JUNE 2020

Powers, Norms, and Institutions

The Future of the Indo-Pacific from a Southeast Asia Perspective

Results of a CSIS Survey of Strategic Elites

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A Report of the CSIS Southeast Asia Program

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We would also like to thank our colleagues at Polity Research Consulting LLC of Andover, Massachusetts, who helped the CSIS research team both design and field the survey during the latter part of 2019.

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Finally, we would like to thank our fellow CSIS colleagues who helped the research team at every step of the way in producing this final report, in particular Nicholas Szechenyi and Gregory Poling.

Contents

Executive Summary

In late 2019, the Center for Strategic and International Studies (CSIS) conducted a survey of strategic elites in Southeast Asia and the Pacific to understand how the region is viewing trends in power, norms, and institutions. In early 2020, the research team conducted extensive analysis of the survey data and convened a workshop in Sydney, Australia, to further examine the results with leading experts from all of the Southeast Asian countries surveyed in this poll as well as from the United States and Australia.

The results of this survey paint a picture of clearly ascendant Chinese influence in Southeast Asia, complex and diverging views of China, and deep concerns over U.S.-China strategic competition and its impact on the Association of Southteast Asian Nations (ASEAN). Power dynamics are further complicated by the emergence of Japan, India, and Indonesia as powerful players in their own right, leading toward a more multipolar strategic environment that is likely to become even more fluid and complex in the future.

In terms of national and regional priorities, the survey finds that Southeast Asian strategic elites are more concerned with non-traditional security and economic threats than traditional security challenges and that they continue to prioritize ASEAN as the key institution for organizing collective action on regional challenges. The results also show strong support for democratic values as intrinsically linked to regional stability and prosperity, while good governance ranks particularly high among other normative values.

It is important to note that the survey was conducted in late 2019, before the emergence of the Covid-19 pandemic in China and the rest of the region. We expect that the public health and economic crisis created by the novel coronavirus in Southeast Asia would lead strategic elites in these countries to prioritize pandemic preparedness, economic security, and perhaps ASEAN cooperation at even higher levels than is reflected in this survey.

This report outlines 10 key findings across four categories:

Power and Influence:

- **Finding 1: China is seen as holding slightly more political power and influence than the United States in Southeast Asia today and considerably more power relative to the United States in 10 years.** However, power dynamics in Southeast Asia are about much more than just the United States and China. Japan, India, and Indonesia, in particular, are viewed as major players in their own right.

- **Finding 2: In terms of economic power and influence, the region views China as much more influential than the United States today, and this gap is expected to grow in the next 10 years.** China's edge in terms of relative economic influence is wider than for relative political influence. Japan is a close third today and will remain third in 10 years, but its economic influence is expected to wane, with India's expected to rise.

- **Finding 3: There is no consensus on whether China's role is beneficial or detrimental to the region.** A slight majority of respondents have a benign view of China. However, the benign view is tempered by the fact that only 8 percent view China playing a "very beneficial" role. Vietnam and the Philippines, the two countries with the most significant maritime territorial disputes with China, are most negative about China's role in the region.

Challenges:

- **"Finding 4: The region has deep concerns about U.S.-China strategic competition, ranking it as the greatest geopolitical challenge.** U.S.-China strategic competition is the top concern of every country surveyed except for the Philippines and Vietnam, which both rated conflict in the South China Sea as an even greater concern, and Indonesia, which sees China's economic influence as the greatest challenge.

- **Finding 5: Climate change and other non-traditional security threats are of greater concern than traditional military problems.** Overall, climate change is viewed as the biggest concern to national security, with economic and financial crises second, well ahead of traditional security concerns. Had the survey been conducted in 2020, health pandemics would likely have also been a top concern as well.

Values:

- **Finding 6: There is high regional support for democratic values.** When asked about the importance of democratic values to the regional order, the vast majority of respondents say they are "very confident" or "somewhat confident" that democratic values are beneficial for regional stability and prosperity. These results, however, do not seem to match recent trends in governance in the region and highlight a possible disconnect with what people want and the actual state of affairs.

- **Finding 7: Economic cooperation and good governance rank as the most important principles for regional stability and economic prosperity.** When asked to rank the importance of various normative, economic, and security issues for regional stability and prosperity, respondents overwhelmingly choose trade and economic integration, followed closely by good governance and strengthening domestic political institutions.

Institutions:

- **Finding 8: ASEAN is seen as the most important regional institution.** All countries rank ASEAN as the most important regional institution or initiative, with the

exceptions of Thailand, where respondents split evenly between ASEAN and China's Belt and Road Initiative (BRI), and Vietnam, where the Quad ranked highest.

- **Finding 9: The main challenge facing ASEAN is seen as external pressure from major powers, which is increasing disunity among ASEAN members.** These pressures rank ahead of ASEAN member countries themselves not prioritizing ASEAN and ASEAN lacking the means to deal with challenges. Extremely few respondents think ASEAN faces no challenges.
- **Finding 10: ASEAN is seen as best suited to deal with most regional challenges.** When asked to identify which ASEAN-led regional framework is best suited to deal with a variety of regional challenges, respondents show a clear preference for ASEAN over the East Asia Summit (EAS), the ASEAN Regional Forum (ARF), or the ASEAN Defense Ministers Meeting Plus (ADMM+).

While this report focuses on responses from the six Southeast Asian countries, Fijian responses to our survey had much in common with those from Southeast Asia and are briefly outlined on page 29.

Introduction

Project Background

Southeast Asia is a dynamic region of more than 650 million people and, until recently, a fast-growing $3 trillion economy, sitting strategically at the heart of the Indo-Pacific region. In recent years, numerous external powers have ramped up engagement with Southeast Asia, including the United States and China, which now openly and aggressively compete for influence in the region. Meanwhile, the region itself is integrating politically and economically via the Association of Southeast Asean Nations (ASEAN), which has become central to Asia-Pacific regionalism. More broadly, Southeast Asia has become a global bellwether on a vast array of normative issues, including the future of democratic governance.

To effectively engage Southeast Asia, the United States and other outside powers need a clear and nuanced understanding of how the region itself views current and future power dynamics, the norms that ought to govern the region, and how the region views the various institutions that might address regional challenges. In this spirit, in late 2019, CSIS conducted a survey of strategic elites in Southeast Asia—as well as the Pacific—to understand how the region is viewing trends in power, norms, and institutions. In early 2020, the research team conducted extensive analysis of the survey data and then conducted a workshop to further examine the results with leading experts from Southeast Asia, the United States, and Australia.

This survey follows on from an earlier survey conducted by CSIS five years previously. In 2014, CSIS collaborated with Opinion Dynamics Corporation to conduct a survey of "strategic elites" from 11 economies in the Asia-Pacific to explore evolving power dynamics in the region. The report, *Power and Order in Asia*, concluded that despite the dramatic changes in the regional power balance that had begun at that time—power shifting toward China—support for an enduring role for the United States remained strong, as did support for multilateralism and economic integration.

Our investigation in this report finds a similar, albeit accelerating trend since *Power and*

Order in Asia was published in 2014. Key to our findings in this report are a decline in faith from respondents in the United States and its commitment to the region, a waning confidence in regional institutions, and concern about China but also continued emphasis on democratic norms as the right guidepost for future regional integration.

We hope that readers will consider our findings alongside important recent surveys done by the ISEAS-Yusof Ishak Institute and Pew Research Center, which have polled different audiences in Southeast Asia on similar issues.[1] As we discuss in the report's conclusion, we believe our survey results generally align with, and are supported by, those of ISEAS and Pew.

Methodology

The 2019 survey targeted strategic elites in seven countries. The CSIS team of Asia scholars identified candidates in Indonesia, Malaysia, Singapore, the Philippines, Thailand, Vietnam, and Fiji. Members of the strategic elite were identified as nongovernmental experts who are influential in the debate on international affairs in these countries. Excluded from the list were serving members of the legislative, judicial, or administrative branches of government or those whose expertise lies outside of international relations or the Indo-Pacific.

Polity Research Consulting LLC worked with CSIS to design an online survey template and fielded the survey electronically from November 21 to December 23, 2019. Participants from Thailand, Vietnam, Malaysia, and Indonesia were given the option of filling out the survey in their native languages. The survey required a significant level of expertise on a range of policy issues, but the use of an online template allowed for completion in 10 minutes or less. The final number of responses from each country is listed below:

Vietnam	27
Thailand	30
Indonesia	38
Malaysia	26
Singapore	28
Philippines	39
Fiji	13
Total	**201**

To allow comparisons among the six Southeast Asian countries (across which the number of respondents varied from 26 to 39), we used average values that weight each country equally. The response rate was 21 percent, which sits within the standard response rate for a survey of this kind. We did not include Fiji as a point of comparison in the body of this report because Fijian respondents received a different version of the survey.

As noted in previous CSIS survey reports, there are advantages and limitations to this kind of elite survey sample. The respondents are influential individuals who have studied and written on the subjects of the survey, and many have held senior positions in their respective governments with responsibility for policy. The 201 responses

1 Tang Siew Mun et al., *The State of Southeast Asia: 2020 Survey Report* (Singapore: ASEAN Studies Centre and ISEAS Yusof Ishak Institute, January 2020), https://www.iseas.edu.sg/images/pdf/TheStateofSEASurveyReport_2020.pdf; and Jeremiah Cha, "People in Asia-Pacific regard the U.S. more favorably than China, but Trump gets negative marks," Pew Research Center, February 25, 2020, https://www.pewresearch.org/fact-tank/2020/02/25/people-in-asia-pacific-regard-the-u-s-more-favorably-than-china-but-trump-gets-negative-marks/.

therefore allow for a well-informed comparison of strategic thinking in Southeast Asia and Fiji. However, the selection of "strategic elites" is necessarily subjective, and as the figures show, the number of responses vary from country to country. In addition, this sample does not necessarily reflect the full range of elite views. While derived from a carefully constructed survey and methodological approach, these elite-oriented surveys cannot be compared with larger public opinion surveys in terms of precision or margin of error.

Despite these limitations, the project team is confident the results will enhance understanding of Southeast Asian and Fijian perspectives on regional dynamics. The report that follows outlines 10 key findings derived from the survey, analysis of underlying dynamics by the project team, and a private workshop held in Sydney, Australia, in February 2020 with an expert group of key stakeholders from across the region. The insights of those experts from the region enhanced the analysis in this report, but the judgments are those of the CSIS project team and do not necessarily reflect the consensus in our stakeholder discussions in Australia or even specific views of any one of the participants. We are nevertheless grateful for their extended commentary and suggestions.

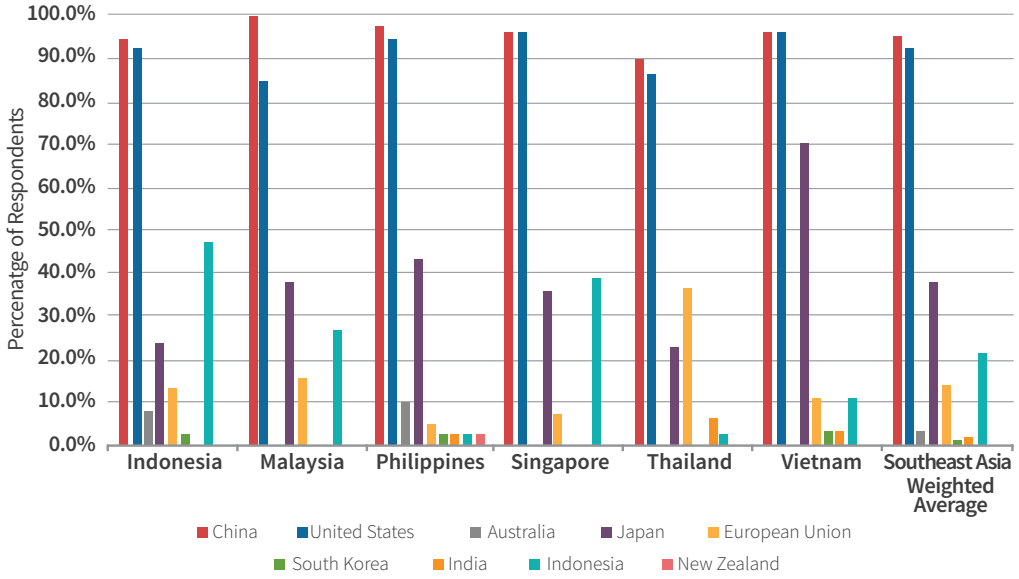
Finally, it is critical to note that this survey and workshop took place just before the Covid-19 pandemic emerged. Thus its findings represent the regional dynamics of late 2019, not the reality of June 2020, and it will take some time for scholars and analysts to assess whether the Covid-19 pandemic has shifted the trajectory of international relations in Southeast Asia, had a long-term impact on geopolitics, or perhaps accelerated trends such as U.S.-China strategic competition.

One question that would have been answered differently amid the Covid-19 pandemic is question 5, described on page 15, in which respondents were asked to rank on a scale of 1 to 10: "How concerned are you about the following challenges to your nation's security?" Of the 11 options offered (e.g., conflict, economic crisis, climate change, natural disasters), respondents ranked a pandemic as only the seventh concern on that list and gave it an average rating of concern of 6 out of 10. The survey does not tell us what Southeast Asians think about questions of power, institutions, and norms post-Covid-19, but it does provide a baseline for making those assessments going forward.

Power and Influence

Finding 1: China is seen as holding slightly more political power and influence than the United States in Southeast Asia today . . .

FIGURE 1.A: WHICH OF THE FOLLOWING COUNTRIES HOLD THE MOST POLITICAL POWER AND INFLUENCE IN SOUTHEAST ASIA TODAY? [CHOOSE UP TO 3 COUNTRIES]



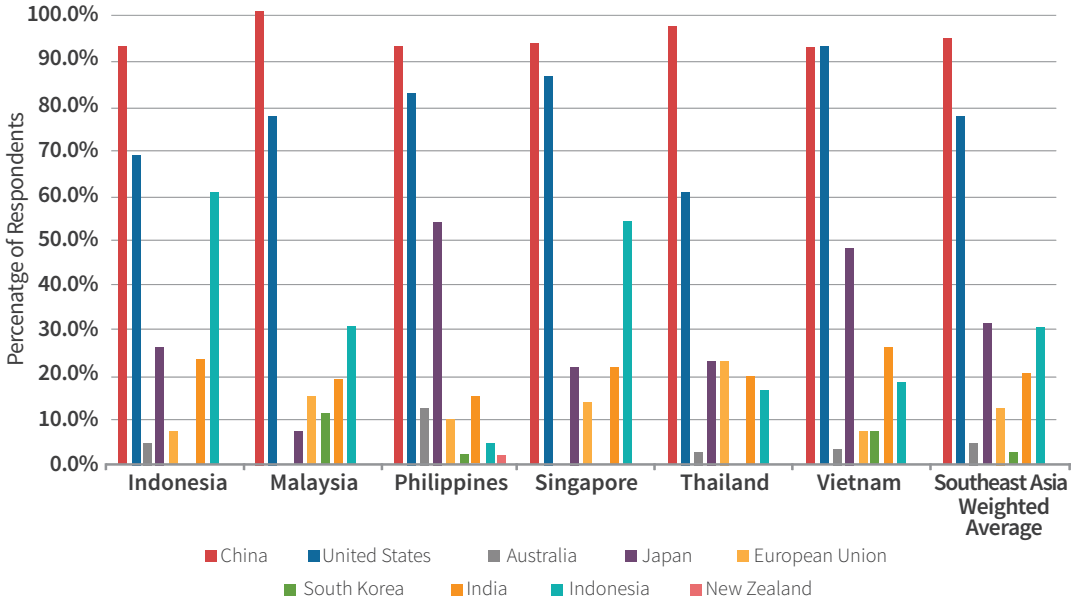
- In total, 94.5 percent of respondents include China as one of three countries with the most **political** power and influence in the region **today**.[2] The United States is chosen by 92 percent of respondents.
- The starkest gap between China and the United States in terms of their political power and influence is seen in the Malaysian response, which has 100 percent of respondents selecting China, compared to only 84.6 percent selecting the United States.

2 To allow comparisons among the six Southeast Asian countries (across which the number of responses varied from 26 to 39), this report uses average values that weight each country equally.

- After China and the United States, respondents have a variety of views on which country is most politically influential, with 38.3 percent selecting Japan among the three most influential, followed by 21.8 percent choosing Indonesia, and 14.4 percent identifying the European Union.
- Indonesia ranks as one of the top three most powerful countries by respondents from Indonesia (47.4 percent), Singapore (39.3 percent), and Malaysia (26.9 percent).
- Vietnamese respondents consider Japan more influential than do other Southeast Asian respondents, with 70.4 percent selecting Japan, compared to the Southeast Asian weighted average of 38.3 percent.

. . . and the region thinks China will be considerably more politically powerful and influential relative to the United States in 10 years.

FIGURE 1.B: WHICH OF THE FOLLOWING COUNTRIES WILL HOLD THE MOST POLITICAL POWER AND INFLUENCE IN SOUTHEAST ASIA 10 YEARS FROM TODAY? [CHOOSE UP TO 3 COUNTRIES]



- The gap between China and the United States widens when respondents are asked to project the political power and influence of countries **in 10 years**, with 94.5 percent selecting China as one of three countries that will hold the most political power and influence, while 77.0 percent select the United States.
- The countries most bullish about China's future power and influence are Thailand, where 96.7 percent expect China to be one of the three most powerful countries, compared to only 60 percent that chose the United States; Malaysia, where 100 percent of respondents select China, compared to 77 percent for the United States; and Indonesia, where 92.1 percent name China, compared to 68.4 percent for the United States.
- After China and the United States, the countries that rank highest in projected political influence in 10 years are Japan at 31.4 percent and Indonesia at 30.9 percent.

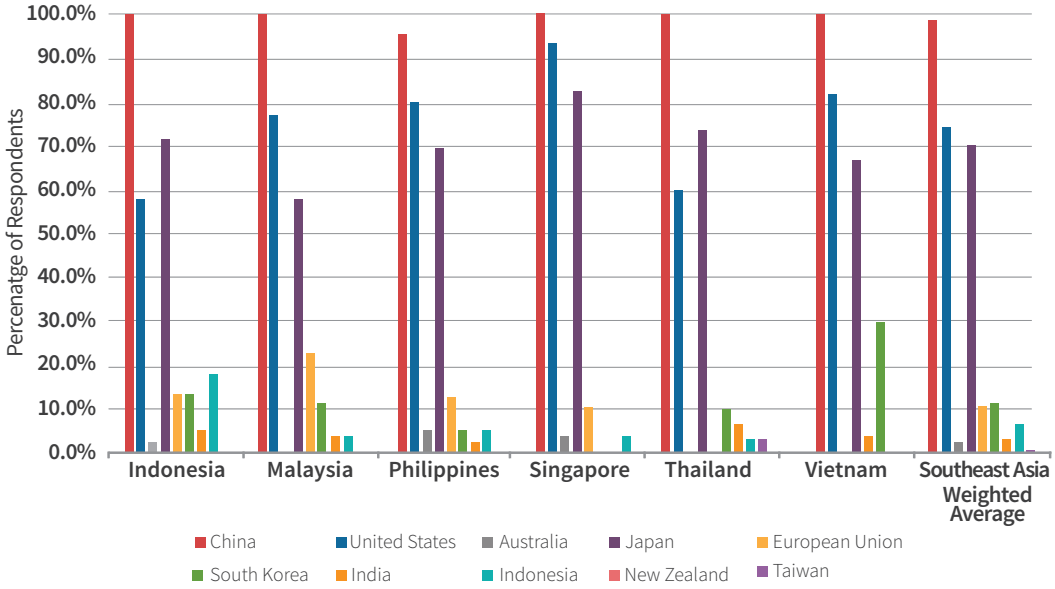
- Perceptions of India's future political power and influence feature prominently, with 19.4 percent ranking India as one of the top three countries in 10 years, compared to only 2.0 percent today.

Analysis:

- The survey made clear that the region believes the relative balance of political power is changing, with a relative decline in U.S. influence. However, our analysis, informed by our Sydney workshop, concluded that shifts are likely to be gradual, although dynamics associated with responses to the Covid-19 pandemic will likely test this conclusion.
- In Southeast Asia, there is no "one-size-fits-all" narrative regarding China. While many countries are increasing ties with China to hedge against declining U.S. influence, participants in our Sydney workshop noted that this was not true among the surveyed countries, with Vietnam in particular expecting sustained high U.S. influence in the region.
- The survey and workshop also underscored how power dynamics in Southeast Asia are about much more than just the United States and China. Japan and India, in particular, are viewed as major players, with Indonesia holding significant influence in its own right.
- Some participants in the Sydney workshop argued that had Cambodia, Laos, and Myanmar been included in the survey, it would likely have shown larger perceptions of Chinese power relative to the United States.
- Participants in the Sydney workshop noted that Chinese diplomatic engagement in the region is currently more energetic than that of the United States and other countries and that this trend line is expected to accelerate if the United States does not think more strategically and creatively about engagement strategies. Whether China's prestige translates into political influence on particular issues of interest is more difficult to assess. There was also considerable discussion of the ways in which Chinese diplomatic outreach is undercut by the actions of China's maritime forces, including incidents that occurred even after the survey was conducted.

Finding 2: In terms of economic power and influence, the region views China as much more influential than the United States today . . .

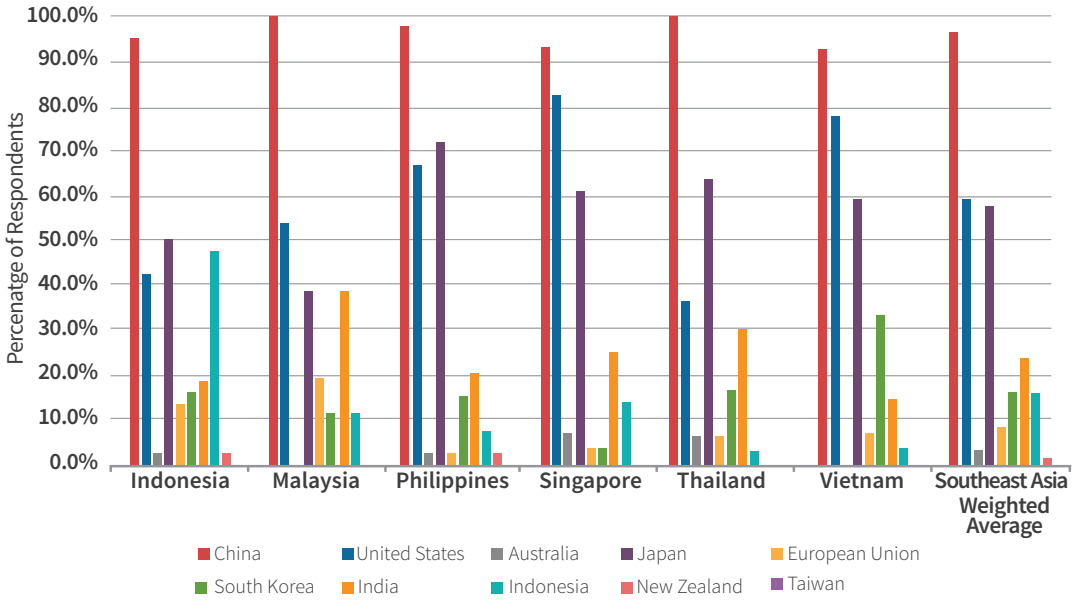
FIGURE 2.A: WHICH OF THE FOLLOWING COUNTRIES HOLD THE MOST ECONOMIC POWER IN SOUTHEAST ASIA TODAY? [CHOOSE UP TO 3 COUNTRIES]



- Nearly all respondents (98 percent) name China as one of three countries that hold the most economic power and influence in the region **today**, followed by the United States at 70.6 percent and Japan at 66.7 percent.
- The gap between China and the United States in terms of relative economic influence (25 percentage points) is wider than for relative political influence (4 percentage points).
- Japan ranks as the third most economically influential, just below the United States, by four of the six Southeast Asian countries surveyed, while two countries—Indonesia and Thailand—rank Japan second after China.

. . . and this gap is expected to grow in the next 10 years.

FIGURE 2.B: WHICH OF THE FOLLOWING COUNTRIES WILL HOLD THE MOST ECONOMIC POWER AND INFLUENCE IN SOUTHEAST ASIA 10 YEARS FROM TODAY? [CHOOSE UP TO 3 COUNTRIES]



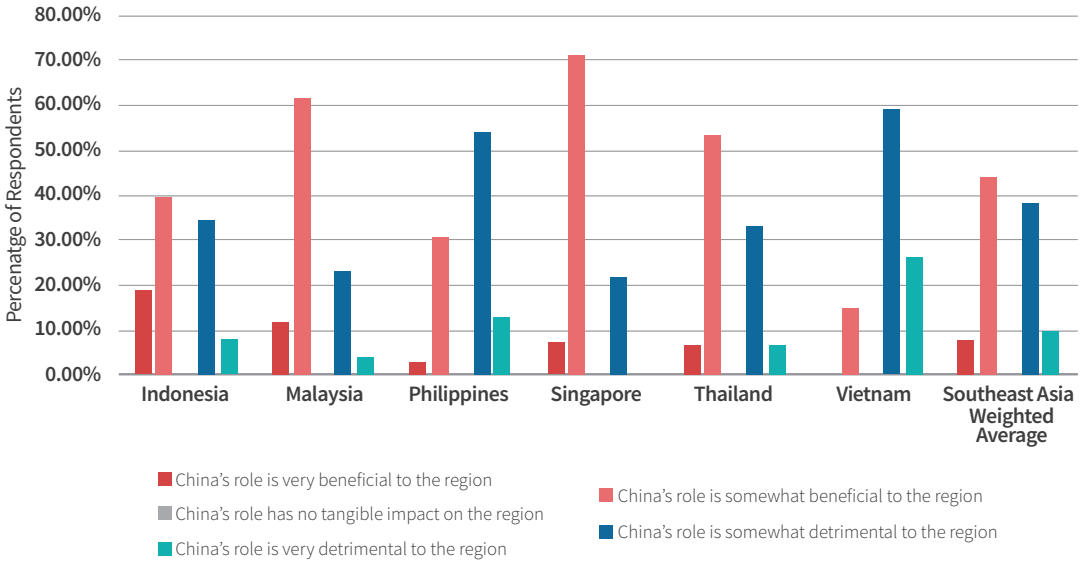
- Fully 96 percent of respondents rank China as one of three countries that will hold the most economic power and influence **10 years from today**, while only 56.7 percent rank the United States in the top three and 56.2 percent name Japan.
- The region views the United States' relative economic influence in Southeast Asia in sharp decline, and respondents from several countries project that in 10 years U.S. economic influence will fall behind that of Japan. Perceptions of declining U.S. economic influence are particularly strong in Thailand (where only 36 percent of respondents project the United States will be among the top three countries in terms of economic influence in 10 years), followed by Indonesia (42 percent) and Malaysia (53 percent).
- Perceptions of India's economic influence rise substantially when projected, with 22 percent expecting India to be one of the major economic powers in Southeast Asia 10 years from now, compared to only 3 percent today. This is particularly evident in Malaysia, where 38.5 percent of respondents expect India to rise to major economic power status in 10 years, on par with Japan.

Analysis:

- There is a striking disconnect between how Southeast Asians view the political influence and economic power of their most important partners. While China may be able to draw significant political influence from its economic heft, Japan continues to wield comparatively little political influence despite its considerable economic importance in Southeast Asia and the Abe government's strategic focus on building ties with Southeast Asia. Participants in the Sydney workshop noted that this might be due to high levels of trade with China rather than levels of foreign direct investment (FDI), where Japan is more committed but perhaps less visible.
- It was also noted in our Sydney workshop that China's economic influence will continue to rise despite forecasts suggesting that Chinese economic growth is slowing. Looking forward, the speed with which the Chinese economy bounces back from Covid-19 will ultimately be a major factor in China's future economic influence.
- Regional observers may also be betting that China's present surging economic influence, buoyed by the BRI, is creating a fait accompli, regardless of the official figures indicating that China still accounts for only a fraction of FDI in Southeast Asia. As some workshop participants argued, accepting the argument that China's rising influence is inevitable enhances China's ability to shape global narratives today. Judging from the survey results, this clearly is the narrative.
- While no questions about technology were asked in the survey, similar results could have been found in the technology realm, especially as ASEAN countries make decisions about whether to adopt Chinese 5G networks. It is worth noting, however, that Vietnam and other countries in the region are seeking alternatives to China for 5G.

Finding 3: There is no consensus on whether China's role is beneficial or detrimental to the region.

FIGURE 3: HOW DO YOU VIEW CHINA'S ROLE IN SOUTHEAST ASIA?



- A slight majority of respondents have a benign view of China. While 53 percent consider China's role **very or somewhat beneficial** to the region, 46 percent consider it **somewhat or very detrimental** to the region.
- However, the benign view is tempered by the fact that only 8 percent view China playing a "**very** beneficial" role, while 45.8 percent see China's role as "**somewhat** beneficial" to the region.
- The majority of respondents in four of the six countries—Indonesia, Malaysia, Singapore, and Thailand—view China's role as beneficial to the region, with Singapore leading the way with over 78 percent viewing China's role in the region very or somewhat beneficial, followed by Malaysia with 74 percent.
- Vietnam and the Philippines, the two countries with the most significant maritime territorial disputes with China, are most negative about China's role in the region. Over one quarter (26 percent) of Vietnamese respondents view China's role as "very detrimental," and an additional 59 percent view it as "somewhat detrimental." Meanwhile, 67 percent of Philippine respondents view China's role as very or somewhat detrimental to the region.

Analysis:

- An important dynamic in how strategic elites see China relates to the sector in which they work. While not apparent in the survey results, workshop participants noted that there is a noticeable disconnect between how cultural and business elites in Southeast Asia view China versus foreign policy elites, with the former group less likely to be concerned about China's influence. It was also argued that Vietnamese elites are effective in "disaggregating" China's economic role in the region from Beijing's more confrontational foreign policy approach. This observation dovetailed with survey data that clearly showed that elites in Southeast Asian countries with maritime territorial disputes with China are considerably warier about China's role.
- It is an open question whether the region's assessment that China's role is more beneficial than detrimental is a triumph of the Chinese narrative in an ideological competition with the United States. One workshop participant noted that the countries with a prominent ethnic Chinese population, such as Singapore, are more likely to buy into China's narrative so that they can be part of what they perceive as a cultural resurgence.
- More broadly, positive perceptions of rising Chinese power are likely to correlate with a perception that China's engagement is consistent with national economic development policies in Southeast Asia. Despite some recent pushback from Japan and the United States, one workshop participant noted that China has delivered tangible benefits for most governments, especially in developing infrastructure.
- Workshop participants also highlighted that the two countries engaged in ongoing maritime territorial disputes with China—Vietnam and the Philippines—have the most negative views of China's role.

Challenges

Finding 4: The region has deep concerns about U.S.-China strategic competition, ranking it as the greatest geopolitical challenge. U.S.-China strategic competition is the top concern of every country surveyed except for the Philippines and Vietnam, which both rated conflict in the South China Sea as an even greater concern, and Indonesia, which sees China's economic influence as the greatest challenge.

FIGURE 4: ON A SCALE OF 1 TO 10, WITH 1 MEANING "NOT CONCERNED AT ALL" AND 10 MEANING "EXTREMELY CONCERNED", HOW CONCERNED ARE YOU ABOUT THE FOLLOWING GEOPOLITICAL CHALLENGES?

Geopolitical challenges	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam	Southeast Asia Weighted Average
U.S.-China strategic competition	7.47	7.58	8.49	8.61	7.97	7.7	7.98
Conflict in the South China Sea	7.14	7.46	9.33	7.50	6.73	8.81	7.87
China's economic influence	7.5	6.96	8.74	7.39	7.53	8.52	7.82
Declining U.S. presence	6.08	5.62	8.51	7.00	5.77	7.56	6.82

Note: The color green indicates less concern and red indicates more concern.

- U.S.-China strategic competition ranks as the top concern of every country in the region except for the Philippines, Vietnam, and Indonesia.
- Respondents from Singapore are most concerned about U.S.-China strategic competition, with an average score of 8.61, while Indonesian respondents are least concerned at 7.47.

- Declining U.S. presence is viewed overall as the least concerning geopolitical challenge, scoring a weighted average of 6.82. However, there is substantial variation among country respondents, with the Philippines, a U.S. treaty ally, rating declining U.S. presence at an 8.5 level of concern, while Malaysia (5.6), Thailand (5.8), and Indonesia (6.1) are relatively unconcerned.
- The Philippines and Vietnam are the two countries most concerned about conflict in the South China Sea, rating this challenge at 9.33 and 8.81, respectively, which are the two highest scores for any geopolitical challenge across the six countries.
- China's economic influence is likewise viewed with the most concern by respondents from the Philippines (8.74) and Vietnam (8.52).
- Thailand, another U.S. treaty ally, is far less concerned about declining U.S. presence than the other countries surveyed, rating it a 5.77, substantially lower than the regional weighted average score of 6.82. Only Malaysia shows a lower level of concern about this challenge, rating it a 5.62.

Finding 5: Climate change and other non-traditional security threats are of greater concern than traditional military problems . . .

FIGURE 5.A: ON A SCALE OF 1 TO 10, WITH 1 MEANING "NOT CONCERNED AT ALL" AND 10 MEANING "EXTREMELY CONCERNED", HOW CONCERNED ARE YOU ABOUT THE FOLLOWING CHALLENGES TO YOUR NATION'S SECURITY?

Challenges to Security	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam	Southeast Asia Weighted Average
Climate change	7.79	7.42	8.90	7.75	8.30	8.26	8.11
Regional economic and financial crises	7.95	8.00	7.59	8.07	8.27	6.85	7.79
Natural disasters	8.55	6.19	8.95	5.43	7.00	7.33	7.42
Human security needs–such as water, food, and education	7.34	7.04	8.28	6.18	7.30	7.56	7.35
Territorial and historical disputes	6.16	6.96	9.05	5.07	5.60	8.70	6.98
Terrorism	8.11	6.88	8.36	6.86	6.10	4.07	6.90
Health pandemics in the region	6.16	6.42	8.13	7.14	5.70	6.33	6.70
Internal ethnic conflict	7.45	7.54	7.00	5.54	6.43	6.44	6.42
Lack of natural resources	5.76	5.36	6.87	6.46	6.43	6.44	6.24
Nuclear proliferation	4.18	4.12	5.18	4.50	4.86	5.07	4.66
A military attack on your country by a foreign country	3.82	4.08	6.54	3.89	3.20	5.96	4.64

- Overall, climate change is viewed as the biggest concern to national security, with a weighted average of 8.11. Climate change ranks as one of the top two challenges in three countries surveyed, with the exception of Indonesia, which gives the top ranking to natural disasters (8.55), Malaysia, which gives the top ranking to regional economic and financial crises, and the Philippines, which ranks climate change as the third highest concern after territorial disputes and natural disasters. At the same time, however, the Philippines ranking for climate change is the highest across countries, likely reflecting the growing vulnerability of the Philippines archipelago to more frequent and intense tropical cyclones, which have wreaked havoc across the country in recent years.

- Regional economic and financial crises rank as the second highest regional concern, with an average score of 7.79. Respondents from Thailand represent the highest score at 8.27, and it is the top concern for Singapore, which likely reflects the sluggish growth outlook for both countries at the time of the survey and the sense of vulnerability that still lingers from the 1997-1998 Asian financial crisis.

- Other non-traditional security challenges that rank very high as concerns are human security needs, which scored 7.35, and health pandemics, which had an average score of 6.70 but was especially high for the Philippines (8.13) and Singapore (7.14).

- Territorial and historical disputes are viewed as relatively moderate concerns (6.98 overall), but yet again the Philippines (9.05) and Vietnam (8.7) are outliers, with both ranking this challenge highest among all national security challenges.

- Other traditional security concerns including nuclear proliferation (4.66) and military attacks (4.64) are viewed with less concern compared to other challenges. The exception is terrorism, which was ranked as a top concern for respondents from Indonesia (8.11) and the Philippines (8.36).

- Taken together, these findings suggest that climate change, economic stability, and non-traditional security challenges rank as top concerns for the region, which does not necessarily align with priority areas of engagement for the United States and other regional partners.

. . . and, compared with our 2014 survey, concern over climate change has surged.

FIGURE 5.B: "ON A SCALE OF 1 TO 10, WITH 1 MEANING "NOT CONCERNED AT ALL" AND 10 MEANING "EXTREMELY CONCERNED", HOW CONCERNED ARE YOU ABOUT THE FOLLOWING CHALLENGES TO YOUR NATION'S SECURITY?

	2014 RESULTS				2019 RESULTS		
Challenges to Security	Indonesia	Singapore	Thailand	Challenges to Security	Indonesia	Singapore	Thailand
Regional economic and financial crises	8.3	8.1	7.7	Regional economic and financial crises	7.95	8.07	8.27
Human security needs—such as water, food, and education	8.5	7	7	Climate change	7.79	7.75	8.3
Terrorism	7.8	7.6	6.8	Terrorism	8.11	6.86	6.1
Climate change	7.1	7.8	6.9	Natural disasters	8.55	5.43	7
Natural disasters	8.2	5.9	7.3	Human security needs—such as water, food, and education	7.34	6.18	7.3
Health pandemics in the region	6.4	7.6	7	Internal ethnic conflict	7.45	5.54	6.43
Territorial and historical disputes	6.7	6.7	6.8	Health pandemics in the region	6.16	7.14	5.7
Internal ethnic conflict	7.1	6	6.5	Lack of natural resources	5.76	6.46	6.43
Lack of natural resources	5.9	6.5	6.5	Territorial and historical disputes	6.16	5.07	5.6
Nuclear proliferation	5.3	6.2	6.4	Nuclear proliferation	4.18	4.5	4.86
A military attack on your country by a foreign country	5.2	6	4.9	A military attack on your country by a foreign country	3.82	3.89	3.2

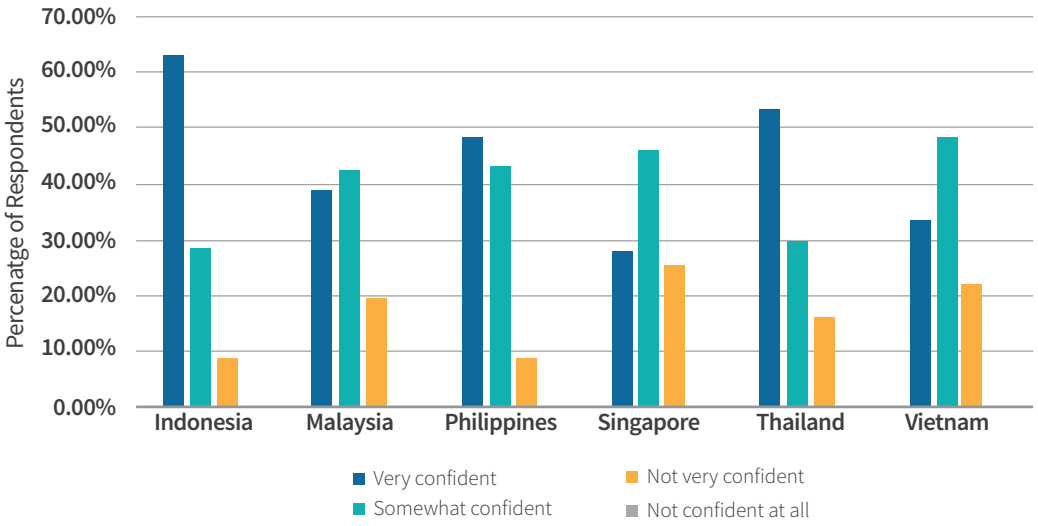
- These results are broadly in line with a similar survey conducted by CSIS in 2014 that included Indonesia, Thailand, and Singapore.[3] In both the 2014 and 2019 surveys, regional economic crises rank as the top concern of these three countries, underscoring their perceived vulnerability to economic shocks as a national security challenge.
- Climate change's rise as a priority issue in these three countries is notable, rising from the number four concern to the number two concern, leapfrogging terrorism, which remains ranked as the third-highest priority.
- The comparison between the 2014 and 2019 surveys also shows a consistent pattern where traditional security concerns such as military attacks, nuclear proliferation, and territorial and historical disputes are less of a concern compared to nontraditional challenges such as climate change, economic crises, natural disasters, and human security needs, at least for Indonesia, Thailand, and Singapore.

3 The 2014 CSIS survey polled 11 Asia-Pacific economies: Australia, China, Indonesia, Singapore, Taiwan, Burma, India, Japan, South Korea, Thailand, and the United States. Michael J. Green and Nicholas Szechenyi, Power and Order in Asia: A Survey of Regional Expectations (Washington, DC: CSIS, July 2014), https://csis-prod.s3.amazonaws.com/s3fs-public/legacy_files/files/publication/140605_Green_PowerandOrder_WEB.pdf.

Values

Finding 6: There is high regional support for democratic values.

FIGURE 6: HOW CONFIDENT ARE YOU THAT DEMOCRATIC VALUES WILL BE BENEFICIAL TO THE STABILITY AND PROSPERITY OF SOUTHEAST ASIA?



- When asked about the importance of democratic values to the regional order, the vast majority of respondents (85 percent) say they are "very confident" or "somewhat confident" that democratic values are beneficial for regional stability and prosperity. Nearly half of all respondents (48 percent) are "**very** confident" in the importance of democracy, while 37 percent are "**somewhat** confident." It is also striking that no respondents select the option of "not confident at all" that democratic values are important.

- Indonesia and the Philippines, arguably the region's two most vibrant democracies, are most enthusiastic about democratic values, with 92 percent of respondents very or somewhat confident that democratic values would be beneficial to the stability and prosperity of the region. The highest proportion of those "very confident" in democratic values are from Indonesia (63.2 percent), followed by Thailand (53.3 percent) and the Philippines (48.7 percent).

- Least confident in democratic values is Singapore, where 25 percent of respondents say they are not very confident that democratic values are beneficial to regional stability and prosperity, followed by Vietnam at 22.2 percent and Malaysia at 19.2 percent.

Analysis:

- Overall, support for democratic norms is on an upward trend in the region. These results, however, do not seem to match recent trends in governance in the region and highlight a possible disconnect with what people want and what they are getting. It was noted in the workshop that countries that were not featured in the survey such as Cambodia, Laos, and Myanmar might have responded differently to the question. The survey results do not capture overall satisfaction with the current state of democracy in a country.
- It is notable that Vietnam and Thailand rate democratic values highly despite Vietnam being an authoritarian regime and Thailand becoming increasingly so in recent years.
- Participants in the workshop also highlighted the important role of the media in shaping perceptions of democracy, especially in the Philippines and Indonesia.
- For the United States and its democratic allies, the data suggest that leaning in on values and democracy could yield strategic dividends with Southeast Asian citizens, if not governments. However, as suggested in the workshop, a more granular approach to democracy promotion in the region—focusing on a broad spectrum of policies promoting good governance, transparency, accountability, inclusiveness, and other democratic norms rather than embracing a one-size-fits-all approach—would be more effective.

Finding 7: Economic cooperation and good governance rank high as the most important principles for regional stability and economic prosperity.

FIGURE 7.A: FOR EACH OF THE FOLLOWING ISSUES, PLEASE RATE HOW IMPORTANT EACH ONE IS FOR REGIONAL STABILITY AND ECONOMIC PROSPERITY – PERCENTAGE RESPONDING "VERY IMPORTANT" AND "SOMEWHAT IMPORTANT.

Issues	Indonesia	Malaysia	Philippines	Singapore	Thailand	Vietnam	SEA Weighted Average
Establishing a framework for trade and regional economic integration	94.7%	100.0%	94.8%	100.0%	96.6%	96.3%	96.8%
Promoting good governance	94.8%	100.0%	100.0%	100.0%	96.7%	85.1%	96.3%
Strengthening domestic political institutions	94.7%	96.1%	100.0%	96.4%	100.0%	85.2%	95.7%
Promoting confidence and mutual understanding	89.5%	92.3%	97.4%	96.5%	96.7%	96.3%	94.7%
Preventing interstate conflict	94.7%	100.0%	97.5%	89.2%	80.0%	96.3%	93.1%
Maintaining national unity	100.0%	92.3%	94.8%	100.0%	63.3%	92.6%	90.9%
Promoting free and open elections	92.1%	88.4%	92.3%	82.1%	96.7%	81.4%	89.3%
Promoting human rights	97.4%	80.8%	92.3%	71.5%	90.0%	77.7%	86.2%
Promoting greater defense and security cooperation	84.2%	80.8%	97.4%	92.9%	60.0%	100.0%	86.2%
Promoting women's empowerment	92.1%	88.5%	84.6%	71.5%	80.0%	70.4%	81.9%
Promoting greater cooperation on refugee management	86.8%	92.3%	79.5%	75.0%	93.3%	63.0%	81.9%
Promoting common diplomatic policies	76.3%	73.1%	97.4%	82.1%	50.0%	96.3%	79.8%
Developing a regional identity	63.2%	88.5%	84.6%	82.1%	63.3%	77.8%	76.1%
Advocating non-interference in internal affairs of other countries	76.3%	73.0%	71.8%	89.3%	60.0%	74.0%	73.9%

- When asked to rank the importance of various normative, economic, and security issues for regional stability and prosperity, respondents overwhelmingly choose trade and economic integration, followed closely by good governance and strengthening domestic political institutions.
    - Across countries surveyed, 96.8 percent of respondents think that establishing a framework for trade and regional economic integration is **very or somewhat**

important for regional stability and economic prosperity, while 96.3 percent say that promoting good governance is very or somewhat important and 95.7 percent say that strengthening domestic political institutions is very or somewhat important.

- Democratic norms including promoting human rights, promoting women's empowerment, and promoting free and open elections are viewed as more important than noninterference in internal affairs—a core ASEAN principle. (However, this survey did not include Laos, Cambodia, and Myanmar, where there may be more support for non-interference in internal affairs.) These issues also ranked higher than "developing a regional identity" for Thai and Indonesian respondents.

FIGURE 7.B: COMPARISON OF CSIS 2014 AND 2019 SURVEYS

2014: How important is each of the following to the establishment of an East Asian Community?				2019: How important is each one of the following for regional stability and economic prosperity?			
Issues	Indonesia	Singapore	Thailand	Issues	Indonesia	Singapore	Thailand
Establishing a framework for trade and regional economic integration	100%	100%	93%	Promoting good governance	95%	100%	97%
Promoting confidence and mutual understanding	100%	100%	93%	Establishing a framework for trade and regional economic integration	95%	100%	97%
Preventing interstate conflict	91%	100%	93%	Strengthening domestic political institutions	95%	96%	100%
Promoting good governance	100%	100%	82%	Promoting confidence and mutual understanding	90%	97%	97%
Strengthening domestic political institutions	96%	89%	86%	Promoting free and open elections	92%	82%	97%
Maintaining national unity	96%	93%	79%	Preventing interstate conflict	95%	89%	80%
Promoting human rights	96%	78%	78%	Maintaining national unity	100%	100%	63%
Promoting greater defense and security cooperation	82%	100%	68%	Promoting human rights	97%	72%	90%
Developing a regional identity	69%	89%	82%	Promoting greater cooperation on refugee management	87%	75%	93%
Advocating non-interference in internal affairs of other countries	79%	86%	75%	Promoting women's empowerment	92%	72%	80%
Promoting free and open elections	87%	72%	75%	Promoting greater defense and security cooperation	84%	93%	60%
Promoting common diplomatic policies	82%	79%	71%	Advocating non-interference in internal affairs of other countries	76%	89%	60%
Promoting women's empowerment	74%	64%	61%	Developing a regional identity	63%	82%	63%
				Promoting common diplomatic policies	76%	82%	50%

- Compared to results from a similar survey CSIS conducted in Indonesia, Thailand, and Singapore in 2014, democratic norms—in particular "promoting free and fair elections" and "promoting women's empowerment"—have risen substantially in perceived importance in 2019. Free and fair elections has risen from the 11th ranked priority in 2014 to 5th in 2019, while women's empowerment has risen from the lowest priority (13th of 13) to 10th (out of 14). "Promoting human rights" remains in the middle rank. The rise in democratic norms is driven primarily by Indonesia and Thailand, with Singapore remaining below the average in terms of support for these issues.
- After economic cooperation and democratic norms, preventing interstate conflict and promoting confidence building have increased in importance compared to previous surveys.

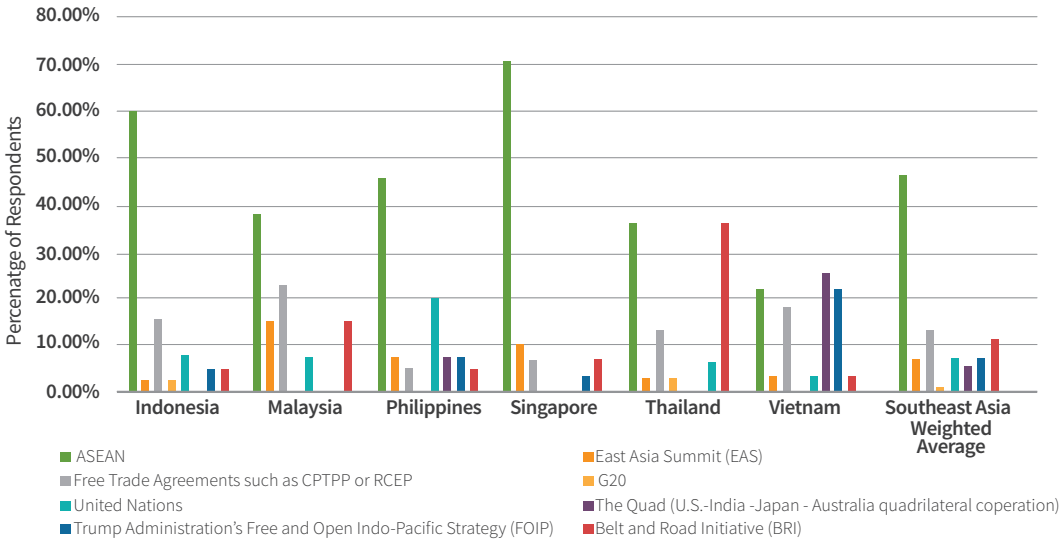
Analysis:

- Good governance is clearly a high priority within ASEAN, both among those thought leaders who emphasize open societies and those who prioritize economic development and cooperation. To the extent cooperation on democratic norms is framed in terms of better governance, the effort will likely draw broader support and have higher impact.
- The continued low scores for core ASEAN principles such as "noninterference in internal affairs" and "developing a regional identity" suggest a broader weakness of ASEAN across the countries polled, with the caveat that non-surveyed countries such as Cambodia and Laos would perhaps show stronger support for these norms given their domestic politics and relationship with China.
- Thailand's increased support for democratic norms in the 2019 survey is perhaps a sign that strategic elites in the country are frustrated with the current military-dominated political system.
- For more on regional cooperation on democratic governance, see the forthcoming task force report of the CSIS Initiative on Enhancing Democratic Partnership in the Indo-Pacific Region.

Institutions

Finding 8: ASEAN is seen as the most important regional institution.

FIGURE 8: WHICH OF THE FOLLOWING INSTITUTIONS OR INITIATIVES DO YOU THINK IS THE MOST IMPORTANT TO REGIONAL ORDER?



- All countries rank ASEAN as the most important regional institution or initiative, with the exception of Thailand, where respondents split evenly between ASEAN and China's Belt and Road Initiative (BRI), and Vietnam, where the Quad (quadrilateral cooperation among the United States, India, Japan, and Australia) ranks highest. Overall, 46.8 percent of respondents across all countries name ASEAN as the most important for regional order.

- Singaporean respondents are most enthusiastic about ASEAN, with 71.4 percent of respondents identifying ASEAN as the most important institutional framework, followed by Indonesia at 60.5 percent and the Philippines at 46.2 percent.

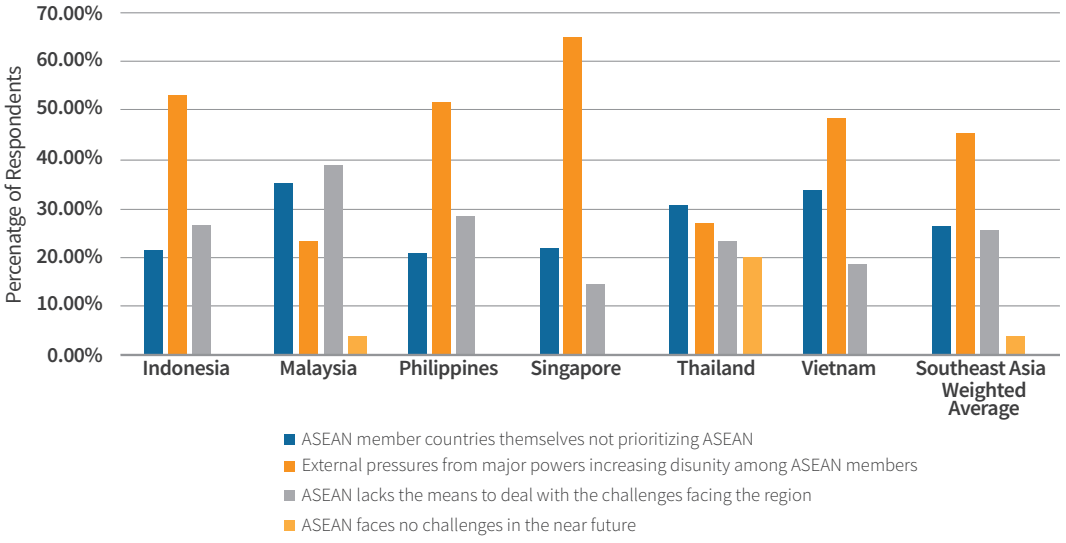
- Least enthusiastic about ASEAN is Vietnam, with only 22.2 percent of respondents selecting ASEAN as the most important, followed by Thailand at 36.7 percent and Malaysia at 38.5 percent. For Malaysia, ASEAN received the plurality of responses, but respondents are relatively split, with 23.1 percent selecting free trade agreements (FTAs) such as the Comprehensive and Progressive agreement for Trans-Pacific

Partnership (CPTPP) and Regional Comprehensive Economic Partnership (RCEP) as most important, while the BRI and East Asia Summit each received 15.4 percent.

- Overall, across all countries, the institutions or initiatives viewed as most important after ASEAN are FTAs such as the CPTPP or RCEP and the BRI.
    - FTAs score particularly highly among respondents from Malaysia (23.1 percent), Vietnam (18.5 percent), and Indonesia (15.8 percent).
    - BRI support is sizeable in only two countries—Thailand, where a plurality of 36.7 percent of respondents identified the BRI as most important, and Malaysia, with 15.4 percent.
- Support for the Quad as the most important institutional framework is only found in Vietnam, where a plurality of 25.9 percent name it as the most important institutional framework. The Philippines is the only other country with respondents selecting the Quad, at 7.7 percent.
- A similar pattern of support is seen for the Trump administration's Free and Open Indo-Pacific (FOIP) strategy, with Vietnam showing the highest level of support (22.2 percent), followed by the Philippines at 7.7 percent, with fewer responses supporting FOIP from Thailand, Singapore, and Indonesia. None of the Malaysian respondents selected FOIP.
- The United Nations received a low number of responses overall, but received relatively strong support from the Philippines, where 20.5 percent identify it as the most important institutional framework to regional order—second only to ASEAN. This may be attributable to the role that the UN Convention on the Law of the Sea (UNCLOS) has played in supporting the Philippines' South China Sea claims.

Finding 9: The main challenge facing ASEAN is external pressure from major powers, which is increasing disunity among ASEAN members.

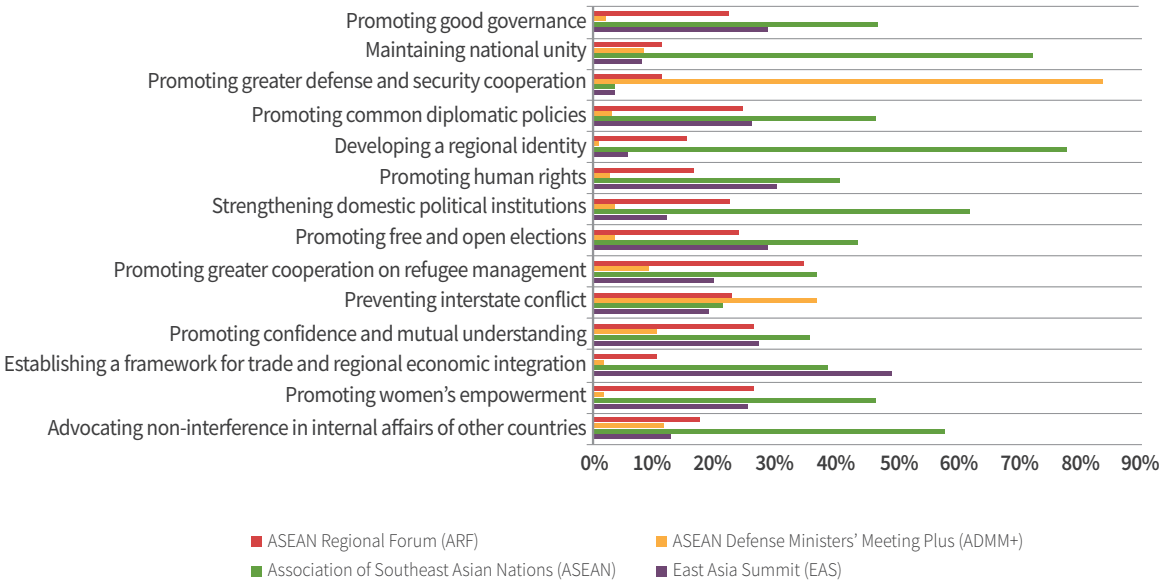
FIGURE 9: WHICH OF THE FOLLOWING IS THE MAIN CHALLENGE FACING ASEAN IN THE NEAR FUTURE?



- Of all respondents, 45.2 percent feel the main challenge facing ASEAN is external pressure from major powers causing disunity among members. Support for this view is highest among respondents from Singapore at 64.3 percent, followed by Indonesia at 52.3 percent, the Philippines at 51.3 percent, and Vietnam at 48.1 percent.
- Respondents are nearly evenly split between the two other potential challenges posed by the survey question, with 26.1 percent viewing "ASEAN countries themselves not prioritizing ASEAN" as the main challenge, while 25 percent select "ASEAN lacking the means to deal with the challenges facing the region." Very few (3.7 percent) endorse the sanguine view that "ASEAN faces no challenges in the near future."
- Malaysian respondents are least concerned about external pressure from major powers disrupting ASEAN unity, with only 23.1 percent identifying this as the major challenge facing ASEAN, while 38.5 percent choose "ASEAN lacking the means to deal with challenges" and 34.6 percent choose "ASEAN countries themselves not prioritizing ASEAN."
- Overall, these findings align with **Finding 4**, clearly showing that strategic elites in Southeast Asia are most concerned about great power competition and its effect on regional solidarity in Southeast Asia.

Finding 10: ASEAN is seen as best suited to deal with most regional challenges.

FIGURE 10: WHICH INSTITUTION IS BEST SUITED TO DEALING WITH THE FOLLOWING ISSUES?



- When asked to identify which ASEAN-led regional framework is best suited to deal with a variety of regional challenges, respondents show a clear preference for ASEAN over the East Asia Summit (EAS), the ASEAN Regional Forum (ARF), or the ASEAN Defense Ministers Meeting Plus (ADMM+).

- Majorities consider ASEAN most capable in: developing a regional identity (78 percent), maintaining national unity (72 percent), strengthening domestic political institutions (62 percent), and advocating for non-interference in the affairs of other states (58 percent).
- A plurality of respondents also view ASEAN as most suitable for promoting good governance (47 percent), promoting common diplomatic policies (46 percent), promoting women's empowerment (46 percent), promoting human rights (44 percent), promoting free and open elections (44 percent), and promoting confidence and mutual understanding (36 percent), with the EAS, and to a lesser extent the ASEAN Regional Forum, also seeing support on these issues.
- The ADMM+ is the preferred institutional framework to address traditional security issues. By a wide margin (84 percent), the ADMM+ is viewed as the most suitable institutional framework to promote greater defense and security cooperation, compared to only 9 percent support for the ARF. The ADMM+ is also viewed as best placed to prevent interstate conflict, with 37 percent choosing the ADMM+, compared to 23 percent for the ARF.
- The EAS's institutional advantage is seen most clearly in the economic realm. A plurality of 49 percent of respondents favored the EAS for establishing a framework for trade and regional economic cooperation, which reflects the role of EAS in advancing the Regional Comprehensive Economic Partnership (RCEP) trade negotiations.
- Overall, respondents are not very confident in the ARF for solving key challenges. The ARF did not outrank the other ASEAN-led frameworks on any issue. It scored highest for the issues of promoting greater cooperation on refugee management (35 percent) and promoting common diplomatic policies (25 percent).

Analysis:

- The survey data makes clear that Southeast Asians want ASEAN-centric solutions for regional problems. It is ironic, however, that ASEAN is perceived to be most effective at promoting a common regional identity given that relatively few of the countries surveyed deem building a common regional identity a priority (See Figure 7.A).
- •The survey data show that the ARF, despite its 25-year history, is not seen as effective in addressing key regional challenges. Meanwhile, the ADMM+ is viewed quite positively on addressing security issues despite only being in existence since 2010. The EAS, meanwhile, is middling, although with a consistent strong basis of support.
- Workshop participants noted the "indispensable" role of ASEAN in the region and the permanence of the ASEAN centrality narrative.
- External powers would do well to focus investments related to ASEAN on good governance, human rights, and women's empowerment, all of which score high for ASEAN.

Views from Fiji

In addition to the 188 responses from Southeast Asia, CSIS also received 13 responses from strategic elites in Fiji. Fijian respondents received a unique version of the survey with questions tailored to the Pacific Islands region. The findings generally align with those from Southeast Asia, including perceptions of rising Chinese influence, the salience of non-traditional security issues and democratic governance, and frustration with the strains that external powers are placing on the region's premier regional organization, in this case the Pacific Islands Forum (PIF). From a Fijian perspective, Australia clearly plays a much bigger role in the Pacific Islands region compared with Southeast Asia, while the United States is perceived as much less influential.

The following is a summary of the full results, which can be found in an online annex at https://csis-website-prod.s3.amazonaws.com/s3fs-public/20609_FijiAnnex_FINAL.pdf

Finding 1: Australia holds the most political power and influence in the Pacific Islands region today . . .

- All respondents from Fiji say that Australia is one of three countries with the most political power and influence in the region today. Of respondents, 76.9 percent select China as one of the three countries, followed by New Zealand at 61.5 percent, the European Union at 30.8 percent, and the United States at 23.1 percent.

. . . but China is expected to be as politically influential as Australia 10 years from now.

- Similar to Southeast Asian respondents' expectation that China will become more politically powerful and influential in 10 years, 92.3 percent of respondents identify China as one of the three most politically influential countries in the region, matched by 92.3 percent who select Australia. New Zealand remained third with 53.8 percent.

Finding 2: In terms of economic power and influence, Australia and China are on equal footing today . . .

- In total, 84.6 percent of respondents believe that China is one of the three most important economic powers in the region, matched by the same percentage of respondents who believe the same about Australia, with New Zealand a distant third.

. . .but China is expected to be most influential in 10 years.

- Similar to Southeast Asian responses, 92.3 percent of respondents from Fiji expect China to hold the most economic power and influence 10 years from today, pulling ahead of Australia at 76.9 percent.

- Unlike Southeast Asian respondents, who expect Japan's economic power to decrease between now and 10 years from today, respondents project Japan's influence to significantly increase between now and 10 years from today, with the percentage of respondents picking Japan as economically powerful doubling from 15.4 percent today to 30.8 percent in 10 years. This increase puts Japan on par with New Zealand, which remains constant at 30.8 percent between now and 10 years from today.

Finding 3: Fiji views China's role in the region as largely beneficial.

- In total, 76.9 percent of respondents believe that China's role in the Pacific Islands region is either "very beneficial" or "somewhat beneficial" to the region, compared to the 23.1 percent who believe it is either "somewhat detrimental" or "very detrimental."
- Similar to results from Southeast Asia, a majority of respondents who believe that China's role is beneficial respond that it is only "somewhat beneficial," not "very beneficial."

Finding 4: Fiji is concerned about U.S.-China strategic competition, ranking it as the most significant geopolitical challenge to the region.

- U.S.-China strategic competition scores highest among geopolitical challenges, despite overall optimism regarding China's role in the region and the relative low ranking of the United States in Fijian perceptions of political and economic power.

Finding 5: Climate change and natural disasters are clearly the greatest threats.

- Climate change is overwhelmingly seen as the most significant threat to Fiji's security, with natural disasters ranked second. Other non-traditional security threats that rank highly include human security needs, health pandemics, and lack of natural resources. Like their Southeast Asian counterparts, Fijian respondents are less concerned with traditional security challenges.

Finding 6: Fijian respondents show enthusiastic support for democratic values.

- When asked about the importance of democratic values to the regional order, an overwhelming majority of respondents (92.3 percent) say they are "very confident" or "somewhat confident" that democratic values are beneficial for regional stability and prosperity, matching levels of support seen in Indonesia and the Philippines.
- Fijian respondents are unanimous in seeing promoting good governance as "very important" (100 percent) and also unanimous in supporting free and open elections.

Finding 7: Fijians take a comprehensive view of what is needed for regional stability and economic prosperity.

- When asked to rank the importance of various normative, economic, and security issues for regional stability and prosperity, Fijian respondents are unanimous in saying that the following are either "very" or "somewhat" important: strengthening domestic political institutions (100 percent say "very" important), promoting free and open elections (92.3 percent say "very" important), promoting good governance (84.6 percent say "very" important), promoting women's empowerment (84.6 percent say "very" important), establishing a framework for trade and regional economic integration (76.9 percent say "very" important), promoting confidence and mutual understanding (76.9 percent say "very"), maintaining national unity (76.9 percent say "very" important), promoting common diplomatic policies, and developing a regional identity.

- In total, 92.3 percent of respondents stated that promoting human rights is "very" important. Promoting greater cooperation on refugee management and non-interference in internal affairs of other countries are the lowest ranking priorities.

Finding 8: Among regional institutions and initiatives, the Pacific Islands Forum (PIF) is seen as the most important for the regional order.

- A slim majority of respondents (53.8 percent) rank the PIF as the most important institution to regional order, mirroring Southeast Asia's support for ASEAN, with free trade agreements ranking second.

Finding 9: External pressure the key challenge for the PIF.

- In total, 53.8 percent of respondents view external pressure from major powers causing disunity among members as the main challenge facing the PIF. It is important to note, however, that from a Fijian perspective, external pressure includes pressure from the major regional powers of Australia and New Zealand, as well as China, rather than a focus on bipolar U.S.-China competition.

Finding 10: The PIF is seen as being best suited to deal with most regional challenges.

- When asked to identify which regional framework is best suited to deal with a variety of regional challenges, respondents show a clear preference for the PIF over the Pacific Islands Development Forum (PIDF) and the Pacific Community (SPC), with the United Nations being important for issues related to human rights promotion and refugee management.

Conclusion

The results of this survey paint a picture of clearly ascendant Chinese influence in Southeast Asia, complex and diverging views of China, and deep concerns over U.S.-China strategic competition and its impact on ASEAN. However, they also demonstrate that power dynamics are about more than the United States and China, with Japan, India, Indonesia, and others contributing to a multipolar strategic environment that is likely to become even more fluid and complex in the future.

The results also clearly suggest that strategic elites are more concerned with non-traditional security and economic threats than traditional security challenges, and they continue to prioritize ASEAN as the key institution for addressing regional challenges. Finally, democratic values are viewed by these elites as very important for regional stability and prosperity, and good governance ranks particularly high among other normative values.

These results are supported by other recent surveys, in particular the ISEAS-Yusof Ishak Institute's The State of Southeast Asia: 2020 Survey Report, which also concludes that China is the most influential political and economic actor in Southeast Asia today, with U.S. influence declining. Like in the CSIS survey, ISEAS found that trust in China remains mixed despite its rising influence, with Vietnam and the Philippines least trusting of China and most trusting of the United States. Both the CSIS and ISEAS surveys also highlight the strain of U.S.-China competition on ASEAN. Likewise, 2019 polling by Pew reported steep declines in Indonesia and the Philippines on perceptions of U.S. economic power relative to China since 2015, but also attitudes toward the United States remaining overwhelmingly positive in the Philippines and mixed in Indonesia, as this report also highlights. The trend over time that Pew tracks is consistent with the trend lines seen across two CSIS reports, this 2019 survey and an earlier 2014 CSIS poll that is used as a reference point in this report.

The similarities in our polling results are particularly striking given the differences in our samples: over half of ISEAS respondents were born after 1981, whereas the "elites" surveyed by CSIS were older, with the vast majority born before 1981; 40 percent of ISEAS respondents were government officials, while CSIS did not include current officials; ISEAS

surveyed experts from all 10 ASEAN countries and had the highest response number of responses from Myanmar (18 percent), while CSIS only surveyed the six largest Southeast Asian economies. Likewise, Pew surveyed a large random public sample, as opposed to a targeted list of elites like CSIS or a broader pool of experts like ISEAS.

When these dynamics are considered in the context of U.S. policy and engagement with Southeast Asia, it is clear that U.S. priorities in engaging Southeast Asia, principally traditional security matters related to China, do not always match the priorities of the region. Based on the survey results, the United States and regional partners should clearly be more focused on engaging Southeast Asian countries on what matters most to them, including pandemic preparedness, climate change, economic security and stability, and other non-traditional challenges. The survey results also suggest that there is considerably more room to engage the region on democracy and governance, areas in which the United States has reduced emphasis in recent years.

Key Areas to Watch

While trends are clear regarding how Southeast Asia views power, norms, and institutions, the region is extremely dynamic, and opinions could shift based on several key issues on the horizon, as well as unforeseen shocks.

Most immediately, Covid-19 will have widespread implications for the issues examined in this report. How will Southeast Asia assess China's role in the spread of the pandemic and the global response? Will ASEAN's response to the pandemic be seen as effective? Will the Chinese economy bounce back quickly and power Southeast Asia's economic recovery or not? Will China seize on Southeast Asian economic weakness to advance strategic aims or will it be seen as a truly beneficial partner?

Looking forward, climate change and related transnational challenges highlighted as key threats for Southeast Asian strategic elites in this report will become increasingly salient in coming years. Will regional institutions drive cooperation on these or will they continue to struggle? Will external powers be seen as partners to Southeast Asian nations on these key challenges?

Finally, the November 2020 U.S. presidential election will have an impact on regional dynamics and regional perceptions of the United States, particularly if there is a change in administration. Would a new U.S. administration change the tone or direction of a strategic competition with China in ways that enhance Southeast Asian states' confidence? Would it prioritize engagement with ASEAN-based organizations? Would it take a proactive role on climate change?

Despite the major influence of China and the United States in Southeast Asia, as well as other key regional powers such as Japan, India, and Australia, Southeast Asian countries themselves will shape how their own region develops. However, given that the region collectively continues to be extremely open and prioritizes deep engagement by outside powers, external actors will have influence as well. It is our hope that this survey report will contribute to a nuanced understanding of Southeast Asian views on key issues and help guide more constructive engagement by outside powers to address the key challenges as assessed by Southeast Asia itself.

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