



CENTRAL FORCE

CREATIVE INSIGHTS &
AUDIENCE ANALYTICS

2026 **INSIGHTS REPORT**

**THE JOHOR-SINGAPORE
SPECIAL ECONOMIC
ZONE (JSSEZ)**

**Public Sentiment and
Lived Perspectives**

**Part 2: Growth, Trust and
Expectations**



When progress meets the everyday.

Welcome to Part 2 of Central Force's 2026 *Insights Report: The Johor–Singapore Special Economic Zone (JSSEZ): Public Sentiment and Lived Perspectives*. Building on the foundations set out in Part 1, which explored awareness and perception, this report focuses on how Johoreans evaluate development in practice – what they expect, what they support, and the conditions that shape their acceptance of growth.

For readers new to this series, welcome. We hope you enjoy deeper insight into a very important moment in Johor Darul Ta'zim's progress and future.

Each publication in this series is designed to be read independently, while together they provide a fuller picture. Part 1, which includes the introduction, CEO foreword, executive summary, and methodology, can be accessed by scanning the QR code on the right.



The Central Force Insights Team

SO WHAT?
CF INSIGHTS SAYS

Look for **SO WHAT? CF INSIGHTS SAYS** panels, which offer interpretive context and practical considerations to support clarity, reflection, and engagement in decision-making and strategic planning.

LAYING THE GROUNDWORK

This publication represents **Part 2** of a multi-part exploration of Johoreans' public sentiment and lived perspectives surrounding the Johor–Singapore Special Economic Zone (JSSEZ). Future parts in this series will be released progressively.

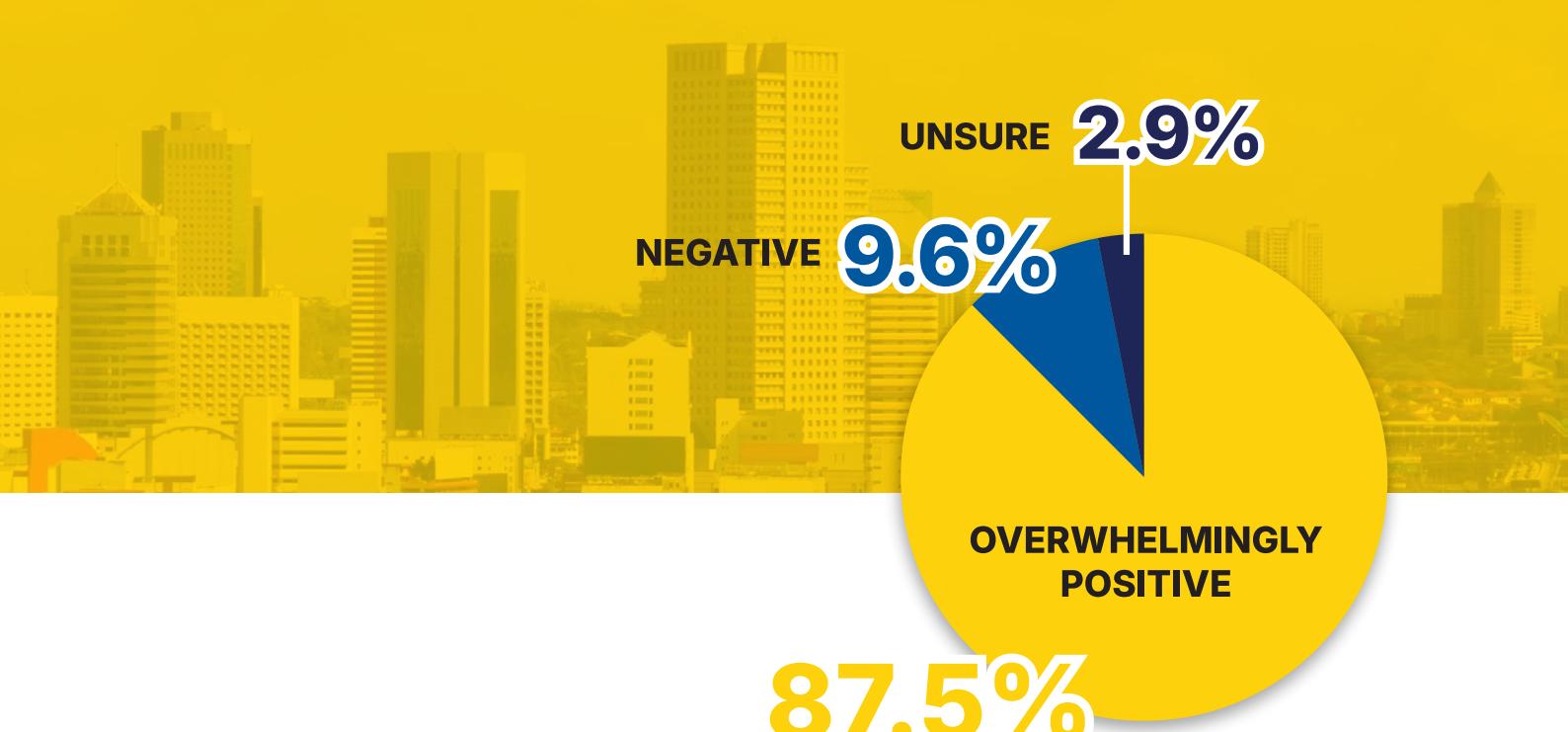
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Part I – Clearing the Fog: Perception, Awareness and the Narrative Landscape

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2.0

Acceptance and expectations of JSSEZ

Despite limited awareness, perceptions of JSSEZ's potential are overwhelmingly positive. Among Johoreans who expressed an opinion, a strong majority believe the initiative can improve Johor's future development.

Negative views are limited, and outright rejection is rare. This suggests that acceptance is driven less by detailed understanding of the JSSEZ and more by broad expectations of inherent economic progress and opportunity. Johoreans naturally, or perhaps want to believe, that JSSEZ will automatically bring overall progress to the state of Johor.

At the same time, this optimism is not unconditional. Rather than signalling blind support, responses point to a public that is open, hopeful, and attentive to how development unfolds. In the section that follows, we explore how Johoreans assess JSSEZ through tangible outcomes that affect their daily lives, and their expectations around the benefits that JSSEZ is expected to deliver.

SO WHAT?

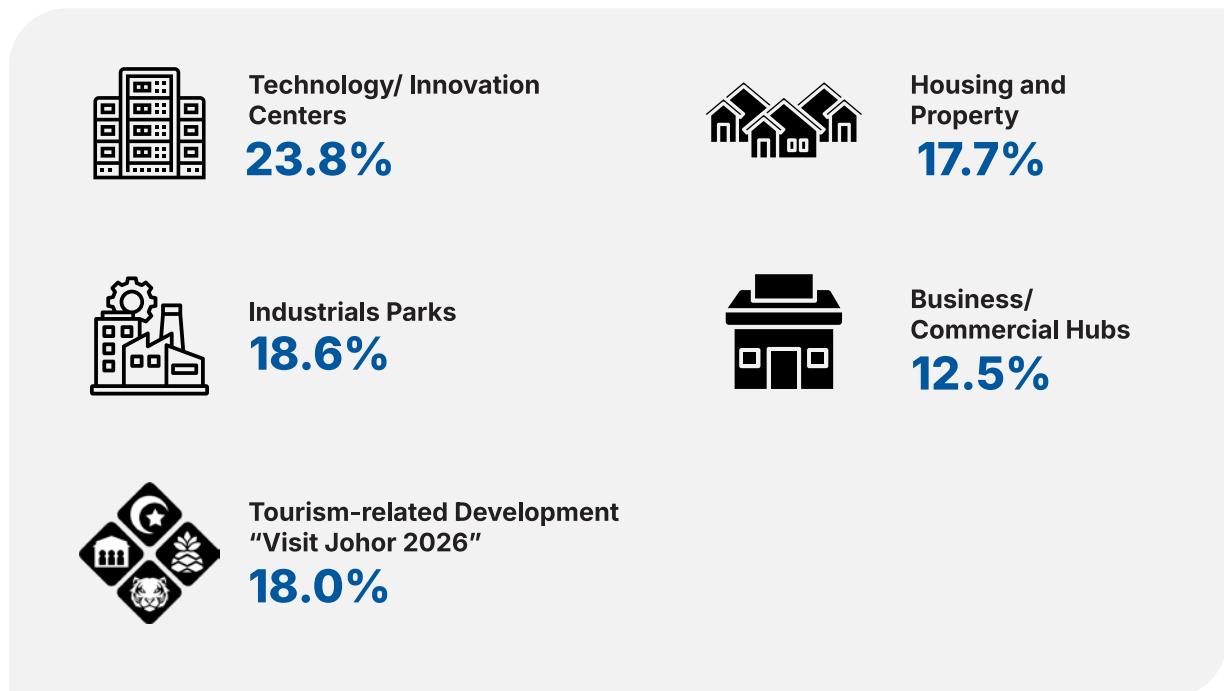
CF INSIGHTS SAYS

Limited exposure to information about JSSEZ does not prevent Johoreans from recognizing its economic potential. Optimism is high but remains largely untested by real-world outcomes. Rather than rejecting development, Johoreans are waiting to see how JSSEZ translates into visible, tangible benefits in their daily lives.

2.1

What kind of development do Johoreans really want?

Johoreans broadly associate progress with development that creates jobs, strengthens industry, and improves daily life. Their preferences span technology, industry, tourism, housing, and commercial activity, reflecting a practical and balanced view of what growth should look like.



SO WHAT? CF INSIGHTS SAYS

Johoreans prioritize visible, everyday benefits – jobs, housing, tourism, and tech. These preferences reflect a desire for employment creation, economic activity, and quality of life improvements.

TO STRATEGIZE GOVERNANCE

Prevalent across local news sources are articles that highlight the Federal as well as State government and administration's plans to further develop Johor into a hub of AI and technology, increase foreign direct investment, cultivate tourism, and expand affordable housing.

The strategy is sound, but communication should be carried out in phases and in a tactical manner, with greater emphasis on localized and relatable narratives. More of which will be elaborated on in the next sections.

2.2

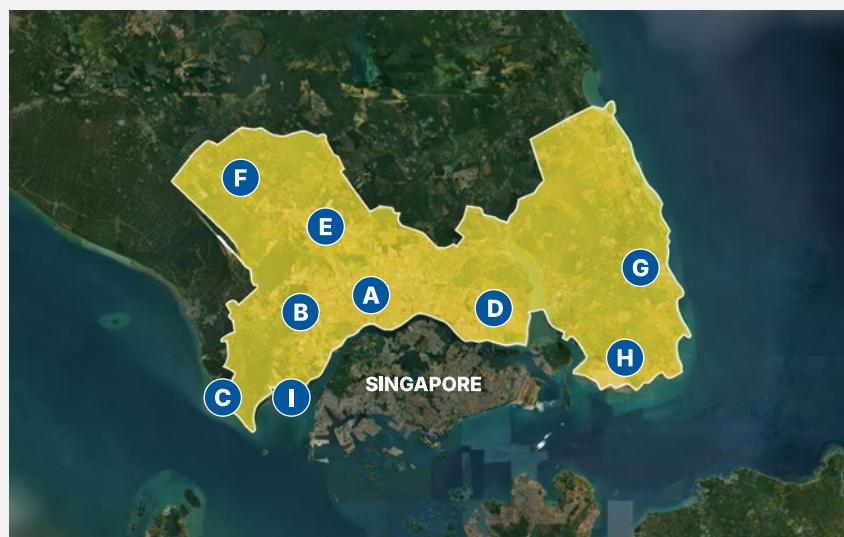
Deep diving into district level expectations and alignment

Across districts in Johor, there are variations in how Johoreans imagine progress. Some lean more towards tourism, others towards technology or housing. Yet overall, Johoreans broadly recognize the potential of the state becoming a hub for technology and innovation, supported by development that synergizes with industrial and commercial parks. These shared aspirations indicate broad agreement on the types of development Johoreans agree will bring tangible benefits.

Where JSSEZ flagship objectives meets Johoreans' lived expectations

Public acceptance of JSSEZ is shaped not only by what is planned, but by how well those plans align with Johoreans' expectations and how clearly the benefits are understood. JSSEZ planning and its objectives are articulated through nine flagship areas across the state, each designed to advance specific economic objectives.

The nine flagship areas of JSSEZ



A. Johor Bahru Waterfront Global Services & Health	F. Kulai - Sedenak Manufacturing
B. Iskandar Puteri Global Services & Manufacturing	G. Desaru - Penawar Tourism
C. Tanjung Pelepas Logistics	H. Pengerang Integrated Petroleum Complex (PIPC)
D. Tanjung Langsat - Kong Kong Logistics	I. Energy & Logistics Forest City Special Financial Zone Financial Services
E. Senai - Skudai Manufacturing	

This section looks at how Johoreans in different parts of the state view development, and how their expectations compare with official JSSEZ flagship objectives planned for their respective regions.

By placing public preferences alongside official planning intent, we are able to see where expectations and direction naturally align, and where clearer explanation or alignment may be needed to support effective and sustainable implementation.

It is important to note that differences between Johoreans' expectations and government planning do not necessarily indicate rejection. In many cases, they reflect a translation gap. Johoreans tend to prioritize visible, employment-linked, and day-to-day benefits, while government macro plans often emphasize higher-value, longer-term industries whose impacts may be less immediately felt at the local level.

Understanding these patterns provides a foundation for interpreting the district-level responses to JSSEZ that follow. Rather than treating differences as resistance, this report highlights where explanation, reassurance, and emphasis are needed. The district deep dives that follow explore how these dynamics play out across Johor. Each *SO WHAT? CF INSIGHTS SAYS* section is designed to help governments and businesses refine communication and strategic emphasis by location in order to reinforce public perception, alignment, and intent.

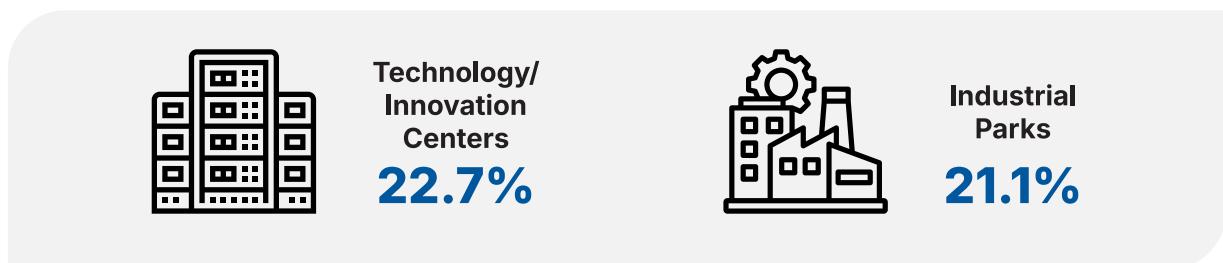
With this context in mind, the following district-level deep dives examine how these dynamics play out on the ground. Each section highlights how local expectations intersect with JSSEZ planning, and where alignment, reassurance, or clearer communication may be required.

- 2.2A Johor Bahru – “The Anchor and the Engine”**
- 2.2B Kota Tinggi and Pengerang – “The Strategic Bet”**
- 2.2C Pontian and Tanjung Pelepas “The Gateway Perspective”**
- 2.2D Batu Pahat “The Practical Heartland”**
- 2.2E Muar “The Cultural & SME Anchor”**
- 2.2F Kluang “The Laid-back Rhythm”**

2.2A

Deep dive: Johor Bahru “The Anchor and the Engine”

Johor Bahru is where all eyes are naturally focused on – where expectations for JSSEZ are highest and where failure would be felt first. Johoreans thus naturally view JSSEZ not just as a future concept, but also as an essential and immediate economic engine that must be implemented for the better of Johor as a whole.



Flagship intent and public expectations in Johor Bahru

JSSEZ planning positions Johor Bahru as a core execution zone for several flagship initiatives, namely Flagship A and B, which include the development of global service hubs, downstream specialty chemical manufacturing, and the Forest City Special Financial Zone, which focuses on smart logistics, global services, research and development, advanced technology, and fintech.

Johoreans are broadly receptive to technology/innovation-led and industrial development. This shows overall alignment between public expectations and flagship intent, which is towards economic modernization, high value and high skill activities, and employment creation.

SO WHAT? CF INSIGHTS SAYS

TO STRATEGIZE GOVERNANCE

The government and everyday Johoreans may often talk about development using different terms and jargon. When Johoreans refer to “technology”, “innovation”, or “industrial parks”, they usually mean practical outcomes such as jobs, training opportunities, and visible economic activity. Government planning, however, often focuses on more specialized sectors such as global services, specialty chemicals, and fintech, whose benefits may take longer to materialise and may not feel immediately relevant to everyday life.

This difference does not indicate opposition to JSSEZ plans. Instead, it highlights the need for clearer translation between policy intent and lived impact. Governance strategies should therefore focus on explaining how flagship developments connect to real employment pathways, upskilling opportunities, and

improvements in quality of life. Making these links visible and easy to understand will help sustain confidence in Johor Bahru, where expectations for delivery are highest and public perception is closely shaped by early outcomes.

TO SHAPE BUSINESS STRATEGY

For businesses operating in or investing in Johor Bahru, public acceptance will depend less on how advanced or specialized a sector sounds, and more on how clearly local benefits are communicated and demonstrated. Johoreans are inclined to support projects when they can easily relate to how these developments create jobs, encourage upskilling, and improve the local economy.

Business strategies that emphasize local hiring, workforce training, and participation in the surrounding community are therefore more likely to resonate to Johoreans. By clearly communicating how daily operations translate into everyday benefits, businesses can strengthen trust, reduce uncertainty, and align closely with public expectations in a district where scrutiny is high and perceptions travel quickly across the state.



The Johor-Singapore Causeway, connecting Johor Bahru in Malaysia to Woodlands in Singapore, is one of the world's busiest land border crossings, handling more than 350,000 travellers daily. Johor Bahru today is a far cry from the city it was when it was officially designated a city on January 1, 1994.



2.2B

Deep dive: Kota Tinggi and Pengerang “The Strategic Bet”

Kota Tinggi and Pengerang residents are familiar with large-scale industrial activity and understand its importance to Johor’s economy. However, their expectations for the JSSEZ are shaped less by industry itself, and more by how development improves everyday life.

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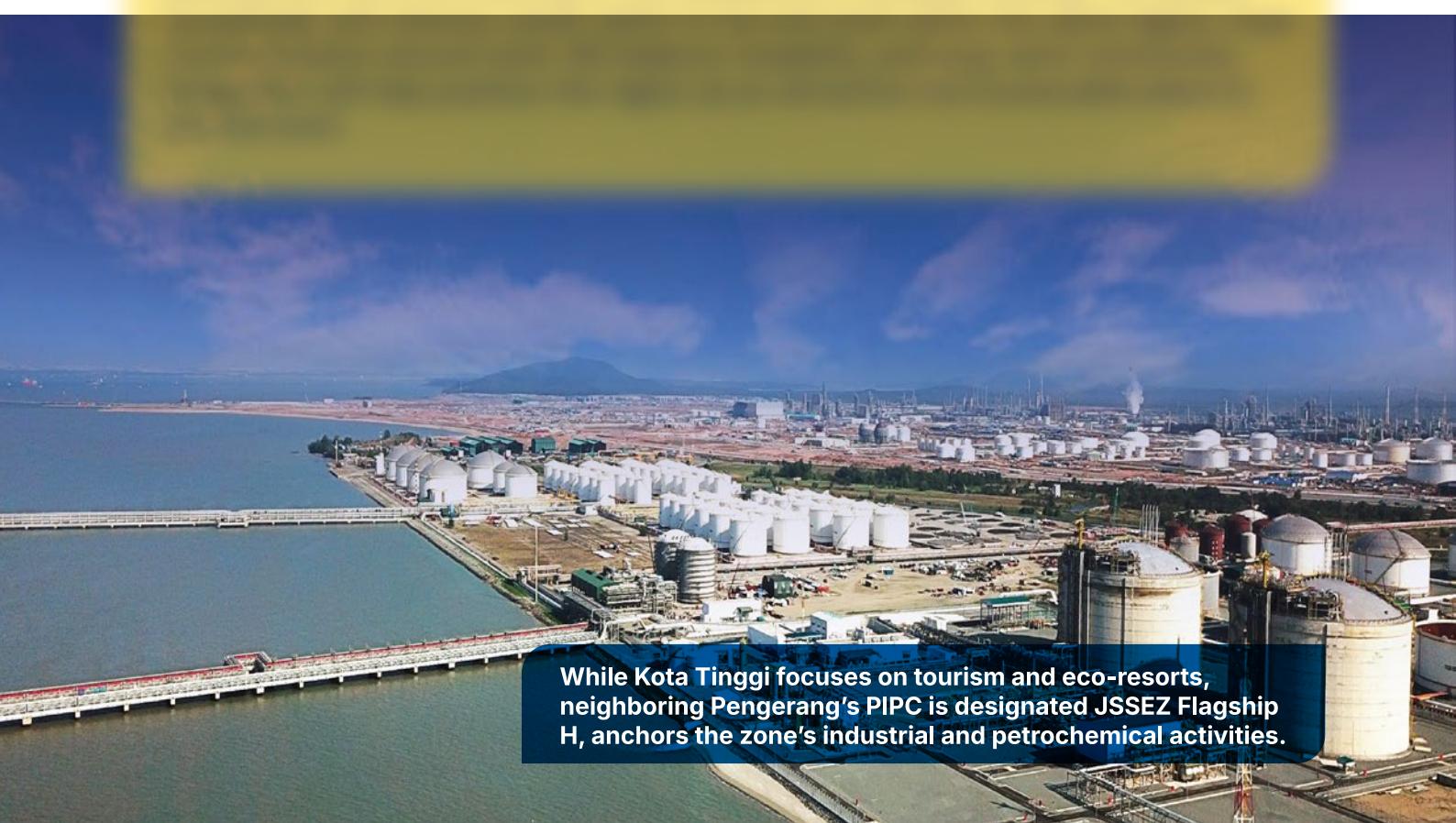
Kota Tinggi is designated JSSEZ Flagship G, which focuses on high-end tourism, hospitality, and eco-resorts.



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While Kota Tinggi focuses on tourism and eco-resorts, neighboring Pengerang's PIPC is designated JSSEZ Flagship H, anchors the zone's industrial and petrochemical activities.



2.2C

Deep dive: Pontian and Tanjung Pelepas “The Gateway Perspective”

Pontian and Tanjung Pelepas is closely linked to movement, trade, and connectivity, particularly through port and logistics activity. Johoreans here tend to experience development as something that passes through their area rather than something that is centred within it.

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2.2D

Deep dive: Batu Pahat “The Practical Heartland”

Batu Pahat is Johor’s second-largest industrial town, with large-scale employment anchored in manufacturing. The region’s well-established manufacturing base across textiles, electronics, food processing, and plastics reflects survey results that point to a development outlook shaped by existing industries and everyday economic realities, both present and future. Johoreans’ expectations here are shaped by lived experience rather than ambition alone.

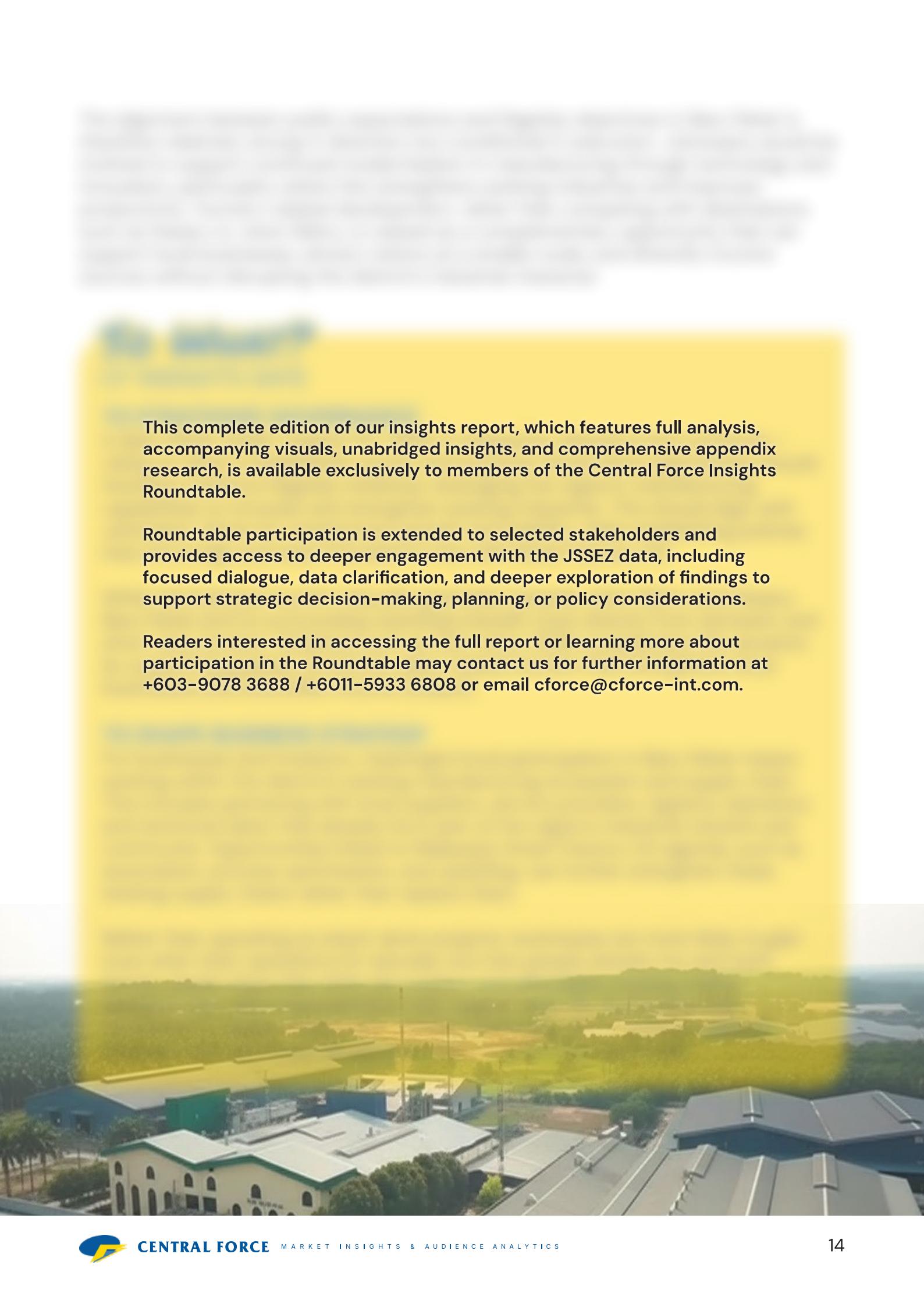


Manufacturing forms the backbone of Batu Pahat’s economy, supporting employment and development.

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2.2E

Deep dive: Muar “The Cultural & SME Anchor”

Muar occupies a distinct place within Johor’s economic and social landscape. Known for its strong SME base, heritage industries, tourism, and vibrant town life, the district is often associated with food, furniture, traditional manufacturing, and family-run businesses that have grown steadily over generations. For Johoreans, Muar represents continuity, self-sufficiency, and a way of life that blends economic activity with community identity.

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2.2F

Deep dive: Kluang “The Laid-back Rhythm”

Synonymous with its coffee culture, Kluang represents a quieter and more laid-back, yet important, perspective within Johor’s overall development landscape. With strong ties to agriculture, small industries, and town-based livelihoods, Kluang is often associated with affordability, everyday liveability, and a slower pace of growth compared to its neighboring districts. For many Johoreans, Kluang reflects stability and the practical realities of daily life.

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Opportunities and benefits abound with the promise of growth under the JSSEZ. However, realizing this promise depends not only on scale and ambition, but on how well development aligns with local expectations, so that progress delivers sustainable, long-term value for Johoreans, rather than short-term gains for a select few.

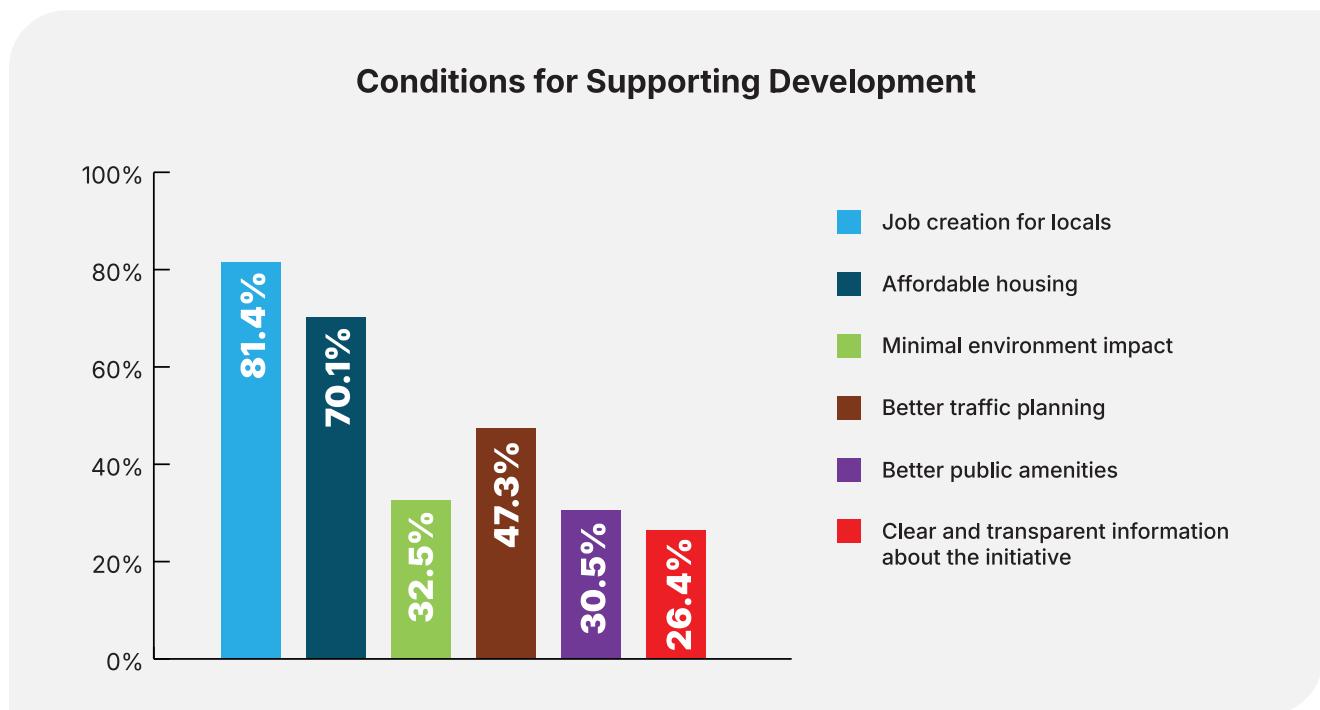


2.3

Conditions and concerns for supporting JSSEZ

While overall acceptance of JSSEZ is high, support is not unconditional. Across districts, residents evaluate development through a practical lens, weighing expected benefits against perceived risks to everyday life. This section examines the conditions Johoreans attach to their support, as well as the concerns that could weaken acceptance if left unaddressed.

Taken together, these findings indicate that public support for development is conditional, structured, and highly consistent across development types. Rather than being emotional or reactive, support is shaped by clear expectations around how development should improve daily living conditions.



Across all respondents, the conditions required for supporting development are both clear and consistent.

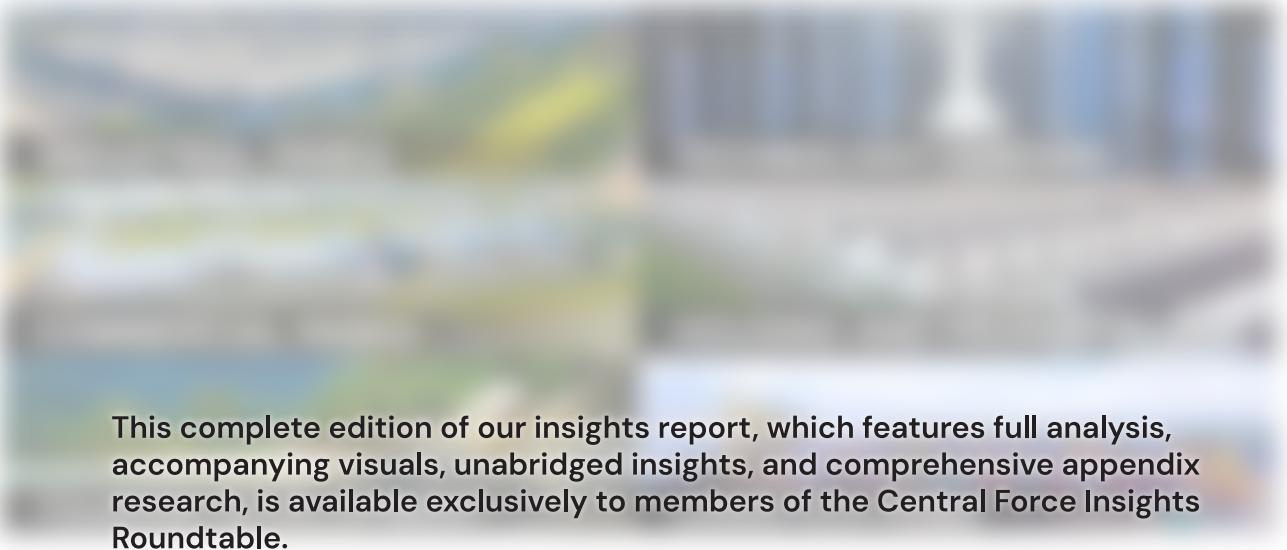
Job creation for locals emerges as the dominant condition, cited by 81.4% of respondents. This is followed by affordable housing (70.1%), better traffic planning (47.3%), minimal environmental impact (32.5%), and improved public amenities (30.5%).

These results highlight that economic growth alone is not sufficient to secure public support. Johoreans expect development to translate into tangible local employment while preserving affordability, mobility, and environmental quality. Support for JSSEZ is therefore grounded in whether development improves everyday living conditions, rather than solely delivering macroeconomic or investment-led indicators.

2.4

Development types and conditional support

While job creation remains the common foundation across all development types, secondary conditions vary depending on the nature of the development. This highlights how Johoreans differentiate between sectors and assess their potential impacts on daily life differently.



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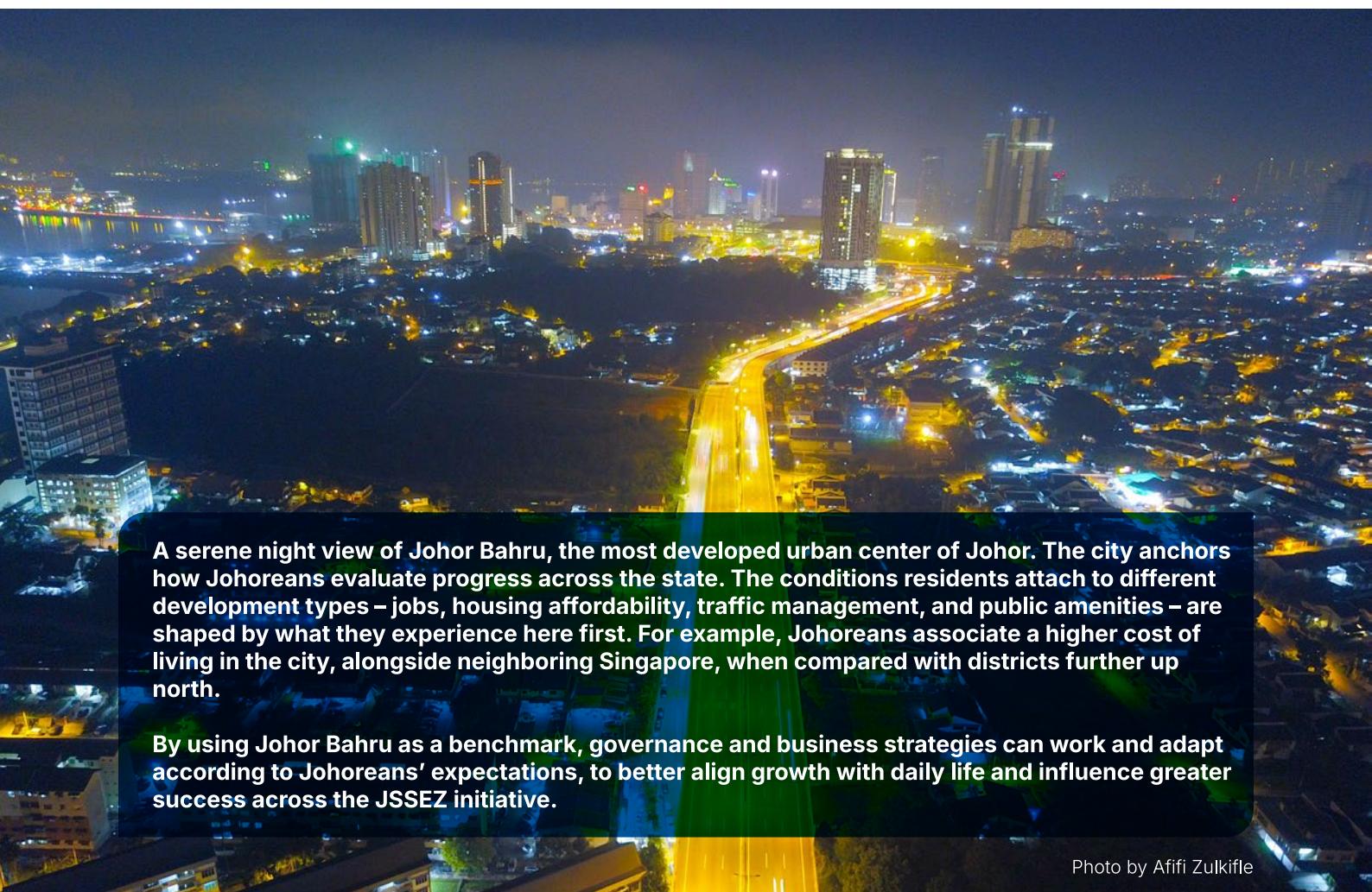
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A serene night view of Johor Bahru, the most developed urban center of Johor. The city anchors how Johoreans evaluate progress across the state. The conditions residents attach to different development types – jobs, housing affordability, traffic management, and public amenities – are shaped by what they experience here first. For example, Johoreans associate a higher cost of living in the city, alongside neighboring Singapore, when compared with districts further up north.

By using Johor Bahru as a benchmark, governance and business strategies can work and adapt according to Johoreans' expectations, to better align growth with daily life and influence greater success across the JSSEZ initiative.

Photo by Afifi Zulkifle



2.5

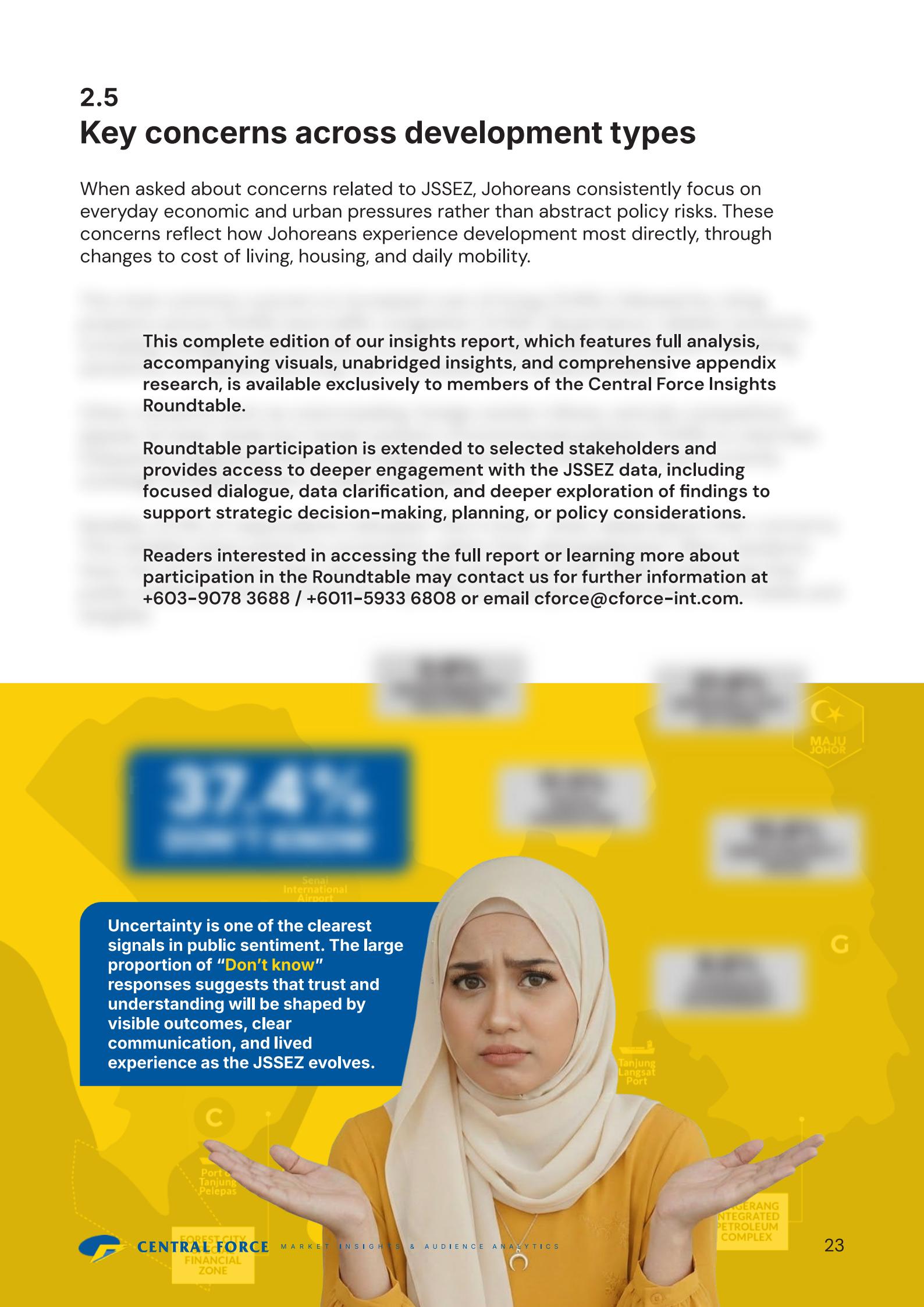
Key concerns across development types

When asked about concerns related to JSSEZ, Johoreans consistently focus on everyday economic and urban pressures rather than abstract policy risks. These concerns reflect how Johoreans experience development most directly, through changes to cost of living, housing, and daily mobility.

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Uncertainty is one of the clearest signals in public sentiment. The large proportion of “Don’t know” responses suggests that trust and understanding will be shaped by visible outcomes, clear communication, and lived experience as the JSSEZ evolves.



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