

ASEAN Perspectives on Current Geopolitics and Japan

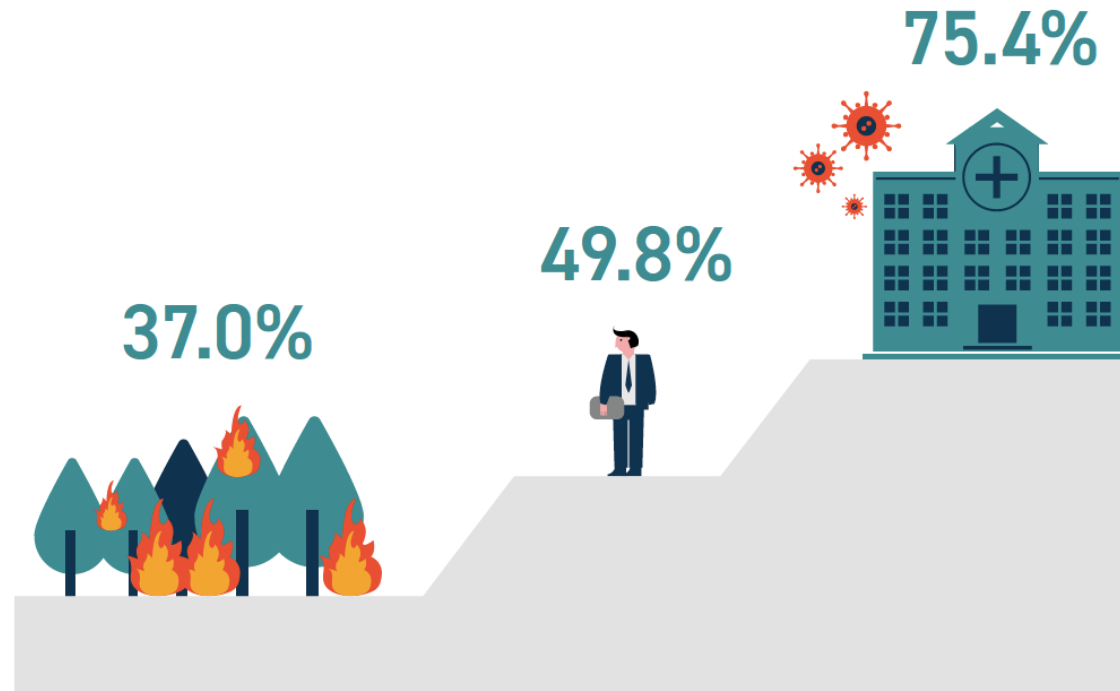
ISEAS-RIETI Joint Webinar
30 May 2022

The State of Southeast Asia: 2022

Key Highlights

Regional Outlook and Developments

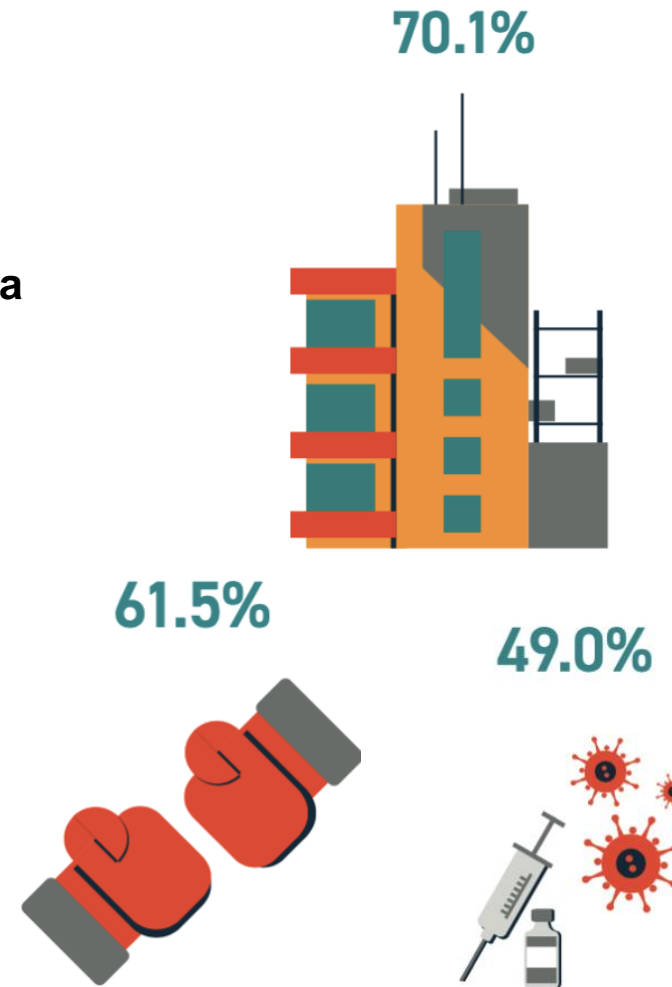
What are the top 3 challenges facing Southeast Asia?



- **COVID-19's threat to health (75.4%), unemployment and economic recession (49.8%), climate change and more intense and frequent weather events (37.0%)**
- **The Philippines (52.0%) and Vietnam (53.5%)** gave higher weightages to climate change
- All countries except Myanmar chose COVID-19's threat to public health as top challenge

What are your top 3 concerns about ASEAN?

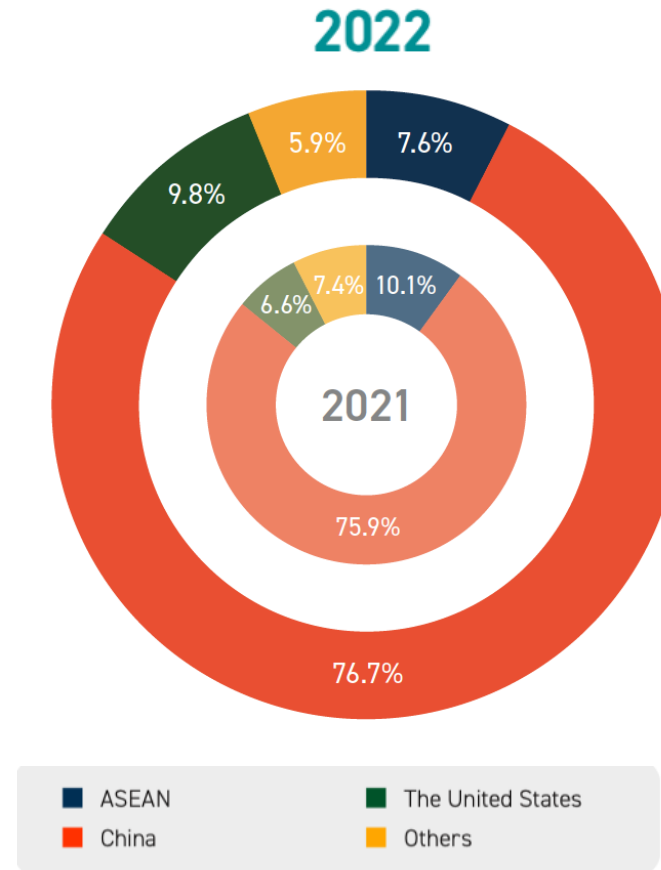
- Top concern – ASEAN is **slow and ineffective** (70.1%): top choice in 7 countries
- 2nd concern – ASEAN **risks becoming an arena of major power competition** (61.5%); top choice in Laos, Vietnam
- 3rd concern – ASEAN's **inability to overcome current pandemic challenges** (49.0%)
- Significant jump in concern about **ASEAN's relevance** (32.2%): esp. Cambodia (43.2%), Myanmar (41.4%), Vietnam (37.5%) and Thailand (36.8%).



Major Powers' Regional Influence and Leadership

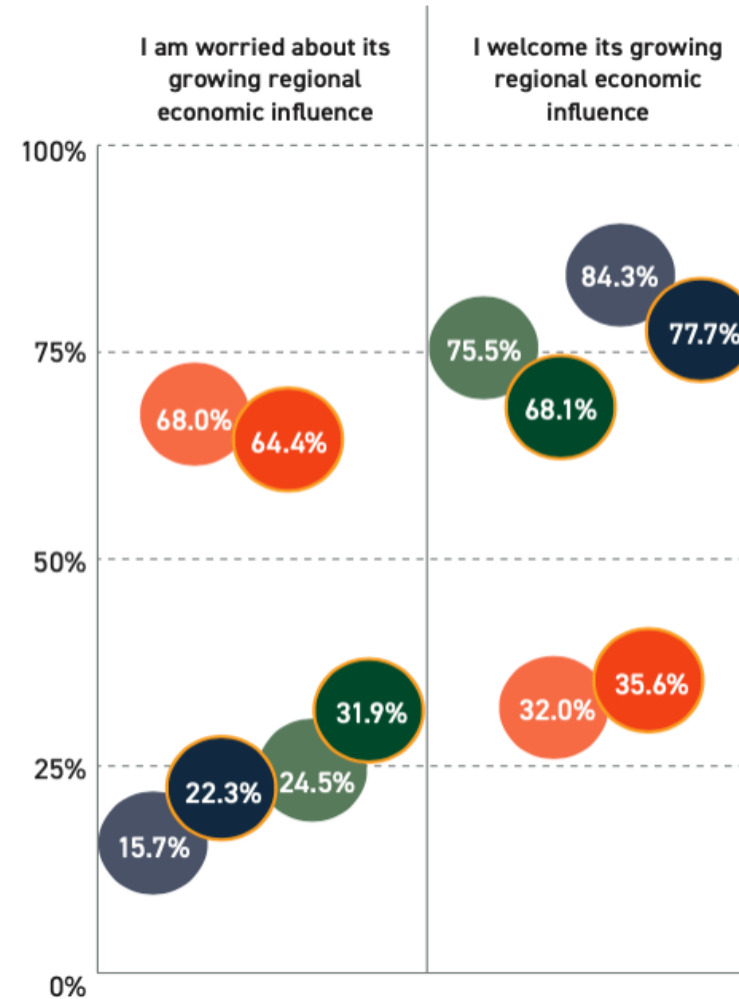
Which country/regional organisation is the most influential economic power in Southeast Asia?

- **China** retains the title of most influential economic power in the region (**76.7%**) – consistent trend since 2019
- Followed by **US** (**9.8%**) and **ASEAN** (**7.6%**)
- Highest recognition levels of **China's** economic influence: **Brunei** (84.9%), **Cambodia** (84.0%), **Laos** (86.4%), **Myanmar** (83.4%), and **Singapore** (81.1%).



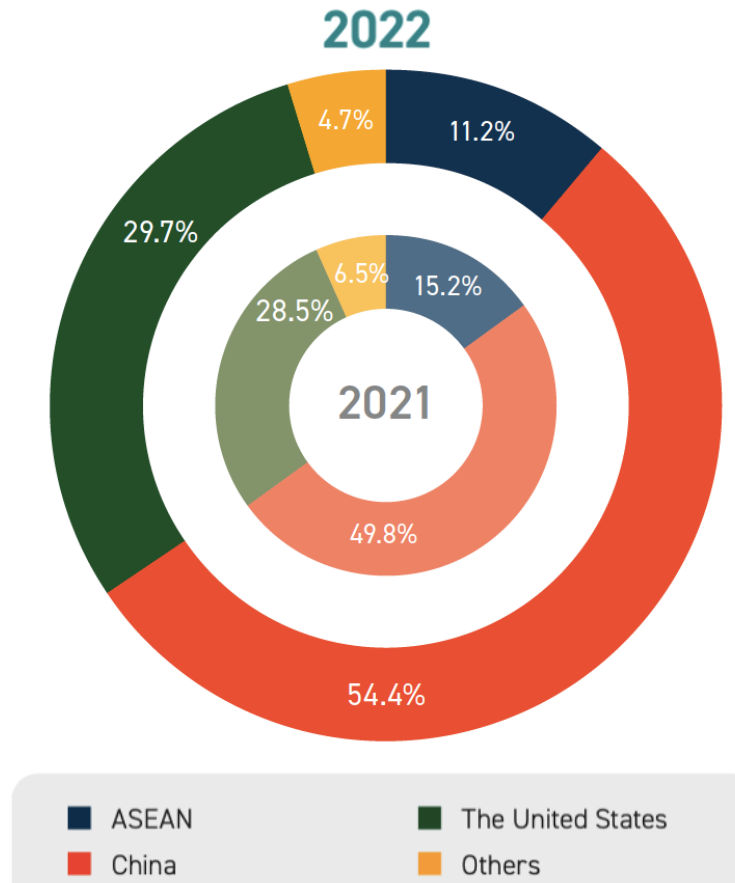
What is your view of this economic power's influence on your country?

- Majority (**64.4%**) remain **worried** about **China's** growing regional economic influence
- Regional anxiety towards China decreased slightly this year, but increases recorded in **Laos** (65.8%), **Myanmar** (87.3%) and **Singapore** (73.9%)



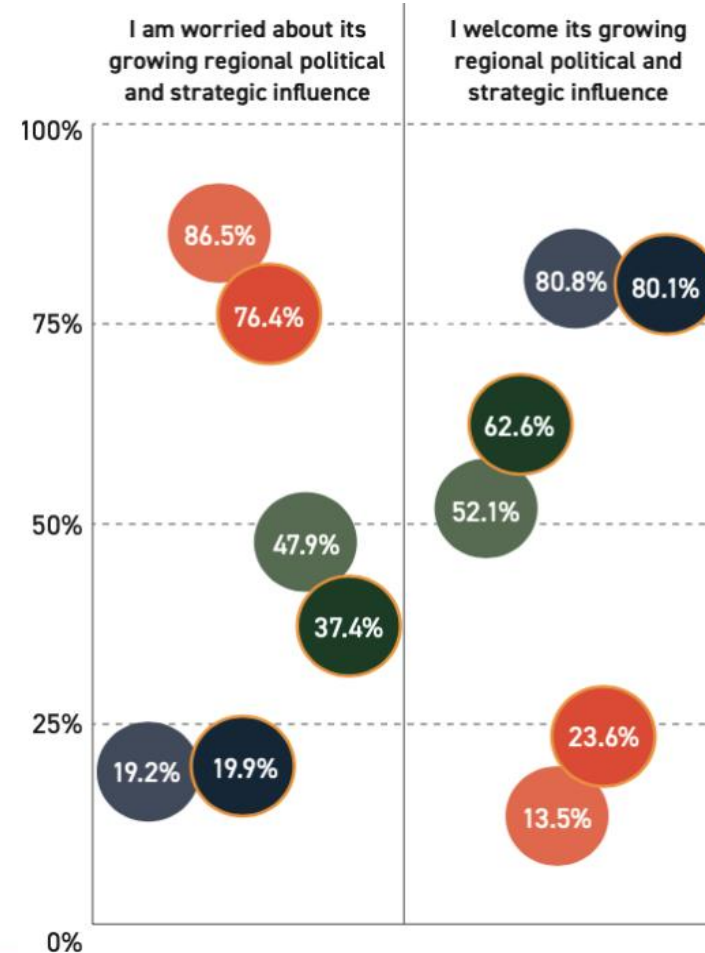
Which country/regional organisation has the most political and strategic influence in Southeast Asia?

- **China** remains the most influential political-strategic power (**54.4%**), followed by **US** (**29.7%**) and **ASEAN** (**11.2%**)
- Strongest views from **Cambodia** (75.3%), **Laos** (75.0%), and **Myanmar** (70.9%)

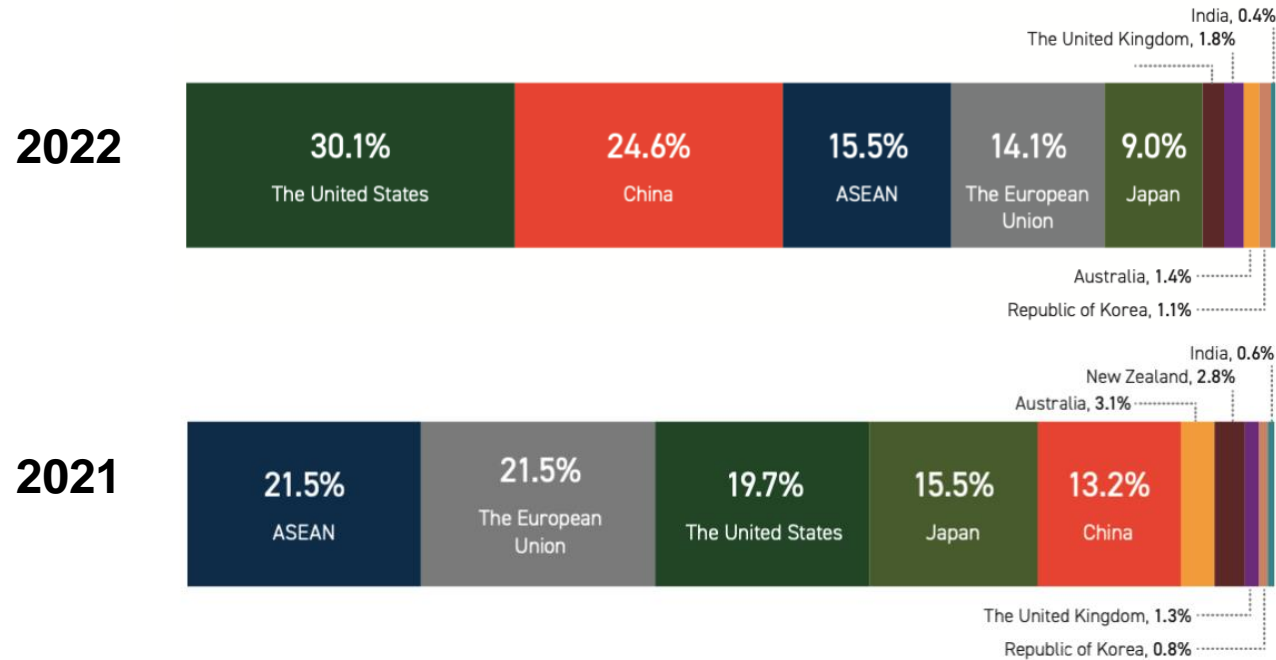


What is your view of this power's political and strategic influence on your country?

- Region remains **worried** about **China's** growing strategic clout (76.4%), albeit a decrease from last year's 86.5%
- Greatest acceptance of China's influence from **Cambodia** (54.1%)
- Increased apprehension towards China's rise: **Myanmar** (93.5%), **Singapore** (90.7%) and **Laos** (78.8%),

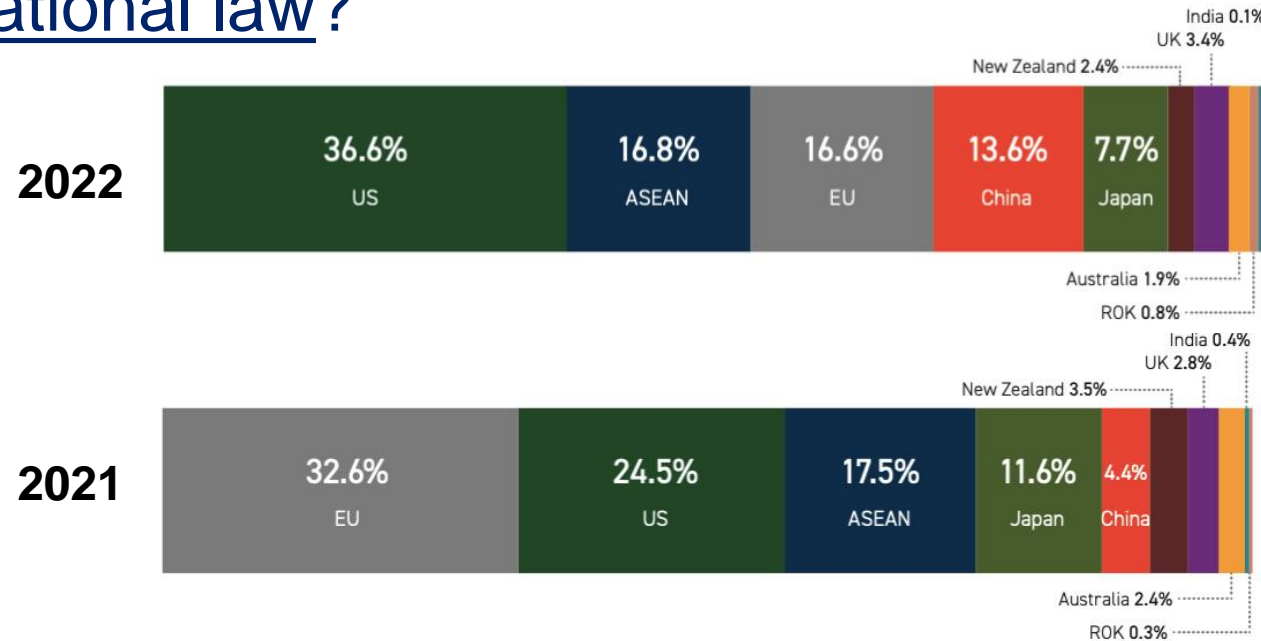


Who do you have the **strongest** confidence in to provide leadership in championing the global free trade agenda?



- Confidence in **US** expanded from 19.7% last year to **30.1%** this year
- **China** second place with **24.6%**, up from 13.2% last year
- **ASEAN** ranked third at **15.5%** dropping from 21.5% last year
- The **EU**, last year's frontrunner, placed fourth (**14.1%**) and **Japan** placed fifth (**9.0%**)

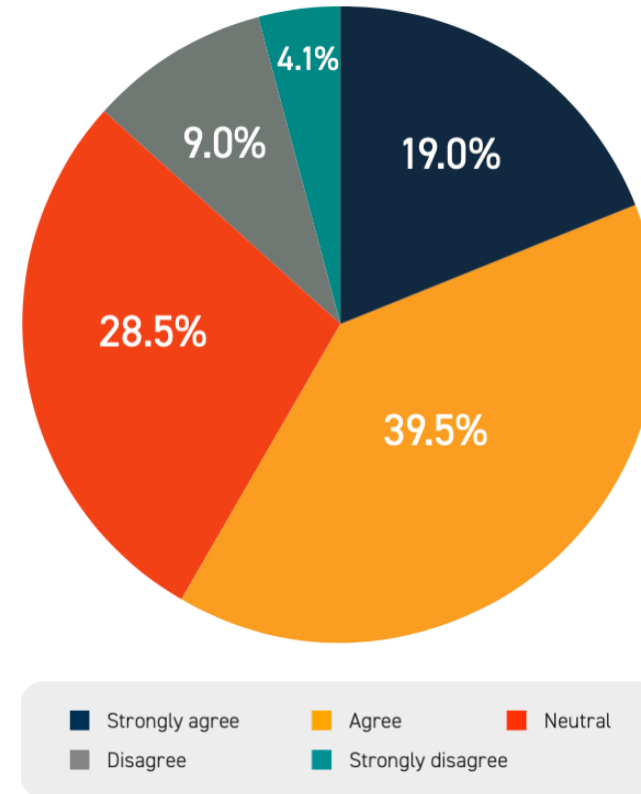
Who do you have the **strongest** confidence in to provide leadership to maintain the rules-based order and uphold international law?



- Top 3: **US** (36.6%), **ASEAN** (16.8%) and the **EU** (16.6%)
- **US**: top choice for **Malaysia, Myanmar, the Philippines, Singapore, Thailand** and **Vietnam**
- **ASEAN**: top choice for **Brunei, Indonesia** and **Laos**
- **China**: **Cambodia's** top choice

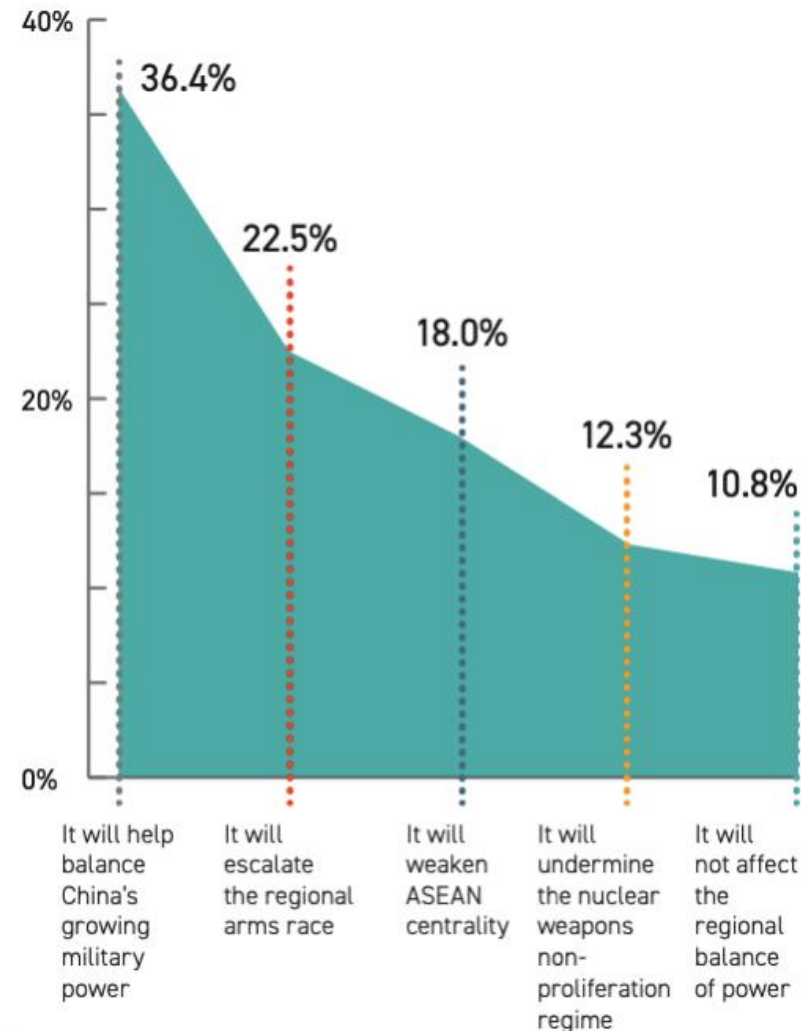
The strengthening of the Quad and the prospects of tangible cooperation in areas like vaccine security and climate change is positive and reassuring for Southeast Asia.

- **58.5%** of respondents **agreed** that the strengthening of the Quad would be constructive for the region
- Especially **Philippines** (81.6%), **Laos** (75.0%), **Vietnam** (65.9%), **Indonesia** (64.9%), **Singapore** (63.5%), and **Myanmar** (61.4%)
- **13.1%** **disagreed** with the question, especially **Cambodia** (40.7%)



How will AUKUS affect regional security?

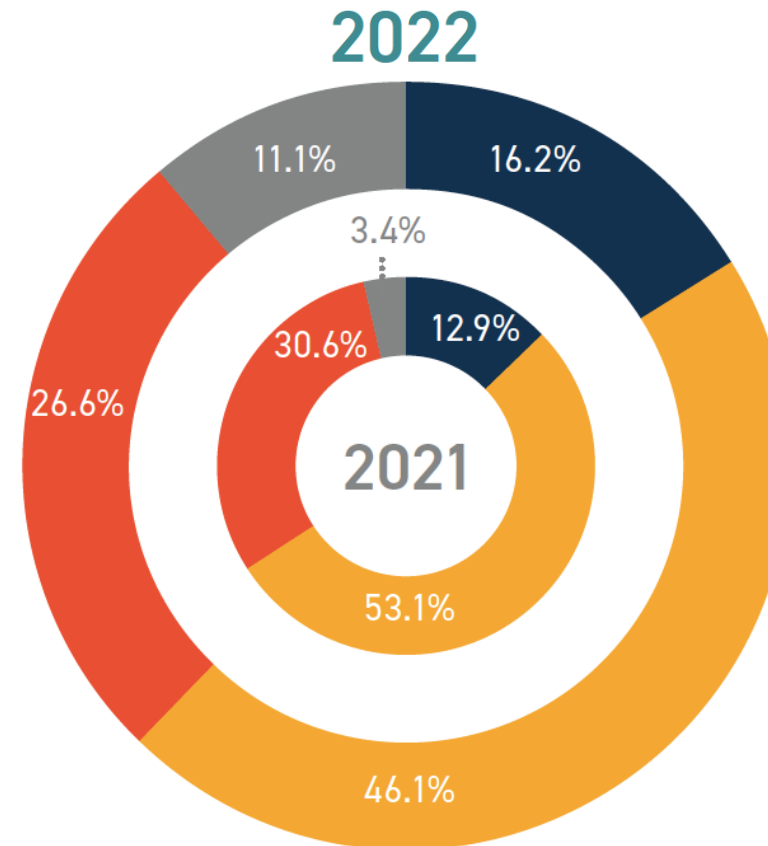
- **36.4%** feel that **AUKUS** will help balance China's growing military power
→ Especially so for **Myanmar** (63.7%) and **the Philippines** (60.0%)
- One-quarter feel that it **will escalate regional arms race** (22.5%)
- One-fifth feel that it will **undermine the nuclear weapons non-proliferation regime** (12.3%).
- Approximately a fifth (18.0%) feel that the **AUKUS arrangement will weaken ASEAN centrality**.
→ Top choice for **Laos** (36.4%)



ASEAN in the Middle

ASEAN is caught in the crossfire as Beijing and Washington compete for influence and leadership in Southeast Asia. How should ASEAN best respond?

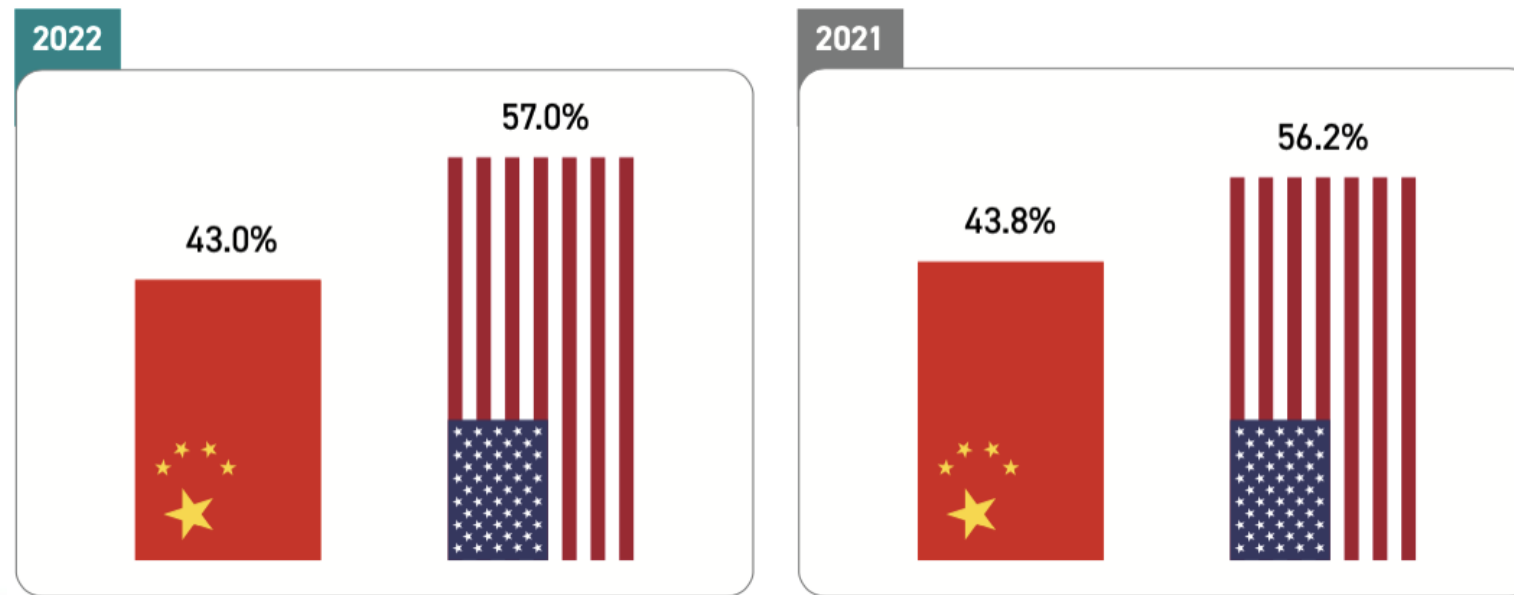
- ASEAN continues to favour proactive approach of **enhancing its resilience and unity to fend off pressure from two major powers** (46.1%)
- Outstrips preference for the traditional position of **not choosing sides** (26.6%)
- Option to **seek out “third parties” to broaden its strategic space and options** increased to 16.2%



If ASEAN were forced to align itself with one of the two strategic rivals, which should it choose?

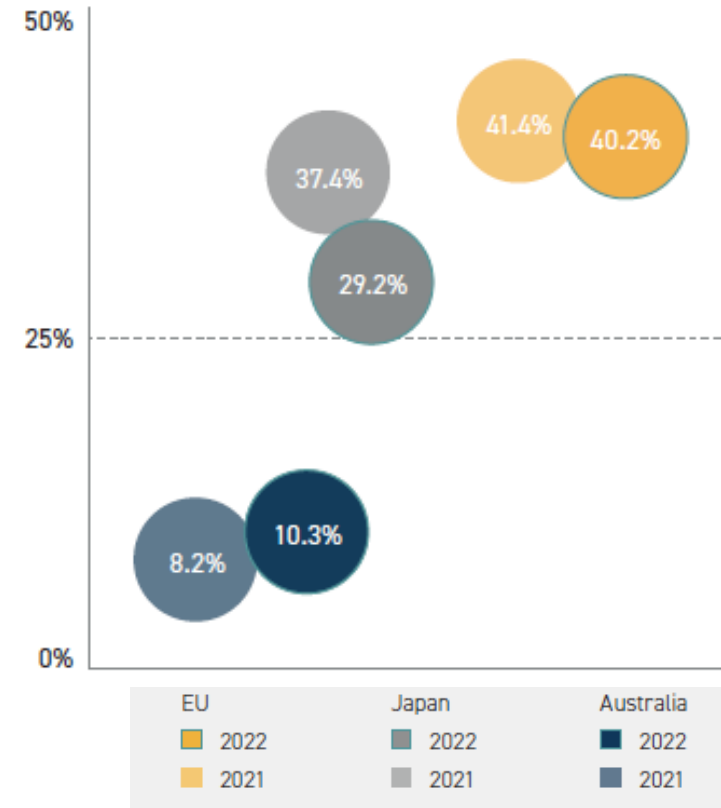
The US (57.0%) continues to enjoy popular support vs. **China (43.0%)**

- Greatest support for **US**: **Myanmar** (92.0%), the **Philippines** (83.5%) and **Singapore** (77.9%)
- Greatest support for **China**: **Cambodia** (81.5%), **Laos** (81.8%) and **Brunei** (64.2%)



If ASEAN were to seek out “third parties” to hedge against the uncertainties of the US-China strategic rivalry, who is your most preferred and trusted strategic partner for ASEAN?

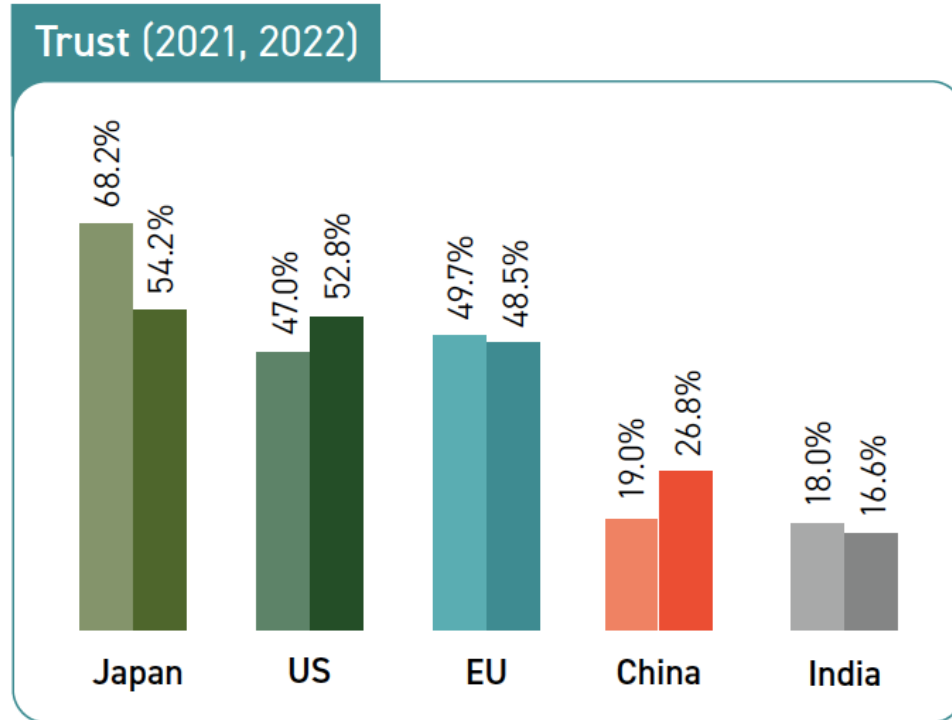
- Frontrunners remain: **EU** (40.2%) & **Japan** (29.2%)
- Share for **Japan** and **India** decreased while share for **Australia**, **UK** and **ROK** increased
- Significant increase for **UK**: Sixth place (2.9%) last year to fourth place (**8.4%**) this year



Perceptions of Trust

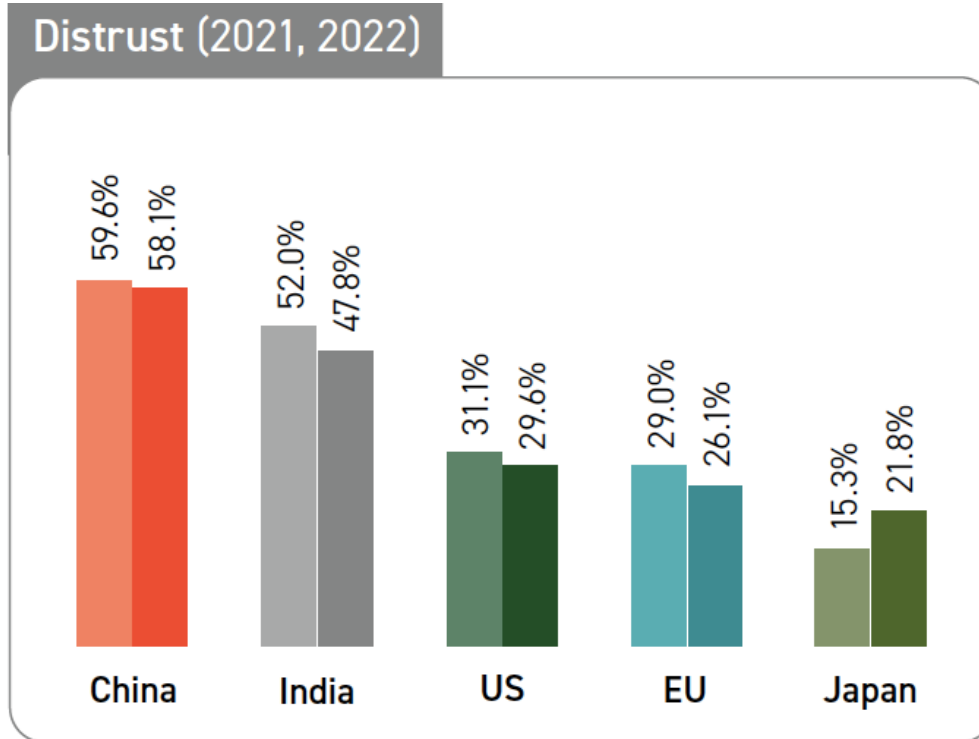
Perceptions of Trust among Southeast Asians in the Major Powers

- **Japan**, recognised as a responsible stakeholder with vast economic resources and political will, remains **most trusted** major power; but overall trust share decreased from **68.2% in 2021** to **54.2% in 2022**.
- 2nd position: **US**, under the Biden Administration, jumped in the trust rankings with an increase from **47.0% in 2021** to **52.8% in 2022**.
- 3rd position: **EU's** trust rankings remain strong but declined from **49.7% in 2021** to **48.5% in 2022**.



Perceptions of Distrust among Southeast Asians in the Major Powers

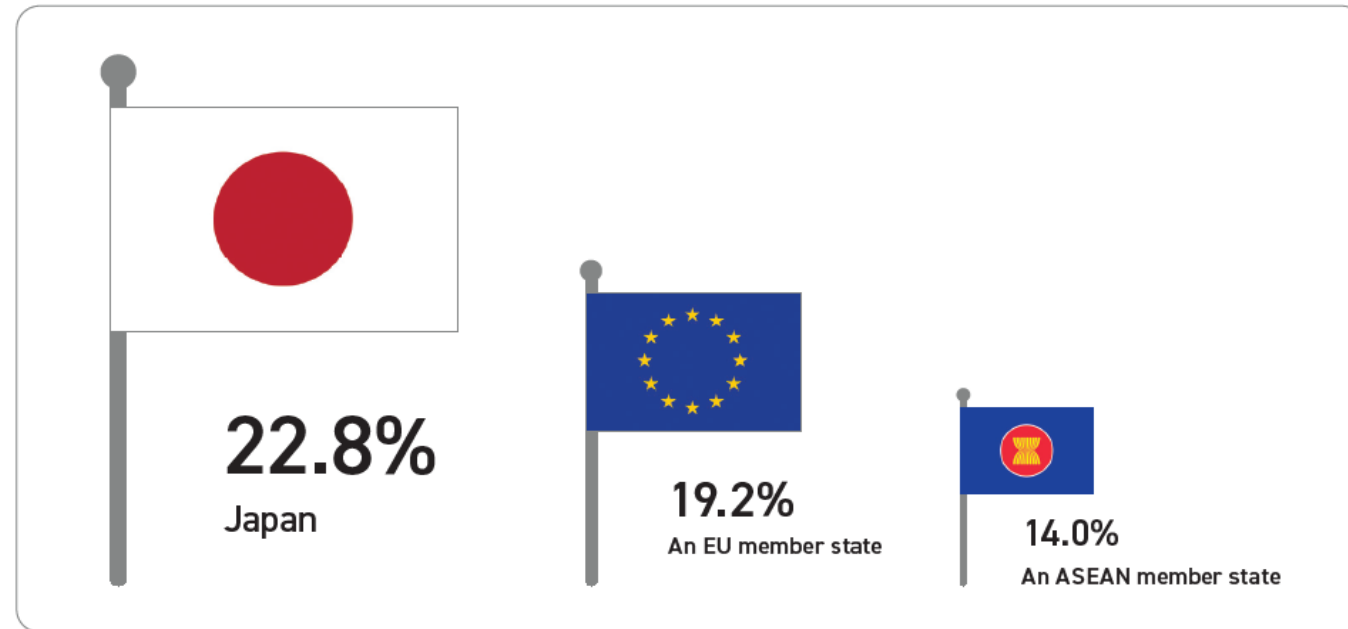
- Despite concerns of its economic and military clout, **China's distrust** ratings decreased slightly from **59.6% in 2021** to **58.1% in 2022**.
- 2nd position: **Distrust** towards **India** dropped from **52.0% in 2021** to **47.8% in 2022**, but trust rankings did not correspondingly increase.
- **US** has the third-highest **distrust** ratings, but it decreased from **31.1% in 2021** to **29.6% in 2022**.



Soft Power

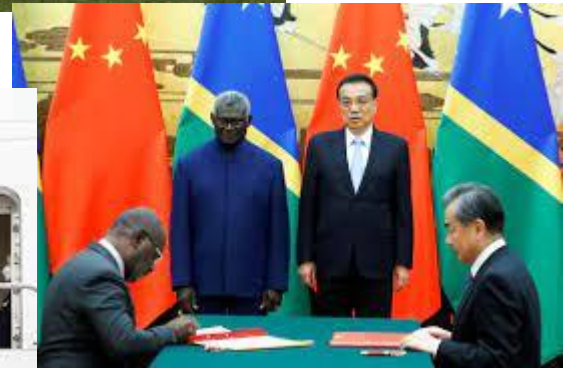
Japan's Soft Power

Most preferred country to visit since 2020

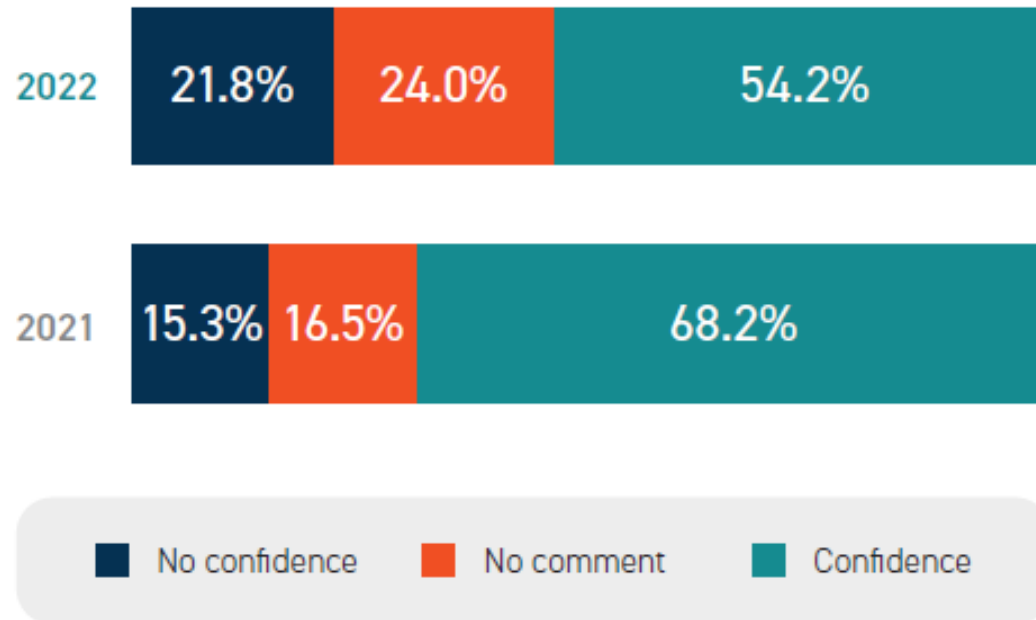


Current Developments

Global State of Flux



How confident are you that Japan will “do the right thing” to contribute to global peace, security, prosperity, and governance?



Why do you trust Japan?

Country	Japan has vast economic resources and the political will to provide global leadership		My country's political culture and worldview are compatible with Japan's		Japan is a responsible stakeholder that respects and champions international law		Japan's military power is an asset for global peace and security		I respect Japan and admire its civilisation and culture	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	24.0%	25.8%	5.5%	6.3%	52.1%	46.6%	1.5%	2.6%	17.0%	18.7%
Brunei	18.2%	30.0%	0.0%	0.0%	77.3%	50.0%	0.0%	0.0%	4.5%	20.0%
Cambodia	27.3%	26.9%	4.5%	19.2%	45.5%	30.8%	0.0%	3.8%	22.7%	19.2%
Indonesia	23.3%	31.5%	6.8%	9.6%	38.4%	41.1%	2.7%	4.1%	28.8%	13.7%
Laos	33.3%	30.0%	8.3%	0.0%	41.7%	55.0%	0.0%	0.0%	16.7%	15.0%
Malaysia	18.8%	16.2%	5.8%	4.4%	59.4%	57.4%	2.9%	2.9%	13.0%	19.1%
Myanmar	31.1%	26.1%	8.4%	6.4%	37.8%	37.4%	0.8%	1.0%	21.8%	29.1%
Philippines	25.9%	27.7%	3.7%	3.3%	44.4%	45.3%	3.7%	3.6%	22.2%	20.1%
Singapore	12.9%	12.3%	7.5%	5.3%	73.1%	69.3%	1.1%	0.9%	5.4%	12.3%
Thailand	25.9%	27.8%	5.9%	7.4%	45.9%	42.6%	2.4%	1.9%	20.0%	20.4%
Vietnam	22.9%	29.3%	3.8%	7.6%	57.3%	37.0%	1.5%	7.6%	14.5%	18.5%

Why do you distrust Japan?

Country	Japan does not have the capacity or political will for global leadership		My country's political culture and worldview are incompatible with Japan's		I am concerned that Japan is distracted with its internal affairs and relations with its Northeast Asian neighbours (i.e. China, Korea and Taiwan), and thus cannot focus on global concerns and issues		Japan's economic and military power could be used to threaten my country's interests and sovereignty		I do not consider Japan a responsible or reliable power	
	2021	2022	2021	2022	2021	2022	2021	2022	2021	2022
ASEAN	43.5%	41.0%	1.5%	8.3%	31.9%	27.2%	1.8%	7.2%	21.2%	16.3%
Brunei	60.0%	46.2%	0.0%	0.0%	40.0%	30.8%	0.0%	15.4%	0.0%	7.7%
Cambodia	0.0%	21.9%	0.0%	3.1%	0.0%	25.0%	0.0%	21.9%	100.0%	28.1%
Indonesia	48.3%	26.9%	0.0%	7.7%	27.6%	38.5%	0.0%	7.7%	24.1%	19.2%
Laos	66.7%	75.0%	0.0%	25.0%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Malaysia	48.4%	33.3%	0.0%	4.8%	32.3%	23.8%	0.0%	7.1%	19.4%	31.0%
Myanmar	52.9%	42.6%	5.9%	7.4%	11.8%	22.1%	5.9%	2.9%	23.5%	25.0%
Philippines	16.7%	30.8%	0.0%	12.8%	66.7%	35.9%	0.0%	10.3%	16.7%	10.3%
Singapore	43.3%	57.4%	0.0%	0.0%	40.0%	24.6%	6.7%	1.6%	10.0%	16.4%
Thailand	51.7%	42.3%	3.4%	7.7%	37.9%	38.5%	0.0%	0.0%	6.9%	11.5%
Vietnam	47.1%	33.3%	5.9%	14.3%	29.4%	33.3%	5.9%	4.8%	11.8%	14.3%

Final notes

1. Transitions and Transformations

- Complex global, regional and technological forces at play
- Wicked problems

2. Protect the global rules-based order

- Changes to status quo
- Challenges to past 75 years of international global order

3. Japan as supporter of rule of law and multilateralism