

**E-LAUNCH: THE STATE OF SOUTHEAST ASIA 2024 SURVEY
REPORT**

**WELCOME REMARKS BY MR CHOI SHING KWOK
DIRECTOR AND CEO, ISEAS - YUSOF ISHAK INSTITUTE**

2 APRIL 2024

Excellencies

Distinguished Participants

Ladies and Gentlemen

Good morning/afternoon/evening, and a very warm welcome to the launch of *The State of Southeast Asia 2024* survey report conducted by the ASEAN Studies Centre at the ISEAS-Yusof Ishak Institute.

Entering its 6th edition, this annual survey has gained a great deal of attention from policy-makers, academics, and media around the world seeking to understand how geopolitical events have been affecting the very diverse ASEAN region. It provides a useful platform for Southeast Asian perspectives on important developments and challenges facing the region to be heard and understood. The survey ranks as one of our Institute's most read and cited publications since its inception in 2019.

Conducted over eight weeks from January to February 2024, this year's survey captures the views of 1,994 opinion leaders from government, research institutions, businesses, civil society and media across all ten ASEAN member countries. The survey findings provide insights into the shared perceptions, aspirations and concerns of Southeast Asians, as well as the nuances and divergences in their national outlooks about regional developments.

Against the backdrop of new and unprecedented challenges – including territorial disputes and other strategic uncertainties; the rise of economic nationalism; the evolving dynamics between major powers; and the spillover effects from conflicts such as the Israel-Hamas conflict, the Russia-Ukraine war, the Myanmar crisis, and regional tensions in the Taiwan Strait and the Korean Peninsula - this year's survey has curated questions that are both broad and deep to better understand how these challenges are being perceived.

Among the new questions explored in this edition are the impact of the Israel-Hamas war and regional governments' response to it, perceptions of China's vision of a community with a shared future, the strategic relevance of individual Dialogue Partners to ASEAN, and expectations of the ASEAN Digital Economy Framework Agreement (DEFA). I am sure that many of you will also be particularly keen to learn if there has been any significant shift in the region's trust and distrust ratings towards the major powers as geopolitical tensions evolved over the past year.

In addition to popular questions such as how to move the Myanmar issue forward, possible responses to a conflict in the Taiwan Strait, US-China rivalry and the binary choice between major powers, views about the Biden Administration now at its final stages, and the future of bilateral relations with China, this year's survey also continues with a number of other key questions from the previous years, especially those related to the top challenges and concerns of the region and ASEAN as an organisation, perceptions of soft power and the latest read on the influence and leadership of the major powers. With the benefit of six years' worth of data, we are now in a position to conduct more extensive time series analysis to observe the durability of existing trends and the emergence of new ones in future analytical pieces beyond today.

With those brief opening remarks, I am delighted that we have a stellar panel of thought leaders and experts from the region as well as from China and the US to share their interpretations of the survey findings for us. The panel consists of Professor Danny Quah, Ms Bonnie Glaser, Professor Wu Xinbo, and Mr Shin Nakayama.

Prof Quah is the Li Ka Shing Professor in Economics and Dean of the Lee Kuan Yew School of Public Policy in Singapore. His work takes an economic approach to world order. Danny holds a rare position as a thought leader with an illustrious career that spans both academia and policy.

Ms Bonnie Glaser is Managing Director of the German Marshall Fund's Indo-Pacific program. She is also a non-resident fellow with the Lowy Institute in Australia and a Senior Associate with the Pacific Forum. She has worked on Asia-Pacific geopolitics and US policy for more than three decades.

Prof Wu Xinbo is Dean of the Institute of International Studies and Director at the Center for American Studies at Fudan University. His interest is in China's foreign policy, Sino-US relations and US Asia-Pacific policy. Xinbo serves on the advisory board of the Chinese Ministry of Foreign Affairs; a member of the Advisory Council of the Asia Society Policy Institute and The Trilateral Commission.

Mr Shin Nakayama is Editor-in-Chief at Nikkei Asia. He has covered political issues for over 20 years. Shin was correspondent in Washington covering the White House, State Department, the Pentagon and Congress from 2011 to 2014.

I thank them for joining us and strongly believe that their insights will be invaluable in unpacking the results of the survey.

Before we get to that, let me first invite Ms Sharon Seah, Senior Fellow and Coordinator of the ASEAN Studies Centre to introduce the State of Southeast Asia 2024 Survey Report and present its key findings.

Over to you, Sharon.
