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The State of Southeast Asia:



Is “Not Taking Sides” a Viable Option for ASEAN?

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What keeps Southeast Asians awake at night on ASEAN matters?



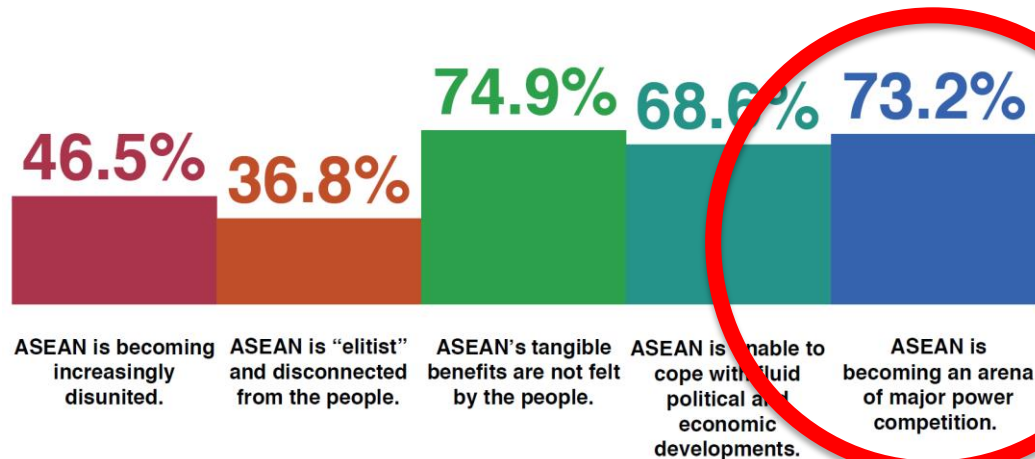
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What are your top 3 concerns about ASEAN?

- Top 3 concerns about ASEAN in 2020 remain the same as 2019: **the tangible benefits of ASEAN are not felt** (74.9%), **ASEAN is becoming an arena for major power competition and its member states may become proxies for the interest of a major power** (73.2%), and **ASEAN is unable to cope with fluid political and economic developments** (68.6%).



Which major power is the most influential in Southeast Asia?

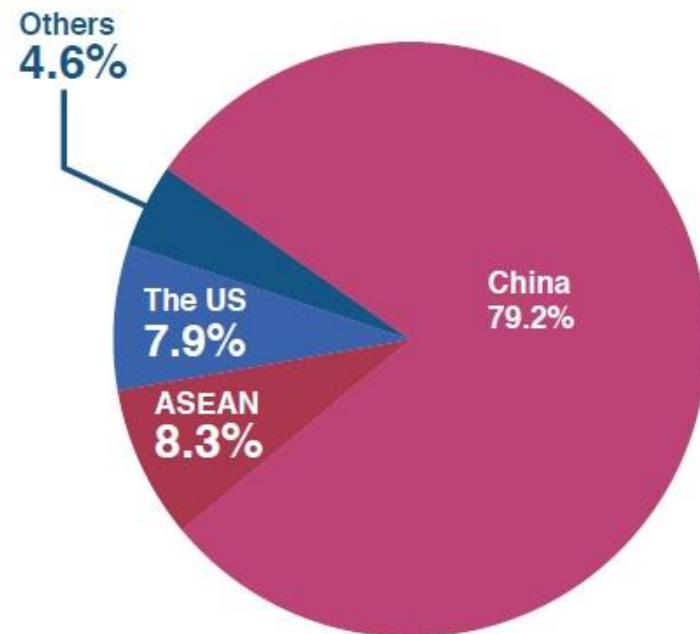


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Which country/regional organisation is the most influential economic power in Southeast Asia?

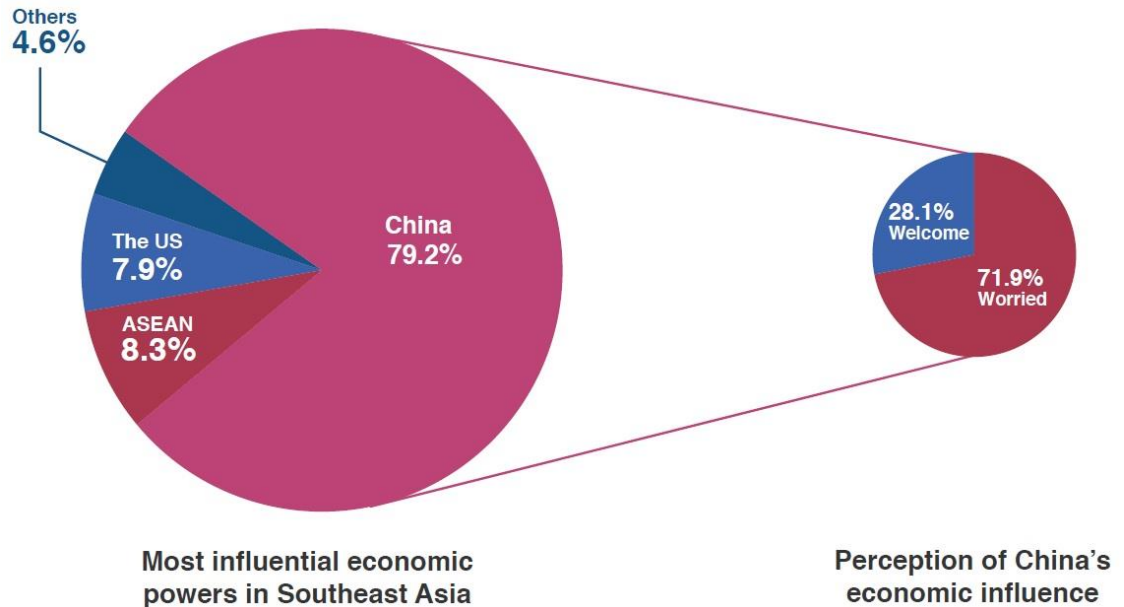
- Share of respondents who picked **China** as the most influential economic power in Southeast Asia increased from **73.3% in 2019** to **79.2% in 2020**.
- Highest levels of recognition of China's economic influence are recorded by respondents from **Cambodia** (88.5%), **Thailand** (86.5%), and **Brunei** (85.5%).

Most influential economic powers in Southeast Asia



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

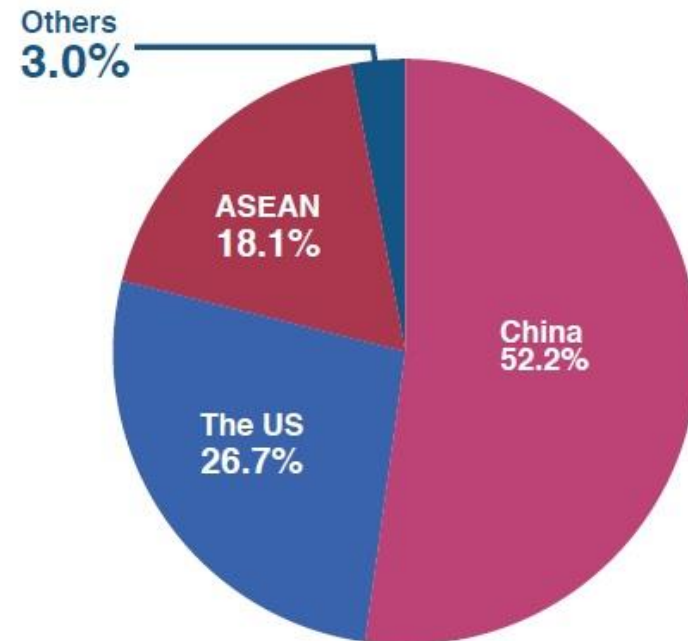
- The region acknowledges China's economic prowess, but does not necessarily embrace this reality.
- **71.9%** of those who see China as the most influential economic power are “**worried** about its **growing regional economic influence**”.



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

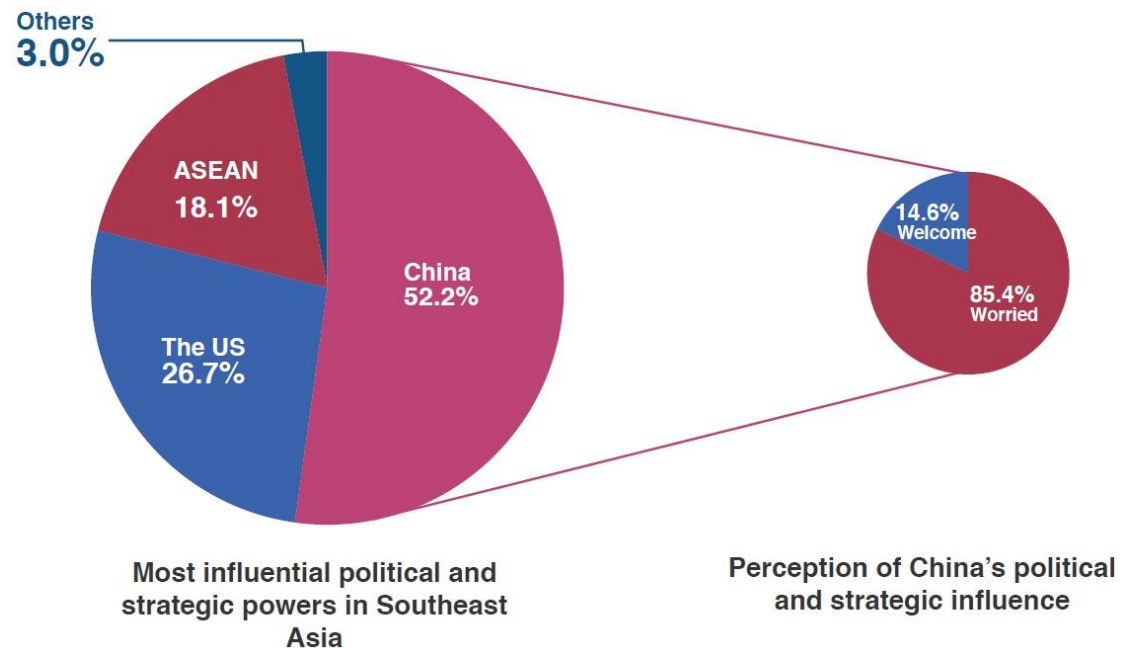
- **China's** share as the most influential political-strategic power increased from **45.2% in 2019** to **52.2% in 2020**.
- **The US** continues to lose political and strategic ground in the region, with its share decreasing from **30.5% in 2019** to **26.7% in 2020**.

Most influential political and strategic powers in Southeast Asia



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

- **85.4%** of those who view China as having the most political-strategic influence in the region are **worried** about China's influence.
- The gap between perceived US and Chinese influence has widened from **14.7% in 2019** to **25.5% in 2020** in China's favour.



Who does Southeast Asia look to for leadership?



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In which country/regional organisation do you have the strongest confidence to provide leadership in championing the global free trade agenda?



- Majority of respondents look to **Japan** (27.6%) and **the EU** (25.5%) for leadership on free trade.
- **The US** (14.5%) – which used to be at the forefront of global free trade – dropped to fourth in the pecking order, behind **China** (14.7%).

In which country/regional organisation do you have the strongest confidence to provide leadership to maintain the rules-based order and uphold international law?



- **The EU** was the top choice for respondents from **Thailand** (51.0%), **Indonesia** (47.3%), **Cambodia** (38.5%), **Malaysia** (38.1%), **Singapore** (36.5%), and **Brunei** (28.9%).
- Support for **US** leadership in this area is strongly felt in **Vietnam** (45.4%) and **the Philippines** (35.1%)
- **Japan** enjoys the highest confidence in **Laos** (34.8%) and **Myanmar** (33.2%).

What are ASEAN's options in responding to the US-China rivalry?



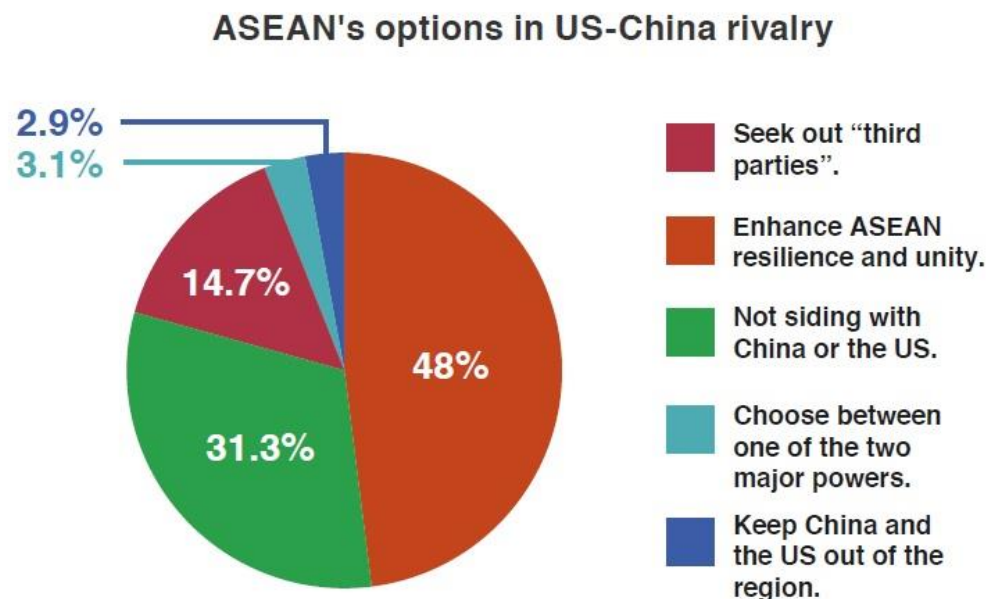
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ASEAN is caught in the crossfire of the US-China strategic rivalry. How should ASEAN best respond?

- The region's most preferred option (48%) is “enhancing **ASEAN’s resilience and unity** to fend off pressure”; this is also the top option in **nine** ASEAN member states.
- 31.3% of the respondents support ASEAN’s default response of “not taking sides”; this is the top option for **Laos** (47.8%) and **Myanmar** (32.4%).



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

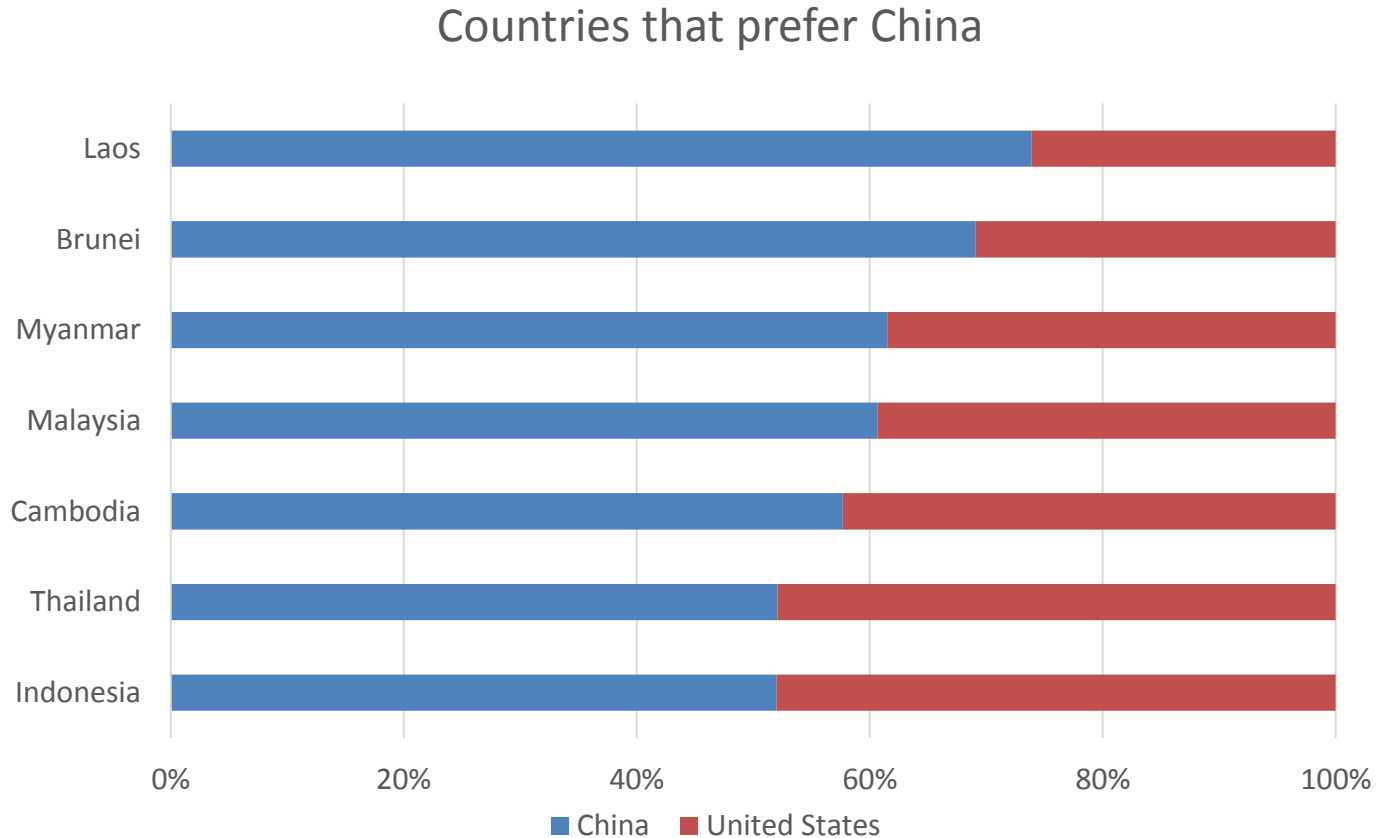
- Hypothetically, if ASEAN were to take sides, **more than half** of the respondents (53.6%) will lean towards **Washington**.
- Yet, the region's support for China **cannot be underestimated**, as 46.4% indicate their preference for **Beijing**.



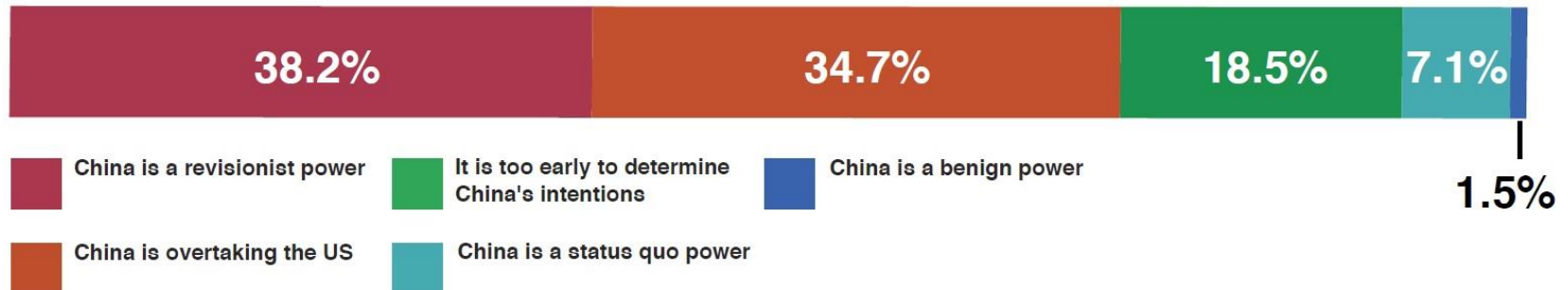
Country-level data presents a more complex picture

- **Majority** of respondents from **seven** ASEAN member states **choose to align with China.**

- Laos (73.9%)
- Brunei (69.1%)
- Myanmar (61.5%)
- Malaysia (60.7%)
- Cambodia (57.7%)
- Thailand (52.1%)
- Indonesia (52%)

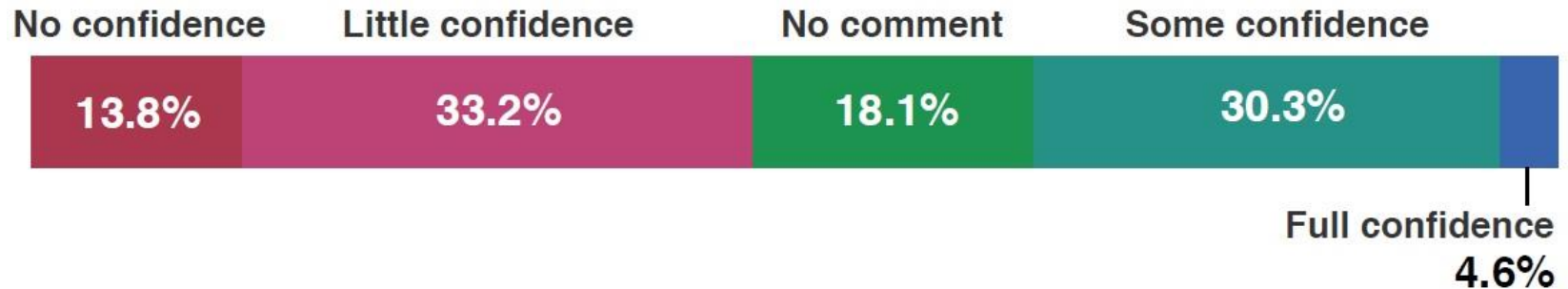


Which statement most accurately reflects your view of China's re-emergence as a major power with respect to Southeast Asia?



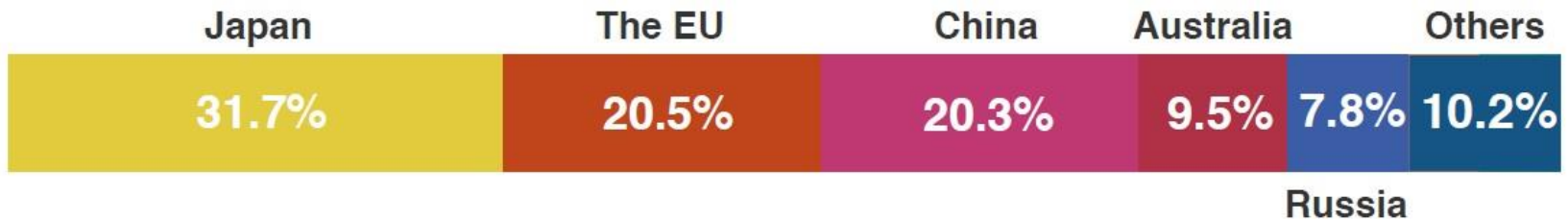
- **38.2%** of respondents believe that “China is a **revisionist power** and intends to turn Southeast Asia into its **sphere of influence**”.
- The region’s perception of China’s revisionist intent is **softening**, as the share of **38.2% in 2020** is **lower** than **45.4% in 2019**.

How confident are you of the US as a strategic partner and provider of regional security?



- The percentage of respondents with “**little** confidence” and “**no** confidence” in the US increased from **34.6% in 2019** to **47% in 2020**.
- The percentage of respondents with “**some** confidence” and “**full** confidence” in the US increased from **31.9% in 2019** to **34.9% in 2020**.
- The only two countries where confidence in the US exceeds the 50% threshold are **the Philippines** (61.3%) and **Vietnam** (52.6%).

If the US is perceived as unreliable, who would you look to as your country's preferred strategic partner?



- **China** and **Japan** are tied as the top choice in Cambodia, while **China** and **the EU** tie as Singapore's top choice.
- Singapore's case is unique, as the gap among the top choices is minimal: **China** (23.9%), **the EU** (23.9%) and **Japan** (23.1%).

Who does Southeast Asia trust (or distrust) the most?



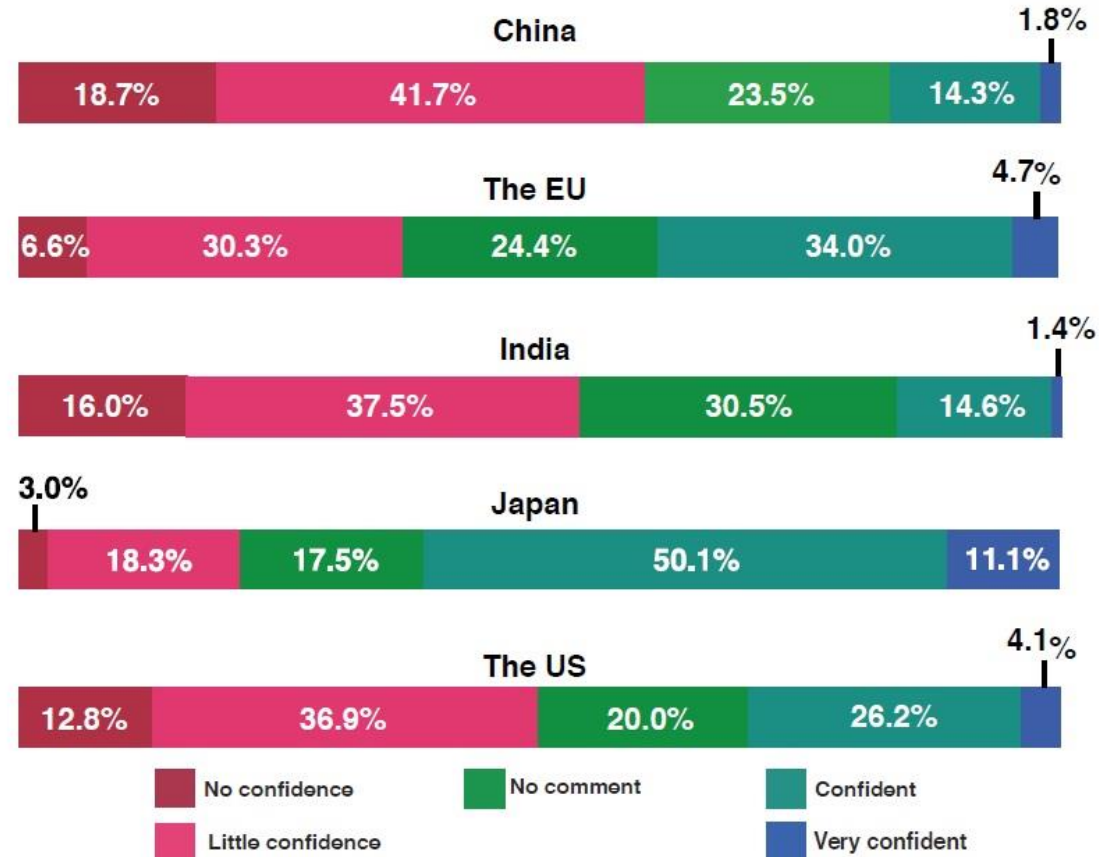
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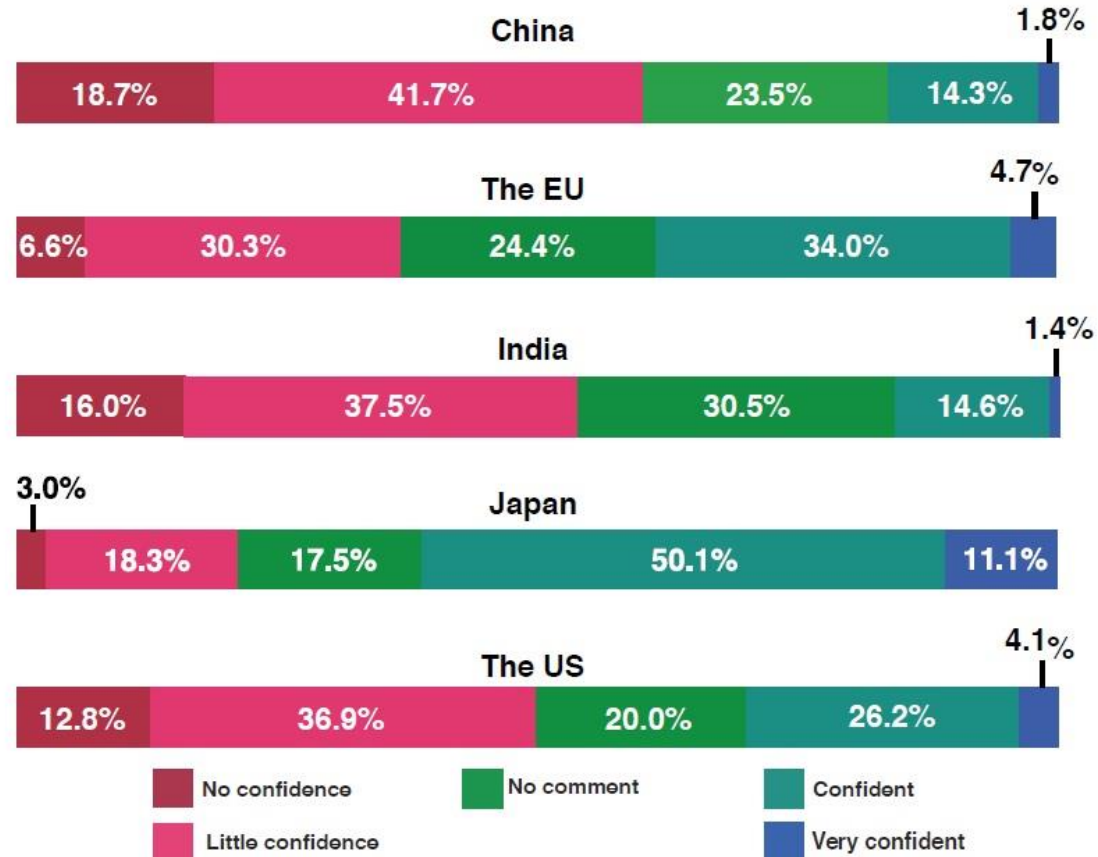
How confident are you that _____ will "do the right thing" to contribute to global peace, security, prosperity and governance?

- Majority (**60.4%**) have **little** or **no** confidence in **China** to "do the right thing" (41.7% + 18.7%).
- Nearly half (**49.7%**) have **little** or **no** confidence in **the US** to "do the right thing".



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

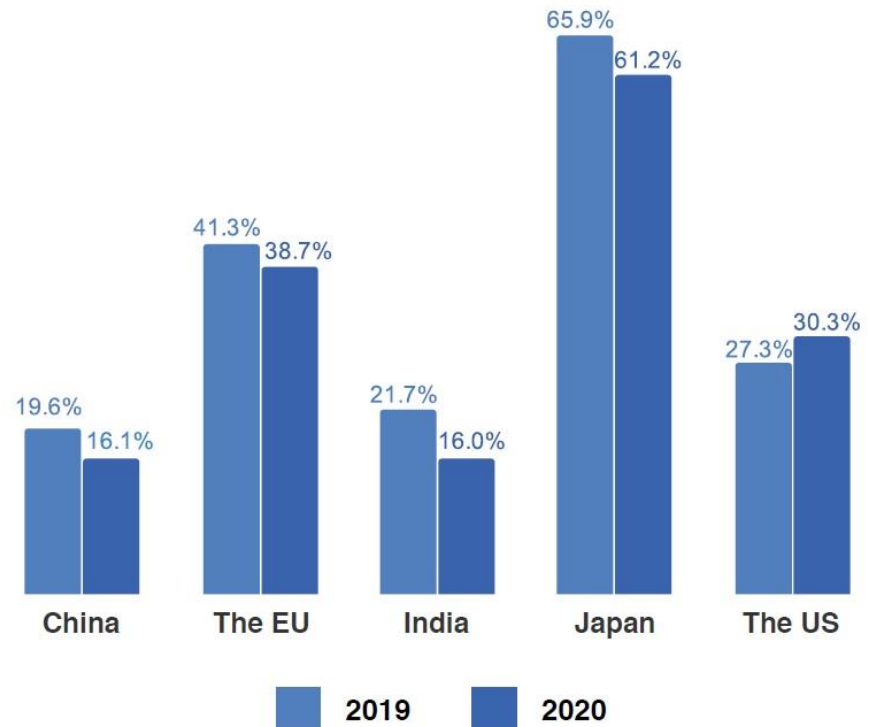
- **38.7%** are **confident** or **very confident** that **the EU** will "do the right thing".
- **61.2%** are **confident** or **very confident** that **Japan** will "do the right thing".



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

- **Japan** remains the **most trusted** major power, but its overall share of **trust** dipped from **65.9% in 2019** to **61.2% in 2020**.
- **Trust in India** declined from **21.7% in 2019** to **16% in 2020**.
- Only **the US** saw an increase in **trust**, from **27.3% in 2019** to **30.3% in 2020**.

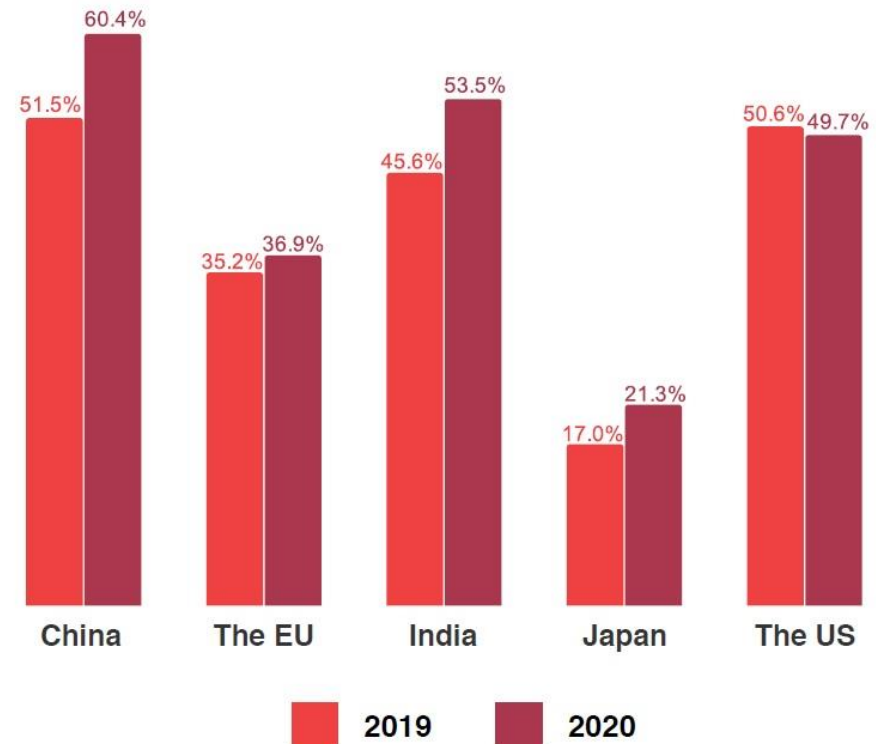
Perception of trust among Southeast Asians in the major powers



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

Perception of distrust among Southeast Asians in the major powers

- **Distrust in China** increased from **51.5% in 2019** to **60.4% in 2020**.
- **Distrust in India** increased from **45.6% in 2019** to **53.5% in 2020**.
- **Distrust in Japan** increased from **17% in 2019** to **21.3% in 2020**.



Some concluding thoughts ...

1. The “fallacy” of “not taking sides”: doctrine versus pragmatism and practice
2. The “fallacy” of “choices”: ASEAN’s major power dilemma
3. Back to the “basics” for ASEAN

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