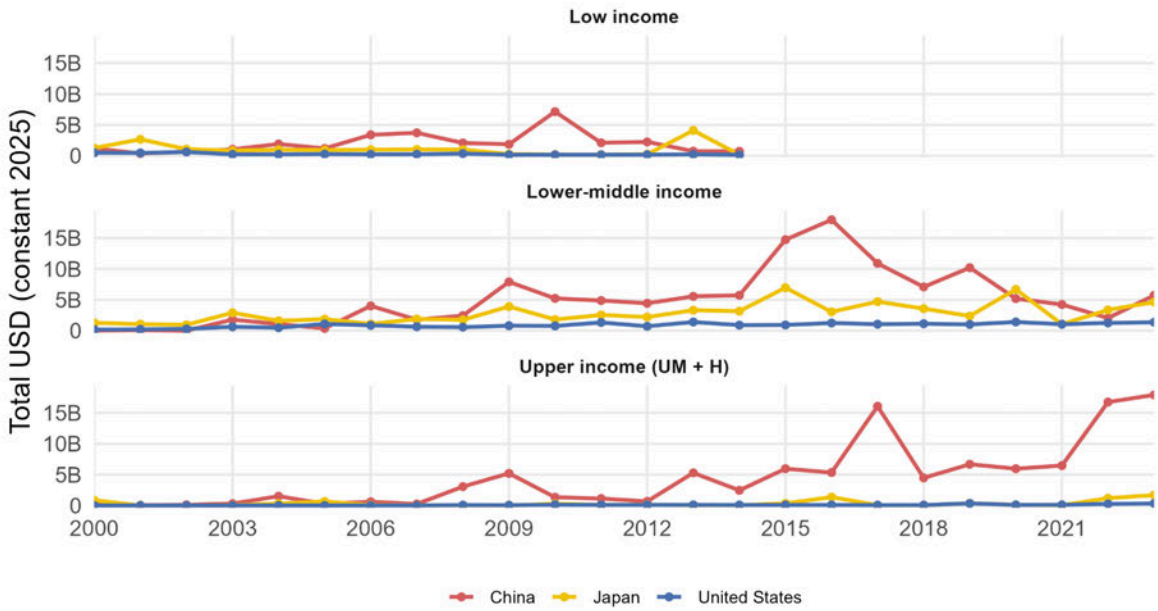
Notes: This figure displays the yearly value of official financing commitments from the U.S., Japan and China to 11 countries in Southeast Asia as a percentage of the recipient's GDP. Data for Japan and the U.S. is available through 2024, while data for China is available through 2023. Sources: OECD CRS; AidData's China Global Loans and Grants Dataset, Version 1.0; and World Bank, with calculations by AidData.

Figure A2. U.S., Japan and China official financing commitments by country per capita, 2000-2023/4



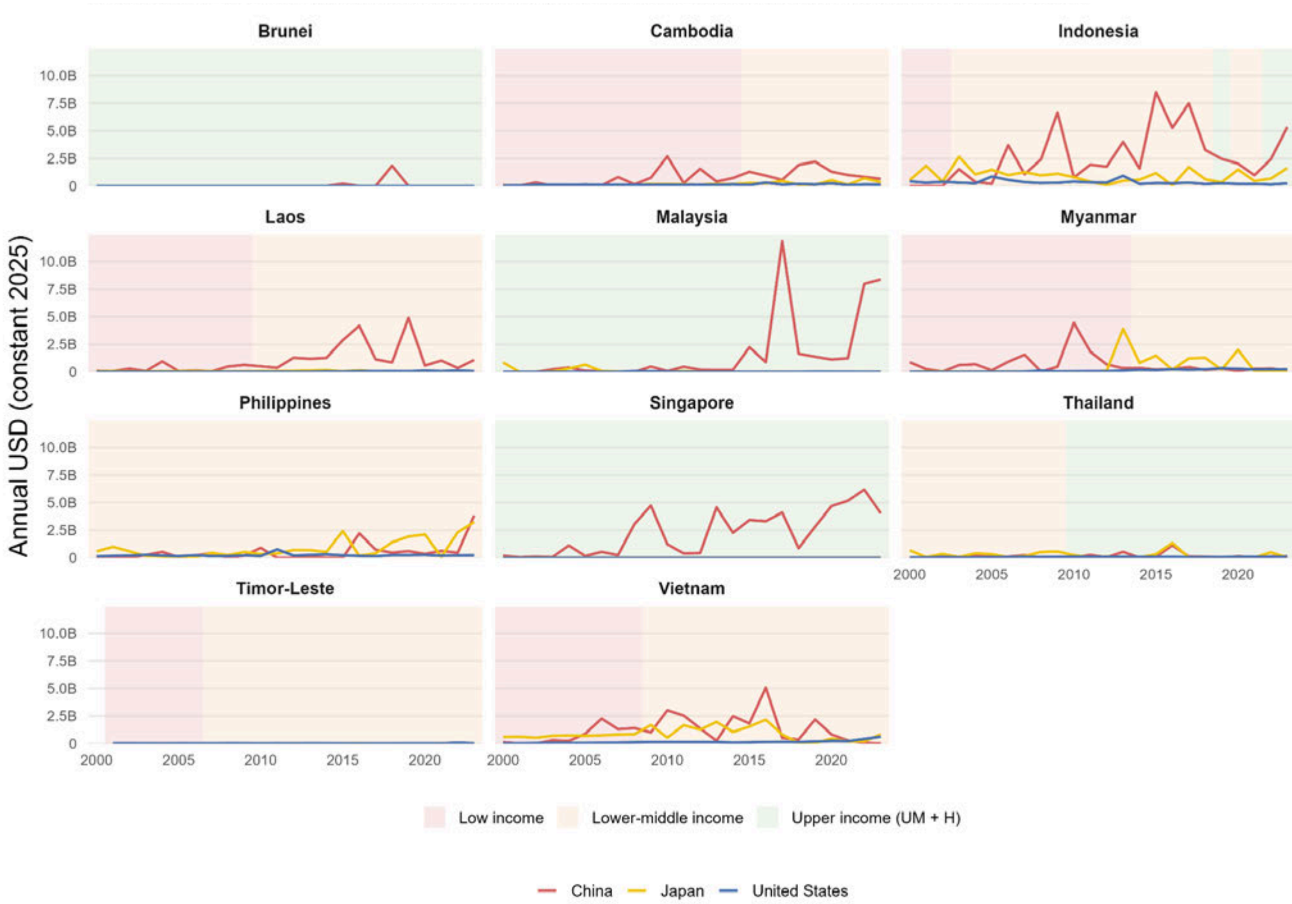
Notes: This figure displays the yearly value of official financing commitments per capita from the U.S., Japan and China to 11 countries in Southeast Asia. Data for Japan and the U.S. is available through 2024, while data for China is available through 2023. Sources: OECD CRS; AidData's China Global Loans and Grants Dataset, Version 1.0; and World Bank, with calculations by AidData.

Figure A3. U.S., Japan and China official financing commitments by World Bank income status, 2000-2023



Notes: This figure displays the annual official financing commitments from the U.S., Japan and China to Southeast Asia disaggregated by the recipient's World Bank income category, between 2000 and 2023. Sources: OECD CRS; AidData's China Global Loans and Grants Dataset, Version 1.0; and World Bank, with calculations by AidData.

Figure A4. U.S., Japan and China official financing commitments by country and World Bank income status, 2000-2023



Notes: This figure displays the annual official financing commitments from the U.S., Japan and China to each country in Southeast Asia disaggregated by the recipient's World Bank income category, between 2000 and 2023. Background shading indicates the country's World Bank income classification. Sources: OECD CRS; AidData's China Global Loans and Grants Dataset, Version 1.0; and World Bank, with calculations by AidData.

Figure A5. Sector comparison of official financing from the U.S., Japan and China in Southeast Asia, 2000-2023/4

Commitment values in millions of constant 2025 USD

Sector	Japan Commitments	Sector Share of Portfolio	U.S. Commitments	Sector Share of Portfolio	China Commitments	Sector Share of Portfolio
Action Relating to Debt	$4,729.89	4.93%	$257.54	0.87%	$480.86	0.18%
Administrative Costs of Donors	$0.00	0.00%	$930.23	3.13%	$0.00	0.00%
Agriculture, Forestry, Fishing	$4,478.62	4.67%	$759.87	2.56%	$3,342.43	1.28%
Banking And Financial Services	$437.28	0.46%	$1,016.72	3.42%	$46,346.00	17.71%
Business And Other Services	$100.31	0.10%	$657.11	2.21%	$7,453.76	2.85%
Communications	$690.01	0.72%	$116.57	0.39%	$13,577.80	5.19%
Development Food Assistance	$80.41	0.08%	$1,435.06	4.83%	$12.37	0.00%
Disaster Prevention And Preparedness	$731.16	0.76%	$347.32	1.17%	$115.39	0.04%
Economic Infrastructure And Services	$0.00	0.00%	$3.82	0.01%	$0.00	0.00%
Education	$2,833.84	2.96%	$1,905.67	6.42%	$345.84	0.13%
Emergency Response	$493.68	0.51%	$2,541.16	8.56%	$188.08	0.07%
Energy	$9,413.67	9.82%	$485.61	1.64%	$69,838.46	26.68%
General Budget Support	$7,041.35	7.34%	$0.00	0.00%	$0.00	0.00%
General Environmental Protection	$1,715.81	1.79%	$1,985.57	6.69%	$25.09	0.01%
Government And Civil Society	$1,135.20	1.18%	$5,808.69	19.56%	$497.36	0.19%
Health	$2,143.49	2.24%	$2,485.24	8.37%	$2,212.92	0.85%
Industry, Mining, Construction	$1,488.40	1.55%	$386.78	1.30%	$59,626.64	22.78%
Other Commodity Assistance	$209.72	0.22%	$0.00	0.00%	$0.66	0.00%

Sector	Japan Commitments	Sector Share of Portfolio	U.S. Commitments	Sector Share of Portfolio	China Commitments	Sector Share of Portfolio
Other Multisector	$5,558.59	5.80%	$1,014.53	3.42%	$5,145.33	1.97%
Other Social Infrastructure And Services	$832.45	0.87%	$1,320.61	4.45%	$2,237.42	0.85%
Population Policies/Programmes And Reproductive Health	$83.63	0.09%	$3,687.48	12.42%	$0.00	0.00%
Production Sectors	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
Reconstruction Relief And Rehabilitation	$1,029.61	1.07%	$748.15	2.52%	$14.99	0.01%
Social Infrastructure And Services	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
Trade Policies And Regulations	$432.31	0.45%	$323.20	1.09%	$1,081.84	0.41%
Transport And Storage	$42,582.66	44.42%	$1,016.92	3.42%	$45,454.14	17.36%
Unallocated/Unspecified	$1,066.99	1.11%	$110.21	0.37%	$2,325.50	0.89%
Water Supply and Sanitation	$6,558.76	6.84%	$351.16	1.18%	$1,437.25	0.55%

Notes: This table displays the total value of commitments to Southeast Asia by sector, from 2000-2023/2024. Sectors are derived from the OECD CRS DAC classification system. Data for Japan and USA is available through 2024, while data for China is available through 2023. Sources: OECD CRS, AidData China Global Loans and Grants Dataset.

Public Opinion Data: Gallup World Poll

The Gallup World Poll (GWP) is a survey that measures public opinion on a wide range of economic, political, and social issues across countries worldwide. Conducted annually since the mid-2000s, it provides nationally representative data on citizens' evaluations of governance, economic conditions, and international actors. In this study, we draw on GWP data for the years 2006–2024, focusing on the question: "Do you approve or disapprove of the job performance of the leadership of [China OR the United States OR Japan OR own country]?" This measure captures broad public sentiment toward the leadership of the specified country and serves as an observable indicator of attitudinal responses to that country's leadership. Respondents can answer "Approve," "Disapprove," "Don't Know," or "Refuse." We generate a binary variable coded as 1 if the respondent approves of, for example, China's leadership and 0 if the respondent disapproves or answers "Don't Know." We exclude respondents who refuse to answer. We treat "Don't Know" responses as substantively distinct from "Refused," reflecting non-approval toward an abstract political actor rather than item nonresponse. Japan was not included as an option in the Gallup survey from 2010–2015. Japan is not consistently included as a core country of interest in the Gallup survey, and its inclusion varies across years, whereas China and the United States are treated as primary reference countries and therefore have full coverage. All responses are weighted across nine Southeast Asian countries; Brunei and Timor-Leste were not included in the sample. Table A1 shows all missing years by country for all data used in the analysis.

Table A1. Missing years by country, Gallup World Poll

Country	China Approval	Japan Approval	Own Govt Approval	US Approval
Cambodia	None	2011–2014	2006, 2018–2024	None
Indonesia	None	2011–2014	2006	None
Laos	2009–2010, 2012–2016, 2018	2009–2016, 2018	2006–2007, 2009–2010, 2012–2016, 2018–2024	2009–2010, 2012–2016, 2018
Malaysia	2013, 2016–2017	2011–2014, 2016–2017	2006, 2016–2017	2013, 2016–2017
Myanmar	2006–2011	2006–2014	2006–2011	2006–2011
Philippines	None	2011–2014	2006	None
Singapore	2012–2013, 2020	2011–2014, 2020	2006, 2013, 2020	2012–2013, 2020
Thailand	None	2011–2014	2006	None
Vietnam	2014, 2017	2011–2014, 2017	2006, 2014–2024	2014, 2017

Public Opinion Data: Asian Barometer Survey

The Asian Barometer Survey (ABS) is a cross-national public opinion survey of citizens' political values, attitudes, and perceptions related to democracy and governance across Asia. Conducted in multiple waves since the mid-2000s, it provides nationally representative data on topics such as governance, democracy, institutional trust, and views of foreign powers. In this study, we draw on Waves 3–6 of the ABS (2005–2023), based on data availability, focusing on two questions: "Which country has the most influence in Asia?" and "Which country should be a model for your own country's future development?" For the "influence" question, responses include the United States, China, India, Japan, Singapore, own country, and an "Other" category, as well as non-substantive responses such as "Do not understand," "Decline to answer," "Not applicable." A -1 value indicates a missing response. For the "future development" question, responses include 30 different countries (including China, the United

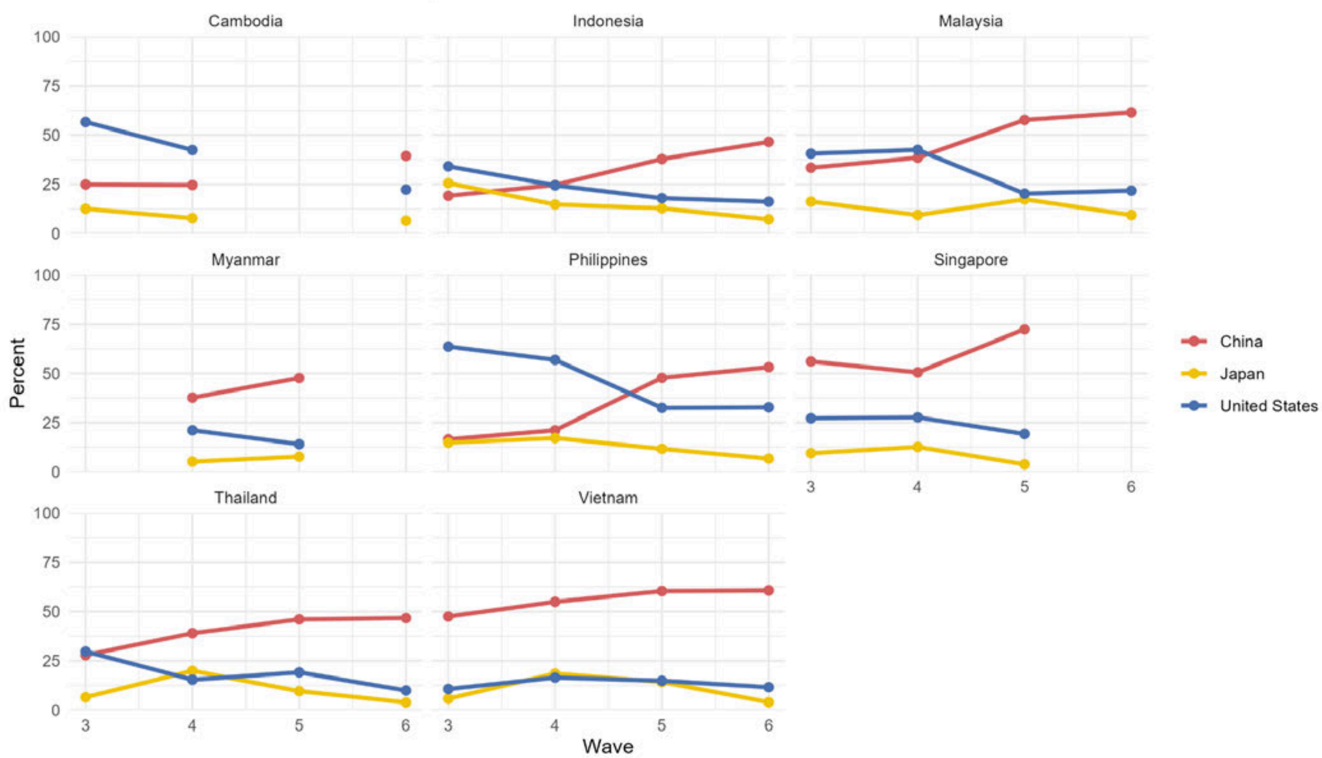
States, and Japan), some paired responses (for example, “United States and Japan”), and three regions: Northern Europe, European countries, and Eastern Europe. Other non-substantive responses also appear, such as “Do not understand,” “Decline to answer,” “Not applicable,” and -1 (for missing). In both cases, the percent is calculated among respondents who selected the United States, Japan, or China only.

We restrict the sample to Southeast Asian countries included in each wave and aggregate responses using survey weights. To ensure comparability across waves, we harmonize variable names (e.g., q156/q163/q174/Q173 for influence and q159/q167/q180/Q180 for model) into common variable labels. Substantive response categories are coded consistently across waves, while “Missing,” “Not applicable,” “Do not understand,” and “Decline to answer” are treated as missing (along with -1 values, which indicate a missing response) and excluded from analysis. We treat “Can’t choose” as a substantive response rather than item nonresponse, as it reflects a meaningful absence of preference. Excluding respondents who understood the question but did not choose a specific country would exaggerate support for countries where respondents indicated a clear preference. Table A2 shows which countries appear in each ABS wave used in our analysis.

Table A2. Countries surveyed by wave, Asian Barometer Survey

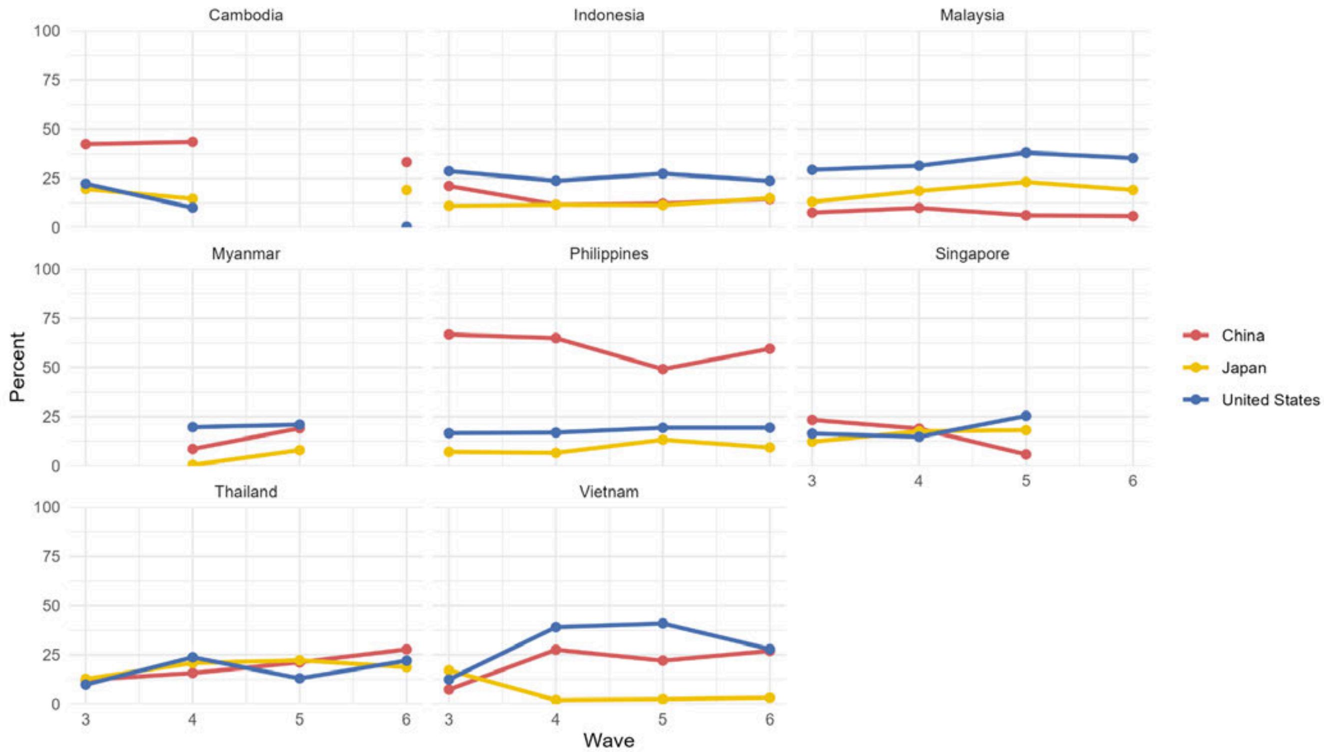
ABS Wave	Countries (year surveyed)
Wave 3	Cambodia (2012), Indonesia (2011), Malaysia (2011), Philippines (2010), Singapore (2010), Thailand (2010), Vietnam (2010)
Wave 4	Cambodia (2015), Indonesia (2016), Malaysia (2014), Myanmar (2015), Philippines (2014), Singapore (2014), Thailand (2014), Vietnam (2015)
Wave 5	Indonesia (2019), Malaysia (2019), Myanmar (2019), Philippines (2018), Singapore (2020), Thailand (2018), Vietnam (2018)
Wave 6	Cambodia (2021–2022), Indonesia (2021), Malaysia (2023), Philippines (2021), Thailand (2022), Vietnam (2022)

Figure A6. Responses to “Which country has the most influence in Asia?”, 2005-2023



Notes: This figure shows responses to a question on the Asian Barometer Survey: “Which country has the most influence in Asia?”. Responses for each question were aggregated using survey weights across all Southeast Asian countries included in each wave. Brunei, Laos, and Timor-Leste are not included in any survey wave, and other countries are not present in all waves. See Table A2 for the list of countries surveyed in each wave. Source: Asian Barometer Survey, 2005-2023.

Figure A7. Responses to "Which country should be a model for your own country's future development?", 2005-2023



Notes: This figure shows responses to a question on the Asian Barometer Survey:"Which country should be a model for your own country's future development?". Responses for each question were aggregated using survey weights across all Southeast Asian countries included in each wave. Brunei, Laos, and Timor-Leste are not included in any survey wave, and other countries are not present in all waves. See Table A2 for the list of countries surveyed in each wave. Source: Asian Barometer Survey, 2005-2023.