



YOUNG BHUTAN AND THE WORLD

A PRELIMINARY SURVEY OF PERCEPTIONS ON FOREIGN POLICY

ADITYA GOWDARA SHIVAMURTHY

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Foreword

Bhutan, often called “the last Shangri-La”, remained largely isolated from the world until the late 20th century. The country welcomed foreign tourists in the 1970s and introduced television in 1999. India, Bhutan’s southern neighbour, played a crucial role in convincing the latter to end its isolation and open up to the world. China’s annexation of Tibet and aggressive statements against Bhutan further convinced it to engage with the world, primarily through New Delhi.

Bhutan is a small landlocked country between two of Asia’s biggest economies and strategic competitors: India and China. It enjoys a time-tested relationship with India, based on what leaders refer to as “trust, goodwill, and mutual

understanding.” Bhutan is dependent on India for almost all sectors of its economy. Both countries enjoy high-level political and people-to-people relations that are parallel to none.

Meanwhile, with China, Bhutan has a disputed border and shares no formal relationship. China sees this as a testament to Indian dominance and is keen on establishing relations with Bhutan. Bhutan, however, is wary of resolving its border dispute with China, considering the strategic repercussions and implications for India. An attempt by China to alter the status quo in 2017 led to the Doklam standoff with India.

Bhutan today is at a crossroads. The country’s embrace of democracy in 2007 and the social media phenomenon in recent years have changed how the younger generations view themselves and their country. They are more vocal about their expectations and more politically opinionated than their elders. On the security and strategic front, China’s aggression against the country has increased. Bhutan is struggling to balance tackling these aggressions and respecting Indian security concerns.

Economically, the country continues to underperform and is overly dependent on hydropower and tourism. Nearly 9 percent of the country’s population is estimated to have migrated elsewhere in recent years, in search of greener pastures. Bhutan is now betting on connectivity and sustainable investments through the Gelephu Mindfulness City (GMC) project, which is expected to boost the economy, create employment opportunities, and reduce mass migration.

Bhutan is the largest recipient of Indian aid and assistance. Unlike other neighbours, Bhutan has consistently supported Indian security interests and does not play the China card to further its interests. Bhutan has also been a vocal supporter of India’s bilateral and multilateral initiatives and policies.

But Bhutan is a country in transition, and the younger generations have their own mind about their nation's place in the region and the world. Despite Bhutan shedding its isolationist policy and undergoing changes, there is very little known of how young Bhutanese think about the world and other countries.

Observer Research Foundation remains committed to tracking youth sentiments across the region, with its Neighbourhood Initiative aiming to fill this void by producing work that speaks to the challenges and opportunities being faced by the youth in South Asia. This monograph by Aditya Gowdara Shivamurthy, one of the few serious observers of Bhutan in India at present, attempts to understand how the young generation views the country and its foreign policy. This assessment will be crucial for policymakers to respond to the aspirations and expectations emerging from a societal churn that is often difficult to decipher but extremely consequential in its outcomes.

Harsh V Pant

Vice President, Studies and Foreign Policy, ORF

Key Findings

1

India's historical ties, people-to-people relations, connectivity, and economic relations with Bhutan continue to foster a positive image of India, enhance bilateral ties, and make young Bhutanese more receptive to Indian interests. Nearly all the respondents have visited India at some point in their lives. Indian languages, newspapers, websites, and radio channels remain popular in Bhutan.

2

There was a time when India enjoyed cultural hegemony in Bhutan. Today's younger generation, however, has more access to the internet, OTT platforms, apps, and social media, providing them a window to other cultures, such as South Korea, Australia, Japan, the US, and China.

3

Young Bhutanese have a largely optimistic view about India in the domains of economy and foreign policy. India is deemed the top country when it comes to offering access to markets, assistance in technology, and exports. They are also of the view that India has helped their country realise its development goals. India is seen as a first responder and a trusted development partner today and in the near future.

4

The surveyed youth note that over-reliance on India is Bhutan's biggest foreign policy challenge. This is closely followed by immigration, climate change, and economic slowdown. The majority are also supportive of Bhutan establishing diplomatic missions with Australia, Japan, Canada, the US, Singapore, the UK, South Korea, and France. Fewer respondents support establishing missions in Russia and China.

5

Bhutanese youth are neither hostile nor hopeful of the potential benefits that their country can derive from relations with China apart from trade. People-to-people relations are limited, and Bhutanese have little interest in studying or working in the country. Young Bhutanese do not regard China's rise as a challenge, nor do they see Beijing benefiting their foreign policy. There is a degree of interest in Chinese culture and entertainment.

6

Australia has become increasingly popular for Bhutanese youth, with the country being their top choice for studies or residence. Australian news, culture, entertainment, and apps are becoming popular, and Canberra is seen as one of Bhutan's well-trusted development partners.

7

Japan is a popular country for Bhutanese youth, especially in terms of foreign policy and economy. The country is seen as one of Bhutan's top development and investment partners. Young Bhutanese see Japan as a country that offers market access and is one of the top exporters of durable goods. There is also some interest in learning the language and visiting the country. Cultural and religious similarities also foster optimism.

8

Young Bhutanese consider the US to be a popular destination to study and settle in, even as their people-to-people relations are limited. There is interest in American culture, though this does not translate to a positive opinion in matters of foreign policy and economic relations.

9

Perceptions of other countries are based on specific sectors of cooperation. In the case of Singapore, for example, investments and assistance in scientific and technological developments have generated positive opinions. With South Korea and Thailand, key are people-to-people relations and culture; and the UK and Canada are preferred for studies and residence. Bangladesh, too, has become important for potential economic ties.

10

India's presence in the region and geographical realities have led to young Bhutanese viewing India positively. However, India's clout is being challenged, as young Bhutanese are keen on diversifying their country's foreign relations.



Bhutan's Foreign Policy and the Shaping of Perceptions

As a small country landlocked between India and China, Bhutan has historically promoted diplomatic engagements, primarily on a need-to-have basis. In the 17th century, following its unification, it established diplomatic ties with Nepal, Ladakh, and Sikkim.^{a,1} However, following the Duar wars of 1865, where it ceded its Cooch Behar and Assam regions to the British, it isolated itself from the rest of the world.^b Its relations with Britain were limited and focused on trade,

^a Historically, Bhutan consisted of several autonomous communities without any central power. In the 17th century, the Tibetan monk Zhabdrung Rinpoche arrived in Bhutan and unified the country, which was suffering from political turmoil and internal fights. Ladakh and Sikkim were princely states at the time.

^b British expansion in the 18th century posed a challenge to Bhutan's sovereignty. This led to a series of confrontations called the Duar wars, at the end of which Bhutan and Britain signed a peace agreement, with the latter controlling both regions.

securing trade routes to Tibet, and receiving a subsidy of INR 50,000 in return for ceding its territories.² The Treaty of Punakha, signed in 1910, enabled Britain to guide Bhutan's foreign policy in return for not interfering in the latter's domestic politics. Following Britain's departure, Bhutan signed a Treaty of Perpetual Peace and Friendship with India in 1949, continuing its safe-distance policy while permitting India to guide its foreign affairs.³ While Bhutan continued to prefer isolation, China's invasion of Tibet in the 1950s and subsequent claims over Bhutan's territories compelled it to gradually eschew this policy.

A leadership change in Bhutan in 1952 and then Indian Prime Minister Jawaharlal Nehru's visit to the country in 1958—the first by a head of government and world leader⁴—convinced Bhutan to enhance its relations with India to further its socioeconomic growth and security and gradually open up to the rest of the world.⁵ The subsequent increase in bilateral relations and high-level visits fostered a positive perception of India amongst Bhutan's public.⁶

In 1961, India launched Project Dantak to build roads, schools, hospitals, and basic socioeconomic infrastructure in Bhutan. In the same year, India deployed the Indian Military Training Team (IMTRAT) to train the Bhutanese army. India has also provided the largest amount of funding for Bhutan's Five Year Plans (FYPs), funding 100 percent of Bhutan's FYPs between 1961 and 1971, amounting to INR 11 and 20 crores, respectively. While the funding percentage for FYPs declined in subsequent plans, the total funds allocated have increased; for instance, for the 11th and 12th FYPs, India provided over INR 45 billion in funding, which has increased to INR 100 billion as of the 13th FYP.⁷

Since the 1980s, India has also assisted Bhutan in developing its hydropower sector, which accounts for 14 percent of the country's Gross Domestic Product (GDP) and 26 percent of the government's revenue.⁸ India is also Bhutan's largest import and export partner and the leading source of Bhutan's foreign direct investments

(FDIs).⁹ Additionally, India is assisting with the Gelephu Mindfulness City (GMC) project, which is expected to reap economic benefits for the next generation of Bhutanese.^{c,10}

This assistance has led to a positive perception of India among the older generations in Bhutan, especially from the early 1960s, when India launched Project Dantak. For most Bhutanese of the older generations, India is a land of holy places, markets, and trade. Indian culture is also an important part of their lives. Bhutanese students have studied in India on Indian government scholarships. Many of these Indian university graduates hold important positions in Bhutanese bureaucracy, administration, and politics.¹¹

Bhutan has also been a reliable partner to India, conducting crackdowns on insurgents from Northeast India taking shelter in their country and consistently displaying sensitivity to Indian security and strategic concerns when negotiating its border disputes with China.¹² Owing to India's assistance and the bilateral people-to-people relations, many in Bhutan, including civilians, understand India's concerns.

Meanwhile, Bhutan's relationship with China remains neutral at best. In tandem with Bhutan's strategy to slowly open up to the world, its aversion to great-power politics and its policy of not having diplomatic relations with the P5 countries, Bhutan has hesitated to maintain diplomatic relations with China—despite the policy being the subject of internal debates.^{d,13,14} China and Bhutan also have no substantial economic and trade ties. Furthermore, Chinese border claims and intrusions have continued to fuel suspicion towards Beijing. Starting from 1984, Bhutan and China have held over 25 rounds of negotiations to demarcate borders and are close to resolving the dispute, barring the Doklam trijunction.

^c The GMC project is a special administrative region in Bhutan, bordering India. It is an urban development project that intends to promote sustainability, attract investments, and connect the country with South Asia, ASEAN countries, and China.

^d Bhutan has been hesitant to establish diplomatic relations with any of the P5 countries—the US, Russia, China, the UK, and France—fearing that it would be dragged into power politics. This scepticism has persisted since the Cold War era. However, its lack of relations with China has been debated in recent years.

Bhutan has also taken steps to gradually open itself up to the world. Bhutan joined the United Nations (UN) in the 1970s and initiated bilateral relations with multiple countries.¹⁵ In the 1980s and 1990s, it established diplomatic relations (not missions) with several Asian, Gulf, and European nations.^e During this time, it signed a transit agreement with Bangladesh and expanded commercial and economic ties with others.¹⁶ The UN agencies and multilateral institutions also played a crucial role in this economic diversification process.¹⁷

By 2004, Bhutan had extended its relations to 22 countries, including Australia, the Netherlands, Canada, and the European Union (EU). During this time, Japan, Denmark, the EU, Switzerland, Austria, Australia, and New Zealand (as well as organisations affiliated to their governments) emerged as sizeable donors. Between 2008 and 2013, the first democratic government of Bhutan extended relations to an additional 31 countries, bringing the total to 53.¹⁸ Nonetheless, Bhutan hosts only three embassies—India, Bangladesh, and Kuwait¹⁹—and has established just 11 diplomatic missions abroad.^f

This gradual extension has also helped Bhutan diversify its development assistance. For instance, in its latest FYP, the EU, Japan, and other multilateral agencies are expected to provide over INR 40 billion in funding.²⁰ This diversification has benefits for Bhutan in various sectors, including education, health, and basic infrastructure, thus garnering goodwill for some of these donor countries in Bhutan (as will be discussed later in this report).

^e These countries include Japan, Kuwait, Finland, Singapore, South Korea, Bahrain, Switzerland, Austria, Norway, Netherlands, Denmark, Thailand, fellow SAARC member states, and Scandinavian countries. See: <https://www.bhutanstudies.org.bt/economic-and-political-relations-between-bhutan-and-neighbouring-countries/>

^f This includes embassies in India, Bangladesh, Belgium, Thailand, Australia, and Kuwait; permanent mission to the UN in New York and Geneva; consulates in India's Kolkata and Guwahati, and the US's New York.

Furthermore, Bhutan has used this diversification to overcome issues of unemployment, foreign reserves, and sources of revenue generation. From the mid-2010s onwards, the Bhutanese government has encouraged the youth to work in countries such as Thailand and Kuwait as well as other Gulf countries.²¹ This has furthered people-to-people relations and shaped Bhutanese perceptions of other countries. For instance, in 2017, the government signed a Memorandum of Understanding (MoU) for the 'Learn and Earn' Programme with Japan which, by 2019, had seen the enrolment of 700 Bhutanese students.²²

Changing Perceptions: Why They Matter

Bhutan has seen political, economic, and social changes in the last couple of decades. Bhutanese historian Karma Phuntsho once wrote that Bhutan “has changed much more in the past 50 years than in the 500 years before that”. The younger generations have different perceptions of foreign policy and the world around them, as well as different aspirations, values, and expectations. They are keen for Bhutan to have an increased international footprint and are themselves more global than older generations. Even though they are keen on maintaining ties with India, they also want to look beyond their immediate neighbours.²³

The factors contributing to this shift in perceptions include the following:

- **A space for politics and dissent:** After nearly a century of being ruled by the Wangchuk dynasty, in 2007, Bhutan embraced a new system of democracy with constitutional monarchy.²⁴ The transition was promoted by the monarchy even as the people were hesitant to accept the system.²⁵ Today, the new generation is getting accustomed to democracy and democratic norms and are increasingly critical of the political class (though not the monarch), their parties, and existing policies, and have used their voting rights to express their sentiments. As a result, till date, Bhutan has not seen an incumbent government being re-elected to power. Young Bhutanese are more willing to criticise and have political opinions than the older generations.

The emergence of democracy has also increased the number of stakeholders in the country, such as the government, opposition, political parties, industries, lobbies, private sector, business communities, and youth—all of whom are promoting new narratives and shaping perceptions. This is being supplemented by the rapid increase in the means of communication, which include the television (introduced to Bhutan in 1999) and the internet. With more than 87 percent of the population using the internet²⁶ and an estimated social media penetration rate of 91 percent,²⁷ the communication and dissemination of information and counter-narratives has become easier. Launching political attacks on social media and sharing unverified posts and opinions has also become common.²⁸ Finally, unlike the older generations, young Bhutanese are exposed to other cultures and lifestyles through the internet, which has led to a shift in their values, aspirations, and priorities as well as the way in which they think of the world and their neighbours.

- **Foreign policy and identity:** Bhutan has balanced modernisation and tradition since the 1960s, when the country began to implement its development plans with assistance from India.²⁹ Capitalising on elements of Vajrayana Buddhism, the country introduced the concept of Gross National Happiness (GNH) in 1980, which places equal importance on the social, economic, spiritual, cultural, and environmental needs of the country and citizens.³⁰ Bhutan has further used the GNH to shape its culture and identity, distinguishing itself from much bigger neighbours such as India and China. This balance between modernisation and preservation has allowed Bhutan to remain distinct from other neighbours—Tibet and Sikkim, which integrated with China and India, respectively—and has offered it a sense of security and sovereignty.³¹

Bhutan has also presented an alternative way of life; 60 percent of its territory is mandated as forest cover, and it is one of the only two carbon-negative countries in the world.³² It has thus acted as a norm entrepreneur and role model for fighting global issues such as climate change.³³ In 2011 and 2012, the UN adopted two resolutions introduced by Bhutan on holistic approaches to development and happiness towards a new economic paradigm.³⁴ This served to reinforce confidence and nationalism among the Bhutanese and further shaped their perceptions about the world. The Gelephu Special Administrative Region project by the Bhutan government, which intends to portray that sustainability, heritage, and business go hand-in-hand, also reinforces this confidence and identity.

In the past, young Bhutanese believed that modernisation could bring more exposure, material benefits, and individual freedom. Yet, they remained sceptical about its social, ecological, and environmental implications.³⁵ The Bhutanese youth of today continue to maintain an awareness of the environment and culture despite emigrating. They seem to be more confident about their country and its foreign policy.³⁶

- **Economic issues:** Bhutan continues to face structural challenges, from its landlocked geography, to its cold climate, to resource scarcity. However, development partnerships, investments in hydropower, and to some extent, tourism, have led to the country's economic growth. Bhutan's GDP rose from US\$128 million in 1980 to US\$400 million in 2000 and US\$2.3 billion in 2020. Compared to the 1950s, the country has also seen a decline in illiteracy and poverty as well as a boost in per-capita income; in 2023, it graduated to the status of a lower middle-income country.³⁷ From 2001 to 2019, Bhutan's GDP grew by around 7 percent, much of which was derived from the country's investments in and exports from hydropower; in 2021, the sector contributed to 16 percent of GDP and 40 percent of the country's domestic revenues.³⁸

Nevertheless, the sector has been unable to generate employment opportunities and absorb the youth who have benefited from the state's economic growth and welfare policies. As a result, youth unemployment has been a growing concern since at least 2005;³⁹ today, youth unemployment is estimated to be at 29 percent.⁴⁰ Nearly 40 percent of the workforce in the country is employed in agriculture, followed by 25 percent in the public sector.⁴¹ These sectors are either unappealing to the youth or unable to absorb them. The COVID-19 pandemic exacerbated the country's economic challenges, triggering mass migration. In 2022 alone, nearly 17,000 Bhutanese nationals emigrated out of the country.⁴² By 2024, the Bhutanese migrating elsewhere numbered 64,000, which is 9 percent of the total population.⁴³ The number of people migrating—mostly to Australia, Canada, Europe, and the UK—is posing a massive challenge to a country that has a population of just 700,000. The migration crisis also indicates a changing Bhutan, where its youth—who make up nearly half of the country's population—have career and educational goals beyond the country and are escaping an economy that is unable to generate enough jobs.

Even as Bhutanese take pride in their unique identity and the GNH, they have continued to look for employment and better opportunities. In this regard, they view economic diversification, including engagement with China, as a crucial process to fuel its own economic growth. A rising China, with which Bhutan does not have diplomatic relations, is being seen as a lost opportunity for economic growth and benefit. A section of young Bhutanese have also blamed India for Bhutan's poor economic performance. India's model of offering loans, grants, and credit lines for hydropower projects and using its labour, capital, and technology for hydropower projects has invited criticism.⁴⁴ Increasing debts and trade deficit, the slow implementation of projects, and environmental damage from some Indian projects have also gradually intensified this sentiment against India. In this regard, there is a growing perception for the need to diversify the economy both domestically and externally.

These factors give rise to the following question: What do Bhutan's youth think of their country and its foreign policy?⁴⁵ This report seeks to provide answers by addressing how young Bhutanese today view the world. The report highlights that a younger generation of Bhutanese are curious about other countries and cultures, are keen to diversify the economy and foreign policy, and are willing to migrate elsewhere. The results also indicate that India continues to have an advantage over other countries and enjoys a largely positive opinion among Bhutanese.



Methodology

This report utilises a survey of 115 Bhutanese students to understand their perceptions of different countries. At the time of the survey, the respondents were students pursuing their higher education (undergraduate degree or higher) in Bhutan, India, or Australia.⁴⁶ The survey was conducted through Google Forms, administered from 12 August 2023 to 20 December 2023. Because the sample was widespread and diverse, the author used the snowballing survey method to record responses.⁹ The author identified an initial round of participants through networks, peers, colleagues, and friends, and asked them to help identify additional potential subjects.

⁹ Snowball sampling is a survey technique in which research participants are asked to assist researchers in identifying potential subjects.

To accommodate diverse responses and understand how younger generations of Bhutanese perceive the world, the survey was conducted across various geographies, age groups, and genders. Nearly 47 percent of the respondents are male and 52 percent are female.^h The age of respondents ranges from 18-43 years, with 96 percent under 35.

The survey was conducted across various geographies, primarily Bhutan, India, and Australia. Most Bhutanese students in Australia (73 percent at the time of the survey) are concentrated in the province of Western Australia (WA).⁴⁷ Two Australian universities with a large Bhutanese student population were shortlisted—Edith Cowan University (ECU) and Murdoch, both located in WA.⁴⁸ In Bhutan, 15 responses each were collected from five most enrolled colleges across the country. The shortlist was based on data from 2021, the latest available at the time of the survey.⁴⁹ However, the fifth most enrolled college—the College of Science and Technology—was substituted with the sixth most enrolled college, the College of Natural Resources, as respondents from the former did not respond to the requests of the survey.

As enrolment data for Bhutanese students studying in India was unavailable, the author chose two universities: South Asian University, where Bhutanese students enjoy a mandatory 4 percent reservation of total seats,⁵⁰ and JAIN (Deemed-to-be University), which is among the most popular private education institutions for Bhutanese students in South India, with over 72 Bhutanese students admitted to the university in the year 2022-2023.ⁱ For a detailed breakdown of the respondents, see Table A.

^h 1 percent preferred not to state their gender.

ⁱ Data received from the International Admissions team of JAIN University.

Table A: Survey Respondents

Country	Educational Institution	Place	Respondents
India	JAIN (Deemed-to-be University)	Bengaluru, Karnataka	10
	South Asian University	Delhi	10
Australia	Edith Cowan University	Multiple campuses, Western Australia	10
	Murdoch University	Multiple campuses, Western Australia	10
Bhutan	Sherubtse College	Kanglung, Trashigang	15
	Royal Thimphu College	Thimphu	15
	College of Natural Resources	Lobesa, Punakha	15
	Paro College of Education	Paro	15
	Gedu School of Business	Gedu, Chukha	15
Total			115

The sample is not representative of the country's population parameters. Rather, it has been used to understand and highlight common narratives and perceptions of the country's foreign policy among young Bhutanese students. All key observations, recommendations, and implications derived from this sample are, therefore, subjective and prerogative to the responses recorded from the sample population.

Perceptions of India

People-to-People Ties and Culture

Bhutan and India have robust people-to-people (P2P) relations. Almost all Bhutanese respondents have visited India at some point in their lives (see Table 1 in Appendices). Factors such as geographical proximity, visa exemptions, close cultural ties, and economic tilt towards India have facilitated these interactions. These factors, along with the popularity of Bollywood films and the pervasiveness of the Hindi language,⁵¹ has familiarised almost all Bhutanese with Hindi and other Indian languages (see Table 7).

Indian newspapers, websites, radio, and television channels remain popular in Bhutan and were preferred over other options throughout all three ranks (see Table 6) and have a role in shaping their opinions and perceptions.^j This popularity is largely due to

the deep P2P relations between the two countries, the familiarity of Bhutanese with Indian languages and entertainment, and the availability of Indian media channels in the country.⁵²

With more than 70 percent of the population being Buddhist,^{k,53} Bhutan also looks to India—the birthplace of Buddhism—as the country that is closest to their cultural and religious values (see Table 11). One in every four respondents stated that they are aware of India’s Nehru-Wangchuk Centre, which conducts regular cultural programmes, seminars, workshops and training, and documentary screening (see Table 9).⁵⁴

However, these ties are also proving to be detrimental to some extent. For several Bhutanese who have visited India and are familiar with the languages, there is little appeal to visit India (see Table 2) or to learn Indian languages (see Table 8). Some respondents also remarked that learning an Indian language over others would not favour them in the job market.

The enthusiasm of Bhutanese students to study in India is also dissipating (see Table 3). Their number has been declining in recent years, with students preferring destinations such as Australia.⁵⁵ In 2020, Australia had over 1,746 Bhutanese students, while India hosted around 3,100 students. Following the mass migration since the COVID-19 pandemic, these numbers have changed.⁵⁶ While the exact number of Bhutanese students in India is not available, over 10,200 students registered to study in Australia in 2023 alone, which is likely to have impacted the number of students studying or willing to study in India.⁵⁷

^j The majority of questions in the survey asked respondents to rank three countries across rank 1, rank 2, and rank 3 each.

^k Hinduism is the second most widely practised religion in the country. Together, Buddhism and Hinduism are practised by almost 97 percent of the country’s population.

Factors such as the decline in the quality of education and income standards are prominent concerns for South Asian students coming to India.⁵⁸ During their interactions with this author, some Bhutanese parents and students expressed little enthusiasm for studying in India, citing safety and security-related incidents and preferring countries in the West because they could study and work at the same time. Nevertheless, India continues to be the top destination for Bhutanese students, who view this option as a compromise, especially due to lower fees, geographical proximity, and better exposure, facilities, courses, and options compared to Bhutan.⁵⁹

There is also very little interest amongst Bhutanese to settle and work in India (see Table 4). With the Bhutanese Ngultrum pegged to the INR, respondents saw little change in their standards of living compared to countries such as Australia, which have better opportunities and income standards. Bhutanese educated in India often return to Bhutan, and the lack of remittances from India further underscore this trend.^{60,61} However, the same does not seem to be the case with those migrating to other countries. This limited interest in migrating or studying in India could also explain why young Bhutanese are less interested in learning Indian languages.

For the younger generation that has grown up with free English-medium education, English-language movies, music, and TV have become more popular, while the Indian entertainment industry is the second and third most popular across the top three ranks (see Table 5). When asked about their most followed accounts and celebrities on social media, Indian pages and celebrities were the top picks for ranks 1 and 2, closely followed by South Korea and the US (see Table 13), thus underscoring the increasing influence of other cultures and their soft power. This influence is also seen with the country hosting a concert by popular British musician Ed Sheeran in 2025, who will be the first international musician to perform in the country.⁶²

Similarly, social media platforms and apps from the US, China, and Australia have become more popular than Indian ones. Facebook, WeChat, YouTube, Telegram, WhatsApp, Instagram, TikTok, and gaming apps have become popular for enabling global

reach and audience, easy access, user friendliness, and ease of communication.⁶³ Meanwhile, Indian social media platforms and apps were the top preference only among rank 3 (see Table 12).

Economy

Young Bhutanese rank India on top in response to which country provides them the most access to goods, people, and services (see Table 26). The free trade regime between both countries, the free transit of goods from third countries, and visa-free entry for Bhutanese have continued to create this perception for India. India was also the top pick across all three ranks when asked which country's scientific and technological advancements would benefit them the most (see Table 27). The history of sharing technology with Bhutan, the potential externalities and spillover impacts of scientific and technological advancements, and India's contribution to science has likely fostered this optimism.

Young Bhutanese ranked India first when asked about which country produces their everyday consumables (see Table 24) and durable goods (see Table 25). The number of responses for India for durable goods was smaller than for consumables. India is the only neighbour that trades with Bhutan and is the largest export and import market as well as the biggest trade partner. In 2020, bilateral trade accounted for 77 percent of Bhutan's total trade, and Bhutan's imports to India amounted to 87 percent and exports to 90 percent.⁶⁴ These imports accounted for a variety of products, including fuel, motor vehicles, phones, and edibles. However, young Bhutanese consider India to be lacking a strong manufacturing base. Additionally, some respondents stated that, with India being the only transit partner, it is difficult to assess the origin of the goods, thus further contributing to fewer responses for durable goods.

Foreign Policy

Young Bhutanese see India as the top partner that helps Bhutan achieve its goals in multilateral platforms (see Table 19). Such optimism arises from India's assistance to Bhutan with the

membership to the Colombo Plan, the Universal Postal Union, and to the United Nations in 1971.^{l,65} India has been sensitive to Bhutan's concerns in regional and sub-regional initiatives such as the BBIN initiative of Bangladesh, Bhutan, India, and Nepal, where it slowed the implementation of the Motor Vehicles Agreement (MVA) due to Bhutan's concerns.^{m,66} As Bhutan's largest development partner, India has also adhered to the GNH guidelines. Therefore, a number of young Bhutanese believe that India respects and promotes its unique model of GNH (see Table 21) despite some Indian hydropower projects being blamed for damaging the ecosystem, such as by disrupting the natural flow of water and causing deforestation.

Additionally, India has helped Bhutan through periods of financial difficulties,⁶⁷ floods,⁶⁸ and during the COVID-19 pandemic.⁶⁹ Consequently, many young Bhutanese believe that India will be the first country to help Bhutan in case of a natural or man-made disaster or emergency (see Table 22). Furthermore, India's development assistance, education cooperation, defence training and cooperation, and regular training programmes for civil servants in Bhutan have helped shape the latter's institutions and democracy. Bhutan's Constitution, judiciary system, and parliament structure have also drawn inspiration from India,^{n,70} likely influencing respondents' view that India shapes the country's democracy, institutions, and bureaucracy (see Table 20).

ⁱ The Colombo Plan is an intergovernmental organisation focusing on development and capacity building in Asia. Bhutan joined the organisation in 1962. The Universal Postal Union (UPU) is an agency of the United Nations that coordinates on postal policies and facilitates a uniform postal system. Bhutan joined the UPU in 1969. Joining these regional and multilateral organisations was viewed as a major victory for Bhutan in terms of external recognition and sovereignty.

^m The MVA intended to further road transport connectivity in the sub-region, facilitating easy cross-border movement of passengers and goods. The agreement was opposed by civil society and lobby groups in Bhutan, citing threats to their livelihood and environment.

ⁿ Several institutions in Bhutan are shaped by the Indian Constitution, assistance, capacity building, and development aid. Several aspects of Bhutan's constitution are also adapted from the Indian constitution.

Respondents positioned India as their most trusted partner for the last 50 years (see Table 14) and their current top development and infrastructure investment partner (see Table 16). The optimism derives from decades-long cooperation and bilateral relations between the two countries. India's assistance in building the country's infrastructure, funding its FYPs, nurturing a mutually beneficial relationship through the hydropower sector, and deep P2P relations have likely contributed to this perception. Some respondents stated that the revision of the friendship treaty in 2007, wherein India renounced its powers to guide Bhutan's foreign policy, increased their trust for India.

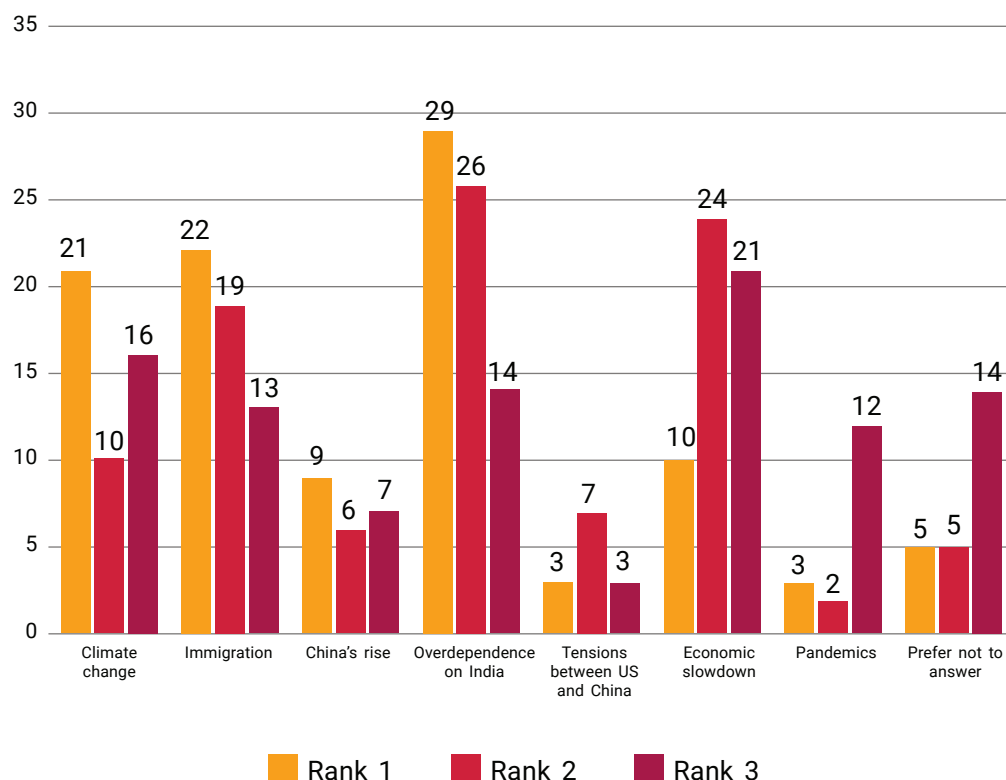
When asked about well-trusted partners (see Table 15) as well as development and infrastructure partners (see Table 17) for the next 10 years, the optimism towards India reduced to some extent. This decline is a product of young Bhutanese hoping that Australia, Japan, and Singapore emerge as trusted development partners. Other factors, such as keenness to expand ties with other countries, increasing debts towards India, and India's limitations to deliver on its promises, have contributed to this outcome. Furthermore, young Bhutanese are sceptical about overdependence on India.

Respondents remarked that over-reliance on India was the biggest challenge (see Table 23 and Figure 1) that their country faced. This was closely followed by immigration, climate change, and economic slowdown. Several respondents recalled India's suspension of kerosene subsidies in 2013 to explain why an overreliance on India is detrimental to their interests.^o A generation that is exposed to social media, have global aspirations, and are desirous of migrating

^o In 2013, India cut off subsidies on kerosene to Bhutan. It was largely suspected that New Delhi's reservations of growing relations between China and Bhutan contributed to this policy decision. See: <https://timesofindia.indiatimes.com/india/ties-strained-as-india-cuts-fuel-subsidy-to-bhutan/articleshow/20936874.cms>

elsewhere want to diversify relations. Furthermore, India-China tensions have placed Bhutan in a difficult position and increased the scepticism towards India, as was already evident during the 2017 Doklam standoff.^{p,71}

Figure 1: Bhutan's Challenges



^p Doklam is a strategic region within Bhutan, disputed by China. Its proximity to India has overarching security implications for the latter's Siliguri corridor. As a result, Bhutan has hesitated to negotiate Doklam with China without India's considerations. In 2017, China unilaterally moved its troops into the Doklam region, to which India retaliated by deploying its troops. This led to a stand-off between both countries.

Perceptions of China

People-to-People Ties

There are limited perspectives of P2P relations with China. Few respondents have visited China (see Table 1) and plan to pursue education (see Table 3) or to settle in that country (see Table 4). In 2020 and 2021, only five and six Bhutanese students, respectively, studied in China.^{72,73} This is contrary to other South Asian nations, for whom China has become an important destination for education.⁷⁴ The lack of diplomatic ties, limited P2P interactions, and Bhutan's reluctance to engage with the country has likely contributed to this perception.

Similar factors have contributed to respondents being unaware of the Chinese language (see Table 7). Awareness of popular Chinese

educational institutions such as the Confucius Institutes are also extremely low (see Table 9). Chinese news websites, radio and television channels, and newspapers are also among the least consumed by young Bhutanese (see Table 6).

Nevertheless, there is some curiosity about the country. When asked to rank the countries they would want to visit, China ranked third, alongside the UK (see Table 2). Chinese was also among the top languages that young Bhutanese wanted to learn (see Table 8). This could be due to geographical proximity, the increasing global importance of China, and prospective job opportunities if Bhutan and Beijing establish diplomatic ties and expand bilateral trade. Furthermore, young Bhutanese view China as being closer to their cultural and religious values and practices (see Table 11). Unlike previous generations, which were antagonistic towards China for annexing Tibet, today's youth are more pragmatic and view Tibet as an integral part of China.

The Chinese entertainment industry—including movies, television shows, music, and celebrities—is popular in Bhutan, being the second most popular response for rank 3 (see Table 5). When asked to rank the origin countries of the pages and celebrities they follow, China was the top pick for rank 3, alongside the US and South Korea (see Table 13).

Social media apps and over-the-top (OTT) platforms have contributed to the increased popularity of Chinese celebrities and entertainment. Chinese social media apps and platforms are popular in the country (see Table 12), almost at par with apps and platforms from the US and from countries such as India and Australia, with which Bhutan has strong P2P relations. With an overall social media penetration rate of 91 percent, Chinese apps like WeChat and TikTok have become popular, with WeChat being the second most popular social media app in the country, largely because of its global branding and popularity as well as ease of use.⁷⁵

Economy

Young Bhutanese have a positive perception of the country's economic ties with China, especially on trade engagements, despite having no direct trade relations and diplomatic ties. China ranked second when the respondents were asked which countries their everyday consumables are imported from (see Table 24). For durables, China was ranked second and third across all three ranks (see Table 25). While still falling short of India, responses for China outweighed those for other countries such as the US, the UK, South Korea, Singapore, and Thailand.

Such optimism arises from the perception of China as being deeply integrated in the global economic order and all countries depending on it for a variety of commodities. In the past two decades, China has also become Bhutan's second top import destination, especially for minerals and chemicals, appliances (mainly televisions and fridges), furniture, and capital goods related to agriculture and construction.⁷⁶ In recent years, there has been a trade surge, largely because of importing bitcoin machinery, which may have reinforced respondents' perception of being economically dependent on China.

However, young Bhutanese recognise the limitations of exporting and settling in China due to limited engagements (see Table 26) and ranked China the lowest among countries that provide Bhutan with access to goods, people, and services. They also have limited hope of benefiting from technological advancements in China (see Table 27). This perception arises from the negligible assistance offered by China and Bhutan's history of rejecting Chinese assistance.

Foreign Policy

China has neither been viewed as a well-trusted partner to Bhutan for the last 50 years (see Table 14) nor as a development and infrastructure partner (see Table 16). A similar indifference persists among respondents when asked which country would emerge as Bhutan's well-trusted partner and a development and infrastructure partner in the next 10 years (see Table 15 and Table 17). Not many in Bhutan see China to be assisting Bhutan in achieving its

goals and interests in multilateral platforms (see Table 19), shaping the country's democracy, institutions, and bureaucracy (see Table 20), promoting its GNH model (see Table 21), or acting as a first responder during a natural disaster or man-made emergency (see Table 22).

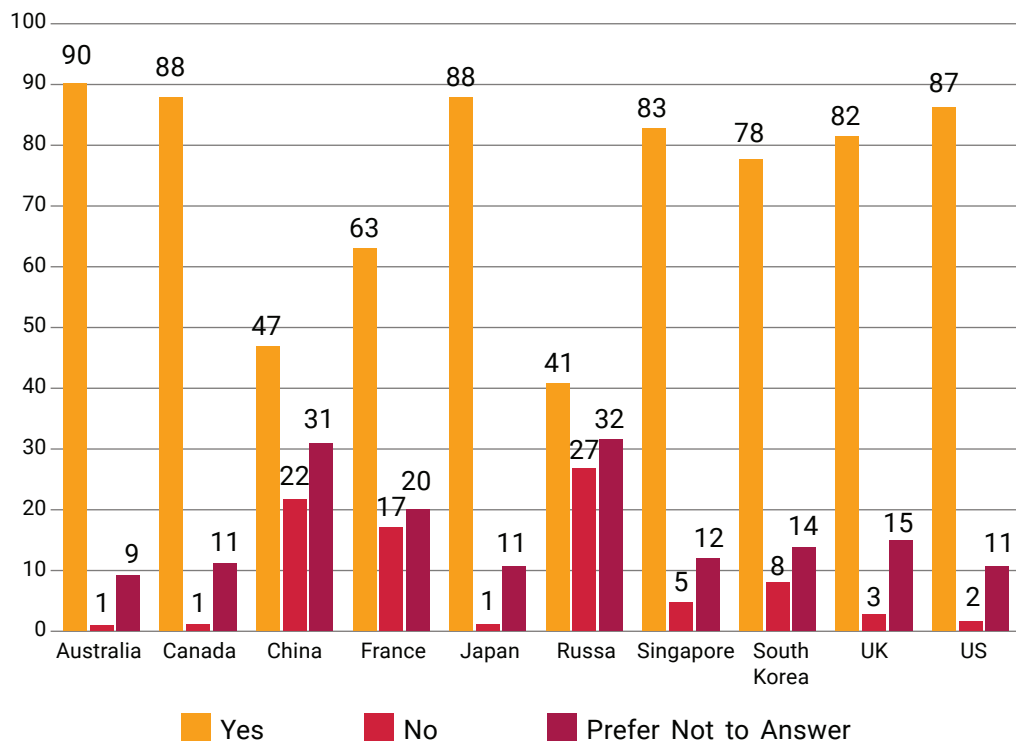
Despite its economic might and ability to assist Bhutan, China has not been able to garner support within the country. This indicates that the youth are specifically thinking of trade and economic opportunities when considering interactions with China. Lack of diplomatic relations, Bhutan's refusal of Chinese assistance, and China's limited investments have created few positive perceptions of the country.

This is not to say China has not assisted the country at all. It has hardly opposed Bhutan on multilateral platforms. Bhutan had even voted in favour of China on multiple occasions in the late 1970s.⁷⁷ China also offered aid in 2021, during the COVID-19 pandemic.⁷⁸ Yet, these isolated incidents are not echoed in the youth's perceptions, largely because of little public knowledge and politicians' reluctance to reiterate them so as to not ring false alarm bells in New Delhi. It is also likely that young Bhutanese find the initiatives to have little benefit compared to those from other countries like India, Australia, and Japan.

Nevertheless, Bhutanese youth are not antagonistic or sceptical of China. For the majority of Bhutanese, China's rise and geopolitical tensions with the US were hardly a concern (see Table 23). The lack of scepticism extends towards China's rise, even as it has an unsettled border dispute, annexed Tibet, claimed Bhutan as a part of Tibet's five fingers, and has been intruding borders. Some respondents expressed that the border dispute is an issue because of India-China competition and that Bhutan could settle the dispute and maintain good ties with China if India consents. However, some respondents also said that the opaqueness of border negotiations has veiled China's aggressive tactics, thereby neutralising its negative perceptions.

When asked about whether Bhutan should host a Chinese diplomatic mission in the country, the responses were less definite compared to other counterparts, apart from Russia (see Table 18 and Figure 2), and less than half of the respondents were keen on having a Chinese mission in the country.

Figure 2: Diplomatic Relations



Distant Partners: Australia, Japan, and the US

Australia

Australia is the most preferred destination for Bhutanese to visit (see Table 2), pursue education (see Table 3), and settle in (see Table 4), driven by push and pull factors, which have been discussed in the previous sections. This preference is a product of long-established relationships between both countries. This trend heightened as the COVID-19 pandemic further damaged Bhutan's economy.

Some respondents prefer to pursue their education in Australia to subsequently find work and settle there, unlike in the case of India. After India, Australia was the first country to host Bhutanese students, with the first cohort arriving in 1969.⁷⁹ Between 2005 and

2022, around 7,800 Bhutanese students studied in Australia; over 10,200 Bhutanese students registered to study in the country in the year 2023 alone.⁸⁰ Similarly, the number of Bhutanese residents in Australia has increased. In 1996, only 50 Bhutanese had settled in Australia, which had increased to 11,000 in 2019 and an estimated 28,000 in 2023.⁸¹ Australia is now home to the largest Bhutanese community abroad,⁸² which attracts other Bhutanese to visit, pursue education, and settle in the country.

Migration and access to English-medium education in Bhutan have also made English-language movies, TV shows, and music from Australia, Canada, the US, and the UK very popular (see Table 5). The same factors have led to Australian news, websites, and media channels (see Table 6) being the second most consumed across all three ranks of Bhutanese students. Some respondents also use Australian social media applications and platforms (see Table 12). Migration has made Australian apps and channels popular among Bhutanese students in Bhutan and India.

Australia also enjoys goodwill when it comes to foreign policy. The country was ranked second across all three ranks among Bhutan's well-trusted partners in the last 50 years (see Table 14). Responses were similar for Bhutan's well-trusted partner in the next 10 years, with increased respondents in rank 1 preferring Australia over India (see Table 15). Canberra is also a popular choice as a development and infrastructure investment partner at present (see Table 16) and in the next 10 years (see Table 17). The number of respondents preferring Australia over India as a development and infrastructure investment partner for first rank in the next decade has also notably increased.

These perceptions are reinforced by the long-term development assistance provided by Australia and recent migration trends. Since 2001, Australia has offered overall development assistance estimated at over US\$100 million.⁸³ Much of this assistance is dedicated to education and scholarships; for the year 2023, over 83 percent of assistance was in the education sector and 13 percent in health,⁸⁴ followed by capacity building, gender equality, climate change,

community development, infrastructure, connectivity, humanitarian assistance and disaster response (HADR), and governance.⁸⁵ Even young Bhutanese acknowledge Australia's assistance since the early 1960s, with the distribution of food grains and assisting with membership in the Colombo Plan in 1962 and the UN in 1971,⁸⁶ indicating that Australia's assistance is deeply entrenched in public memory. This assistance generated significant development opportunities for Bhutan. Some reports estimate that around 50 percent of the Royal University of Bhutan faculty members have an Australian qualification. Additionally, it was estimated that 2,000 of 29,000 civil servants in 2019 had an educational degree from Australia.⁸⁷

Several young Bhutanese believe that Australia provides access to its people, goods, and services (see Table 26). This perception is a result of the recent exodus and the prospects of being employed and settled in that country. This positive perception is also evident in its trade partnership, calculated at A\$354 million (approx. US\$221 million) in 2022-2023, 99 percent of which was related to services trade.⁸⁸ Some respondents also believe that the increasing diaspora will result in increased Bhutanese exports, thus boosting trade. However, respondents acknowledged that the import of goods from Australia, especially durable goods, remains scant (see Table 24 and Table 25). This is likely a product of significant fluctuations in trade between both countries, which is consequently failing to generate a positive opinion on trade.⁸⁹ Prospects of importing capital and technology, the growing Bhutanese diaspora, and increasing bilateral relations between the two countries has led to an opinion that technology advancement in Australia could benefit Bhutan (see Table 27).

While formal diplomatic relations between both countries were established in 2002, they have only just begun to institutionalise regular bilateral consultations and high-level exchanges.⁹⁰ Given the boom in migration and the increasing positive perceptions of Australia, several Bhutanese view Australia as a multisectoral development partner. Almost all respondents expressed an interest in Australia establishing a diplomatic mission in Bhutan (see Table 18). This could also be seen as a way to avoid over-reliance on India.

Japan

Unlike Australia, Bhutan's P2P relationship with Japan remains scant. Only a few respondents visited (see Table 1), wanted to pursue their education (see Table 3), or wanted to settle in the country (see Table 4). In 2021, only 44 Bhutanese students were studying in Japan, all of whom were on scholarships,⁹¹ and only over 442 Bhutanese nationals were settled in Japan as of 2022.⁹² This number is a significant reduction from over 700 students who were enrolled under the "Learn and Earn" Programme between 2017 and 2019.⁹³

That said, there is some curiosity about Japan amongst Bhutanese youth; Japan was one of the popular travel destinations for respondents (see Table 2). There was also reasonable interest in learning Japanese languages amongst respondents (see Table 8). Similarly, Japan is viewed as a country that shares close cultural and religious values with Bhutan (see Table 11) due to common Buddhist practices and Japan's consistent assistance through its cultural grant aid.⁹⁴

Japan is viewed as a well-trusted partner and development and infrastructure investment partner for Bhutanese youth, especially for rank 2 and 3 (see Table 14 and Table 16). As of 2024, Japan has been a notable development assistance partner for Bhutan and has offered US\$500 million in overall grant, loan, and technical assistance.⁹⁵ Much of this development assistance includes healthcare and educational facilities, physical infrastructure, food security, and disaster management.⁹⁶ Both countries also have an annual consultation meeting to implement cooperation and explore areas of cooperation.⁹⁷ This assistance and goodwill has also fostered a perception of Japan as a well-trusted and infrastructure development and investment partner in the next 10 years (see Table 15 and Table 17).

⁹¹ In 2017, Japan and Bhutan signed an MoU for the Learn and Earn Programme, through which Bhutanese students could pursue their educational degrees in Japan while working. However, long working hours, unfavourable working and living conditions, educational burdens, scams from educational consultancies, and the failure to generate employment opportunities limited the prospects of more P2P ties.

Japan has also supported Bhutan in various multilateral platforms, starting from its membership to the Colombo Plan in the 1960s. The Japan-dominated Asian Development Bank has also been one of the top donors of overseas development assistance to Bhutan.⁹⁸ This is one of the reasons why Japan is the top pick among respondents in rank 2 for countries that help Bhutan achieve its goals in multilateral institutions (see Table 19).

Japan is also second and third across the ranks for countries that offer better economic access to Bhutanese goods, services, and people (see Table 26). This optimism arises from Japan's growing openness to international labour. Bhutanese exports to Japan are dominated by vegetables and textiles, which are labour-intensive sectors. Agriculture is the second most employment-generating sector in the country, and this has likely fostered positive perceptions.⁹⁹ Given Japan's historical role in the development of the country, young Bhutanese also believe that scientific and technological advancements in Japan will have positive effects on their country (see Table 27). Bhutanese youth believe that Japan is one of the top exporters of durable goods like vehicles, electrical appliances, laptops, and mobiles due to its strong manufacturing base (see Table 25). This optimism persists despite severe fluctuations in imports from Japan.¹⁰⁰

While P2P relations remain limited, young Bhutanese consider Japan to have several foreign policy and economic benefits. Following on from their need to diversify relations and further diplomatic engagements and ties with Tokyo, several young respondents were keen on Bhutan hosting a diplomatic mission in the country (see Table 18).

The United States

Young Bhutanese consider the US as a popular destination to study and settle in (see Table 3 and Table 4). The country was among the top two picks for rank 1. A number of push and pull factors play a role in this interest to migrate. However, P2P interactions between both countries are limited. Among the surveyed, no Bhutanese had visited the country (see Table 1), largely because

of the geographical distance and expenses. In 2021, only 57 Bhutanese studied in that country.¹⁰¹ The lack of visits and the US's global influence and soft power outreach have likely created more curiosity to visit the country (see Table 2).

Furthermore, education in English and the US's global soft power outreach¹⁰² have continued to foster interest in their pop culture. This consumption of American pop culture was evident when young Bhutanese across all three ranks placed the US in the top three positions when asked about the countries of their most followed pages and celebrities on social media (see Table 13). American newspapers, websites, channels, and radios were somewhat popular amongst young Bhutanese (see Table 6). The US was also ranked first among the social media platforms and applications that the Bhutanese use (see Table 12), with apps like Facebook, YouTube, Telegram, WhatsApp, and Instagram being most popular in the country.¹⁰³

On foreign policy, Bhutan and the US have no diplomatic ties but enjoy warm relations. However, not many young Bhutanese view the country as a trusted partner at present or in the future (see Table 14 and Table 15). The US was the second most popular pick for rank 3 for the country's development and infrastructure investment partner (see Table 16). However, this relative optimism did not last when asked whether the US would be the top development partner in the next 10 years (see Table 17). This attitude persists due to low-level investments from the US despite being the world's largest economy; in 2022 and 2023, the US's FDI was well below 10 percent of Bhutan's total FDI.¹⁰⁴ Other reasons, along with the geographical distance, have likely contributed to the indifference about the US being the first responder and helping promote Bhutan's GNH model (see Table 21 and Table 22).

Some ranked the US as the third popular pick in rank 2 and the second popular pick in rank 3 in response to which country helped them achieve their goals and interests via multilateral platforms such as the UN and World Bank (see Table 19). This optimism, albeit only evident among a few respondents, is likely due to the US's dominance in multilateral institutions and its image as the

promoter and upholder of democracy worldwide. This could also be reinforced by the fact that the US and Bhutan cooperate on multiple issues, albeit in a limited manner and scale.¹⁰⁵

On the economic front, the US did not enjoy a significant positive perception among the Bhutanese, especially on trade (see Table 24 and Table 25). Owing to lower volumes of exports and migration rates, the US was also one of the less popular picks for offering access to services, people, and goods (see Table 26). Few respondents also believed that scientific and technological advancements in the US would benefit Bhutan despite the popularity of US social media applications and platforms (see Table 27). This is likely because of the US's assistance, trade, and capital investment remain below expectations.

However, soft power, the desire to promote P2P relations, and the willingness to promote bilateral ties and economic cooperation are likely contributing to an interest in hosting a US mission in the country (see Table 18).

Other Countries

Canada

Bhutanese youth's perceptions of Canada are largely limited to education and migration. No respondents had visited the country (see Table 1), likely because of the distance and little historical ties. Even the number of people studying in Canada remained low. In 2022, only 94 Bhutanese students were in the country.^{106,107} However, media reports suggest that the country is slowly emerging as an alternative to Australia, especially with the latter tightening its migration rules.¹⁰⁸ Canada was also a popular pick for countries that the respondents stated they would prefer to study or settle in (see Table 3 and Table 4). Push and pull factors explained previously, along with relatively cheaper education fees and unlimited working hours for students, have

made the country a popular destination.^{109,110} This has also fostered some interest in visiting the country (see Table 2). Given this increasing popularity, young Bhutanese have been keen on their country hosting a Canadian diplomatic mission (see Table 18). However, young Bhutanese were indifferent on questions relating to foreign policy and economy.

The United Kingdom

The UK has emerged as the third most popular destination for migration after Canada.¹¹¹ The number of respondents who had visited the country was low (see Table 1), primarily because of the distance and expenses. This also had an impact on the number of Bhutanese students who were willing to study in that country. In 2022, only 40 Bhutanese students studied in the UK.¹¹² However, with increasing restrictions in Australia, the Bhutanese view the UK as a potential destination for further studies and to settle in (see Table 3 and Table 4). Furthermore, the UK's global soft power and media readership (see Table 6) have created an appeal and curiosity for the country. The country was the top pick for the third rank, alongside China, as a potential travel destination (see Table 2). This soft power, combined with the willingness to migrate and study in the country, has also motivated respondents to prefer a UK mission (see Table 18). Perceptions towards the UK were largely indifferent regarding foreign policy and economy.

South Korea

Perceptions towards South Korea seem to emerge from the country's soft power, likely due to the popularity of the Korean pop-culture wave or Hallyu, which is contributing to increasing interest in Korean culture, language, and entertainment. Korean entertainment has influenced the fashion sense and appearances of some Bhutanese, whereas for others, it has helped to keep up with "global trends". Bhutan even hosted the first-ever K-pop concert in the country in 2017.

This curiosity seems to be the driving factor behind young Bhutanese ranking South Korea as one of the top countries that they would like to visit (see Table 2); some also wanted to pursue their education in the country (see Table 3), although only five Bhutanese students studied in that country in 2021.¹¹⁴ Korean was also the second most known language in the country, although still far behind Indian languages (see Table 7). Respondents picked Korean (see Table 8) as the language they would like to learn. When asked how frequently they watched movies and TV shows or listened to music from certain countries, Korean entertainment was ranked third across all three ranks (see Table 5). This influence is also evident on social media, with respondents following South Korean social media pages and celebrities the most (see Table 13).

Singapore

There was no significant positive perception regarding the economy, culture, and P2P relations for Singapore. However, the country enjoyed a positive perception on bilateral relations, especially on development partnership. Singapore was among the top picks for rank 3 when asked about Bhutan's well-trusted partner for the last 50 years and for the next 10 years (see Table 14 and Table 15). It was also the top pick for third rank when asked about top development and infrastructure investment partners and for the next 10 years (see Table 16 and Table 17). Singapore also topped in rank 3 when asked about cooperation on multilateral platforms (see Table 19).

Such optimism persists likely due to the countries' cooperation on human resource development and capacity building since 1971.¹¹⁵ Starting from 2017, Singapore has been the second largest investor in Bhutan, with its annual investments accounting for 13-19 percent of the country's overall FDIs.¹¹⁶ Furthermore, Singapore has assisted Bhutan through the Colombo Plan.¹¹⁷ The countries are also working together on countering mutual regional, geopolitical, and climate-related challenges, thus fostering cooperation on several multilateral forums and platforms. This has also likely fostered an opinion amongst Bhutanese that scientific and technological advancement in Singapore will also benefit Bhutan (see Table 27). Collaborating

with Singaporean firm Bitdeer for bitcoin mining and having Singapore companies and personalities involved in the Board of the Gelephu project indicates the growing cooperation on investments and technology.¹¹⁸

Thailand

Bhutan and Thailand enjoy warm relations. Thailand has become a popular destination for education, medical treatment, trade, leisure, pilgrimage, and transit.¹¹⁹ In 2023, the government estimated that over 1,300 Bhutanese had settled in Thailand,¹²⁰ and around 400 students were pursuing their education in Thailand as of 2021.^{121,122} Given these close P2P ties, it is unsurprising that Thailand was the third most visited country by respondents (see Table 1). It is also deemed a country with close religious and cultural ties, mainly due to its Buddhist practices and history (see Table 11).

Thailand has also established itself as a substantial investor in the country. Between 2017 and 2023, Thailand invested 10-17 percent of its overall FDI every year. Thailand was the second preference in rank 3 when asked about the top development and infrastructure partners in the last 50 years (see Table 16). However, this optimism for the country seems to be fading because of the declining investments in the last few years (see Table 17). In 2017, Thailand invested 17 percent of total FDI, which fell to 10 percent of the overall FDI by 2023. Furthermore, Thailand is one of the top import sources for consumable goods (see Table 24), with the country being the second most popular choice for rank 3, alongside China and South Korea. Both countries are also negotiating a Free Trade Agreement to expedite trade.¹²³

Bangladesh

Bangladesh was the third most preferred country in rank 2 for the top development and infrastructure partners in the next decade (see Table 17). Bangladesh's significant economic growth in the last few decades and push for connectivity initiatives (through India), such as hydropower imports, special economic zones, and railway connectivity, have contributed to this optimism. Similar reasons have likely contributed to several Bhutanese viewing Bangladesh as a country that offers access to Bhutanese goods, people, and services (see Table 26). Finally, Bangladesh is considered one of the top import sources of everyday consumables (see Table 24), with the country being among the top 10 import sources.¹²⁴ This cooperation has been further boosted by a preferential trade agreement with Bangladesh.



Key Observations and Implications

Multiculturalism and Globalisation

The responses recorded for this survey indicate that India's influence in Bhutan is neither lost nor completely unchallenged; the reality is more complex. India enjoys advantages like historical ties, P2P relations, religion, proximity, influence, connectivity, and economic relations that compel increased cultural and P2P relations between the two countries. This fosters a positive image for India, enhances bilateral ties, and makes young Bhutanese more receptive to Indian interests and narratives. However, this familiarity also risks negating the appeal for India, especially when young Bhutanese are looking for diversification and are more exposed to the world.

Unlike before, when Indian media and news were Bhutanese's sole entertainment source, today's younger generation has more access to global entertainment and culture. More familiar with the English language and with greater access to the internet, OTT platforms, apps, and social media, today's youth are more attracted to other countries and their cultures, such as South Korea, Australia, Japan, the US, and China. These developments have little to do with India and are partly related to keeping up with trends and partly related to external factors. For instance, technological advancements, especially on social media platforms and applications, are making the US and China popular. Similarly, the Korean Wave, which has made significant inroads across the globe, has triggered curiosity to learn more about South Korea, its culture, and its language.

There is no single means by which a country or culture has appealed to the Bhutanese. In the case of India, multiple factors, from development assistance to geographical proximity to cultural interactions, have shaped its appeal. For Japan, this appeal is largely based on development assistance and cultural ties. For the US, it is soft power, technological dominance, and economic appeal, whereas for Australia, it is historical ties and increasing migration and diasporic engagements. The appeal for Bangladesh and Singapore has increased due to the nature of bilateral and economic ties. In Thailand, the appeal has largely sprung from P2P relations, while the Korean Wave drives the appeal of Korea. For countries like Canada and Australia, the appeal has increased due to domestic and temporary factors like visa conditions, economic opportunities, migration, and wages.

With young Bhutanese being more exposed to the world, they will continue to embrace different cultures. Similarly, different factors, ranging from bilateral relations to domestic developments, will continue to shape the perceptions and appeal of certain countries. While India has several advantages, various cultures and countries will continue to make inroads, especially with the internet and diversification of foreign policy. This will deepen these countries' soft power and P2P and cultural linkages with Bhutan, which could further challenge India's position.

India will thus have to innovate its policies to make itself and its culture more appealing to the younger generation of Bhutan. For instance, India could collaborate with Bhutanese universities to teach Indian languages (e.g., Hindi and others), which could help them with potential job opportunities in both countries. This could be a crucial opportunity as Bhutan looks at more economic integration and opportunities with India through the Gelephu SAR project. Similarly, while Bhutanese view visiting India as a necessity for the purposes of education, health, and trade, more could be done to incite curiosity in the country. Interaction and visit programs for younger Bhutanese, especially at college levels, could help them understand India as a destination beyond necessity.

Indian languages and the entertainment industry could also become more attractive by involving Bhutan and Bhutanese, especially as they are familiar with Hindi and Bollywood. Campaigns that promote Indian celebrities visiting Bhutan for tourism or filming—as in the case of the Maldives during the COVID-19 pandemic—could benefit both countries. Collaboration in production and star cast in the entertainment industries also provides an opportunity to make Indian entertainment and languages more appealing. The first such production collaboration between India and Bhutan for a feature film took place in 2018; additionally, movies like *Jawan*, which features a Bhutanese actor alongside Shah Rukh Khan, are small steps in the right direction.^{125,126}

The Quest for Education and Employment

Several push and pull factors are at play in Bhutan today. The youth are keen to escape an economy that is failing them. Better standards of living, fluency in English, and higher repayment periods for loans have acted as push factors. In comparison, higher living standards, job prospects, and the ability to earn and study simultaneously have acted as pull factors.

For many Bhutanese, there is little interest to study and settle in India, since it does not offer them what other developed countries can. Isolated safety incidents, relatively lower living standards, and

fewer prospects of higher earnings have further motivated young Bhutanese to move to these new destinations. Nonetheless, India remains a popular destination, though largely a compromise due to its proximity, lower fees, and better education than Bhutan.

For Bhutanese youth, Australia has become the most preferred destination to pursue education and settle in. This migration has further triggered a greater curiosity to embrace their soft power, technology, media, and apps. There is also an increase in positive perceptions of the country regarding foreign policy and economy. Other places like Canada and the UK are also becoming popular. Despite limited migration and P2P relations, Bhutanese are increasingly interested in studying and settling in countries like the US, Japan, Korea, Canada, and the UK.

This will contribute to long-term P2P relations with other countries, which India previously had a monopoly over. For generations, such P2P relations with India have contributed to a better understanding and the deepening of bilateral relations.¹²⁷ It is thus crucial for India to maintain a favourable public opinion to avoid politicising Indian projects and defence and strategic cooperation.

One way to mitigate these implications is to improve the quality of education in India and offer more employment and economic incentives to young Bhutanese. India's decision to help set up campuses of international universities is a step in the right direction.¹²⁸ Indian universities could collaborate with Australian universities to launch exchange and fellowship programs for select foreign students, as from Bhutan, enrolled in their universities. This will further education collaboration between these QUAD countries and strengthen bilateral relations. It will also reduce Australia's concerns of increasing migration and assuage India's concerns about the reducing number of South Asian and Bhutanese students in the country.¹²⁹ Such exchanges could also provide Bhutanese students with employment opportunities in India, which has a demand for students with foreign degrees.¹³⁰

The China Factor

Unlike India, China does not enjoy significant relations or cultural power in Bhutan and falls behind India and other powers in many aspects. In most cases, young Bhutanese are neither hostile nor extremely hopeful of China's potential benefits to Bhutan. There is some interest in the country; Chinese entertainment and soft power have made inroads in the country despite a lack of diplomatic relations. However, this influence lags significantly behind Indian influence and cultural interactions.

Young Bhutanese also do not expect a significant benefit from China in the coming years, nor do they view it as a top development partner or a well-trusted partner now or in the future. They do not see significant benefits, especially to their culture or foreign policy, apart from trade. Nevertheless, despite Tibetan annexation and the lack of diplomatic relations with China, the Bhutanese view China as having close cultural and religious relations with their country. Few respondents see China's rise and competition with the US as a challenge to the country, despite Bhutan's ongoing border dispute with China, indicating that Bhutan harbours no antagonism for its northern neighbour.

China, which intends to expand its influence in Bhutan, has had limited success. Young Bhutanese do not see China as a development partner to the country, despite acknowledging and hoping to benefit from its economic might and trade. However, it remains to be seen whether these dynamics, perceptions, and influence would change if China opens its embassy in Bhutan, expands its diplomatic engagements with Thimphu, and continues to intimidate the country.

Foreign Policy, Economy, and Diversification

Young Bhutanese understand that geographical realities and geopolitical complexities continue to compel Bhutan to align closer to its southern neighbour. Given India's continued assistance, the country remains a well-trusted development partner. Most

respondents continue to see India as a partner for the future—a perception that is fostered by decades-long cooperation and bilateral relations. Similarly, several respondents view India as a top trade and economic partner. That said, the number of responses registering India as a well-trusted and development partner fell when the questions were posed within the context of the next 10 years. Young Bhutanese today are keen on diversifying their foreign policy and are in favour of hosting the diplomatic missions of other countries—besides China and Russia—in Bhutan. Additionally, there is an increasing perception that the country is over-reliant on India.

In contrast to many commentators,¹³¹ India is not losing Bhutan to China. Instead, the younger generation of Bhutan, with their education and global exposure through the internet, is keen on diversification with other countries and looking beyond India and China. Australia and Japan, besides India, remain the most popular choices among the younger generation. The perceptions related to these countries are holistic and expand across sectors, unlike other counterparts. Additional leverages have been created through decades-old assistance from Australia and increased migration from Bhutan in recent years. This will continue to generate more soft power and diasporic and P2P relations, even if Bhutanese students return to their country. Japan, a historical partner, will continue to be viewed with optimism as it increases its engagements with the region, including in development assistance.

Other countries like Singapore have become important for investments and assistance in scientific and technological developments. South Korea and Thailand have become attractive for their P2P relations and culture, and the UK, Canada, and the US have become more preferable options for people to migrate to and settle in. Bangladesh, too, has become important for a potential economic partnership.

Furthermore, young Bhutanese will continue to find alternatives through the internet and other push and pull factors in the country. India should thus work with its like-minded partners to further bilateral ties and negate existing sentiments of Bhutan being over-reliant on India. It could also initiate cooperation with these countries to address issues that could benefit from their strengths. Cooperation with Japan on development and cooperation with Australia on education will benefit all countries involved. This will also improve India's perception as a development and economic partner, which can usher in investments from elsewhere and help Bhutan diversify its economy. This will deter Bhutanese youth from looking up to China and ensure that their opinion remains unshaped, with little interaction, much to India's convenience.



Conclusion

This survey reached out to 115 Bhutanese students to understand how young Bhutanese view other states and their country's foreign policy. The survey results indicate that young Bhutanese are keen on diplomatic diversification and are looking beyond their immediate neighbours to improve diplomatic relations. Throughout the survey, Bhutanese respondents ranked India highly, indicating that India continues to have a strong influence in the country. At the same time, they are looking elsewhere to migrate and diversify the country's relations and economy. They are also attracted to other cultures and countries. Public opinion about China remains neutral. There is increasing optimism for Australia and Japan, which younger generations have grown familiar with and have developed a preference

for. Others like the US, South Korea, Singapore, Bangladesh, and the UK have also garnered optimistic opinions, although only in select areas of cooperation.

The sample used here is not representative of the country's population parameters. All key observations, recommendations, and implications derived from this sample are, therefore, subjective and based on the responses of the sample population. Nonetheless, this report raises important points that need further investigation. Future research could focus on key issues highlighted here: unshaped public opinions about China; perceptions of Australia and Japan; and India's soft power and cultural presence in Bhutan. It is equally important to understand why the youth in Bhutan are seeking diversification and embracing other cultures.

Other areas that could benefit from further research are the implications of development assistance on perceptions. Future research can examine questions related to foreign policy and attempt to understand how young Bhutanese perceive the world and their country. This will help Bhutan tailor its partnerships based on the needs and desires of future generations while also helping partner countries understand the demands and needs of their potential beneficiaries.

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Appendices

People-to-People and Culture

**Table 1: Have you ever visited any of the following countries?
(select all that apply)**

Country	No. of Responses	Percentage
Australia	20	17.4
Bangladesh	2	1.7
Canada	0	0
China	2	1.7
India	109	94.8
Japan	4	3.5
Singapore	6	5.2
South Korea	3	2.6
Thailand	19	16.5
UK	1	0.9
US	0	0

Table 2: Given an opportunity to visit a country, which of the following destinations would you prefer? (rank three preferences)

Country (Rank 1)	No. of Responses	Percentage
Australia	34	29.56
Canada	12	10.43
China	1	0.86
India	0	0
Japan	15	13.04
Singapore	8	6.95
South Korea	18	15.65
Thailand	4	3.47
UK	4	3.47
US	19	16.52
US	0	0

Country (Rank 2)	No. of Responses	Percentage
Australia	15	13.04
Canada	33	28.69
China	6	5.2
India	2	1.73
Japan	17	14.7
Singapore	5	4.34
South Korea	17	14.7
Thailand	3	2.6
UK	6	5.2
US	11	9.56
US	0	0

Country (Rank 3)	No. of Responses	Percentage
Australia	12	10.43
Canada	13	11.3
China	17	14.78
India	9	7.82
Japan	13	11.3
Singapore	7	6.08
South Korea	11	9.56
Thailand	3	2.6
UK	17	14.7
US	13	11.3
US	0	0

Table 3: Given an opportunity to pursue your studies abroad, which of the countries would you prefer to study in? (rank three preferences)

Country (Rank 1)	No. of Responses	Percentage
Australia	34	29.56
Bangladesh	0	0
Canada	17	14.78
China	0	0
India	1	0.86
Japan	9	7.82
Singapore	7	6.08
South Korea	8	6.95
Thailand	0	0
UK	5	4.34
US	24	20.86
Not Applicable	10	8.69

Country (Rank 2)	No. of Responses	Percentage
Australia	17	14.78
Bangladesh	5	4.34
Canada	20	17.39
China	3	2.6
India	2	1.73
Japan	9	7.82
Singapore	8	6.95
South Korea	14	12.17
Thailand	5	4.34
UK	10	8.69
US	13	11.3
Not Applicable	9	7.82

Country (Rank 3)	No. of Responses	Percentage
Australia	16	13.91
Bangladesh	9	7.82
Canada	16	13.91
China	3	2.6
India	4	3.47
Japan	13	11.3
Singapore	8	6.95
South Korea	4	3.47
Thailand	2	1.73
UK	17	14.78
US	14	12.17
Not Applicable	9	7.82

Table 4: Given an opportunity to settle in another country, which of the following countries would you prefer to settle in and work? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	42	36.52
Canada	9	7.82
China	0	0
India	0	0
Japan	14	12.17
Singapore	4	3.47
South Korea	13	11.3
Thailand	3	2.6
UK	2	1.73
US	22	19.13
Not Applicable	6	5.21

Country (Rank 2)	No. of Responses	Percentage
Australia	16	13.9
Canada	28	24.34
China	1	0.86
India	0	0
Japan	12	10.43
Singapore	11	9.56
South Korea	8	6.95
Thailand	1	0.86
UK	20	17.39
US	13	11.3
Not Applicable	5	4.34

Country (Rank 3)	No. of Responses	Percentage
Australia	16	13.91
Canada	22	19.13
China	8	6.95
India	5	4.34
Japan	6	5.21
Singapore	8	6.95
South Korea	5	4.34
Thailand	8	6.95
UK	11	9.56
US	20	17.39
Not Applicable	6	5.21

Table 5: How often do you watch movies/TV shows or listen to music from the following countries? (rank three preferences)

Country (Rank 1)	No. of Responses	Percentage
Australia/Canada/ US/UK (English)	43	37.39
China	3	2.6
India	35	30.43
Japan	9	7.82
South Korea	24	20.86
Thailand	1	0.86
Country (Rank 2)	No. of Responses	Percentage
Australia/Canada/ US/UK (English)	47	40.86
China	7	6.08
India	33	28.69
Japan	10	8.69
South Korea	16	13.91
Thailand	2	1.73
Country (Rank 3)	No. of Responses	Percentage
Australia/Canada/ US/UK (English)	29	25.21
China	24	20.86
India	21	18.26
Japan	13	11.3
South Korea	21	18.26
Thailand	7	6.08

Table 6: The newspapers/websites you often read or channels/radios you often listen to are from which countries?

Country (Rank 1)	No. of Responses	Percentage
Australia	22	19.13
Canada	3	2.6
China	2	1.73
India	51	44.34
Japan	3	2.6
Singapore	0	0
South Korea	10	8.69
Thailand	0	0
UK	8	6.9
US	16	13.91

Country (Rank 2)	No. of Responses	Percentage
Australia	20	17.39
Canada	4	3.47
China	9	7.82
India	24	20.8
Japan	8	6.95
Singapore	2	1.73
South Korea	14	12.17
Thailand	1	0.86
UK	9	7.82
US	24	20.86

Country (Rank 3)	No. of Responses	Percentage
Australia	22	19.13
Canada	5	4.34
China	10	8.69
India	24	20.86
Japan	8	6.95
Singapore	2	1.73
South Korea	6	5.21
Thailand	4	3.47
UK	17	14.78
US	17	14.78

Table 7: Other than English, what other foreign languages do you speak? (select all that apply)

Language	No. of Responses	Percentage
Chinese	4	3.47
Hindi/Indian Languages	108	93.91
Japanese	13	11.3
Korean	23	20
Thai	3	2.6
French	1	0.86
Russian	1	0.86
Spanish	1	0.86

Table 8: Other than English, what other foreign languages do you prefer to learn? (rank three preferences)

Language (Rank 1)	No. of Responses	Percentage
Chinese	18	15.65
Hindi/Indian Languages	13	11.3
Japanese	31	26.9
Korean	32	27.8
Thai	0	0
French	11	9.56
Russian	2	1.73
Spanish	6	5.21
Arabic	2	1.73

Language (Rank 2)	No. of Responses	Percentage
Chinese	5	4.34
Hindi/Indian Languages	8	6.9
Japanese	35	30.43
Korean	21	18.26
Thai	9	7.82
French	23	20
Russian	2	1.73
Spanish	12	10.43
Arabic	0	0

Language (Rank 3)	No. of Responses	Percentage
Chinese	16	13.91
Hindi/Indian Languages	11	9.56
Japanese	13	11.3
Korean	18	15.65
Thai	7	6.08
French	19	16.52
Russian	9	7.82
Spanish	13	11.3
Arabic	9	7.82

Table 9: Are you familiar with any of the following cultural centres? (select all that apply)

Cultural Centre	No. of Responses	Percentage
Confucius Institute	4	3.47
Nehru- Wangchuck Cultural Centre	48	41.73
The Japan Foundation	18	15.65
Korean Cultural Centre	17	14.78
British Council	19	16.5
Alliance Francaise	2	1.73
Instituto Cervantes	0	0
None of the Above	52	45.21

Table 10: Which of the following cuisines do you often prefer when at an eatery? (rank three responses)

Cuisine (Rank 1)	No. of Responses	Percentage
Chinese	9	7.82
Indian	46	40
Japanese	18	15.65
Korean	34	29.56
European	3	2.6
Mediterranean	0	0
American	5	4.34

Cuisine (Rank 2)	No. of Responses	Percentage
Chinese	12	10.43
Indian	20	17.39
Japanese	29	25.21
Korean	27	23.47
European	2	1.73
Mediterranean	7	6.08
American	18	15.65

Cuisine (Rank 3)	No. of Responses	Percentage
Chinese	14	12.17
Indian	23	20
Japanese	23	20
Korean	18	15.65
European	8	6.95
Mediterranean	7	6.08
American	22	19.13

Table 11: Which of the following countries are the closest to your cultural and religious values? (rank three preferences)

Country (Rank 1)	No. of Responses	Percentage
Australia	9	7.82
Canada	0	0
China	12	10.43
India	70	60.86
Japan	4	3.47
Singapore	1	0.86
South Korea	7	6.08
Thailand	12	10.43
UK	0	0
US	0	0

Country (Rank 2)	No. of Responses	Percentage
Australia	9	7.82
Canada	3	2.6
China	24	20.86
India	17	14.78
Japan	29	25.21
Singapore	8	6.95
South Korea	5	4.34
Thailand	17	14.78
UK	1	0.86
US	2	1.73

Country (Rank 3)	No. of Responses	Percentage
Australia	12	10.43
Canada	10	8.69
China	11	9.56
India	15	13.04
Japan	18	15.65
Singapore	8	6.95
South Korea	14	12.17
Thailand	23	20
UK	0	0
US	4	3.47

Table 12: Your most used social media platforms and applications are from which of the following countries? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	24	20.86
Canada	4	3.47
China	19	16.5
India	23	20
Japan	3	2.6
Russia	0	0
Singapore	2	1.73
South Korea	7	6.08
Thailand	0	0
UK	1	0.86
US	32	27.82

Country (Rank 2)	No. of Responses	Percentage
Australia	11	9.56
Canada	12	10.43
China	23	20
India	22	19.13
Japan	6	5.21
Russia	2	1.73
Singapore	2	1.73
South Korea	11	9.56
Thailand	1	0.86
UK	6	5.21
US	19	16.52

Country (Rank 3)	No. of Responses	Percentage
Australia	13	11.3
Canada	9	7.82
China	22	19.13
India	23	20
Japan	11	9.56
Russia	0	0
Singapore	2	1.73
South Korea	11	9.56
Thailand	2	1.73
UK	7	6.08
US	15	13.04

Table 13: Your most followed pages/celebrities on social media are from which countries? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	13	11.3
Canada	6	5.21
China	4	3.47
India	32	27.82
Japan	6	5.21
Russia	0	0
Singapore	0	0
South Korea	36	31.3
Thailand	0	0
UK	1	0.86
US	17	14.7

Country (Rank 2)	No. of Responses	Percentage
Australia	10	8.69
Canada	8	6.95
China	14	12.17
India	22	19.13
Japan	7	6.08
Russia	1	0.86
Singapore	3	2.6
South Korea	16	13.91
Thailand	5	4.34
UK	8	6.95
US	21	18.26

Country (Rank 3)	No. of Responses	Percentage
Australia	13	11.3
Canada	4	3.47
China	19	16.5
India	13	11.3
Japan	11	9.56
Russia	0	0
Singapore	2	1.73
South Korea	19	16.52
Thailand	4	3.47
UK	11	9.56
US	19	16.52

Foreign Policy

Table 14: Who do you think has been Bhutan's well-trusted partner in the past 50 years? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	12	10.43
Canada	0	0
China	1	0.86
India	98	85.21
Japan	1	0.86
Singapore	0	0
South Korea	0	0
Thailand	1	0.86
UK	0	0
US	2	1.73

Country (Rank 2)	No. of Responses	Percentage
Australia	25	21.73
Canada	7	6.08
China	5	4.34
India	9	7.82
Japan	49	42.6
Singapore	4	3.47
South Korea	2	1.73
Thailand	7	6.08
UK	2	1.73
US	5	4.34

Country (Rank 3)	No. of Responses	Percentage
Australia	18	15.65
Canada	11	9.56
China	6	5.21
India	5	4.34
Japan	19	16.52
Singapore	17	14.78
South Korea	5	4.34
Thailand	16	13.91
UK	6	5.21
US	12	10.43

Table 15: Which country do you think will be Bhutan's well-trusted partner in the next 10 years? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	24	20.86
Canada	1	0.86
China	1	0.86
India	70	60.86
Japan	7	6.08
Singapore	5	4.34
South Korea	0	0
Thailand	2	1.73
UK	3	2.6
US	2	1.73

Country (Rank 2)	No. of Responses	Percentage
Australia	25	21.7
Canada	9	7.82
China	6	5.21
India	15	13.04
Japan	28	24.34
Singapore	7	6.08
South Korea	10	8.69
Thailand	9	7.82
UK	0	0
US	6	5.21

Country (Rank 3)	No. of Responses	Percentage
Australia	20	17.39
Canada	7	6.08
China	7	6.08
India	12	10.43
Japan	23	20
Singapore	13	11.3
South Korea	7	6.08
Thailand	7	6.08
UK	10	8.69
US	9	7.82

Table 16: Which of the following countries are Bhutan's top development and infrastructure investment partners? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	13	11.3
Canada	4	3.47
China	1	0.86
India	83	72.17
Japan	10	8.69
Singapore	1	0.86
South Korea	0	0
Thailand	0	0
UK	0	0
US	3	2.6

Country (Rank 2)	No. of Responses	Percentage
Australia	15	13.04
Canada	7	6.08
China	5	4.34
India	20	17.39
Japan	48	41.73
Singapore	7	6.08
South Korea	2	1.73
Thailand	3	2.6
UK	2	1.73
US	6	5.21

Country (Rank 3)	No. of Responses	Percentage
Australia	12	10.43
Canada	8	6.95
China	10	8.69
India	13	11.3
Japan	10	8.69
Singapore	24	20.86
South Korea	3	2.6
Thailand	15	13.04
UK	5	4.34
US	15	13.04

Table 17: Which of these countries will be Bhutan's top development and infrastructure investment partners in the next 10 years? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	24	20.86
Bangladesh	5	4.34
Canada	2	1.73
China	3	2.6
India	53	46.08
Japan	19	16.52
Singapore	4	3.47
South Korea	0	0
Thailand	0	0
UK	0	0
US	5	4.34

Country (Rank 2)	No. of Responses	Percentage
Australia	10	8.69
Bangladesh	12	10.43
Canada	7	6.08
China	9	7.82
India	24	20.86
Japan	30	26.08
Singapore	12	10.43
South Korea	3	2.6
Thailand	1	0.86
UK	3	2.6
US	4	3.47

Country (Rank 3)	No. of Responses	Percentage
Australia	17	14.7
Bangladesh	8	6.95
Canada	13	11.3
China	6	5.21
India	7	6.08
Japan	17	14.78
Singapore	22	19.13
South Korea	5	4.34
Thailand	5	4.34
UK	3	2.6
US	12	10.43

Table 18: Bhutan should host diplomatic missions (consulates/embassies) of the following countries. (Pick from: Yes/No/Prefer not to answer)

Countries	Yes	Percentage of Yes	No	Percentage of No	Prefer not to answer (NA)	Percentage of NA
Australia	104	90.43	1	0.87	10	8.69
Canada	101	87.82	1	0.87	13	11.3
China	54	46.95	25	21.73	36	31.3
France	72	62.6	20	17.39	23	20
Japan	101	87.82	1	0.87	13	11.3
Russia	47	40.86	31	26.9	37	32.17
Singapore	95	82.6	6	5.21	14	12.17
South Korea	90	78.26	9	7.82	16	13.91
UK	94	81.73	4	3.47	17	14.78
US	100	86.95	2	1.73	13	11.3

Table 19: Which of the following countries help Bhutan achieve its goals and interests in multilateral platforms, such as the United Nations, World Bank, etc.? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	14	12.17
Canada	1	0.87
China	2	1.73
India	83	72.8
Japan	8	6.95
Singapore	1	0.87
South Korea	1	0.87
Thailand	2	1.73
UK	1	0.87
US	2	1.73

Country (Rank 2)	No. of Responses	Percentage
Australia	11	9.56
Canada	8	6.9
China	5	4.34
India	16	13.91
Japan	43	37.39
Singapore	2	1.73
South Korea	3	2.6
Thailand	7	6.08
UK	8	6.9
US	12	10.43

Country (Rank 3)	No. of Responses	Percentage
Australia	15	13.04
Canada	7	6.08
China	7	6.08
India	15	13.04
Japan	15	13.04
Singapore	18	15.65
South Korea	7	6.08
Thailand	11	9.5
UK	4	3.4
US	16	13.91

Table 20: What countries have best assisted and shaped Bhutan's democracy, institutions, and bureaucracy? (one answer only)

Country	No. of Responses	Percentage
Australia	4	3.5
Canada	0	0
India	90	78.3
China	1	0.9
Japan	4	3.5
Singapore	2	1.7
Thailand	3	2.6
South Korea	2	1.7
UK	1	0.9
US	8	7

Table 21: Who is the most reliable development partner when it comes to respecting and promoting Bhutan's Gross National Happiness (GNH)? (one answer only)

Country	No. of Responses	Percentage
Australia	6	5.2
Bangladesh	1	0.9
Canada	0	0
China	0	0
India	75	65.2
Japan	18	15.7
Singapore	5	4.3
South Korea	0	0
Thailand	4	3.5
UK	1	0.9
US	5	4.3

Table 22: In case of a natural/man-made disaster or emergency, which of the following countries do you expect to help Bhutan first?

Country	No. of Responses	Percentage
Australia	3	2.6
Canada	1	0.9
India	100	87
China	0	0
Japan	5	4.3
Singapore	0	0
Thailand	0	0
South Korea	0	0
UK	2	1.7
US	4	3.5

Table 23: What are Bhutan's biggest challenges? (rank three biggest threats)

Challenge (Rank 1)	No. of Responses	Percentage
Climate change	24	20.86
Immigration	25	21.73
China's rise	10	8.69
Over-dependence on India	33	28.69
Geopolitical tensions between US and China	3	2.6
Economic slowdown	11	9.56
Pandemics	3	2.6
Prefer not to answer	6	5.21

Challenge (Rank 2)	No. of Responses	Percentage
Climate change	12	10.43
Immigration	22	19.13
China's rise	7	6.08
Over-dependence on India	30	26.08
Geopolitical tensions between US and China	8	6.9
Economic slowdown	28	24.34
Pandemics	2	1.73
Prefer not to answer	6	5.21
Challenge (Rank 3)	No. of Responses	Percentage
Climate change	18	15.65
Immigration	15	13.04
China's rise	8	6.95
Over-dependence on India	16	13.91
Geopolitical tensions between US and China	4	3.47
Economic slowdown	24	20.86
Pandemics	14	12.17
Prefer not to answer	16	13.91

Economy

Table 24: Your everyday consumable goods (food products, medicines, cleaning products, clothing, fuel, etc.) are produced by a company originating from which country? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	12	10.43
Bangladesh	8	6.95
Canada	0	0
China	10	8.69
India	74	64.34
Japan	1	0.86
Singapore	2	1.73
South Korea	2	1.73
Thailand	0	0
UK	0	0
US	6	5.21
Country (Rank 2)	No. of Responses	Percentage
Australia	6	5.21
Bangladesh	16	13.91
Canada	6	5.21
China	26	22.6
India	22	19.13
Japan	16	13.91
Singapore	3	2.6
South Korea	7	6.08
Thailand	11	9.56
UK	0	0
US	2	1.73
Country (Rank 3)	No. of Responses	Percentage
Australia	13	11.3
Bangladesh	18	15.65
Canada	3	2.6
China	15	13.04
India	10	8.69
Japan	12	10.43
Singapore	4	3.47
South Korea	15	13.04
Thailand	15	13.04
UK	1	0.86
US	9	7.82

Table 25: Your everyday durable goods (vehicles, electrical appliances, laptops, mobiles, etc.) are produced by a company originating from which country? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	9	7.82
Bangladesh	3	2.6
Canada	3	2.6
China	27	23.47
India	51	44.34
Japan	7	6.08
Singapore	1	0.86
South Korea	2	1.73
Thailand	1	0.86
UK	1	0.86
US	10	8.69

Country (Rank 2)	No. of Responses	Percentage
Australia	8	6.95
Bangladesh	4	3.47
Canada	4	3.47
China	27	23.47
India	28	24.34
Japan	29	25.21
Singapore	4	3.47
South Korea	1	0.86
Thailand	4	3.47
UK	0	0
US	6	5.21

Country (Rank 3)	No. of Responses	Percentage
Australia	5	4.34
Bangladesh	9	7.82
Canada	5	4.34
China	17	14.78
India	16	13.91
Japan	18	15.65
Singapore	5	4.34
South Korea	14	12.17
Thailand	11	9.56
UK	3	2.6
US	12	10.43

Table 26: Which of the following countries are offering better economic access to Bhutanese goods, people, and services? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	29	25.21
Bangladesh	8	6.95
Canada	0	0
China	3	2.6
India	69	60
Japan	4	3.47
Singapore	1	0.86
South Korea	0	0
Thailand	0	0
UK	0	0
US	1	0.86

Country (Rank 2)	No. of Responses	Percentage
Australia	22	19.13
Bangladesh	17	14.78
Canada	13	11.3
China	5	4.34
India	19	16.52
Japan	22	19.13
Singapore	10	8.69
South Korea	1	0.86
Thailand	4	3.47
UK	1	0.86
US	1	0.86

Country (Rank 3)	No. of Responses	Percentage
Australia	14	12.17
Bangladesh	14	12.17
Canada	13	11.3
China	7	6.08
India	14	12.17
Japan	15	13.04
Singapore	14	12.17
South Korea	2	1.73
Thailand	10	8.69
UK	4	3.47
US	8	6.95

Table 27: Scientific and technological advancement in which of these countries will benefit Bhutan the most? (rank three responses)

Country (Rank 1)	No. of Responses	Percentage
Australia	15	13.04
Canada	3	2.6
China	4	3.47
India	58	50.43
Japan	25	21.73
Singapore	1	0.87
South Korea	0	0
Thailand	0	0
UK	0	0
US	9	7.82

Country (Rank 2)	No. of Responses	Percentage
Australia	10	8.6
Canada	6	5.21
China	11	9.56
India	26	22.6
Japan	26	22.6
Singapore	10	8.6
South Korea	9	7.82
Thailand	2	1.73
UK	6	5.21
US	9	7.82

Country (Rank 3)	No. of Responses	Percentage
Australia	15	13.04
Canada	6	5.21
China	12	10.43
India	23	20
Japan	14	12.17
Singapore	18	15.65
South Korea	6	5.21
Thailand	6	5.21
UK	4	3.47
US	11	9.56

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