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Geopolitics, non-traditional security and political dynasties in Southeast Asia

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Cover image: Protester holds a portrait of former Prime Minster Thaksin Shinawatra and his sister and former Prime Minster Yingluck Shinawatra, Bangkok, Thailand. (Shutterstock)

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Introduction

Southeast Asia is at the crossroads of major global developments, with shifting geopolitical dynamics, economic transitions, and security challenges shaping the region's trajectory. As the world navigates an increasingly complex international landscape, Southeast Asia's strategic location, economic potential, and evolving political structures place it at the centre of global attention. Over the next few years, five key trends will play a decisive role in shaping the region: the intensifying geopolitical competition between the United States and China, public health challenges such as haze pollution, the resurgence of political dynasties, the adoption of electric vehicles, and non-traditional security threats at sea.

This paper discusses the key developments in the Asia-Pacific region with a specific focus on Southeast Asia that will influence the period between 2025-2028 and beyond. These five key trends will shape Southeast Asia and the wider Asia-Pacific region. Addressing these challenges will be crucial to ensuring a sustainable, inclusive, and economically resilient region capable of navigating the complexities of an evolving global order.

Why Southeast Asia matters

Southeast Asia is a dynamic and diverse region comprising ten countries. Due to its strategic location, economic potential, and cultural values, Southeast Asia holds significant geopolitical, economic, and cultural importance beyond its region. Southeast Asia sits in close proximity to major powers (China and India), has a central maritime position along vital sea lanes, including the South China Sea and the Strait of Malacca, and is positioned as a focal point for geopolitical competition alongside traditional trading routes.

The Association of Southeast Asian Nations (ASEAN), as a block, boasts a rapidly growing and diverse economy, currently being the third-largest economy in Asia and the fifth-largest economy globally.[1] With a combined population of over 690 million people and a rising middle class, the region presents a massive consumer market.[2] Countries like Indonesia, Malaysia, Singapore, Thailand, and Vietnam have become key players in the global supply chain, attracting significant foreign direct investment.[3] The economic success of Southeast Asia contributes not only to regional stability but also to global economic growth. ASEAN has emerged as a crucial regional bloc, fostering economic cooperation, and acting as a bridge between major economies.

However, Southeast Asia remains prone to both traditional and non-traditional security risks, including disputes in the South China Sea, transnational issues such as terrorism, and public health crises and environmental impacts, including floods and draughts, deforestation, haze pollution, and climate change which have far-reaching consequences for people and economies.

Addressing the below five key trends over the next few years is crucial in achieving a sustainable, inclusive, and economically prosperous subregion with the ability to accelerate growth and progress for all its population and beyond.

1. Geopolitics and foreign policy: US-China rivalry in the Mekong subregion

While the South China Sea disputes are central regarding geopolitics in Southeast Asia, the Mekong subregion has been increasingly at the centre of a heated rivalry between the big powers—the US and China.[4] Comprised of the five mainland countries in Southeast Asia, namely Vietnam, Laos, Myanmar, Cambodia and Thailand, and China itself, the region shares the mighty Mekong River that flows all the way from the Tibet Plateau to the Mekong Delta in Vietnam. For Beijing, its southern neighbours have both economic and strategic significance, including a direct land route to the whole of Southeast Asia and important maritime trade access to and from the world. For the US, the region has an increasingly strategic importance with Thailand having been its strategic ally since the Cold War and Vietnam, despite their antagonism during the Cold War and ideological difference, having increasingly become its strategic partner in the fast-changing global politics. Most importantly, as the Mekong become increasingly a locus of China's ever-growing influence and assertiveness, the US's special attention to the region was growing to curb China's influence that threatens its interests. The zero-sum game and securitisation of the rivalry are among the primary factors that risk escalating in the region, and effectively threaten peace and economic development in the region and beyond.[5]

The US-China rivalry presents opportunities and challenges for the countries in the region. China, with its focus on infrastructure development and connectivity in Southeast Asia, has expanded its economic footprint southward, especially through the Belt and Road Initiative (BRI). It finances mega infrastructure projects such as the high-speed rail system that connects China's Kunming to Laos and in the future further down all the way to Singapore through Thailand and Malaysia. This also includes one of the most recent controversial projects, the Funan Techo channel, a 180 km China-backed channel in Cambodia linking the Mekong River to the Gulf of Thailand likely impacting already fragile ecosystems and livelihoods.[6] China's trade volume in the subregion was $416.7 billion in 2022, up 5 percent from the previous year.[7]

The US's total trade of goods with the subregion is less than 50 per cent of that of China standing at $156.3 billion in 2022, though it represents a 30 percent rise from the previous year.[8] Nevertheless, the US remains a major trade partner for countries in the region such as Vietnam, Cambodia, and Thailand with huge trade deficits. The Mekong countries have welcomed renewed US commitment and additional funding to the Mekong region, with the US having gradually increased aid to Vietnam, Cambodia, Laos and Myanmar from $380 million in 2015 to almost $520 million in 2022.[9] However, whether that translates into viable alternatives to Beijing's massive trade and investment in the Mekong region and growing influence over smaller countries, such as Laos and Cambodia, remains to be seen as the Lancang Mekong Cooperation Special Fund makes it hard for ASEAN countries to turn away from China.[10]

This is particularly the case with Trump 2.0 creating significant uncertainty for the region with Trump 2.0 likely being as destabilising as during his first term as his nationalist and populist focus to correct trade deficits may result in his administration targeting trade deficits with major trade partners such as Vietnam.[11] The impact of Trump 2.0 is already visible in Southeast Asia in early 2025 due to a 90-day freeze of US Aid, including hundreds of millions of dollars being paused across healthcare, food and education programs alongside for example the Southeast Asia Program and the Energy, Water and Sustainability Program at the Stimson Center, focusing on the Mekong River and broader security issues.[12]

The US administration's anti-China stand may result in mounting pressure for the Lower Mekong countries to take sides, making small countries such as Cambodia and Laos even more vulnerable. Even worse, for democrats, it can be bad news, as Trump's America-First approach likely focuses on correcting trade deficits instead of supporting democratic reforms. Likewise, transnational crimes in the region continue unabated as the two powers place primary attention on strategic and political interests at the expense of cooperation required to address such criminal activities.[13] The outlook for a more prosperous and peaceful region should be prioritised by all partners, especially China and the US.

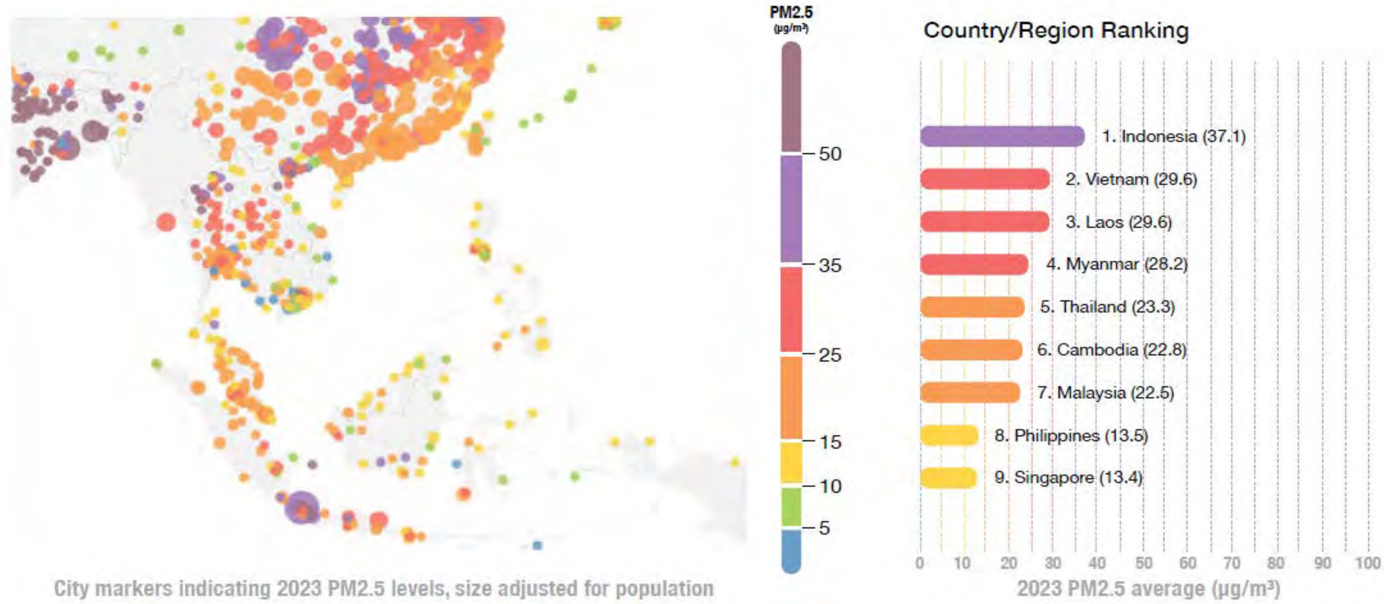
RECOMMENDED ACTIONS:

1. Increase dialogue and negotiations to tackle key challenges such as transnational crime besides focusing on strategic and political interests.
2. Advocate for a prosperous and peaceful region benefiting all economies and people.

2. Public health challenges: Haze pollution

Southeast Asia faces various public health challenges, including the threat of infectious diseases and haze pollution.[14] The fires that cause haze in southern Southeast Asia are mainly located in Indonesia and to a lesser extent Malaysia and the Golden Triangle border areas of Thailand, Laos and Myanmar and legal land clearing in Thailand.[15] Haze severely disrupts regional economies by reducing productivity and tourism, causing spikes in emergency medical spending. A new wave of fires began in 2019 when Indonesia registered 66,000 fire alerts after the country went through the worst year in 2015 with a record 110,000 alerts.[16]

Figure 1: South East Asia IQAir Report 2023



Source: 2023 World Air Quality Report, p. 15.

This upward trend peaked in 2023 before it started to ease again. In 2023, Indonesia experienced a significant surge in wildfire, with the total area burned being 1.16 million hectares, a fivefold increase compared to 2022, which is largely attributed to the El Nino phenomenon leading to prolonged dry conditions across the region.[17] In 2021, fires burned 353,222 hectares of land or up nearly 16 per cent from 296,942 hectares of land that burned during the whole of 2020.[18] Despite 2023 being the worse year for forest fires, the outlook for 2024 and 2025 is better as El Nino was dissipating and transitioning to a neutral phase or La Nina.[19]

Haze blankets the main business district in Jakarta, Indonesia. (AP)

Transboundary haze causes impacts on the economy of countries in the region as it exposes healthcare problems, ecological damage, and a vicious cycle of poverty. In Indonesia, human activities are responsible for 98 per cent of all fires, primarily due to social and cultural factors, including 'slash and burn' agricultural practices.[20] Impacts on human health are significant. For instance, low air quality in Indonesia in 2023 impacted almost 30 million people in the Jakarta Metropolitan Area for more than half of the year.[21] Similarly, millions of children in hotspot areas were subject to air pollution, which led to school closures and lost learning opportunities. Besides health, the wildfires and related smog also impacted transportation (flights, shipping and road travel), and tourism while increasing the production of ozone, acid rain, and greenhouse gases, reducing quality of life, biodiversity and plant photosynthesis by obstructing solar radiation.[22]

Regional responses have emerged since the mid-1980s; however, frequent fires in recent years are seen as strong evidence of the failure of the mechanism, a lack of the countries' commitment, and self-interest politics at the national level in favour of addressing haze.[23] The first Roadmap toward a transboundary haze-free ASEAN by 2020 was adopted, having mixed results with a 2nd Roadmap for a haze-free region by 2030 being adopted in 2022 to sustain commitment to regional solutions to the problem.[24] One of the positive achievements of the region is incremental institutional change through 'layering' and 'conversion' by additional new institutions and activities, such as the Conference of Parties and various sub-committees to support the implementation of the agreement, put in place to coordinate regional activities to address transboundary haze and other associated activities.[25]

Despite this development, questions remain about the well-understood challenges posed by the ASEAN way of non-interference and respect for sovereignty. It is then left to respective countries to adopt legal frameworks such as Singapore's Transboundary Haze Pollution Act and the capable state to enforce it. Similarly, Indonesia's new President Prabowo Subianto's commitment to balance economic growth and environmental protection is required to control transboundary haze in years to come.

Climate change presents additional challenges as extreme weather would mean dryer temperatures which can be associated with fires and haze. Moreover, by expanding the government's efforts beyond reforming agricultural and firefighting practices, responses should include protecting the country's wetlands and peatlands to reduce the risk of wildfires.[26] At the 25th Sub-regional Ministerial Steering Committee on transboundary haze pollution on 3 July 2024 in Bangkok, Thailand, regional leaders noted the rising risks of fires contributed by El Nino conditions and a positive Indian Ocean Dipole (IOD). A positive outlook for a haze-free ASEAN will depend greatly on the additional capacity and resources needed to achieve all objectives. In the meantime, questions over the ASEAN way continue to be relevant. Moreover, calls for the member states to adopt appropriate legal measures as exemplified by Singapore's Transboundary Haze Pollution Act to incentivise corporates to do their part and effective implementation is growing louder, ultimately requiring strong political commitment to balancing economic development with social and environmental health.

RECOMMENDED ACTIONS:

1. Additional support to protect the country's wetlands and peatlands to reduce the risk of wildfires through the governments and international partners, particularly through technical assistance, capacity building, and emergency responses.
2. Closer collaboration and stronger leadership among all levels of governments, including local, district, province, national and regional levels.
3. Stronger collaborative efforts and networks across the region to implement key instruments such as the Sustainable Use of Peatland and Haze Mitigation in ASEAN and Measurable Action for Haze-Free Sustainable Land Management in Southeast Asia.

3. Resurgence of political dynasties

Autocratic rule is not a new phenomenon in Southeast Asia. Yet, the resurgence of political dynasties is surprisingly unfolding as the region is experiencing continued democratic backsliding. In the Freedom House Index, the Philippines is partly free whereas Cambodia, Brunei, and Laos are not free. Brunei and Laos are persistently autocratic states. Brunei is the only absolute monarchy in the region, under the rule of the Sultan as head of state and highest religious and political authority, with no accountability to the parliament.[27] Broader democratic backsliding in Southeast Asia, particularly in Cambodia, Thailand, and Myanmar is accompanied by a resurgence of ruling dynasties in politics, particularly in Cambodia, Laos, Thailand and the Philippines.

In 2024, Thailand saw the reinstatement of the Shinawatra family as Paetongtarn Shinawatra, 37, the youngest daughter of the two-term Thai prime minister Thaksin Shinawatra was appointed Prime Minister after the court ordered the termination of Prime Minister Srettha Thavisin. Her Pheu Thai party managed to form a government after the strong conservative forces standing in the way of the reformist youth and middle class under the Move Forward Party, who won the majority vote in the 2023 election.

At the same time, Hun Sen, who had ruled Cambodia for almost four decades, handed power over to his eldest son Hun Manet. Hun Sen's rule has been known for high level of corruption and expanded patronage aimed at consolidating his rule and continued harsh repression. Manet's rule is at best the continuity of the autocratic rule that Cambodia has seen under his father.

In Laos, the appointment of Sonexay Siphandone marked a power transition from the older generation to the next. Siphandone is from a powerful political clan whose father Khamtay Siphandone was a former prime minister and state president in the 1990s.[28] Laos's change of guard is not necessarily providing hopes for major changes in economy or political spheres; it is rather another episode of a long tradition of clan-based power transfer.[29]

The Philippines also saw a comeback of the Marcos clan as Ferdinand Marcos Jr, son and namesake of the former dictator Ferdinand Marcos became president in 2022, 36 years after his father Ferdinand Marcos was ousted by people's power for his autocratic rule. A year after being elected as President of the Philippines, Marcos Jr., despite being praised for his stronger stand over the country's claim in the South China Sea and softer stand in its relationship with the US, falls short of stopping drug-related killings and fails to hold his predecessor accountable. Press freedom has however improved, ranking the Philippines 132 out of 180 countries in 2023 compared to 147th the previous year though it slipped back again one spot to 134th in 2024.[30]

In many ways, the dynastic power transition represents authoritarian continuity rather than a democratic opening. Associated democratic regression leads to the economic downturn as it tends to bring unskilled people to key positions of power or to instability that can potentially alienate investors, including those from China as in the case of Myanmar's civil conflict and Thailand's underperformed economy vice a vice its investment potential.[31] The election of Marcos Jr is believed to be partly associated with growing support for illiberalism and hence continuity from Duterte to Marcos, which is not necessarily novel as Southeast Asia's lack of democratic consolidation has been linked to a lack of popular and elite support of liberalism.[32] Impunity is yet another great enemy of democratic progress in the region as seen in the election of the Marcos Jr. as continuity of violence of the previous administration, leading to gradual autocratic style of governance and indeed rule of law.[33] Furthermore, increasing authoritarianism in Southeast Asia states has implications for ASEAN, impacting its ability to promote democracy and addressing regional crisis such as Myanmar's civil war, which is in many ways reinforced by the organisation's long-standing principle of non-interference in internal affairs.[34] Likewise, growing authoritarianism brings the region closer to China as they seek political and financial support and more broadly hinders transparency and inclusive and sustainable development.

RECOMMENDED ACTIONS:

1. Improving justice systems to reduce corruption and strengthen the rule of law.
2. Strengthening freedom of speech and the role of media to address democratic backsliding.
3. Continued and increasing support by international partners, such as Australian Aid, to foster resilient institutions and the rule of law.

4. Economic transition: The adoption of electric vehicles

Electric vehicles (EVs), also called battery electric vehicles, consist of many types of automobiles such as PHEV (Plug in Hybrid) and BEV (Battery Electric Vehicles)[35]. EVs are widespread in the Southeast Asian market and have seen an increase of 3.88 per cent sales. EVs are expected to have an estimated market volume of 7,958 million USD by 2029, coupled with 168.40K unit sales in the EVs market. Notably, the revenue for the ASEAN market is expected to reach 6,798 million USD by 2025.[36] This number aligns with Southeast Asia's ambition of becoming a major EV production hub after China.

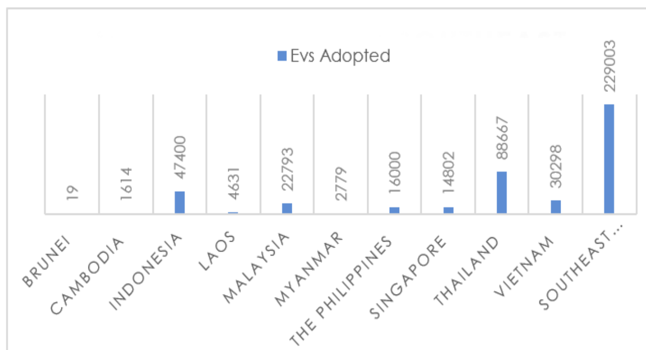
The architecture and development of countries in SEA are diverse, and so is the status of EV adoption. Thailand holds the largest share of the EV market at 78.8 per cent, supported by Chinese automakers, followed by Indonesia with an 8 per cent market share.[37] Thailand focuses on four-wheeler EVs, targeting wealthier buyers, while Indonesia primarily markets two-wheelers to attract less affluent consumers. Vietnam is the only ASEAN country with a market share of EVs of about 7 per cent with its domestic-based Vinfast. Singapore, Malaysia, and the Philippines are known as slow movers. Meanwhile, little data indicates significant growth of EVs in Cambodia, Myanmar, and Laos.

The leading brand for EVs in ASEAN is BYD with demand and supply playing an important part in Southeast Asia's EVs adoption.[38] The domestic market potential, the availability of charging stations, financial incentives for end-users, and key EV policies are key driving factors impacting the sale of EVs in each country. Practically, Thailand has been bringing in more EV types to provide more options for consumers, securing up to 16 units per EV charging point and 1.66 kW per EV charging capacity. Thailand is also maintaining a clear government financial incentive of providing subsidies of up to 100k THB along with reducing tax. Further, a well-established supply chain, robust logistical support for export systems, and policy incentives specially provided to EV manufacturers coupled with strong government plans are additionally compelling factors that help explain the rapid growth of Thai EV manufacturing.

Albeit the driving forces, particularly in Thailand, the market for EVs in SEA is constrained. This is largely due to the constraint of EV adoption and production, trade protectionism, and sustainability concerns.[39]

A hydrogen fuel cell-powered car at the Toyota booth at the GIIAS exhibition Tangerang Regency, Banten, Indonesia. (Shutterstock)

Figure 2: Number of EVs in Southeast Asia



Source: Extracted from Electric Vehicles - ASEAN | Statista Market Forecast.

RECOMMENDED ACTIONS:

1. Develop regulations, guidelines and policies to incentivise diverse EV production.
2. Support collaboration across countries to use lessons learned from leaders in Southeast Asia, particularly Thailand and Indonesia.

5. Non-traditional security threats at sea

The maritime domain, in addition to the land route, is pivotal to world trade. Unfortunately, criminal groups also exploit sea routes for their criminal activities. In this sense, non-traditional security threats remain a long-standing concern for countries across the globe, especially in Southeast Asia. Accounting for 15 per cent of total volumes of global trade, sea lines of Southeast Asia have faced challenges, mainly due to piracy and armed robbery impacting shipping and trade.[40]

Piracy attack under way in Rayong Port, Thailand. (ReCAAP)

Piracy is a serious challenge for Southeast Asia, where pivotal trade routes like the Strait of Malacca keep goods flowing across the globe. Piracy often negatively impacts the commercial shipping industry and fisheries globally. On a regional scale, trade and tourism are often deterred by those piracy activities.[41] Pirates on smaller scales are local fishermen or traders who use piracy to enhance their income through targeted attacks or robberies. On a larger scale, organised pirates usually use violence in addition to having more resources, ambition, and sophistication; they also broaden their attacks.[42] Data from the Regional Cooperation Agreement on Combating Piracy and Armed Robbery against Ships in Asia Information Sharing Centre (ReCAAP ISC) showcases that incidents of piracy and armed robbery against ships in Southeast Asia have increased notably to 100 incidents in 2023, which has increased compared to 2022.[43] In 2024, there were around 116 incidents and the human costs, such as the seafarer and seafarer's family rendered from piracy, are also pricey and often overlooked.[44]

Key victims and affected groups in piracy include shipping companies, insurance firms, local governments, and international maritime forces, all of whom share the cost of combating piracy.[45]

Weak law enforcement remains a primary factor enabling piracy in the region. Various strategies have been implemented to address this challenge, including the establishment of control centres, enhanced information sharing, capacity-building programs, monitoring efforts, and coordinated patrols. Strengthening legal frameworks and fostering regional cooperation through initiatives like ReCAAP have been critical in connecting stakeholders and coastal states to improve maritime security. However, continued investment in these efforts is necessary to curb piracy's growing threat effectively.[46]

In addition to piracy, the rising threat of cyberattacks on maritime infrastructure is an alarming concern. Ships and port facilities are major concerns, where ports' equipment, shore-side corporate networks, and vessels' operation systems are vulnerable to attacks and are the targets, as emphasised by the ASEAN Maritime Outlook.[47] Specific challenges also exist for individual countries. Cambodia, which has a sea border with its neighbouring countries, specifically Thailand and Vietnam, faces challenges due to unclear borders, often leading to uninvited tensions between the nations. Similarly, Cambodia and Vietnam's maritime discomforts, rendered by the French colonial administration, led to national grievance, especially over the case of Koh Tral/Phu Quoc.[48] Malaysia and Indonesia have an ongoing issue over oil-rich areas, particularly the Ambalat dispute[49], while Malaysia also has a maritime dispute with Singapore on the Sabah dispute.[50]

Illegal, unreported, and unregulated (IUU) fishing further adds to Southeast Asian maritime challenges. Cambodia, Indonesia, Malaysia, the Philippines, Thailand, and Vietnam experienced more than US$ 6 billion loss caused by IUU fishing. Indonesia and Vietnam are the largest victims, experiencing damage of 3 billion USD and 1.6 billion USD respectively with key factors including overfishing, weak fisheries enforcement management, inability to regulate the operations of vessels, lack of alternative employment opportunities for those displaced from fishing, disputed boundaries, and floating seafood market fuelling IUU.[51][52] Addressing these multifaceted challenges requires a collective and coordinated effort by all actors, including state, non-state, and regional organisations.

RECOMMENDED ACTIONS:

1. Support the strengthening of law enforcement agencies and key strategies, such as the creation of control centres, information exchange, capacity training, monitoring and coordinated patrolling, and the fortification of legal frameworks.
2. Strengthen the Regional Cooperation Agreement on Combating Piracy and Armed Robbery against Ships in Asia (ReCAAP), particularly through connecting all key stakeholders and coastal counties.
3. Reduce overfishing by improving weak fisheries enforcement management, the regulation of vessels, and by providing alternative employment opportunities for fishermen.

Conclusion

Southeast Asia is a fast-growing region with a lot of potential, particularly driven by its young populations, an increased uptake of digitalisation and connectivity, alongside growing innovation, and entrepreneurship. ASEAN combined as a block is the fifth largest economy globally and due to its significant geopolitical location, developments in Southeast Asia are crucial to follow due to their impact beyond the subregion.

As the region continues to evolve, its role in shaping the Asia-Pacific region and beyond will become even more evident. Addressing the five key trends (geopolitics and foreign policy, public health, resurgence of political dynasties, economic transition, and non-traditional security at sea) and highlighting recommendations over the next few years is important. This will be crucial for Southeast Asia in achieving a sustainable, inclusive, and economically prosperous subregion with the ability to accelerate growth and progress for its population and beyond.

Overall, ASEAN should focus on investing in research and development in the areas of public health prevention and crisis reediness, green technology and legal international best practices regarding maritime management. ASEAN should also invest in building more capacity of workers in the key trend areas and explore joint financing mechanism that enables ASEAN to invest in the five highlighted areas while supporting resilient institutions, transparency and the rule of law. This will be crucial for Southeast Asia in achieving a sustainable, inclusive, and economic prosperous subregion with the ability to accelerate growth and progress for its population and beyond.

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