

PERSPECTIVE

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Surveying ASEAN’s Horizons: The State of Southeast Asia’s 2020 Key Takeaways

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EXECUTIVE SUMMARY

- The State of Southeast Asia 2020 survey report by ISEAS – Yusof Ishak Institute’s ASEAN Studies Centre confirms that ASEAN member states remain preoccupied with domestic issues, which could limit their capacity to think and act regionally.
- ASEAN must do more to deliver tangible results to the region’s people, increase its publicity efforts, and be more visible in managing regional issues, such as the humanitarian crisis in Myanmar’s Rakhine state.
- There is widespread support for ASEAN to shore up its commitment to preserve an open and inclusive regional order, and be engaged with all major powers to sustain multipolarity in the region.
- The split in respondents’ choice between China and the US highlights the polarising consequence of such a binary choice on ASEAN unity.
- Country-level data differences underline the diversity of opinions and strategic leanings within Southeast Asia.

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INTRODUCTION

The State of Southeast Asia 2020 Survey, which canvassed the views of 1,308 government officials, academics, businesspeople, civil society leaders, and media professionals about the state of the region,¹ holds four key takeaways for ASEAN that could inform decision-making within the organisation and its member states.

First, ASEAN member states (AMS) remain preoccupied with domestic and internal issues, which could limit their capacity to focus on regional challenges. *Second*, the goal of a people-oriented, people-centred ASEAN Community remains far-fetched as concerns over the disconnect between ASEAN's actions at the inter-governmental level and its on-the-ground impact remain huge. *Third*, the survey findings attest to ASEAN and its member states' continuing commitment to preserve an open and inclusive regional order in Southeast Asia and beyond. *Fourth*, the respondents' split choice almost down the middle between China and the US – in a hypothetical scenario where the rivalry compels the region to take sides – highlights the polarising consequence of such a binary choice on ASEAN unity, and the imperative to keep ASEAN an open and inclusive medium for multilateral cooperation among external partners.

There is an inherent tension between the respondents' simultaneous domestic focus and their desire for ASEAN to be more proactive and outward-looking, because a proactive ASEAN requires consistent effort and commitment from ASEAN leaders. It drives home the paramount challenge confronting the ASEAN leaders in attending to their domestic constituencies while investing adequately in ASEAN's capacity. They must embrace the symbiotic nature of national and regional interests and nurture both in tandem to reinforce ASEAN's ability to shape regional developments.

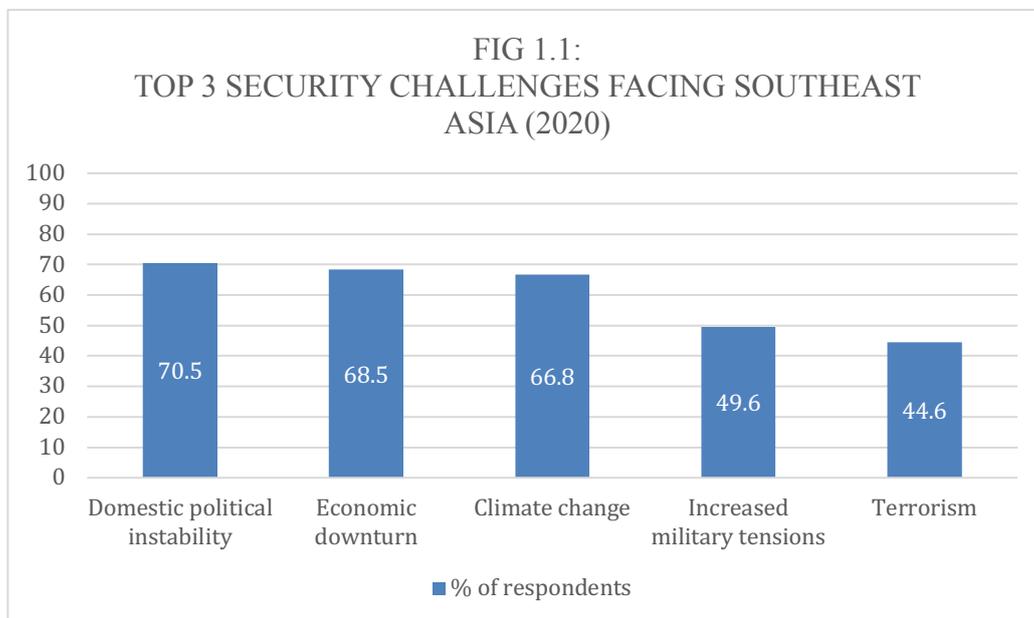
PREOCCUPATION WITH DOMESTIC CHALLENGES

The top three concerns for security challenges facing Southeast Asia identified by the respondents were “domestic political instability” (70.5%), “economic downturn” (68.5%), and “climate change” (66.8%). “Domestic political instability” encompasses challenges such as ethnic and religious tensions and the perceived fragility of national governments and public institutions. This is the second consecutive year that “domestic political instability” has outranked other threats that are more regional or global in character. In the 2019 survey, “domestic political instability” and “ethnic and religious tensions” (the two options were previously separate) also outranked “increased military tensions” arising from flashpoints such as the South China Sea, and “terrorism”.²

The continued predominance of domestic concerns points at the hitherto fragile condition of state-building and nation-building in Southeast Asia. This is especially the case in countries where governments face legitimacy deficits, upheavals in democratic transition, or flares-up of ethno-religious tensions during electoral cycles. Hence, an overwhelming majority of respondents in Cambodia (88.5%), Indonesia (83.8%), Malaysia (81%), Myanmar (88.1%) and Thailand (86.5%) ranked “domestic political instability” as their top security threat.³ The high concerns over domestic political stability in these countries also mirror their medium to low rankings in the World Bank's World Governance Indicators in terms of Political Stability and Absence of Violence/Terrorism: Cambodia (51.4 out of 100), Indonesia (27.6), Malaysia (54.3), Myanmar (10.5), and Thailand (19.5).⁴

While keeping a domestic focus and having a regional outlook are not necessarily mutually exclusive, devoting more time on one will inevitably divert some attention and resources away from the other. In the short term, the results indicate that Southeast Asia and the international community should have realistic expectations of ASEAN’s ability to address regional issues. However, if AMS’ preoccupation with domestic instability continues in the long run, it would undermine ASEAN leaders’ ability to keep their heads above water and approach regional problems with a regional mindset. Indeed, many observers lament the absence of sustained leadership within ASEAN, with member states only having the stamina to don the mantle during the one-year rotational chairmanship term.⁵

In this age of extensive connectivity and interdependence, respondents were asked whether ASEAN should do more to help its members address their domestic challenges despite the constraints of the non-interference principle. ASEAN has been practising this by, for example, providing humanitarian assistance to displaced persons in Myanmar’s Rakhine State and facilitating the repatriation of the Rohingya through needs assessment and capacity building. However, half the survey respondents (54.6%) either “disapprove” or “strongly disapprove” of ASEAN’s management of the Rakhine crisis because they believe that the organisation can contribute more substantively. Within this group of disapproving respondents, 62.2% wanted ASEAN to “increase humanitarian assistance” or “mediate between the Myanmar government and the Rakhine and Rohingya communities”, while the remaining 37.8% preferred more interventionist steps like increasing diplomatic pressure on Yangon or leading a regional peacekeeping mission.⁶ The intertwining of national and regional concerns means that ASEAN must step up internal coordination and consultation to reconcile the principle of non-interference with the imperative for regional intervention.



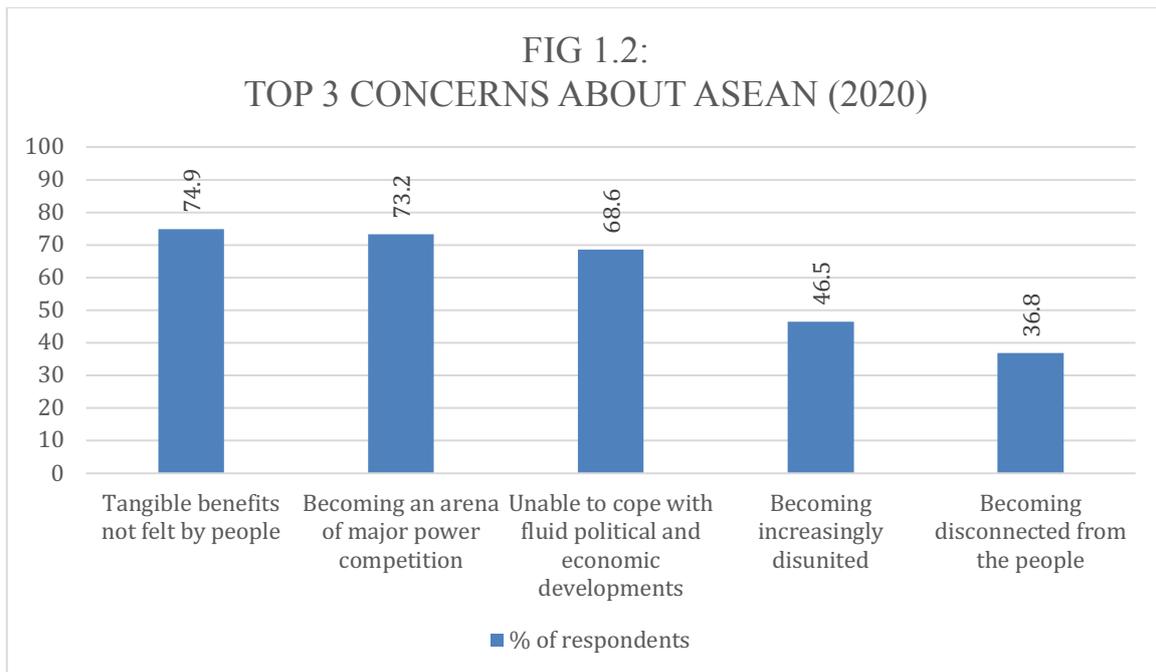
IN SEARCH OF A MORE VISIBLE AND IMPACTFUL ASEAN

Despite the respondents' preoccupation with domestic concerns, the survey results do indicate their preference for a more visible and impactful ASEAN. A large majority selected "ASEAN's tangible benefits are not felt by the people" as their top concern about the regional grouping (74.9%). Last year, this concern also outranked others.⁷ The disconnect between ASEAN and the general public has been a perennial concern, and calls for a more people-centric ASEAN are longstanding. Fifteen years ago, the Eminent Persons Group (EPG) on the ASEAN Charter highlighted the need for ASEAN "to shed its image of being an elitist organisation comprising exclusively diplomats and government officials".⁸ The ASEAN Charter, inspired by the EPG's recommendation, sets out the objective to "promote a people-oriented ASEAN in which all sectors of society are encouraged to participate in, and benefit from, the process of ASEAN integration and community building".⁹

To realise this objective, ASEAN must step up efforts to communicate its work to the public. ASEAN cannot be satisfied with labouring behind the scenes. The grouping must intensify outreach efforts and education programmes to increase awareness about its work, which many in ASEAN do not know about. The people of ASEAN will have difficulty putting their support behind initiatives or institutions they do not understand. ASEAN nationals must therefore be socialised to adopt the ASEAN Community as one of their primary identity anchors. It is insufficient for the organisation to *create* an ASEAN Community; the people of ASEAN must *realise* and *feel* that this community exists and that they are a part of it. Without this sense of buy-in and stakeholder-ship, ASEAN loses its claim as a people-oriented organisation, which could translate to an erosion of support for its substantive initiatives.

The impact of ASEAN's 'invisibility' and the lack of progress in addressing this problem can be seen in the decline of ASEAN's perceived influence in the region. Only 8.3% of the respondents considered ASEAN the most influential economic player in the region, down from 10.3% (2019). The percentage of respondents who choose ASEAN as the most influential political-strategic player also declined from 20.8% (2019) to 18.1% (2020).

There are, however, inherent structural constraints that make it difficult for ASEAN's impact to be felt locally. As an intergovernmental organisation, ASEAN agreements must be enacted through national implementation, which then trickle down to local benefits. Delays or detours in national implementation are the biggest bottleneck in the delivery of ASEAN's public goods. Some ASEAN member governments have launched initiatives to fill the gap, such as setting up ASEAN lanes at ASEAN international airports, creating the ASEAN Business Travel Card to facilitate movement of businessmen in the region, or delivering consular assistance by ASEAN missions in third countries to nationals of other AMS where they have no representation. However, even with these low-hanging fruits, implementation has been lacklustre, often mired in bureaucratic delays, cost-sharing difficulties, or discrepancies in the regulatory frameworks among member states. Other proposed high-impact actions such as creating a common ASEAN time zone, or having a single ASEAN visa, have all hit a wall.



SUSTAINING AN OPEN AND INCLUSIVE REGIONAL ORDER

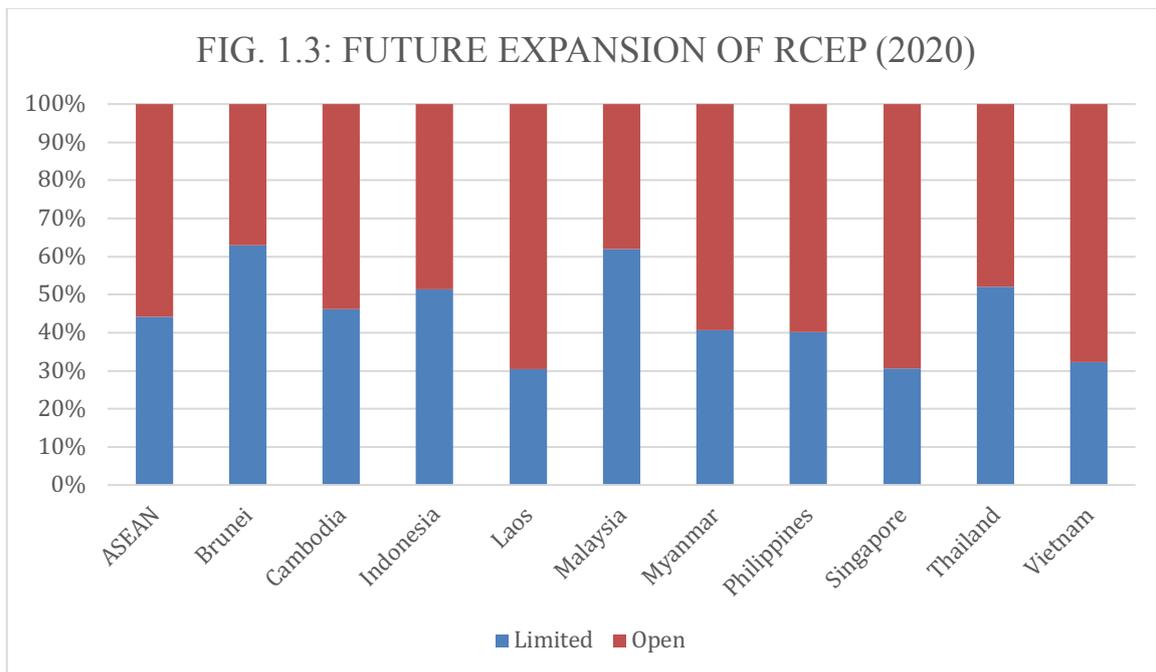
Looking outward, the survey results strongly suggest that in the face of external headwinds, most respondents continue to see solutions in a more open and outward-looking region. For example, even as ASEAN is caught in the crossfire of US-China rivalry, the option “ASEAN should keep the US and China out of the region” garnered the lowest vote (2.9%), while 14.7% preferred that ASEAN seek out “third parties” to broaden its strategic space and options.

Among the “third parties” beyond the US-China dyad, Japan and the EU are the most trusted partners of the region, with approval ratings of 61.2% and 38.7% respectively, compared to 30.3% for the US and 16.1% for China. The main reasons for this absence of trust are the major powers’ perceived lack of capacity and political will, or their distraction with internal affairs. China is the only exception, with 53.5% expressing concern that Beijing may use its economic and military power to threaten their country’s interest and sovereignty. Overall, it is not necessarily the unwelcoming attitude to the major powers’ engagement, but uncertainty over the depth and reliability of their commitment, that explains the region’s lack of trust in them.

The preference to keep Southeast Asia open and inclusive is reflected throughout the survey. For example, most respondents welcome ASEAN’s embrace of the United Kingdom (UK) post-Brexit: 42.4% supported the UK to be ASEAN’s Dialogue Partner despite a two-decade old moratorium on new Dialogue Partnership, and 54.8% opted for a phased-approach with other forms of engagement for now, such as Sectoral or Development Partnership. Another finding to note is the respondents’ perceptions on the Quadrilateral Security Dialogue (Quad) involving the US, Japan, India, and Australia, with 61.6% thinking that their countries should participate in Quad-related “security initiatives and military exercises”.¹⁰ The fact that most of the region still desires engagements with Quad members, despite their ambivalence about the Quad’s impact on regional security or their

sensitivity to China, suggests that the primary motivation behind such support is the benefit that Southeast Asia will accrue by keeping Southeast Asia’s strategic space equally open and inclusive to all external powers, rather than support for the Quad per se.

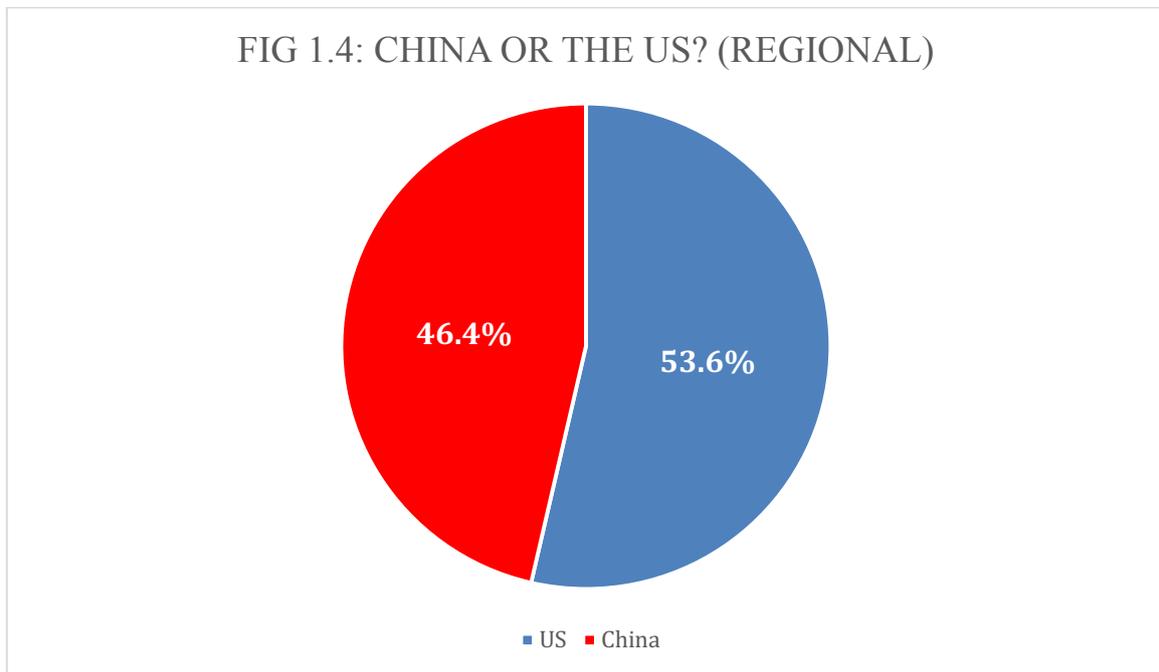
Furthermore, the region’s overall sentiment remains inclined towards free and open trade, even though country results suggest a more complex picture. The most pro-trade stance is found among respondents from Vietnam and Singapore, the two most open ASEAN economies with the share of trade in GDP in 2018 at 208% and 326% respectively. Conversely, respondents from Indonesia and Malaysia are more reserved. For example, more than half of the respondents (55.8%) believed that the Regional Comprehensive Economic Partnership (RCEP) agreement should be “opened to all qualified parties and not be limited by geography”, to include the likes of the European Union (EU) and the UK. This position was supported by a majority of respondents from Cambodia, Laos, Myanmar, the Philippines, Singapore, and Vietnam. An expanded RCEP faced more disagreement in Brunei, Indonesia, Malaysia, and Thailand. As for an ASEAN-EU FTA, there was greater support across the region with an overwhelming 88.7% expressing “some” or “strong” support. Again, the strongest support came from Singapore (95.9%) and Vietnam (92.8%), while more reservation was recorded in Indonesia (14.2%) and Malaysia (14.1%). On the balance, the survey results demonstrate that people in the region remain enthusiastic about forging multilateral economic cooperation and diversifying ASEAN’s partnerships to keep the region open and inclusive.



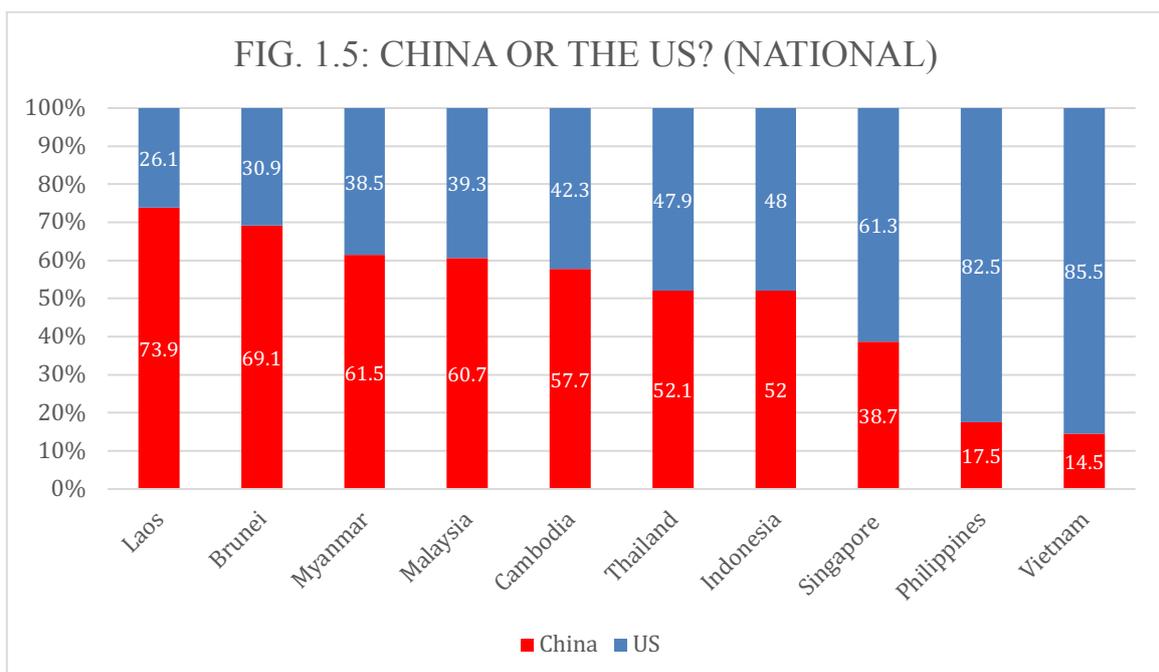
CONSEQUENCES OF A BINARY CHOICE

On the current conundrum of ASEAN’s strategic dilemma between China and the US, the survey also provides ASEAN much material for introspection. The 2020 survey asked respondents to choose between the US and China if push came to shove. The almost evenly-split result – 53.6% for the US and 46.4% for China – is significant not in providing a numerical measure of support for either party, but rather because it accentuates the

underlying point of the question: that the region cannot allow itself to take sides in the US-China strategic rivalry because doing so will split ASEAN and divide the region.



The divisive consequence of making a binary choice is clear when scrutinising the data for this question at the country-specific level. A majority of respondents from seven AMS (Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, and Thailand) opted to side with China, while three AMS chose the US (the Philippines, Singapore, and Vietnam). The results strongly indicate that the region would be split if it were forced to take sides in the rivalry, which would surely inflict enduring damage on intra-ASEAN unity and its very existence as the regional grouping representing Southeast Asia.



Other survey responses provide additional context to help account for the above splinter. In a preceding question, respondents were asked how they think ASEAN should “best respond” to the US-China rivalry. The top response was that “ASEAN should enhance its resilience and unity to fend off pressure from the two major powers” (48%), while the second most popular answer was that “ASEAN should continue its position of not siding with China or the US” (31.3%). Conversely, only 3.1% of respondents believe that ASEAN has no choice but to take sides, and only 2.9% think that ASEAN must keep both powers out of the region. Hence, ASEAN’s strategic dilemma stems from its rejection of “taking sides” as a solution to the US-China rivalry *even if* push came to shove.

CONCLUSION

The State of Southeast Asia 2020 holds four key takeaways for ASEAN, all of which are not new, but help consolidate data points for policymaking on ASEAN-related matters.

First, internal political challenges continue to dominate the agenda of most AMS, especially those that are in democratic transition (Myanmar), democratic consolidation (Indonesia and Malaysia) or democratic backsliding (Cambodia and Thailand). This also implies that ASEAN leaders’ domestic preoccupations would likely hamper their ability to think regionally, and that the current deficit of leadership within ASEAN would likely endure. ASEAN leaders must resist the temptation to think myopically, but recognise the benefits that the regional organisation holds for the pursuit of their respective national interests.

Second, ASEAN must bridge the gap between regional cooperation and the impact to be felt among the general public. This is a tall order, as ASEAN needs to overcome structural constraints in national implementation of and compliance with regional agreements, and gradually transition from a process-driven to a result-oriented culture in the design and valuation of its programmes. Besides, ASEAN publicity efforts must be stepped up to promote and explain its public goods to secure greater buy-in from the regional community, especially for high-impact initiatives such as FTAs or the ASEAN Single Window, among others.

Third, the report indicates a strong desire to preserve the open and inclusive regional order that has become the DNA of Southeast Asia. This would help sustain multipolarity in the region, which in turn creates space and opportunity for AMS to exercise their agency amidst intensifying major power competition.

Finally, the region’s preferred response to the US-China strategic rivalry is for ASEAN to consolidate its internal unity and diversify its external relations to navigate major power competition. The survey results demonstrate that dire consequences await if AMS are forced to take sides in the strategic rivalry.

The above analysis contains yet another cautionary note. Although the survey results provide region-wide trends, the country-level data often reveals divergences and nuances. Given that ASEAN makes decisions on the basis of consensus between all ten AMS, one must avoid making sweeping generalisations of the regional sentiment, and analyse the data at the national level to fully appreciate the diversity of opinions within the region.

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- ¹ Tang Siew Mun et al., *The State of Southeast Asia: 2020* (Singapore: ISEAS – Yusof Ishak Institute, 2020), https://www.iseas.edu.sg/images/pdf/TheStateofSEASurveyReport_2020.pdf.
- ² Tang Siew Mun et al., *The State of Southeast Asia: 2019* (Singapore: ISEAS – Yusof Ishak Institute, 2019), https://www.iseas.edu.sg/images/pdf/TheStateofSEASurveyReport_2019.pdf, p. 11.
- ³ Tang et al., *The State of Southeast Asia: 2020*, p. 7.
- ⁴ World Bank, Worldwide Governance Indicators 2018, <https://info.worldbank.org/governance/wgi/Home/Reports>.
- ⁵ Wang Gungwu, “With Hindsight and Foresight: Taking the Long View of ASEAN”, *ASEANFocus* Issue 6/2019, 23 December 2019, pp. 26-29, <https://www.iseas.edu.sg/images/pdf/ASEANFocus%20-%20December%202019.pdf>.
- ⁶ Tang et al., *The State of Southeast Asia: 2020*, p. 12.
- ⁷ Tang et al., *The State of Southeast Asia: 2019*, p. 12.
- ⁸ Report of the Eminent Persons Group on the ASEAN Charter, 2006, p. 6, <https://www.asean.org/wp-content/uploads/images/archive/19247.pdf>.
- ⁹ Association of Southeast Asian Nations (ASEAN), *The ASEAN Charter*, 2019, p.5, https://asean.org/storage/2012/05/3.-November-2019-The-ASEAN-Charter-27th-Reprint_rev-2711191.pdf.
- ¹⁰ Tang et al., *The State of Southeast Asia: 2020*, pp. 33-34.

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