

MEDIA RELEASE

Geopolitical Concerns Dominate the State of Southeast Asia 2023 Survey Report

Singapore, 9 February 2023 - Findings from the latest run of the State of Southeast Asia Survey conducted by the ASEAN Studies Centre at the ISEAS – Yusof Ishak Institute reveal that Southeast Asia's top preoccupations are with recessionary pressures, potential military tensions, and a 'slow and ineffective' ASEAN. China continues to be regarded as the most influential economic and political power in the region and the US has sharpened its edge over China in the event of a forced choice while Japan remains its most trusted major power.

The survey was conducted from 14 November 2022 to 6 January 2023 in English, Bahasa Indonesia, Khmer, Lao, Burmese, Thai and Vietnamese, gathering views from 1,308 respondents from academia, business, government, civil society and the media.

The fifth edition of this region-wide survey covers a broader and more diverse set of questions including the Russian invasion of Ukraine; tensions in the Taiwan Strait; ASEAN's Five-Point Consensus for Myanmar; Timor-Leste's accession to ASEAN; the US-led Indo-Pacific Economic Framework for Prosperity (IPEF); China's Global Security Initiative (GSI); the US-China rivalry and its impact on Southeast Asia; levels of trust in the major powers; and indicators of soft power.

The survey was conducted both online and offline using a mixed sampling method. Most respondents took the survey online while 20% of respondents were polled using Computer-Assisted Personal Interview (CAPI) methods with the assistance of a panel provider.

Coming out of the pandemic, unemployment and economic recession are billed as the region's top challenges, followed by the severe impacts of climate change, the widening of socio-economic gaps and rising income disparity as well as potential military tensions. A majority of respondents express concern over the Russian invasion of Ukraine and almost half fear that an outbreak of hostilities in the Taiwan Strait will destabilise the region. The survey also found that respondents are concerned that ASEAN remained ineffective in coping with political and economic developments, and that ASEAN may become an arena for major power competition.

China remains the undisputed influential economic power in the region and also continues to be seen as the most influential political and strategic power, outpacing the US by significant albeit reduced margins compared to 2022. However, misgivings about China's influence also remain with around two-thirds of respondents expressing concern about China's influence.

On specific country-led initiatives such as the US-led Indo-Pacific Economic Framework for Prosperity (IPEF) or the China-led Global Security Initiative (GSI), the region preferred to sit on the fence with 41.8% of respondents expressing uncertainty about the IPEF and 44.5% saying that they had either little or no confidence in the benefits of the GSI. Two strong reasons for the uncertain attitudes towards the IPEF were the need to see what emerged from the negotiations (35.5%) and a complaint that there was little information available (27.2%). Of those who expressed poor confidence in the GSI, a third were concerned that US-China tensions would increase, and another third feared that ASEAN would be forced to take sides. But in a hypothetical forced question on who ASEAN should choose to align itself with, a higher proportion of respondents chose the US over China as compared to the findings in 2022.

Closer to home, nearly two-thirds of respondents support Timor-Leste's admission to ASEAN with close to half of those supportive believing that it will enhance ASEAN unity and centrality. With regard to moving the Myanmar situation forward, slightly more than a third want to see ASEAN engage actively in independent dialogue with all key stakeholders, including the shadow National Unity Government.

Japan remains the most trusted major power in terms of "doing the right thing" to provide global public goods, followed by the US and the EU. Japan also shines in the soft power domain in terms of tourism while the US's soft power continues to hold strong attraction in tertiary education.

Commenting on the results, **Mr Choi Shing Kwok, Director and CEO of ISEAS - Yusof Ishak Institute and Head of the ASEAN Studies Centre** said: "The results of this year's survey reflect heightened regional concerns about economic and geopolitical issues that can adversely affect the region's interests in the short to medium term. They also show that the region remains open to both the US and China playing constructive roles and welcomes the presence of other major powers, while not discounting that ASEAN itself can exercise greater agency to direct its own future in a more challenging environment."

The full survey findings were released online during a webinar this morning. A distinguished panel comprising Professor Tommy Koh, Singapore's Ambassador-at-Large; Mr Shivshankar Menon, Former National Security Adviser of India; Ms Wendy Cutler, Vice President and Managing Director, Washington, D.C. Office, Asia Society Policy Institute; and Prof Chen Dongxiao, President, Shanghai Institutes for International Studies discussed the findings and shared their insights at the launch. Mr Choi Shing Kwok moderated the discussion.

The 2023 report and those from the previous years can be downloaded from ISEAS website - <https://www.iseas.edu.sg/category/articles-commentaries/state-of-southeast-asia-survey/>

Media contact

Ms Teo Hwee Leng
Assistant Director, Corporate Communications
ISEAS – Yusof Ishak Institute
Email: teo_hwee_leng@iseas.edu.sg

About ISEAS – Yusof Ishak Institute (ISEAS) and ASEAN Studies Centre (ASC)

ISEAS – Yusof Ishak Institute (formerly Institute of Southeast Asian Studies) was established as an autonomous organization in 1968. It is a regional centre dedicated to the study of socio-political, security, and economic trends and developments in Southeast Asia and its wider geostrategic and economic environment. The Institute's research programmes are the Regional Economic Studies (RES), Regional Strategic and Political Studies (RSPS), and Regional Social and Cultural Studies (RSCS). The Institute is also home to the ASEAN Studies Centre (ASC), the Temasek History Research Centre and the Singapore APEC Study Centre.

The **ASEAN Studies Centre (ASC)** was established in 2008 to research on issues pertaining to the Association of Southeast Asian Nations (ASEAN) as an institution and a process. Through research, publications, conferences, media engagement and outreach activities, ASC seeks to promote greater understanding of ASEAN and to contribute toward regional cooperation and integration. The Centre conducts studies and provides inputs to stakeholders on issues and matters that call for collective ASEAN actions and responses, especially those pertinent to the ASEAN Community building process. The ASC is the first institutional Recipient of the ASEAN Prize in 2020, a prestigious award to honour outstanding achievements of individuals or organisations who have made meaningful contributions to ASEAN.