



PRESS RELEASE

24 May 2023

Results of the 2022 National Security Survey

The Amador Research Services (ARS) and Foundation for National Interest (FNI) conducted the second annual iteration of its Philippine National Security Survey from November to December 2022, which focused on an expanded menu of regional strategic issues ranging from US-China competition, the Russia-Ukraine conflict, and Philippine relations with external powers.

More than 1,200 respondents - covering civilian policy officers, uniformed personnel, academics, and policy-makers - shared their views on defense, foreign policy and geo-economics that have and will likely continue to inform the policy-planning of the Marcos administration. The key findings include:

1. High salience of non-traditional security issues such as food and energy security, as well as natural disasters and climate change mitigation. Territorial defense in the West Philippine Sea continues to be a top concern.
2. A majority preference for “neutrality” amid US-China competition, albeit with a strong level of support for measures addressing territorial defense and military modernization, such as the Enhanced Defense Cooperation Agreement (EDCA).
3. Since the 2021 survey, traditional partners such as the US, Australia, and Japan remain the top-preferred diplomatic partners. There is a growing but still minority interest in partnerships with China, which is strongly opposed by an equal number of respondents.
4. Continuing belief by Filipino experts on multilateralism, including in arrangements such as the Regional Comprehensive Economic Partnership (RCEP), the Association of Southeast Asian Nations (ASEAN), and the Indo-Pacific Economic Framework for Prosperity (IPEF).

For the assessments of the government’s capabilities and strategic processes, there is no clear-cut majority satisfaction across 9 parameters, including research, monitoring and evaluation, strategic analysis, and whole-of-government security planning - indicating the need to address institutional factors in defense and security modernization. A plurality of



respondents were satisfied with the performance of the national administration, with the exception of issues such as developing capabilities for state security agencies and pre-2023 policies in addressing external security threats.

On views about international organizations, a majority supports ASEAN's centrality on foreign policy but also favors cooperation with security initiatives outside the region, like Quadrilateral Security Dialogue (Quad) and Australia-UK-US (AUKUS) trilateral pact. There is also a strong interest in deepening engagement with the European Union (EU). Nearly half of them of the respondents agreed on deepening the US-Philippine alliance beyond current levels of cooperation, with an almost equal number ambivalent and only 10% opposed to further enmeshment.

Given the commitment of the present and last administrations toward “independent foreign policy” (IFP), the survey also unpacked national security elites’ views and found that IFP is interpreted as a form of strategic autonomy to pursue national interest and defense, rather than non-alignment per se. This suggests that respondents may be partial to transactional or issue-based cooperation internationally.

On the Philippines’ international economic relations, respondents expressed support for RCEP, IPEF, ASEAN single market, and the Philippines’ economic strategy are discussed. More than half of the respondents believe that the goal of the cooperation under an ASEAN single market is achievable however, but also view that progress on the matter has been slow.

There are nuances in preferred economic partners. Japan is viewed as a priority partner for digital technology & ICT, infrastructures, and renewable energies, while ASEAN countries dominate issues such as agriculture and blue-economy.

The findings of the survey were presented by Dr. Charmaine Willoughby and Mr. Julio Amador to the public during an expert roundtable on 18 April 2023. The survey report was written by [Julio Amador](#), Dr [Aries Arugay](#), [Deryk Baladjay](#), [Justin Baquisal](#), and Dr [Charmaine Misalucha-Willoughby](#).

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END



2022 National Security Survey

Presentation of Findings

18 April 2023

Mandaluyong, Metro Manila PH

Outline

- I. **Background of the Survey**
- II. **Profile of Respondents**
- III. **Part 1. Internal Assessments**
 - Top 10 National Security Threats
 - Functional Assessment of the States' Capabilities and Processes
 - Satisfaction with the Performance of the National Administration
 - Views on Civil-Military Relations
- IV. **Part 2. International Security**
 - Top and Least Choice of Partners
 - Views on Regional Associations & Organizations
 - Views on International Security Issues
 - Views on 'Independent' Foreign Policy
- V. **Part 3. International Economic Relations**
 - Views on RCEP
 - Views on CPTPP and IPEF
 - Views on the ASEAN Single Market
 - Views on the Philippines' performance in attracting FDI
 - The Philippines' Top Choices of Partner in Select Issues

Background of the Survey

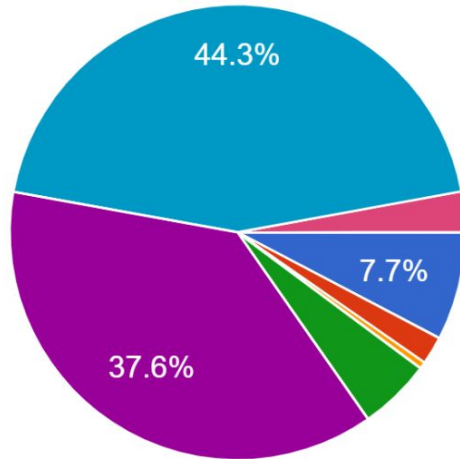
Security sector? *This is a niche group with key interest and hand in preserving and advancing Philippine national interest.*

Survey timeline? *The survey ran from November 7, 2022 to December 7, 2022.*

Sample? *As of 07 December 2022 (end of survey), sample size is at 1,248.*

Profile of Respondents

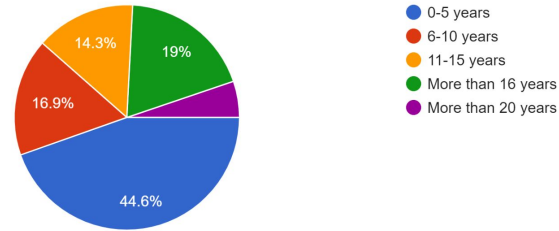
Nature of Profession



- Academe (University / Education)
- NGO / Non-Profit / Private think-tanks / Civil Society
- International Organization / Foreign Embassy or Consulate in Manila
- Government (Civilian bureaucracy)
- Government (Military)
- Government (Police, Coast Guard, and related services)
- Business sector

Profile of Respondents

Number of Years in Your Profession



Almost half (44.6%) of the respondents of the survey are relatively early in their career.

This is followed by those who have spent more than 16 years in their respective works (18.8%) and who have spent, at most, a decade in their positions (16.9%). This reflects Philippine demographics more broadly.



Part 1. Internal Assessments

- Top 10 National Security Threats
- Functional Assessment of the States' Capabilities and Processes
- Satisfaction with the Performance of the National Administration
- Views on Civil-Military Relations



Top 10

National Security Threats

Top Security Threats

1 *Human security threats*

2 *West Philippine Sea encroachments*

3 *Natural and Human Disasters*

4 *Terrorism & Violent Extremism*

5 *Cybersecurity*

6 *Disinformation & Fake News*

7 *Insurgency*

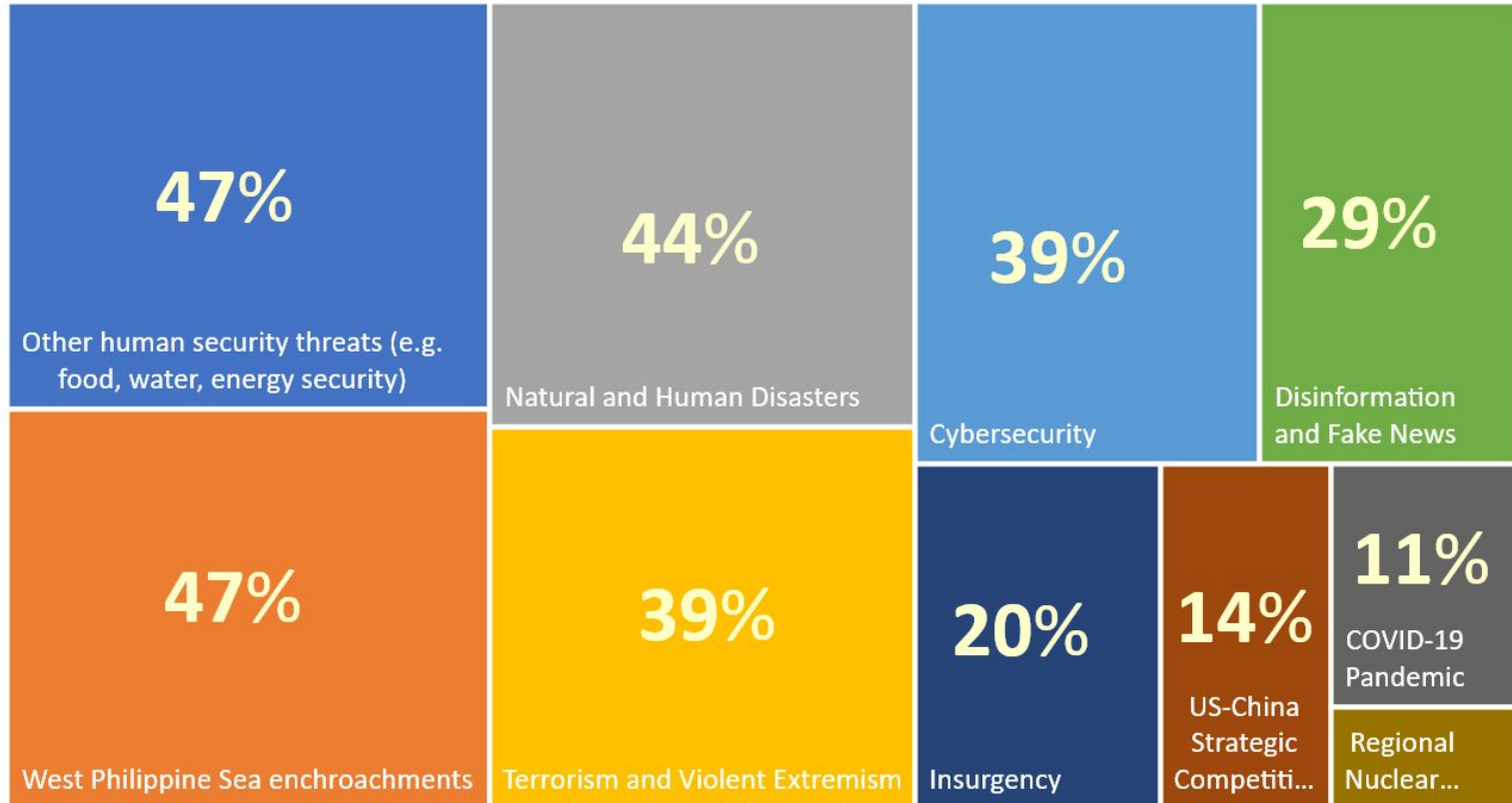
8 *US-China Strategic Competition*

9 *COVID-19 Pandemic*

10 *Regional Nuclear Proliferation*

- High perceptions of the importance of non-traditional security issues
- Consensus that external defense concerns (such as West Philippine Sea issues) trump the local insurgency problem
- Growing concerns about cyberthreats and disinformation/ influence operations

Perceived top pressing national security issues





Functional Assessment

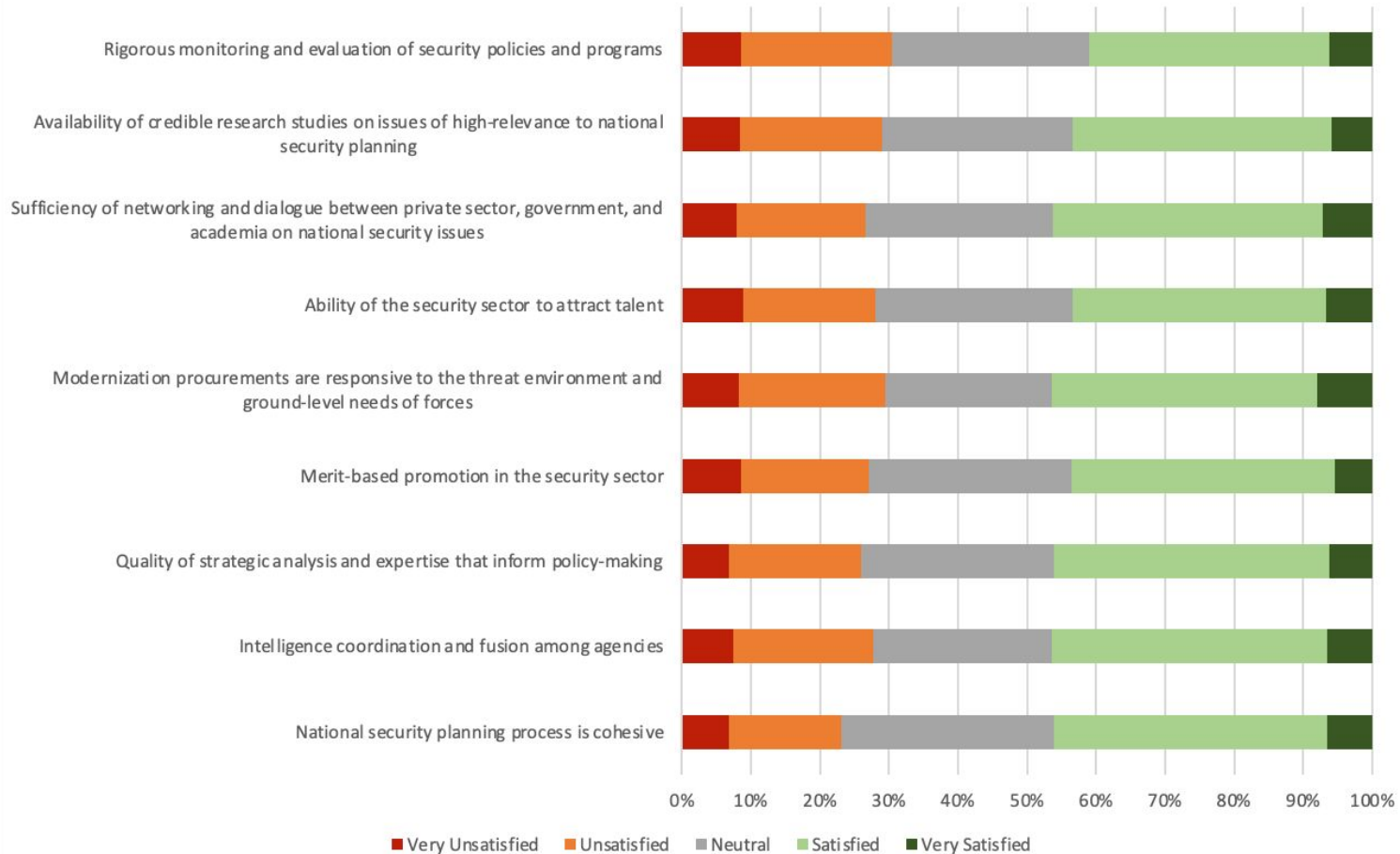
State's Capabilities and Processes

Functional Assessment of Philippine National Security

Satisfactory performance on:

1. *National security planning*
2. *Intelligence coordination and fusion among agencies*
3. *Quality of strategic analysis and expertise that inform policy-making*
4. *Merit-based promotion in the security sector*
5. *Modernization procurements*
6. *Ability of the security sector to attract talent*
7. *Sufficiency of networking and dialogue between private sector, government, and academia*
8. *Availability of credible research studies on issues of high-relevance to national security planning*
9. *Rigorous monitoring and evaluation of security policies and programs*

FUNCTIONAL ASSESSMENT OF THE STATES' CAPABILITIES AND PROCESSES



Functional Assessment of Philippine National Security

KEY FINDINGS

- No clear-cut majority satisfaction with the 9 parameters.
- Security sector should consider addressing agency-specific capabilities (e.g. intelligence, capability upgrade procurements) and sector-wide issues (e.g. monitoring and evaluation, cohesion of defense and security planning).
- Modernization should address other pillars of capability development as specified in the Revised AFP Modernization Law and other capability upgrade programs for other security agencies. Big ticket procurements need to have parallel improvements relating to “basic issues” like talent acquisition, the quality of strategic intelligence writing, and research.



Satisfaction

National Administration Performance

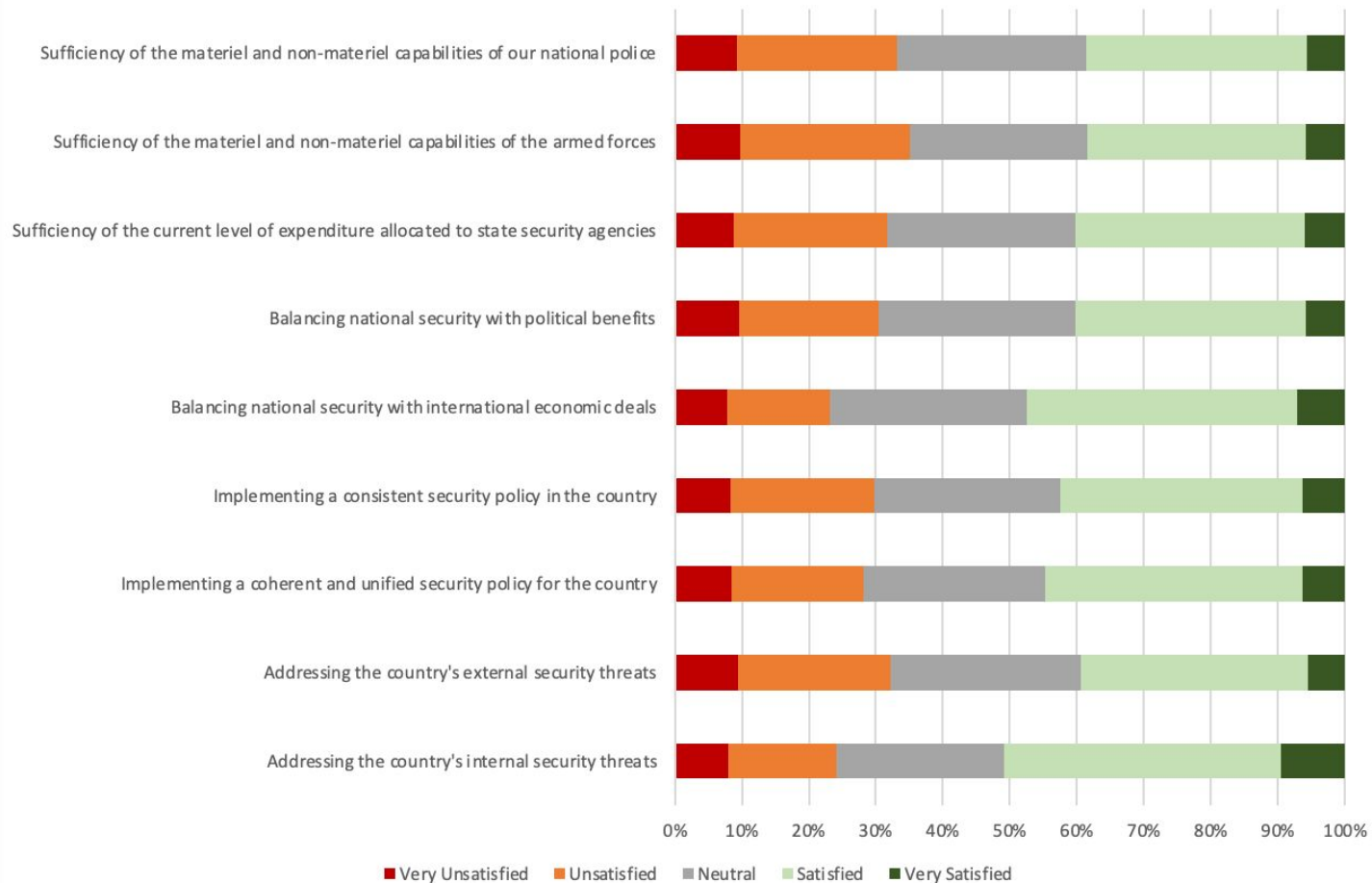
Satisfaction with the Performance of the National Administration

Satisfactory performance on:

1. *Addressing the country's internal security threats*
2. *Addressing the country's external security threats*
3. *Implementing a coherent and unified security policy for the country*
4. *Implementing a consistent security policy in the country*
5. *Balancing national security with international economic deals*
6. *Balancing national security with political benefits*
7. *Sufficiency of the current level of expenditure allocated to state security agencies*
8. *Sufficiency of the material and nonmaterial capabilities of the armed forces*
9. *Sufficiency of the material and non-materiel capabilities of our national police*

- Satisfaction rating is mixed. While a plurality of respondents are satisfied across all parameters, areas with significant dissatisfaction (combined unsatisfied and very unsatisfied) ratings include:
 - Sufficiency of capabilities of the armed forces and the police
 - Administration's way of addressing external security threats
- Only “addressing internal security threats” received a simply majority satisfaction rating.

SATISFACTION WITH THE PERFORMANCE OF THE NATIONAL ADMINISTRATION

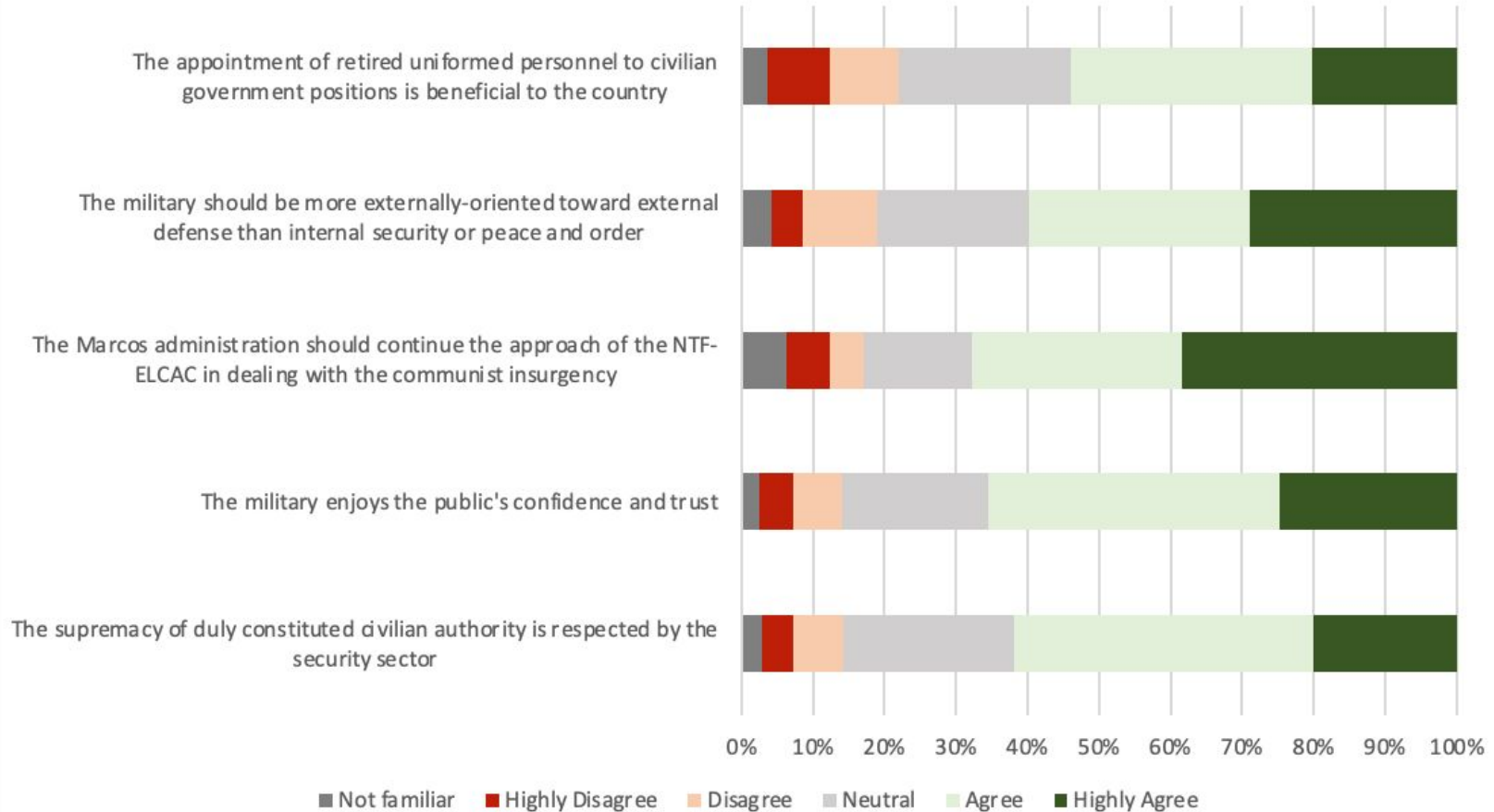




Views

Civil-Military Relations

CIVIL-MILITARY RELATIONS



Civil-Military Relations

Respondents agreed that:

1. *The supremacy of duly constituted civilian authority is respected by the security sector*
2. *The military enjoys the public's confidence and trust*
3. *The Marcos administration should continue the approach of the NTF-ELCAC in dealing with the communist insurgency*
4. *The military should be more externally-oriented toward external defense than internal security or peace and order*
5. *The appointment of retired uniformed personnel to civilian government positions is beneficial to the country*

Civil-Military Relations

Key Findings:

1. Majority believe that the appointment of retired uniformed personnel to civilian government positions is beneficial to the country. This raises questions about Security Sector Reform and civilian control of the government. The public may view the appointments differently.
2. Strong support for the National Task Force on Ending Local Communist Armed Conflict (NTF-ELCAC) as a whole-of-nation approach to insurgency.
3. Very little opposition to the strategic goal of orienting the Armed Forces of the Philippines toward external defense rather than internal security/ peace and order.



Part 2. International Security

- Top and Least Choice of Partners
- Views on Regional Associations & International Organizations
- Views on International Security Issues
- Views on 'Independent' Foreign Policy



Preferred & Least Preferred

Choice of Partners

Top Preferred Partners

1 *The United States*

2 *Japan*

3 *Australia*

4 *South Korea*

5 *China*

6 *The European Union*

7 *Indonesia*

8 *The United Kingdom*

9 *Russia*

10 *Malaysia*

- Strong preference for traditional allies and partners

The Philippines SHOULD forge or strengthen partnerships with the following countries/ entities:		The Philippines SHOULD NOT forge or strengthen partnerships with the following countries/ entities:	
	%		%
United States	69%	None (should engage all)	40%
Japan	69%	China	35%
Australia	44%	Russia	23%
South Korea	40%	United States	13%
China	39%	European Union (as a bloc)	8%
European Union (as a bloc)	38%	Japan	6%
Indonesia	34%	Taiwan	6%
United Kingdom	32%	Vietnam	6%
Russia	30%	India	6%
Malaysia	29%	South Korea	5%
Vietnam	28%	Malaysia	5%
Taiwan	27%	Germany	4%
India	25%	United Kingdom	4%
Germany	24%	Australia	4%
France	23%	France	4%
None	3%	Indonesia	3%

Least Preferred Partners

1 *China*

2 *Russia*

3 *The United States*

4 *The European Union*

5 *Japan*

6 *Vietnam*

7 *Taiwan*

8 *India*

9 *South Korea*

10 *Malaysia*

- **Growing interest in China as a security partner, but this topic deeply divisive** (nearly 40% agreed, 40% opposed). Historically negative perceptions of China within the security sector may be changing. In the long run, the assumed pro-US inclination of military and uniformed personnel is not assured.
- **Strong but minority (40%) sentiment to engage all countries** (friend to all, enemy to none).



Views

*Regional Associations &
International Organizations*

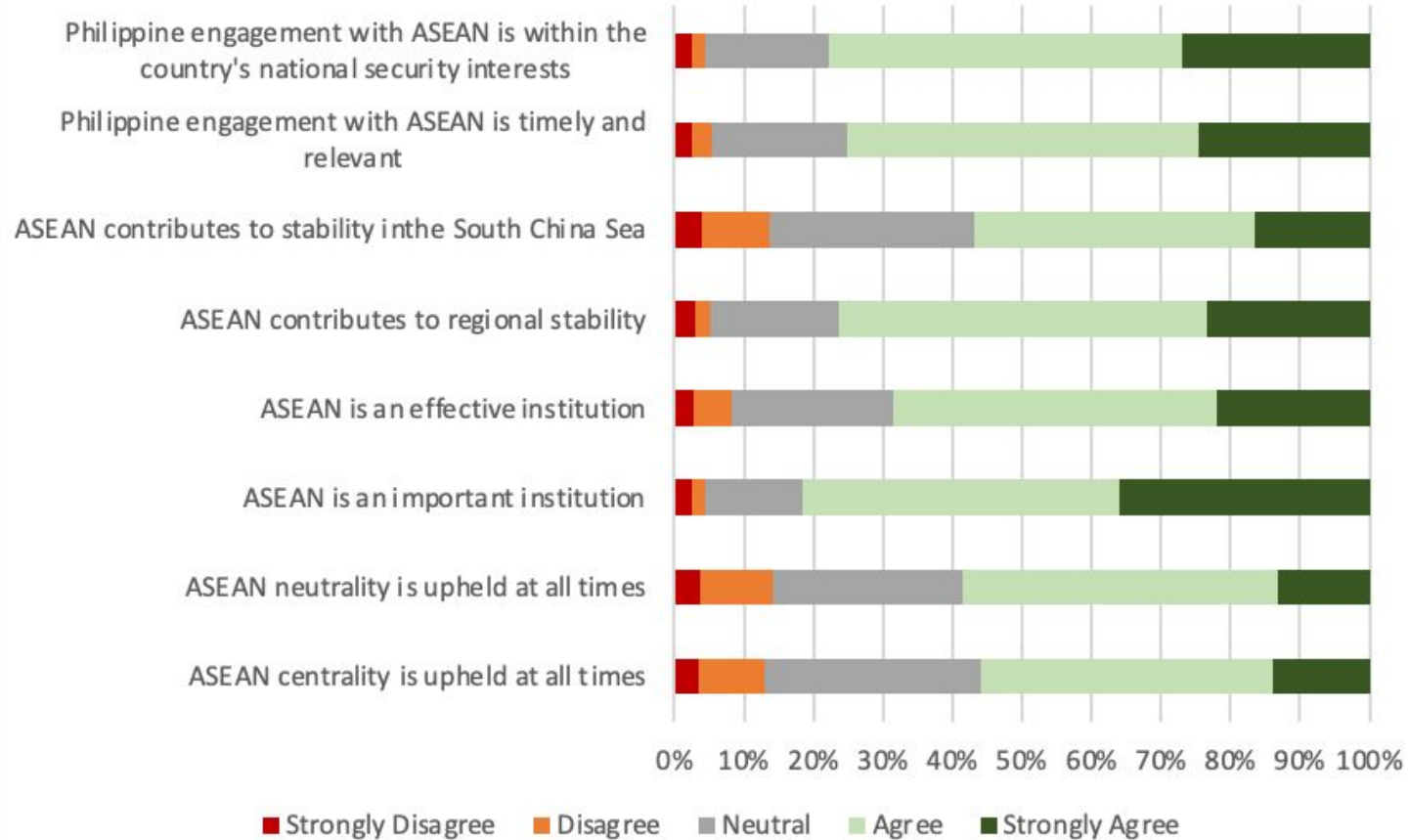




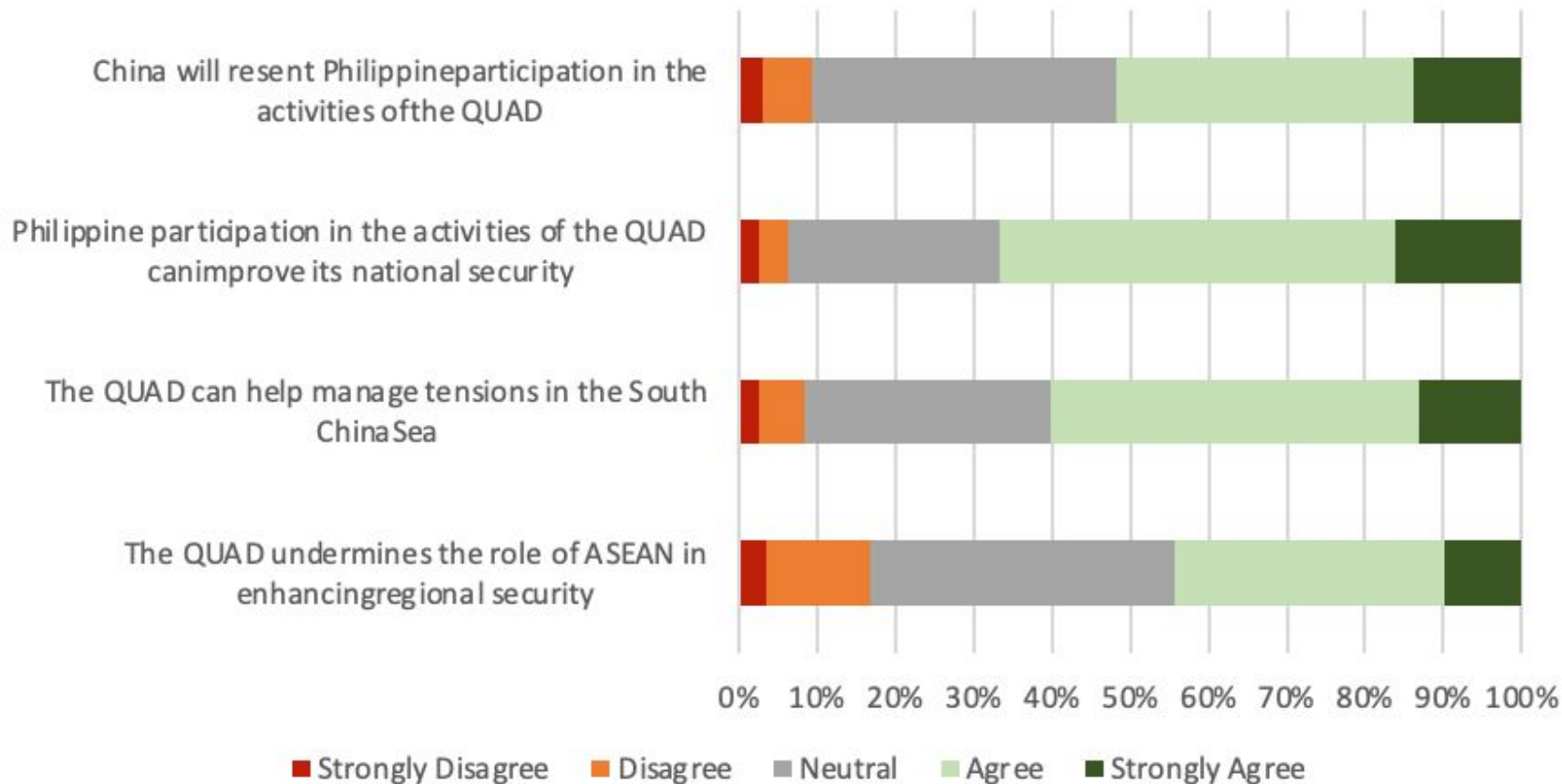
Key Findings:

- Strong support for ASEAN centrality in foreign policy, but there is a **growing willingness to support measures outside ASEAN (e.g. AUKUS) in pursuit of balancing against China.**
- Majority (>65%) perception that the Philippines can improve national security by engaging the QUAD and AUKUS. The strong preference is *despite* the assessment that China will resent the Philippines for supporting such measures.
- Majority (>60%) say PH-EU engagement in national interest. Slim majority (~51%) believe it will help manage South China Sea issues.

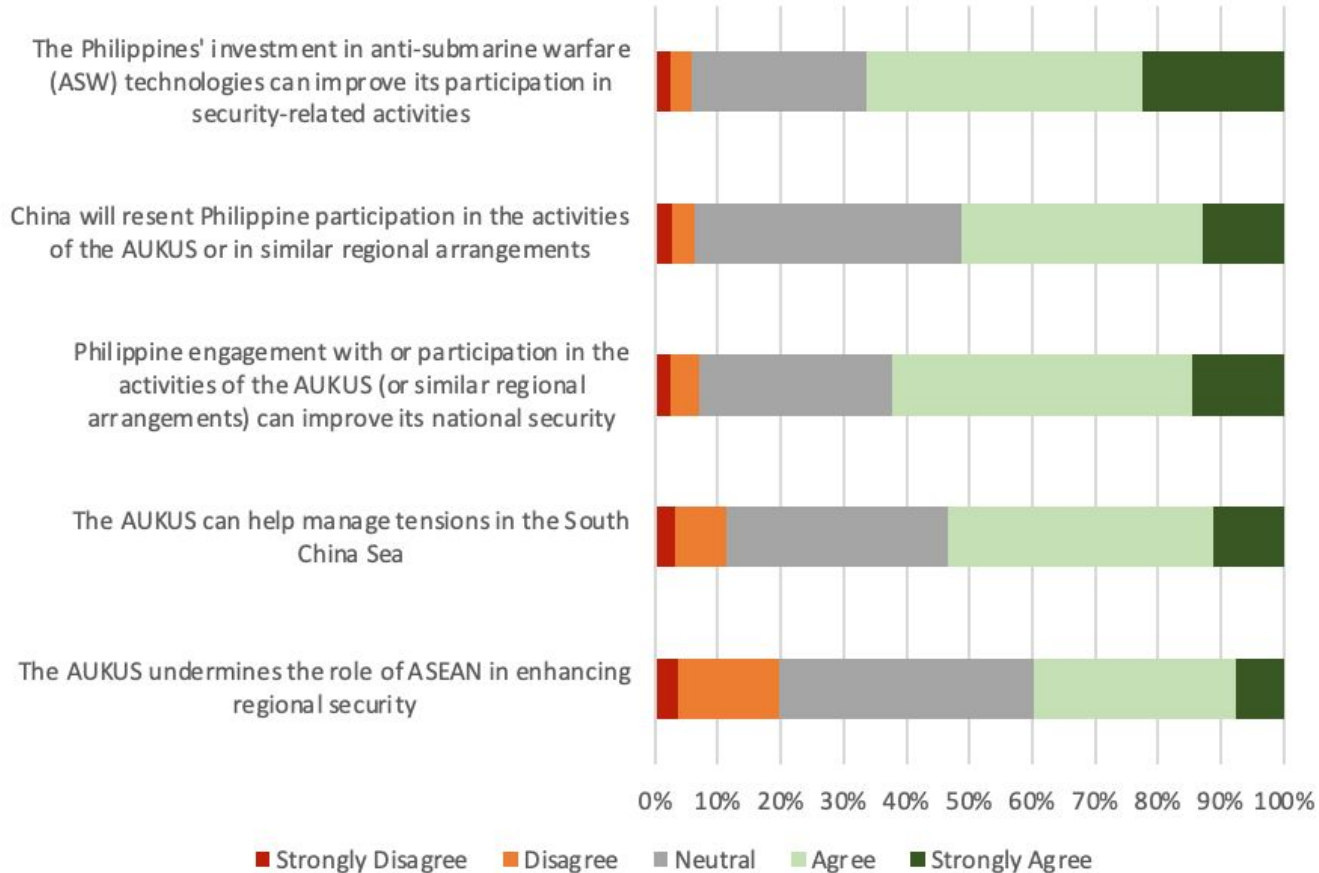
Perceptions of the Association of Southeast Asian Nations



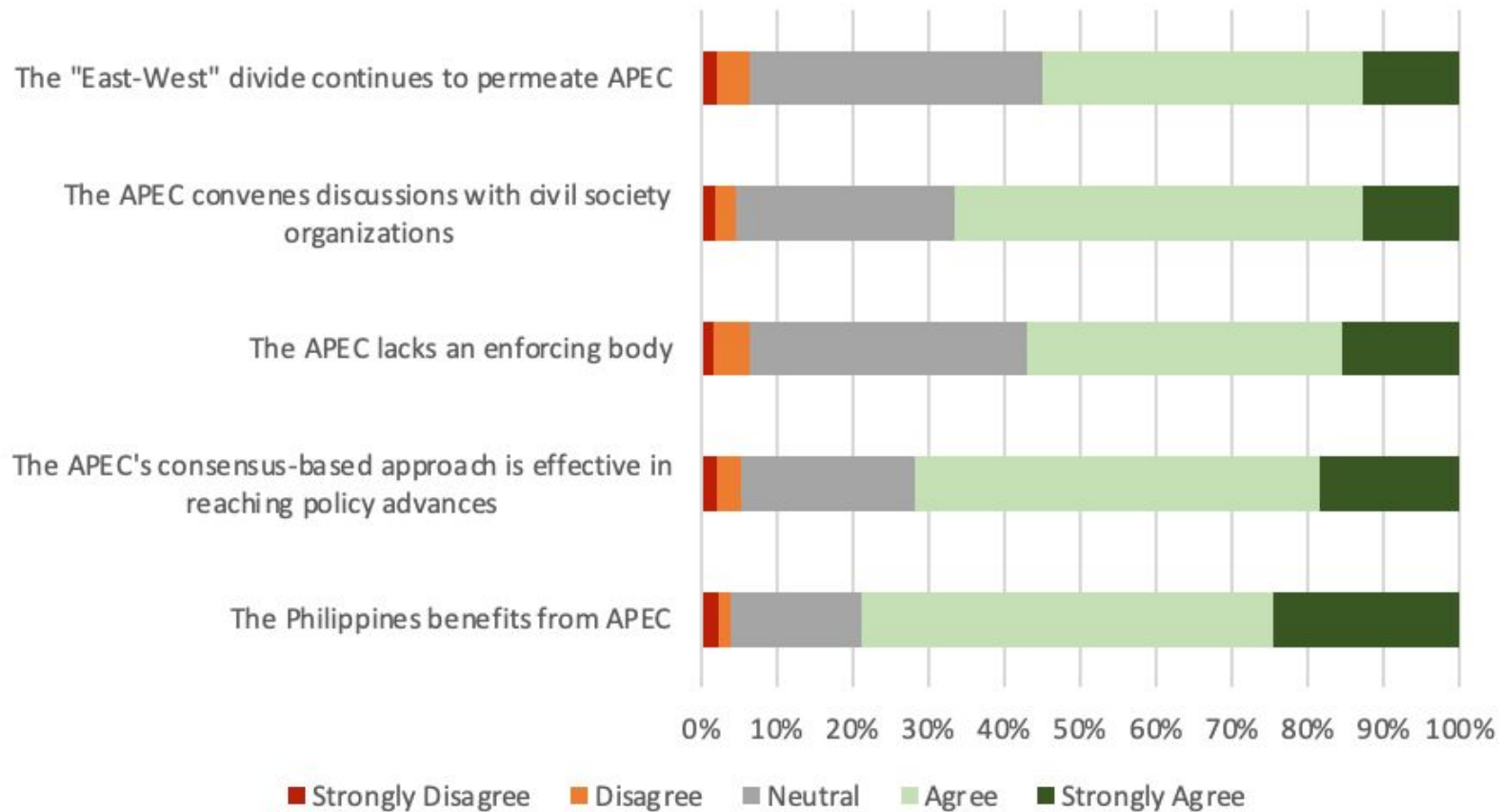
Perceptions of the Quad



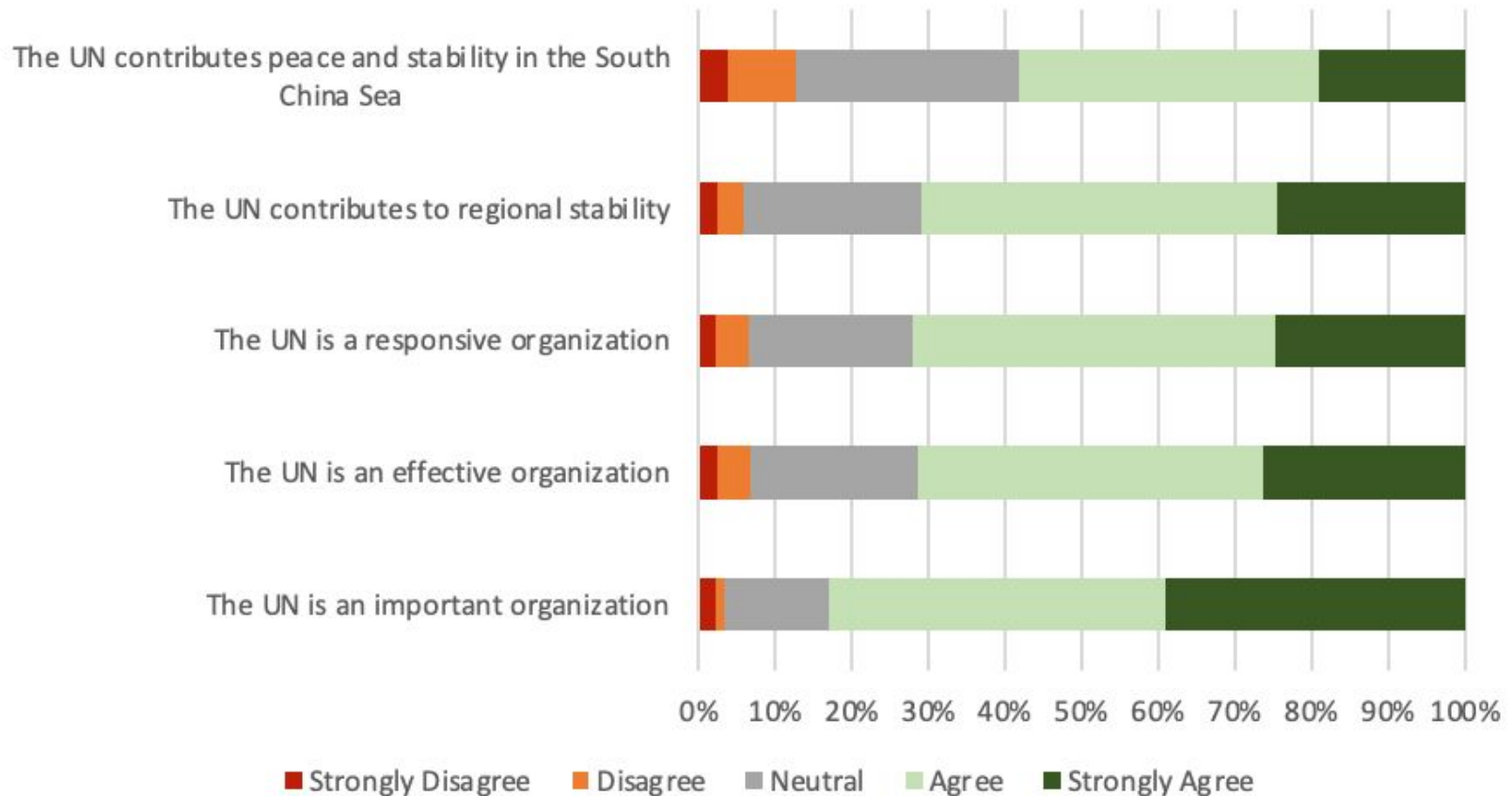
Perceptions of AUKUS



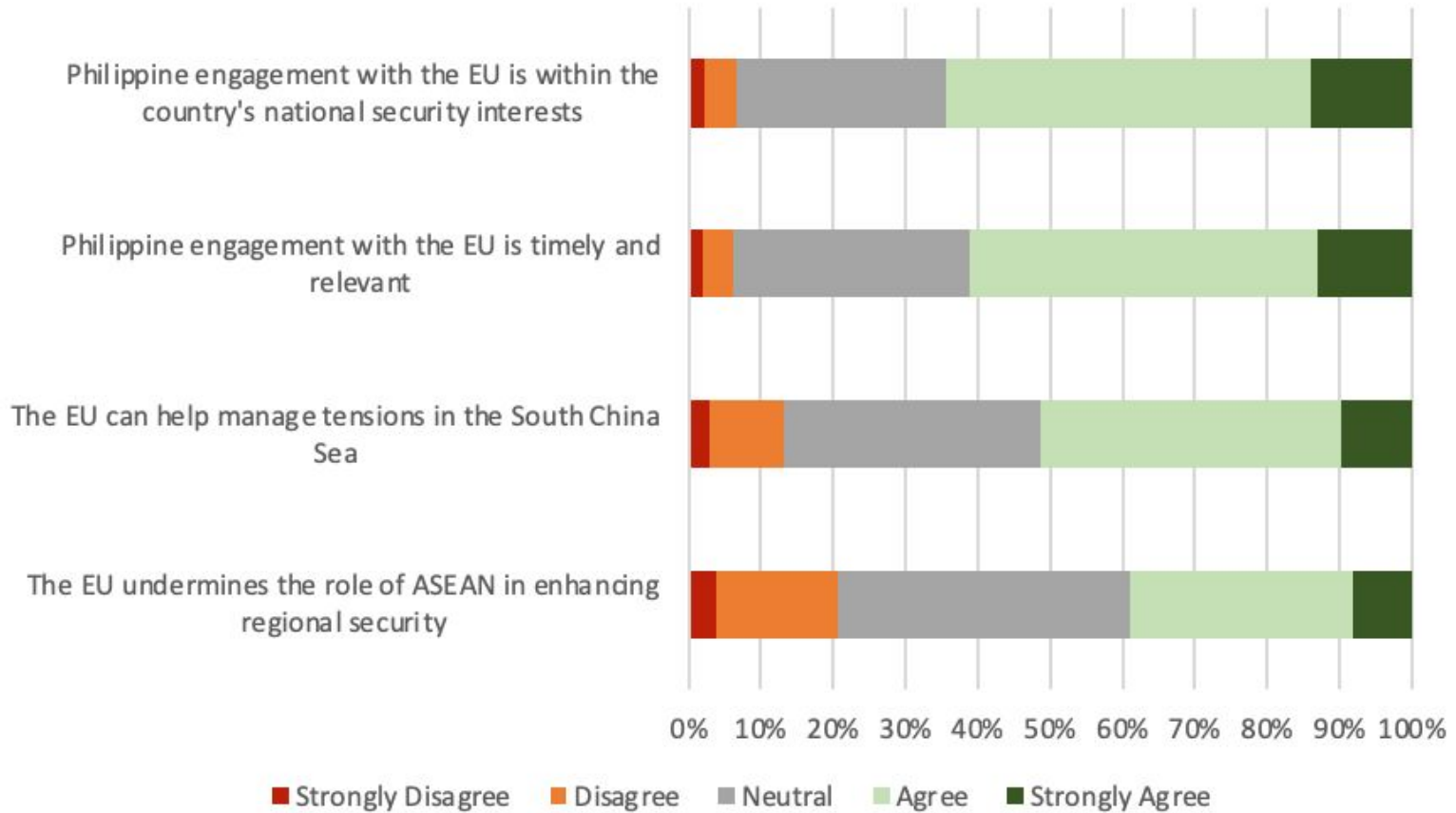
Perceptions of the Asia Pacific Economic Cooperation (APEC)



Perceptions of the United Nations (UN)



Perceptions of the European Union (EU)

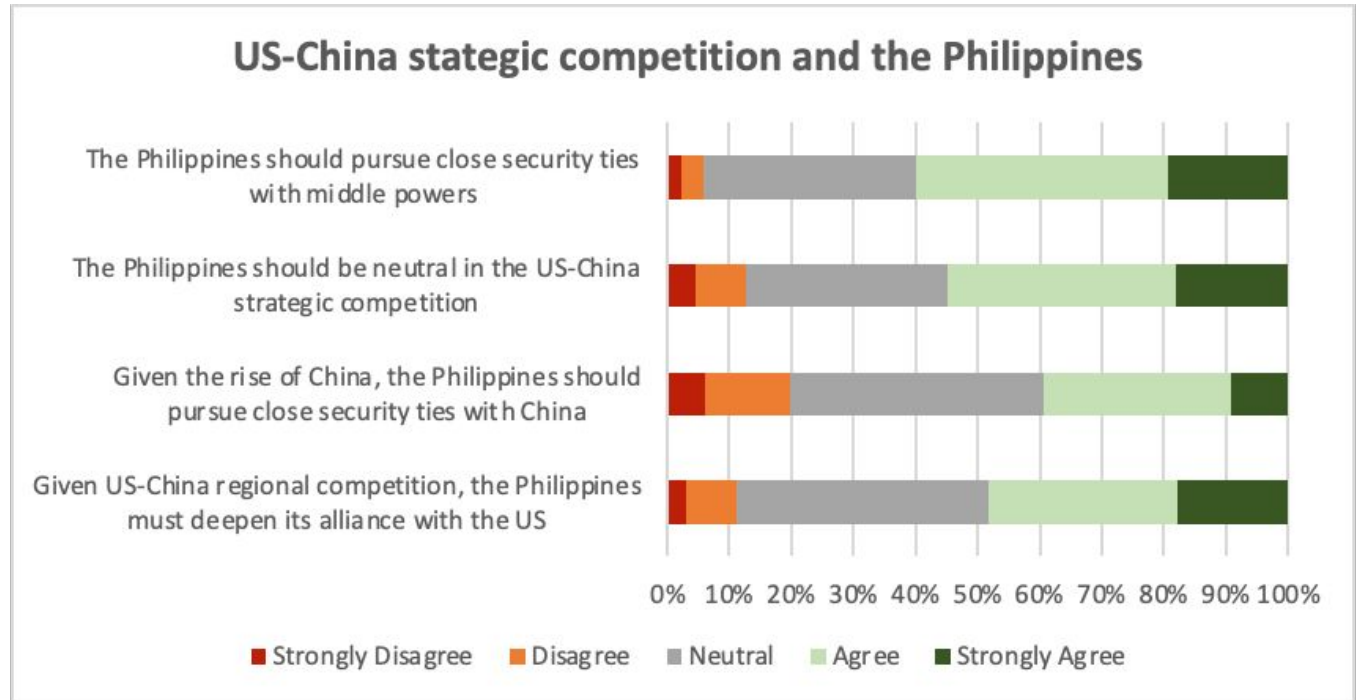




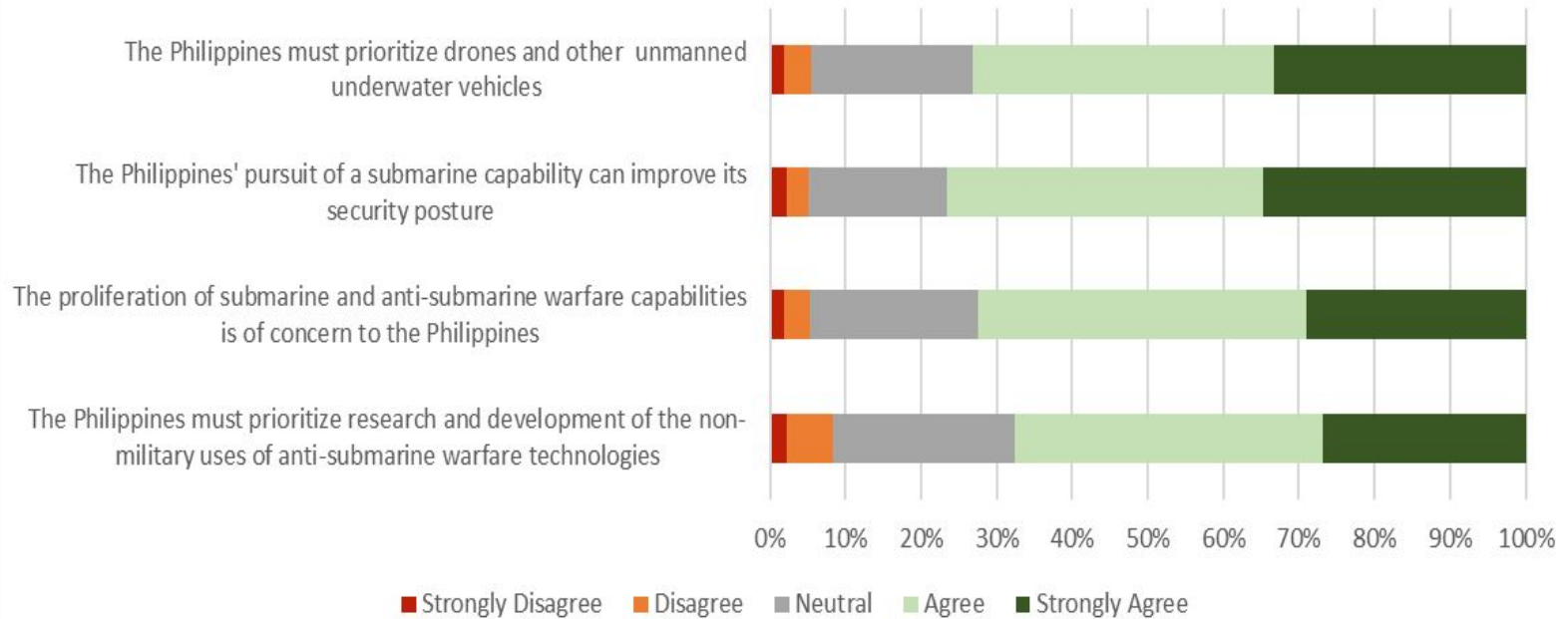
Views

International Security Issues

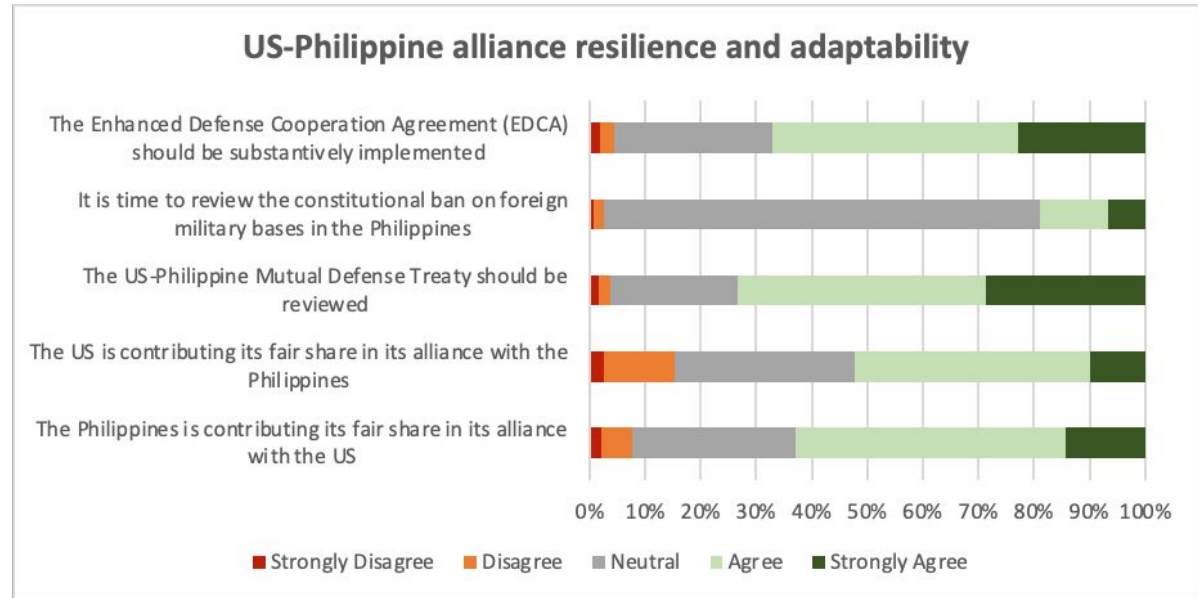
- **NON-ALIGNED:** Majority preference (~55%) for neutrality amid US-China competition.
- **DIVIDED:** Nearly 50% agree the Philippines should deepen alliance with the US. Nearly equal number ambivalent on the issue.



Emerging technologies in the South China Sea and West Philippine Sea



- Strong (>65%) support for:
 - EDCA
 - Review of the Mutual Defense Treaty (MDT)
- High ambivalence (~80%) on whether 1987 constitutional provisions prohibiting foreign military bases should be reviewed



Related Issues

China-Taiwan

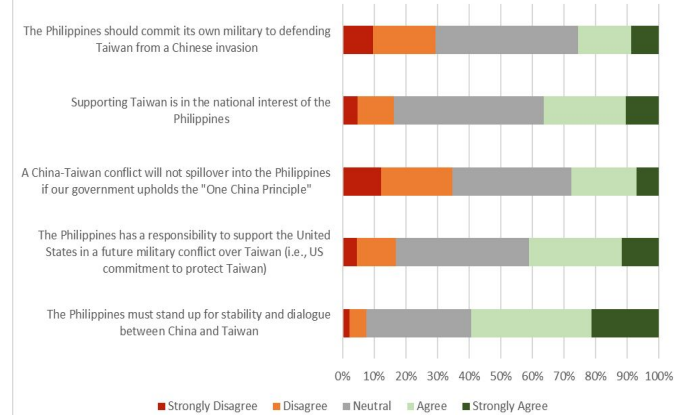
High ambivalence about whether the Philippines should:

- Commit to Taiwan's defense
- Support Taiwan in general
- PH responsibility to support US in a Taiwan contingency

Russia-Ukraine

Ambivalence on recent Philippine policy decisions on Russia, e.g. UN condemnation vote and cancellation of orders of Russian helicopters

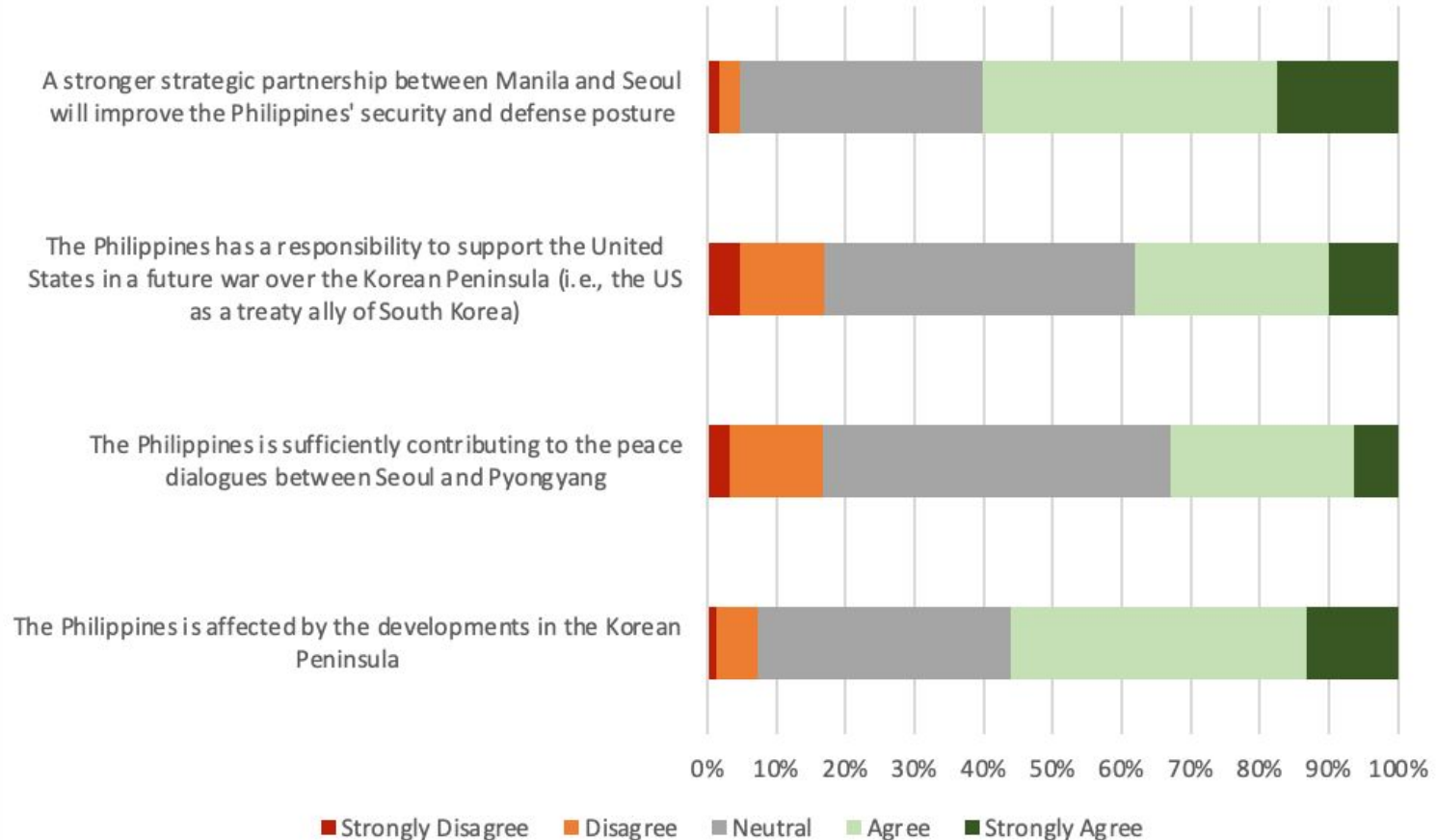
Perceptions on China-Taiwan tensions



Perceptions on the Ukraine-Russia Conflict



Nuclear proliferation in the Korean peninsula

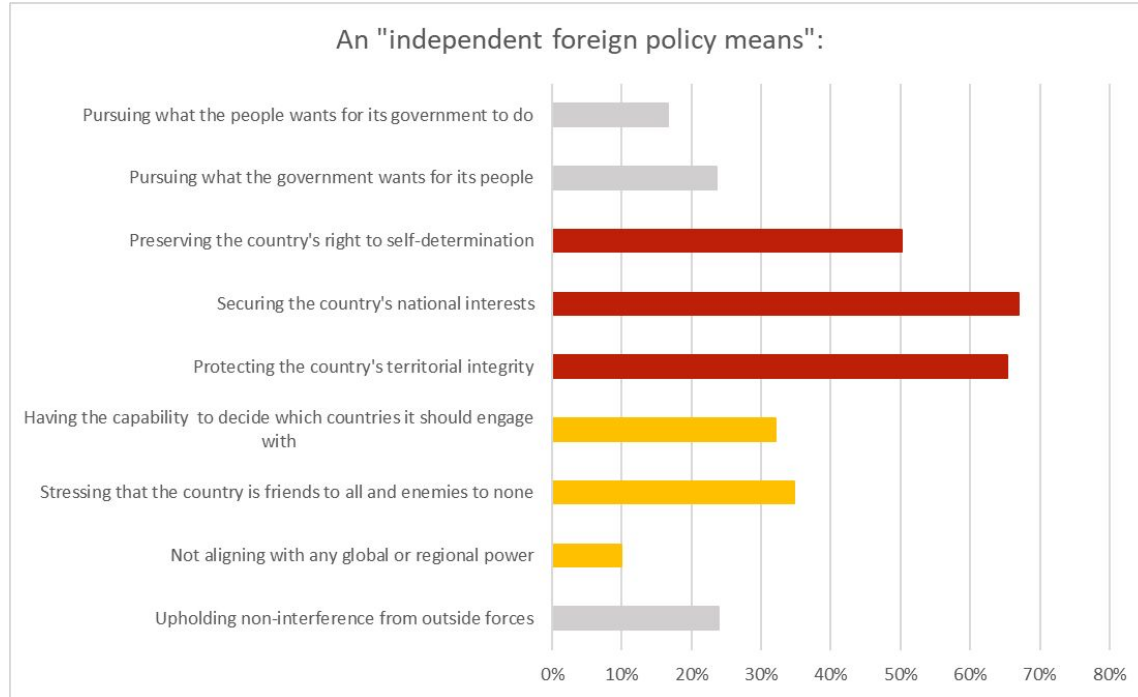




Views

'Independent' Foreign Policy

- **Top interpretations not about neutrality per se, but freedom of choice in service of national interest** (self-determination, securing interests, protect territory)
 - Does not preclude cooperation with the US, e.g. EDCA
- **Low preference for interpreting independent foreign policy as non-alignment.**





Part 3. International Economic Relations

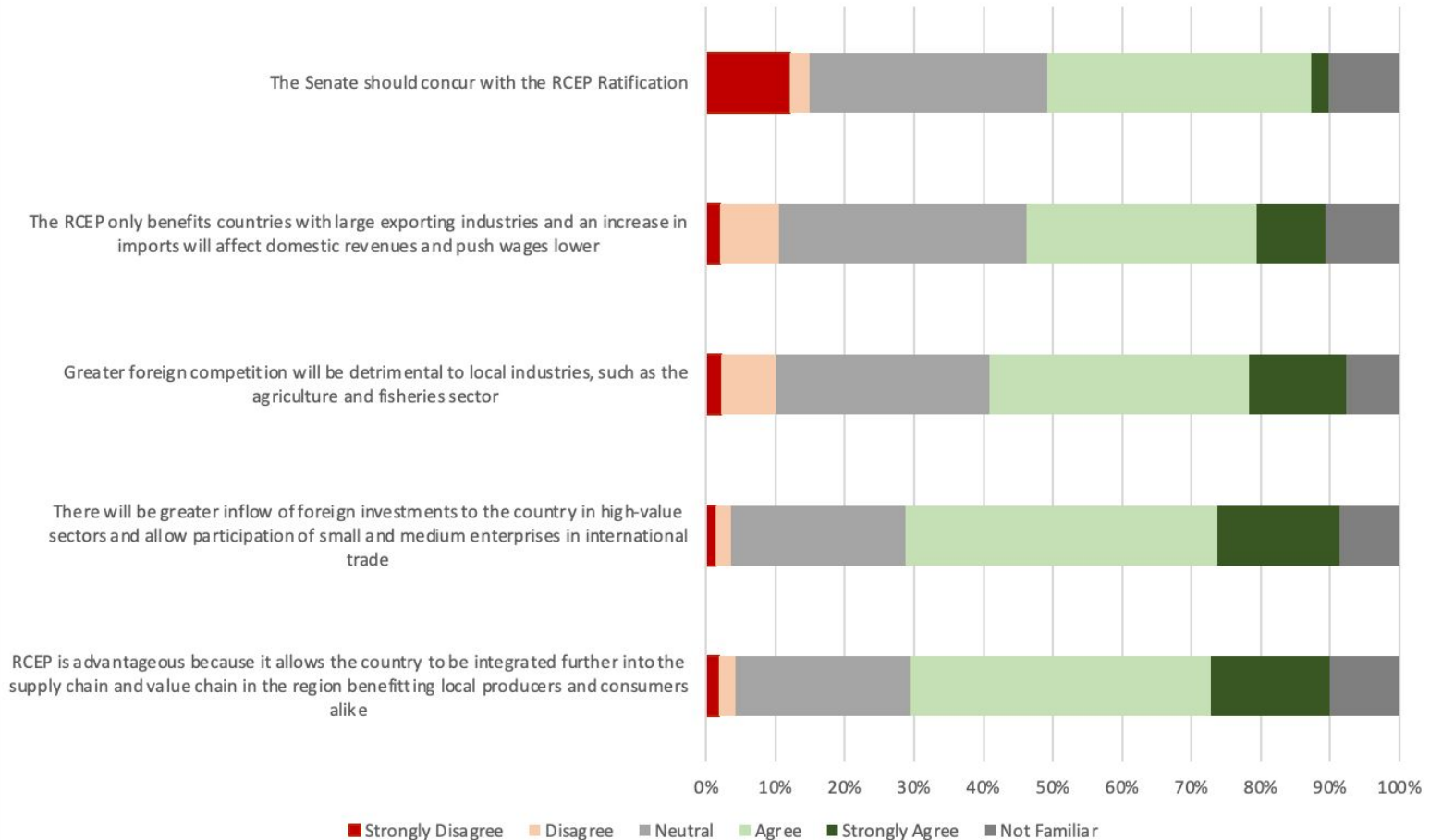
- Views on RCEP
- Views on CPTPP and IPEF
- Views on the ASEAN Single Market
- Views on the Philippines' economic strategy (FDI)
- The Philippines' Top Choices of Partner in Select Issues



Views

Regional Comprehensive Economic Partnership (RCEP)

The Philippines' Membership in RCEP

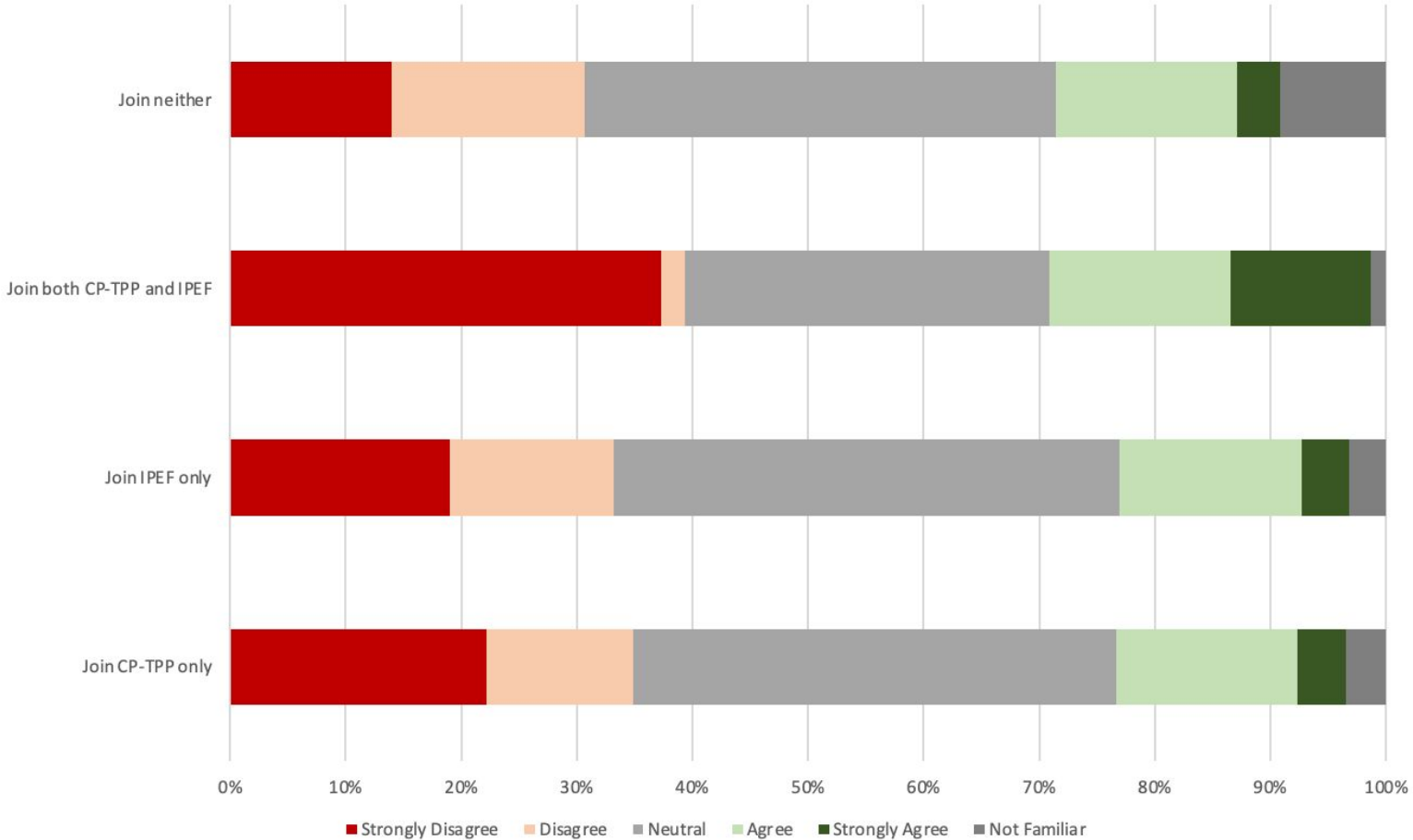




Views

CPTPP and IPEF

The Philippines and CP-TPP and IPEF

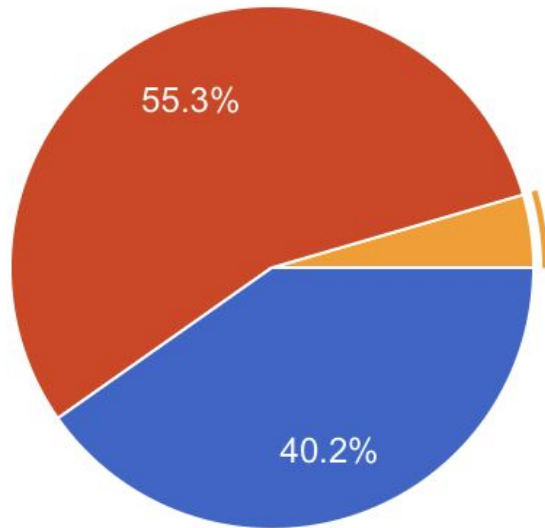




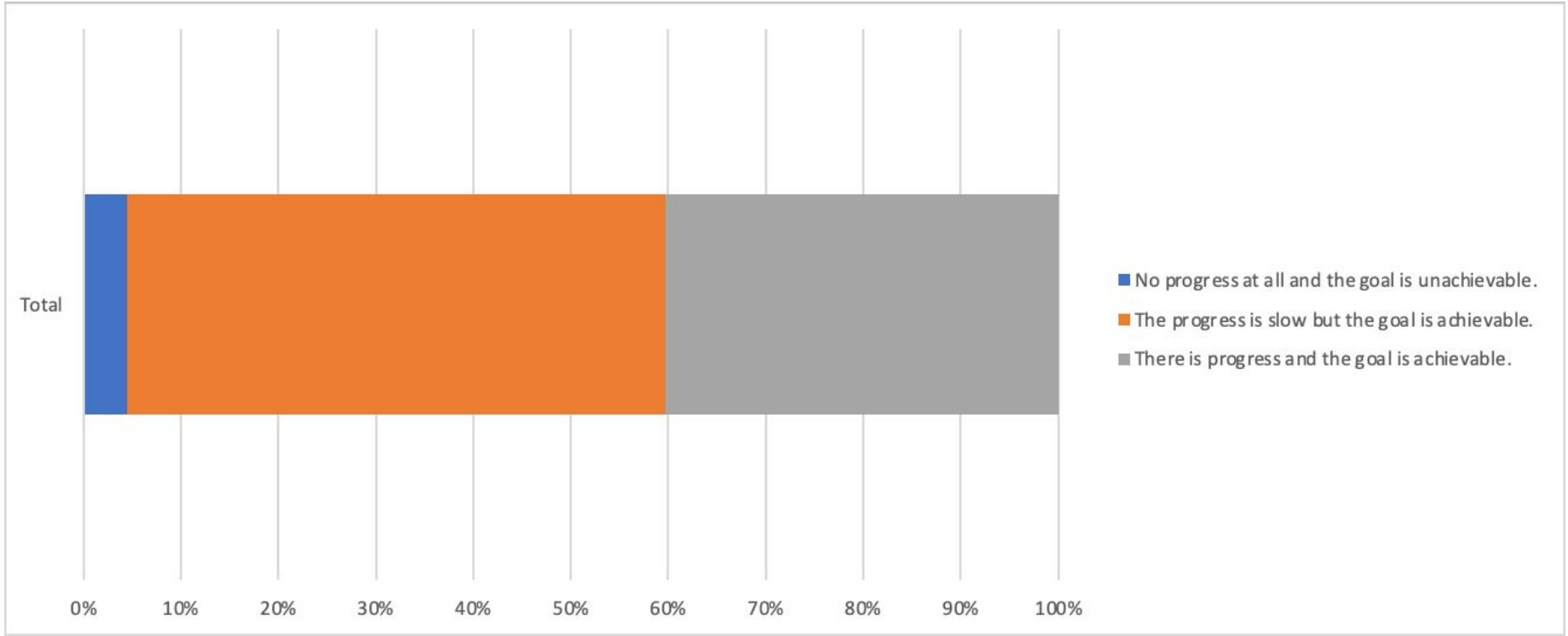
Views

ASEAN Single Market

Respondents are cautiously optimistic of the goal of the ASEAN Economic Community to become a single market and production base



- There is progress and the goal is achievable.
- The progress is slow but the goal is achievable.
- No progress at all and the goal is unachievable.



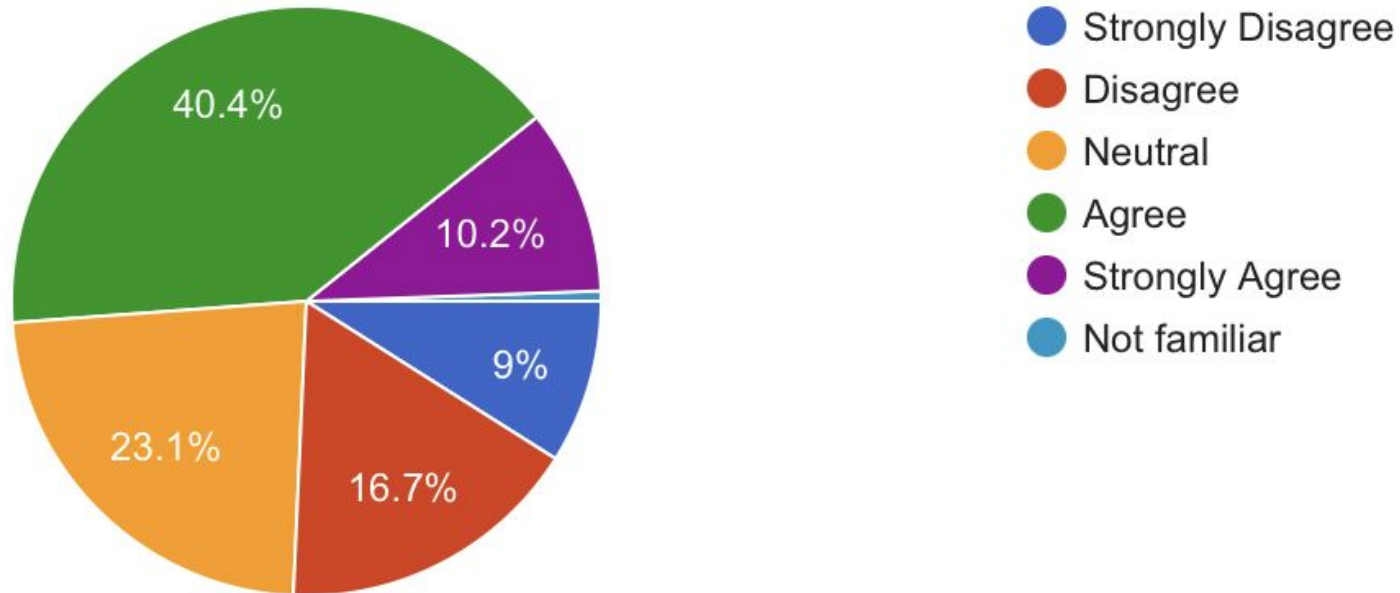


Views

*The Philippines' Performance in
Attracting FDI*

Most of the respondents believe the Philippines is doing well in attracting high-value, quality FDI

Is the Philippines doing well in attracting high-value and quality FDI?



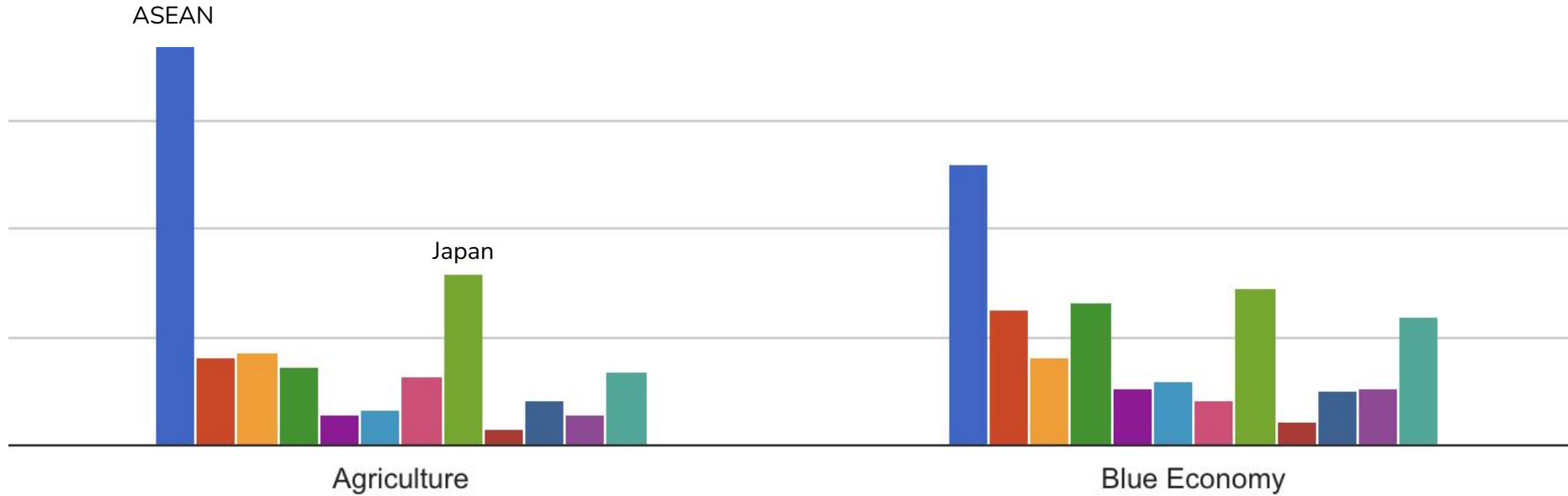


Views

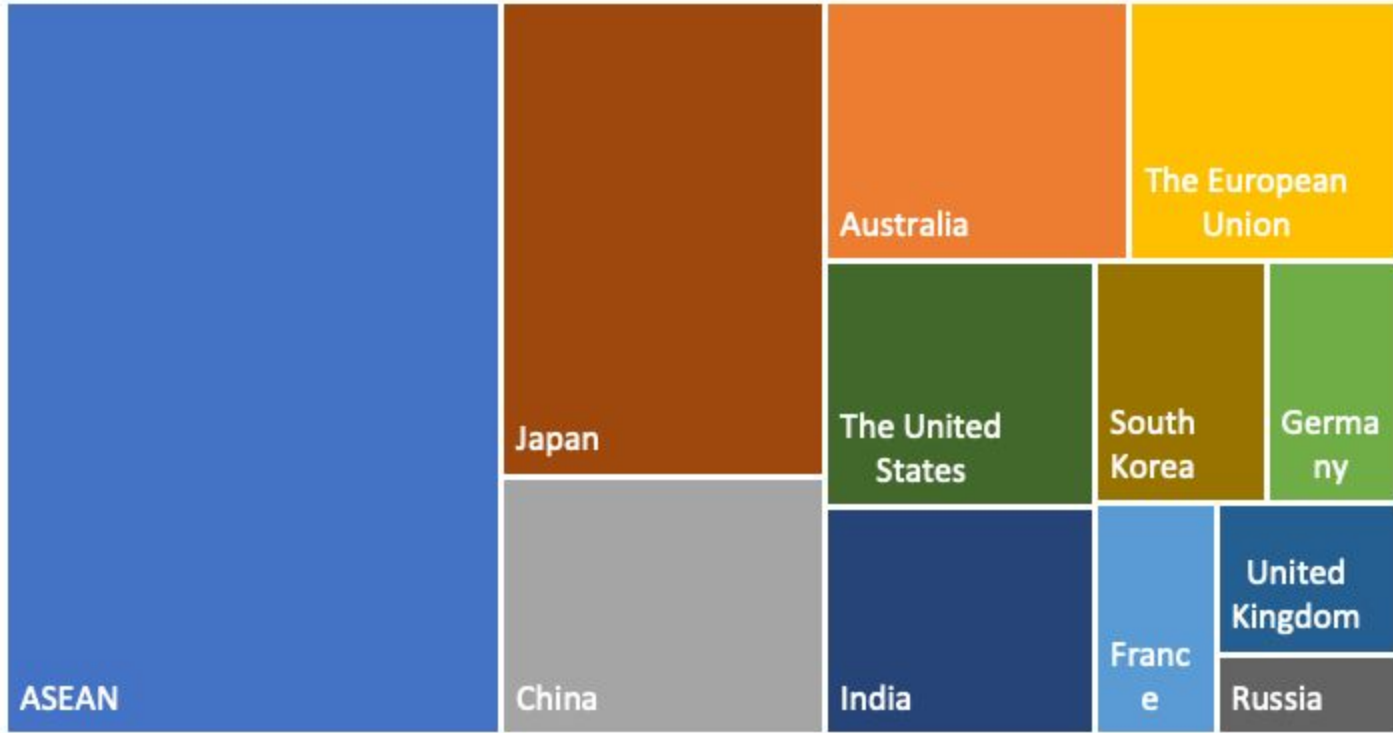
The Philippines' Top Choice of Partners in Select Issues

Agriculture - Blue Economy - Environment - FinTech
ICT - Infrastructure - Renewable Energy

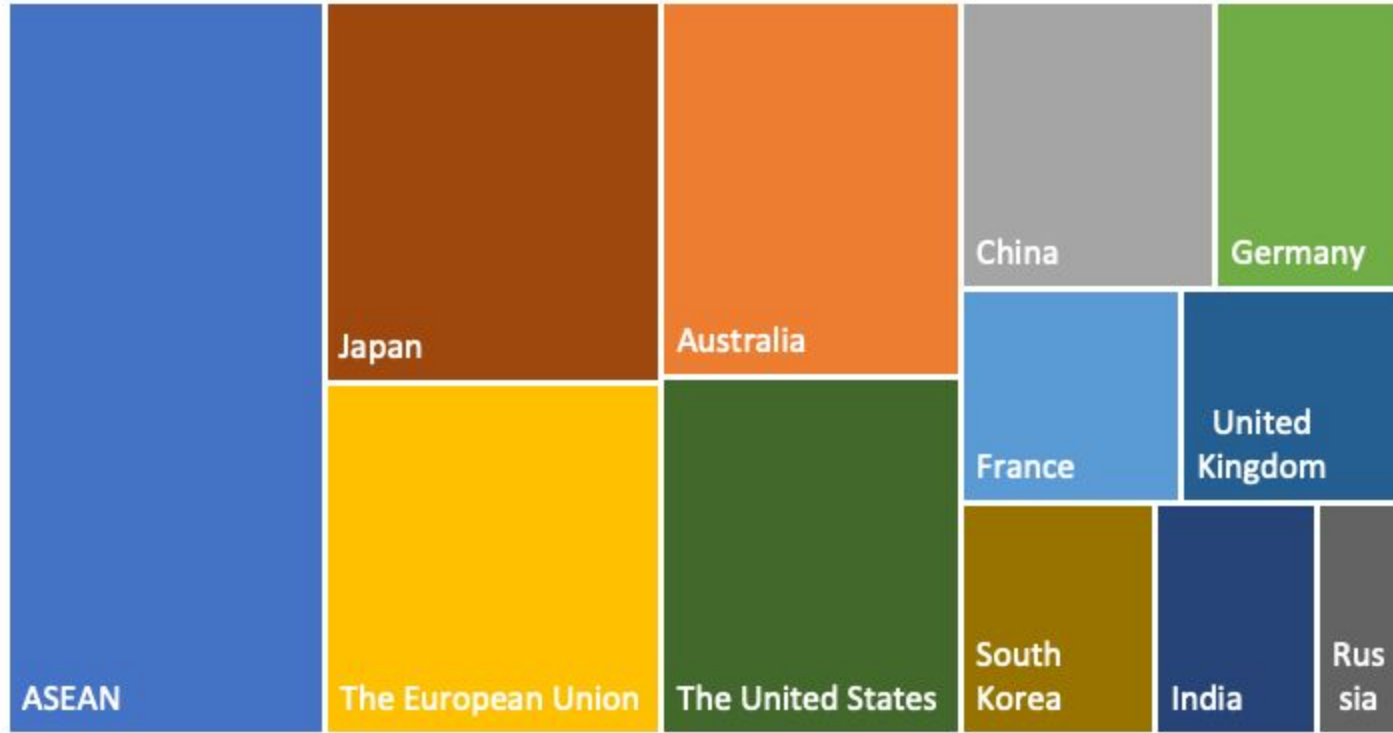
Respondents turn to ASEAN for many of the Philippines' needs (in agriculture and the blue economy)



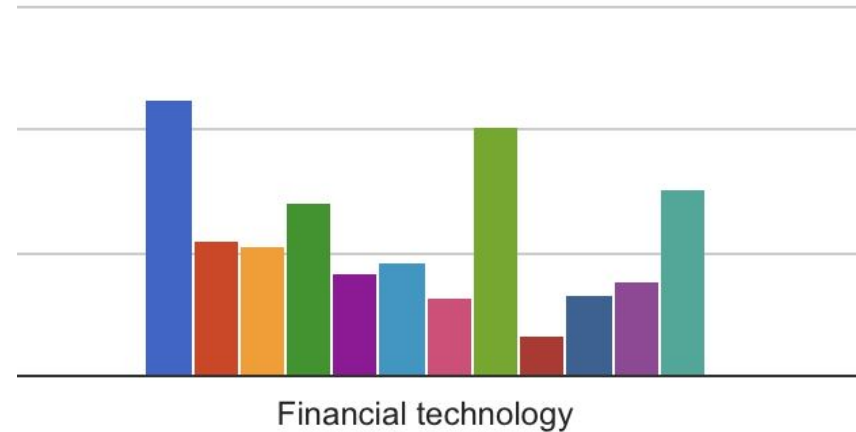
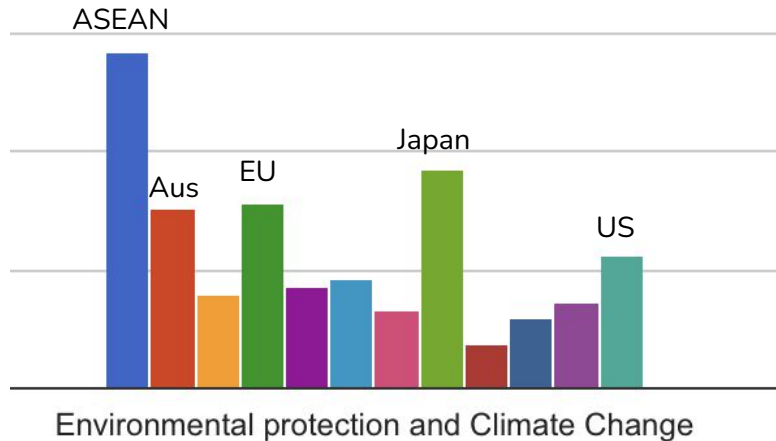
Top choice partner: Agriculture



Top choice partner: Blue economy



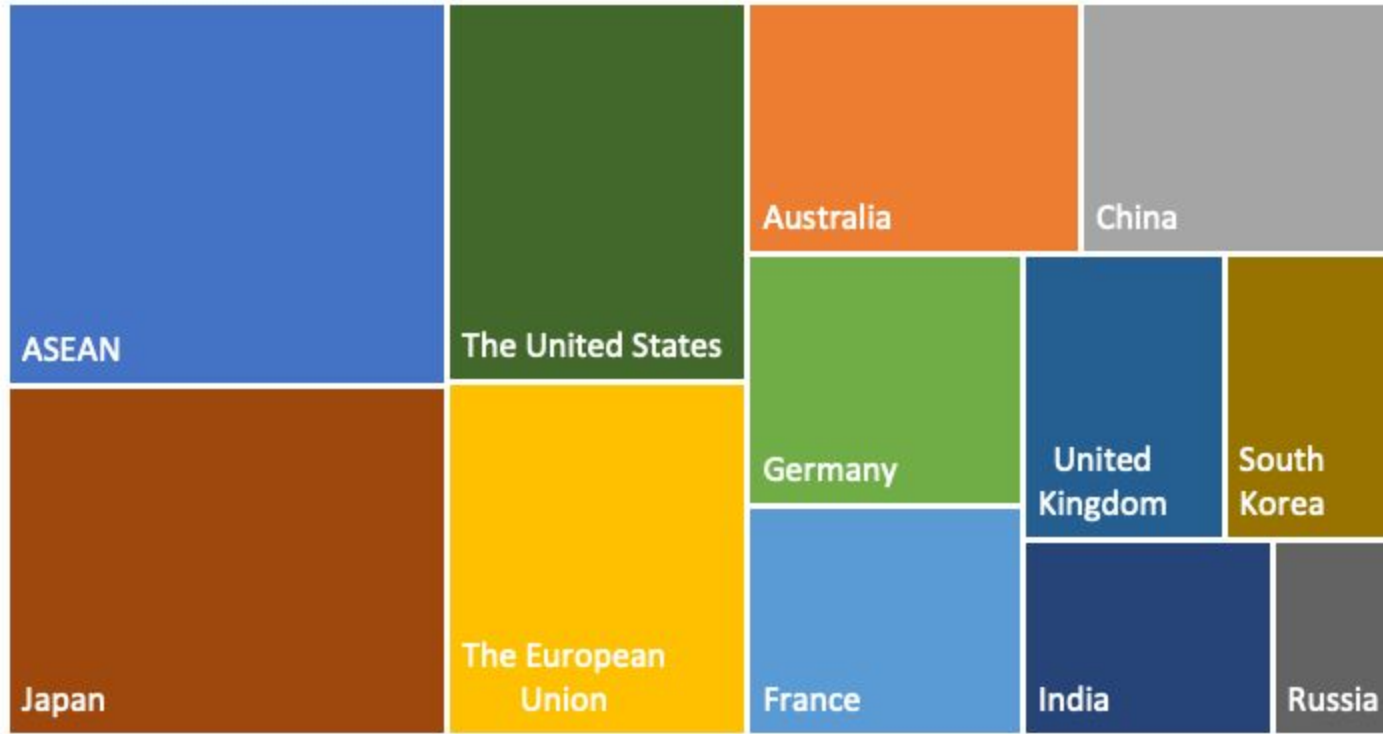
Respondents turn to ASEAN for many of the Philippines' needs, cont'd. (in environment and fintech)



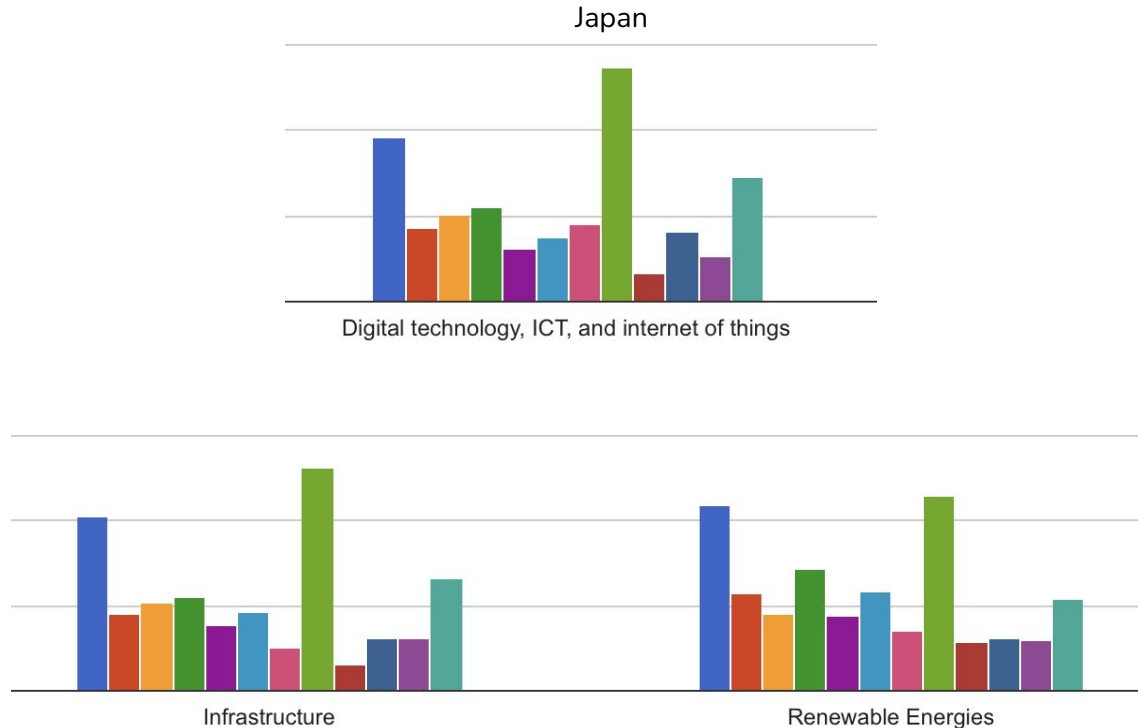
Top choice partner: Environment Protection & Climate Change



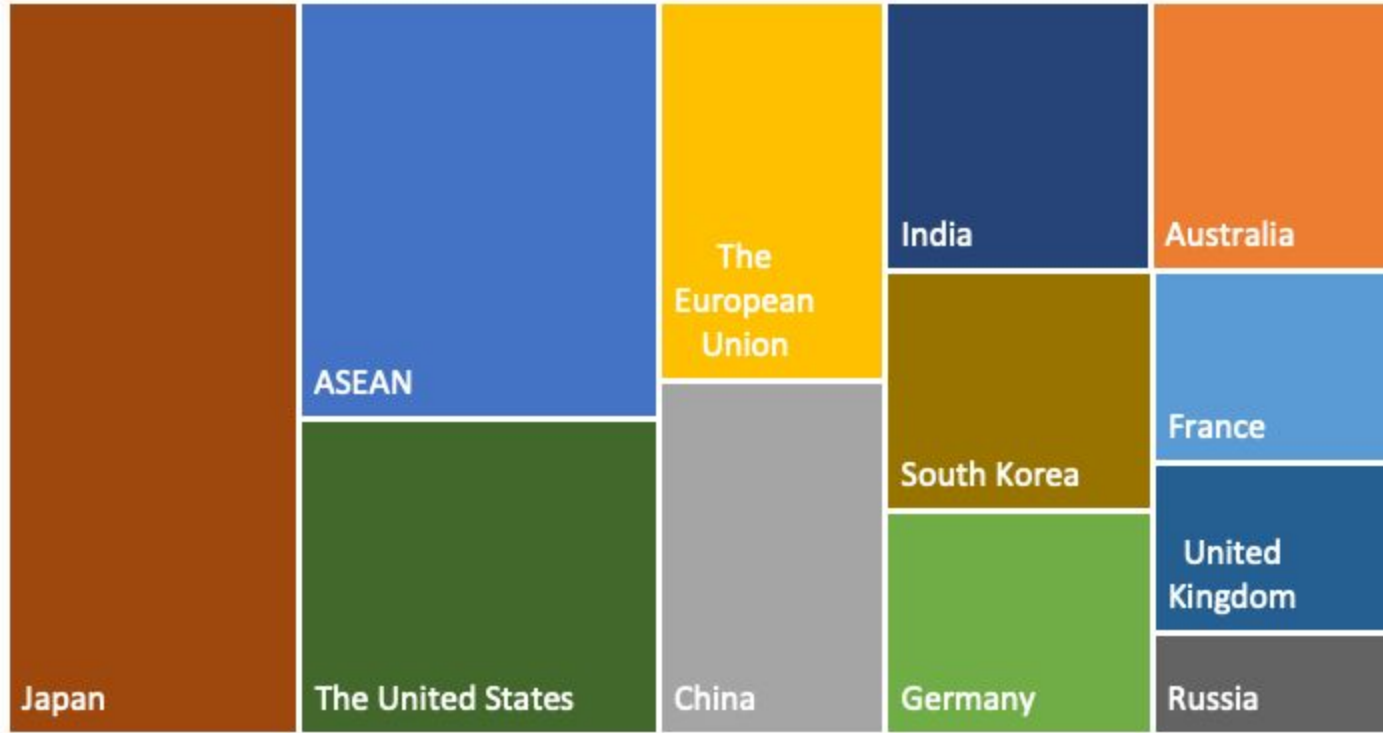
Top choice partner: Financial Technology



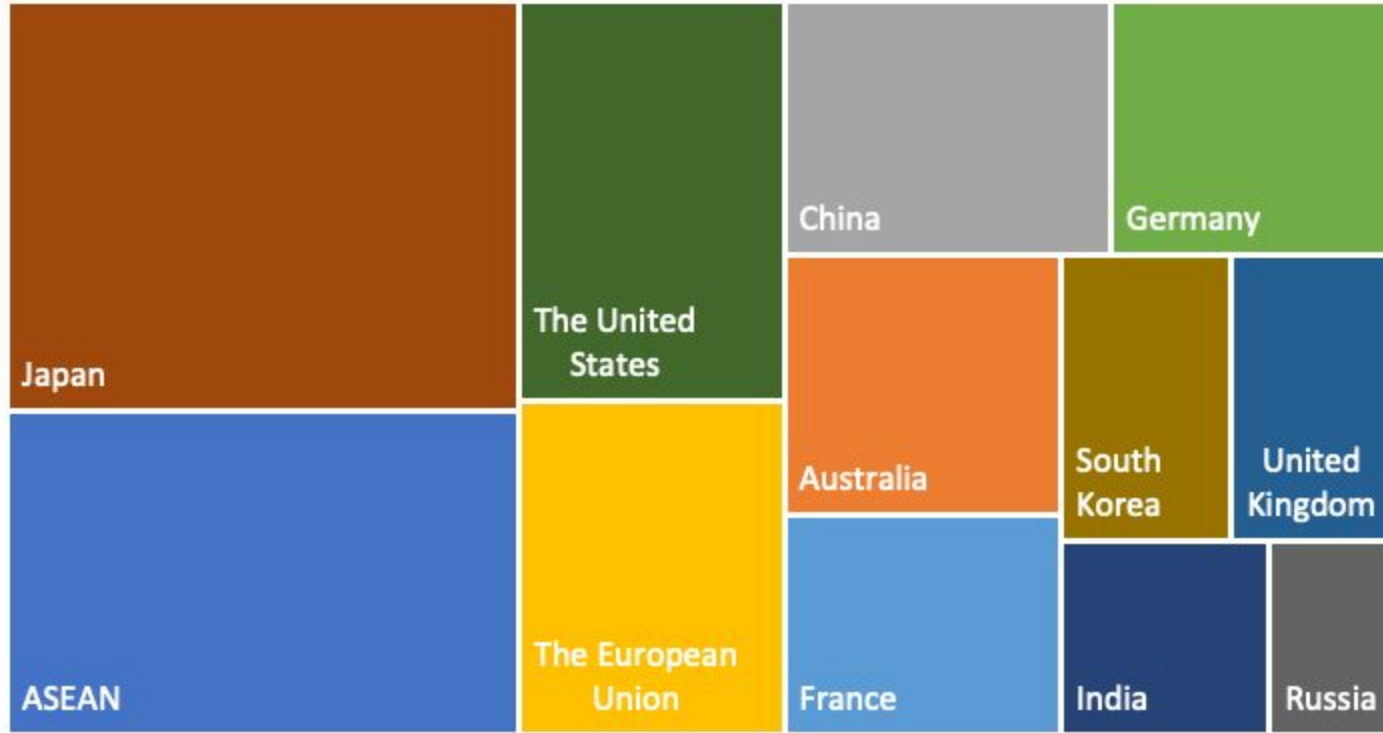
Japan is the Philippines' choice of partner in ICT, infrastructure, & renewable energies



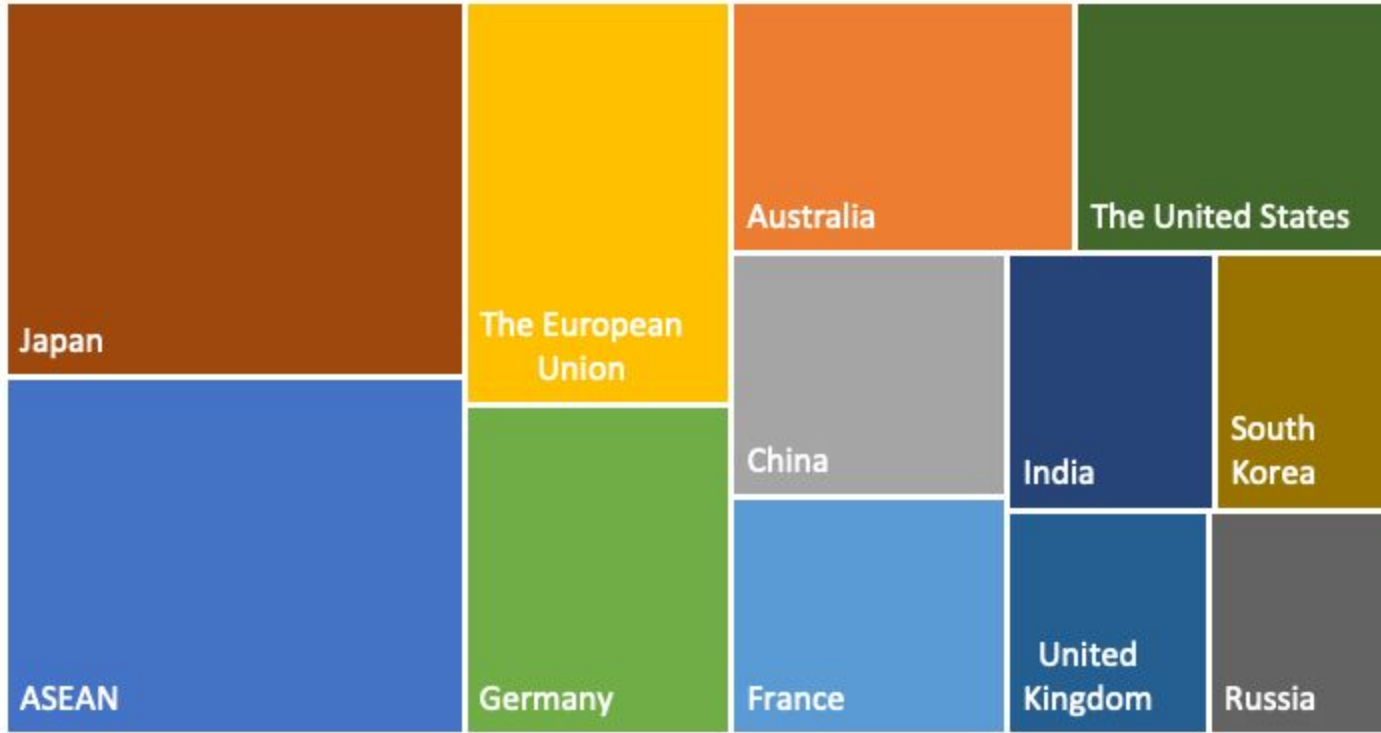
Top choice partner: Digital technology & ICT



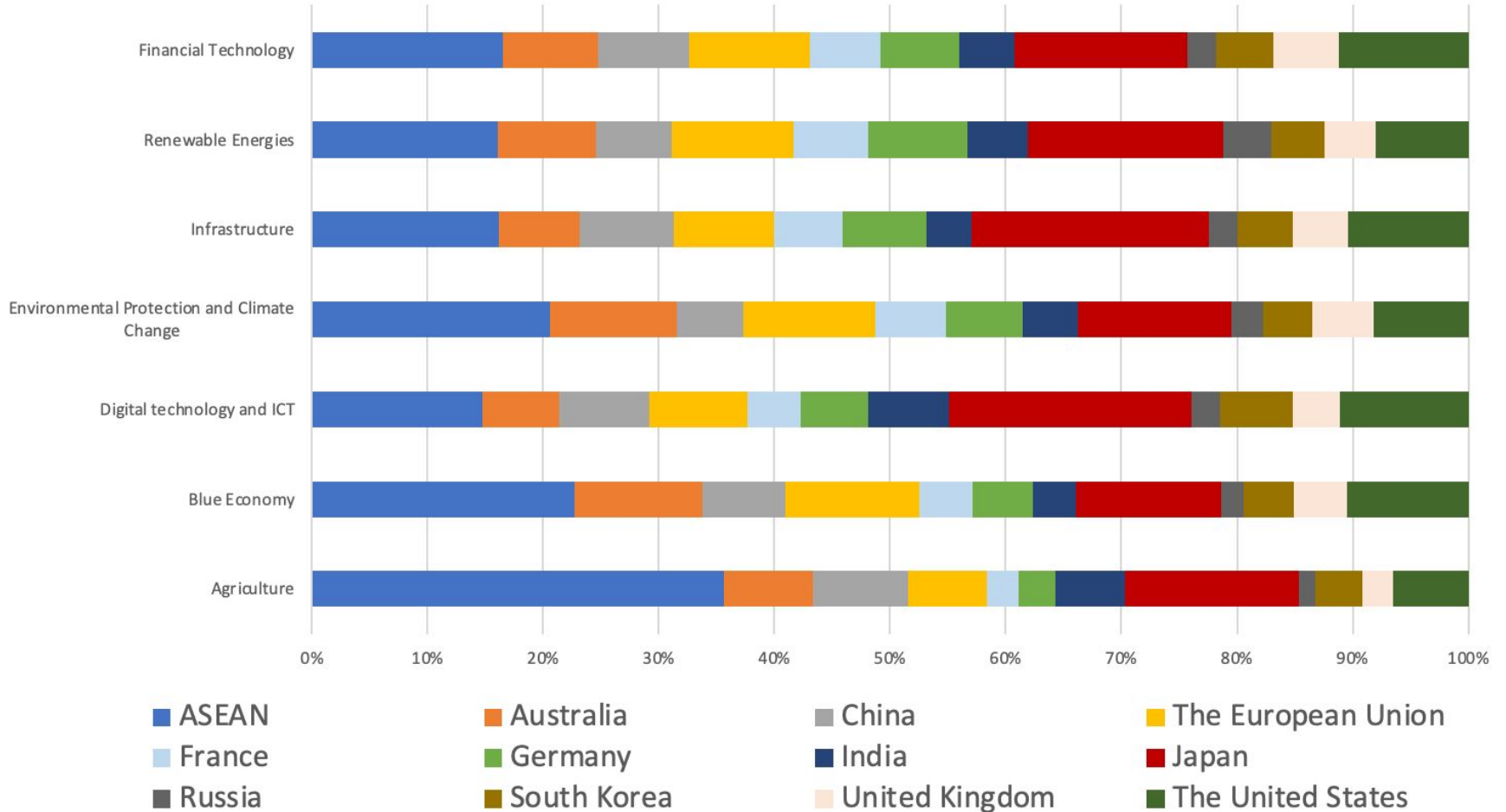
Top choice partner: Infrastructure



Top choice partner: Renewable Energies



The Philippines' top choice of sector partner





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