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Power and Order in Asia

A Survey of Regional Expectations

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CSIS | CENTER FOR STRATEGIC &
INTERNATIONAL STUDIES

A Report of the CSIS Asia Program

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| Executive Summary

Asia stands out as the world's most vibrant region, where rivalries and confrontation coincide with increased economic cooperation and community building. How should we interpret these two dynamics, and what are the implications for U.S. policy? With the support of the MacArthur Foundation, *Asahi Shimbun*, *Joongang Ilbo*, and *China Times*, the Center for Strategic and International Studies (CSIS) collaborated with Opinion Dynamics Corporation on a survey of strategic elites¹ in 11 Asia Pacific economies.² Key findings are as follows:

Finding One: Power Will Shift to China

An average of 53 percent of respondents³ believed China will exert the greatest power in East Asia in 10 years, followed by the United States with 43 percent. Similarly, 56 percent of respondents expected China to be their country's most important economic partner in 10 years, followed by the United States at 28 percent. Most respondents, 79 percent, considered China's impact on regional economic development either very or slightly positive, but 61 percent felt China is having a very or somewhat negative impact on regional security.

Finding Two: U.S. Leadership Will Nevertheless Remain Strong

Despite expectations that China will be the most powerful country in the region in 10 years, experts continue to see continued U.S. leadership even with declining U.S. relative power. When asked about the future dynamics of international relations in East Asia over the next decade, 57 percent of respondents on average predicted continued U.S. leadership while only 7 percent predicted Chinese primacy. South Korean and Japanese respondents were most certain of continued U.S. leadership, but a majority of Chinese experts also agreed. A plurality of respondents on average also felt that continued U.S. leadership would be in the best interests of their country, although only 11 percent of Chinese respondents agreed. Thailand, despite its status as a U.S. treaty ally, was least enthusiastic about U.S. leadership.

¹ Members of the "strategic elite" were identified as nongovernmental experts who are influential in the debate on international and/or Asian regional affairs. Excluded from the list were serving members of the legislative, judicial, or administrative branches of government or those with expertise outside of international relations and/or Asia.

² CSIS identified 150 candidates each in the United States, Japan, South Korea, China, Thailand, Indonesia, India, Australia, Singapore, Burma/Myanmar, and Taiwan. The survey was conducted online between March 24 and April 22, 2014, and the total number of participants was 402.

³ To allow comparisons among the 11 economies (across which the number of responses varied from 23 to 81), we used average values that weight each country equally. Burma/Myanmar was excluded due to a low response rate and is therefore analyzed separately.

Finding Three: Broad Support for the U.S. Rebalance, but Concern about Implementation

An average of 79 percent of respondents expressed support for the Obama administration's strategic rebalance to Asia. China was the only country where a majority of respondents disapproved of the rebalance, by a margin of 77 to 23 percent. When asked to evaluate the rebalance, most respondents, 51 percent on average, suggested it is the right policy but is neither resourced nor implemented sufficiently, followed by 24 percent who felt it is reinforcing regional stability and prosperity. China was the only country where a majority of respondents believed the rebalance is too confrontational toward China (74 percent compared with a regional average of 18 percent).

Finding Four: Territorial Confrontations Are the Greatest Obstacle to Regional Community Building

A failure to resolve territorial issues was deemed the greatest obstacle to community building in East Asia on average.⁴ South Korea, Singapore, and China were most concerned about the failure to resolve historical issues as an obstacle, which came in second on average. The third greatest obstacle was uncertainty about a rising China, led by respondents from Japan and Taiwan. When asked whether their country should resort to military force to reverse a hostile takeover of territory by the other side should diplomacy fail, over 80 percent of Chinese and Japanese respondents said yes.

Finding Five: Northeast Asia Struggling with History

Respondents in South Korea and China were even more concerned about historical issues than territorial issues. In addition, 88 percent of respondents in China, 62 percent in Taiwan, and 60 percent in South Korea said Japan's impact on regional security was very or slightly negative. Most respondents, 42 percent on average, said that these historical issues would remain diplomatic and not military problems, but 43 percent of Chinese said the historical differences could lead to military confrontation.

Finding Six: Regional Economic Crises Seen as the Greatest Challenge to National Security

Most respondents on average considered regional economic and financial crises to be the greatest challenge to their nation's security, led by Indonesia.⁵ Territorial and historical disputes came in second on average, with South Korea, China, Taiwan, India, and Japan expressing the most concern, in that order. Climate change emerged as the third-greatest challenge on average, led by India and Singapore, with Northeast Asia relatively less concerned.

⁴ Participants were asked to rate nine potential obstacles to community building in East Asia on a scale of 1 to 10, with 1 meaning not a major obstacle at all and 10 meaning a very significant obstacle.

⁵ Participants were asked to rate their level of concern about 12 potential challenges to their nation's security on a scale of 1 to 10, with 1 meaning not concerned at all and 10 meaning extremely concerned.

Finding Seven: Support for Trans-Pacific Regional Economic Framework Strong

When asked about the importance of various economic frameworks to their country's economic future,⁶ respondents on average ranked the Asia-Pacific Economic Cooperation (APEC) forum and the Group of 20 (G-20) highest, with 82 percent considering them either very or somewhat important, followed by the Association of Southeast Asian Nations Economic Community (81 percent) and the Trans-Pacific Partnership (75 percent).

Finding Eight: Robust Regional Support for Democratic Values, but now Americans More Doubtful

In the 2008–2009 CSIS Survey,⁷ respondents listed democratic norms as a high priority for regional community building, with Americans near the top and Chinese respondents most uncertain about these priorities. In a surprising change, Americans now ranked at the bottom of the surveyed countries in the priority they placed on these norms for regional community building. On human rights and women's empowerment, American experts ranked last, below Chinese counterparts. On promoting free and fair elections, Americans were second from the bottom.

Finding Nine: Peace in the Taiwan Strait Matters to the Entire Region

Seventy percent of respondents on average felt that if Taiwan were reunified with mainland China through *coercive* means that would have a slightly or very negative impact on their country's interests. The United States and Japan expressed the most concern (99 and 98 percent either slightly or very negative, respectively) followed by Taiwan (89 percent), Australia (85 percent), and South Korea (80 percent). Respondents in China were more negative than positive by a margin of 43 to 40 percent.

⁶ Participants were asked to rate the importance of seven economic frameworks on a scale of 1 to 4, with 1 meaning very important and 4 meaning not at all important.

⁷ Bates Gill et al., *Strategic Views on Asian Realism: Survey Results and Analysis* (Washington, DC: CSIS, February 2009), http://csis.org/files/media/csis/pubs/090217_gill_stratviews_web.pdf.

1 | Introduction

Project Background

In 2008–2009, the MacArthur Foundation supported a CSIS survey of strategic elites in nine Asia-Pacific countries on the future of regional architecture.¹ The survey, which was conducted in cooperation with Opinion Dynamics Corporation (ODC), *Asahi Shimbun* (Japan), and *Joongang Ilbo* (South Korea), was designed to map aspirations and expectations across the region with respect to Asia’s emerging power relations, institutions, and norms.

The 2008–2009 survey demonstrated that despite notional support for creation of an “East Asia Community,” there continues to be deep skepticism across Asia about the ability of regional institutions to handle security, economic, or transnational crises. The survey also revealed a strong degree of support in the region for the idea that a future East Asia Community should be based on democratic norms such as human rights, free and fair elections, and good governance, though there were divisions about whether states should cede national sovereignty to advance those norms. In response to questions about regional dynamics there was a clear assessment that power was shifting toward China, but trust was highest toward the United States and quite high toward Japan. The one surprising exception to this result was in Thailand, where expressions of mistrust toward the United States were significant, perhaps reflecting stresses in the U.S.-Thai relationship in the wake of the 2006 coup and a more benign Thai view of China.

The juxtaposition of power competition and increased economic cooperation and community building has become even more pronounced in the years since the initial CSIS survey was completed. In 2010, North Korea sank the South Korean corvette *Cheonan* and shelled the island of Yeonpyeong; China and Japan entered a cycle of crisis and confrontation over the Senkaku/Diaoyu Islands in the East China Sea; and in the South China Sea the Philippines and Vietnam began squaring off against an expanding and assertive Chinese maritime presence. These confrontations moved from incidents at sea to multilateral diplomatic settings. When the ASEAN Regional Forum (ARF) of foreign ministers failed for the first time in decades to issue a joint communiqué because of the South China Sea confrontations, the weakness of the region’s institutions detected in the prior CSIS survey was exposed. Emerging Chinese strategies such as the “Near Sea Doctrine” and American concepts such as “AirSea Battle” also suggested that the localized tests of will in the East and South China Seas were increasingly being connected to a larger strategic competition between Washington and Beijing. Also underlying these growing confrontations over territorial issues were clashing interpretations of history and identity among the claimants.

The 2008–2009 CSIS survey results shed light on the strategic landscape in Asia with respect to questions of regional institutions, norms, and power. Since then, intervening crises on the Korean peninsula and in the East and South China Seas—as well as in the

¹ Bates Gill et al., *Strategic Views on Asian Realism: Survey Results and Analysis* (Washington, DC: CSIS, February 2009), http://csis.org/files/media/csis/pubs/090217_gill_stratviews_web.pdf.

governance of ARF and other forums—suggested a need to reassess regional trend lines. CSIS approached Opinion Dynamics Corporation to design a second survey of strategic elites and, with the support of the MacArthur Foundation, *Asahi Shimbun*, *JoongAng Ilbo*, and *China Times*, was able to further explore issues related to power and order in Asia.

Methodology

The 2014 survey targeted strategic elites in 11 Asia Pacific economies. The CSIS team of Asia scholars identified candidates in Australia, Burma/Myanmar, China, India, Indonesia, Japan, Singapore, South Korea, Taiwan, Thailand, and the United States.² Members of the strategic elite were identified as nongovernmental experts who are influential in the debate on international and/or Asian regional affairs. 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 Asia.

The Opinion Dynamics Corporation worked with CSIS to design an online survey template and fielded the survey electronically between March 24 and April 22, 2014. Participants in China, Japan, and South Korea 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 participants in each country was as follows:

Australia	26	Burma/Myanmar	8
China	35	India	33
Indonesia	23	Japan	52
Singapore	28	South Korea	59
Taiwan	29	Thailand	28
United States	81		
Total	402		

To allow comparisons among the 11 economies (across which the number of respondents varied from 23 to 81), we used average values that weight each country equally. Burma/Myanmar was excluded due to a low response rate but is analyzed separately in the section on key assessments.

As noted in the previous survey report, 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 402 responses therefore allow for a well-informed comparison of strategic thinking across Asia on questions associated with power and order. However, the selection of “strategic elites” is necessarily subjective, and the number of responses varied from country to country. In addition, this

² The authors wish to thank Ernie Paicopolos of Opinion Dynamics Corporation for his expert advice as well as the following CSIS scholars and staff for their assistance with the design, implementation, and analysis of the survey: William Colson, Zack Cooper, Rick Inderfurth, Persis Khambatta, Nicole White, Jacqueline Vitello, Ying Sun, Ellen Kim, Sang Jun Lee, Eunhong Jeon, Marie Dumond, Greg Poling, Kathleen Rustici, Phuong Nguyen, Elke Larsen, Grace Hearty, David Parker, Samir Nair, Vineeth Murthy, Deep Pal, Yuko Nakano, Benjamin Self, Eri Hirano, Ayumi Teraoka, James Dunton, Alison Bours, and Ryan Sickles.

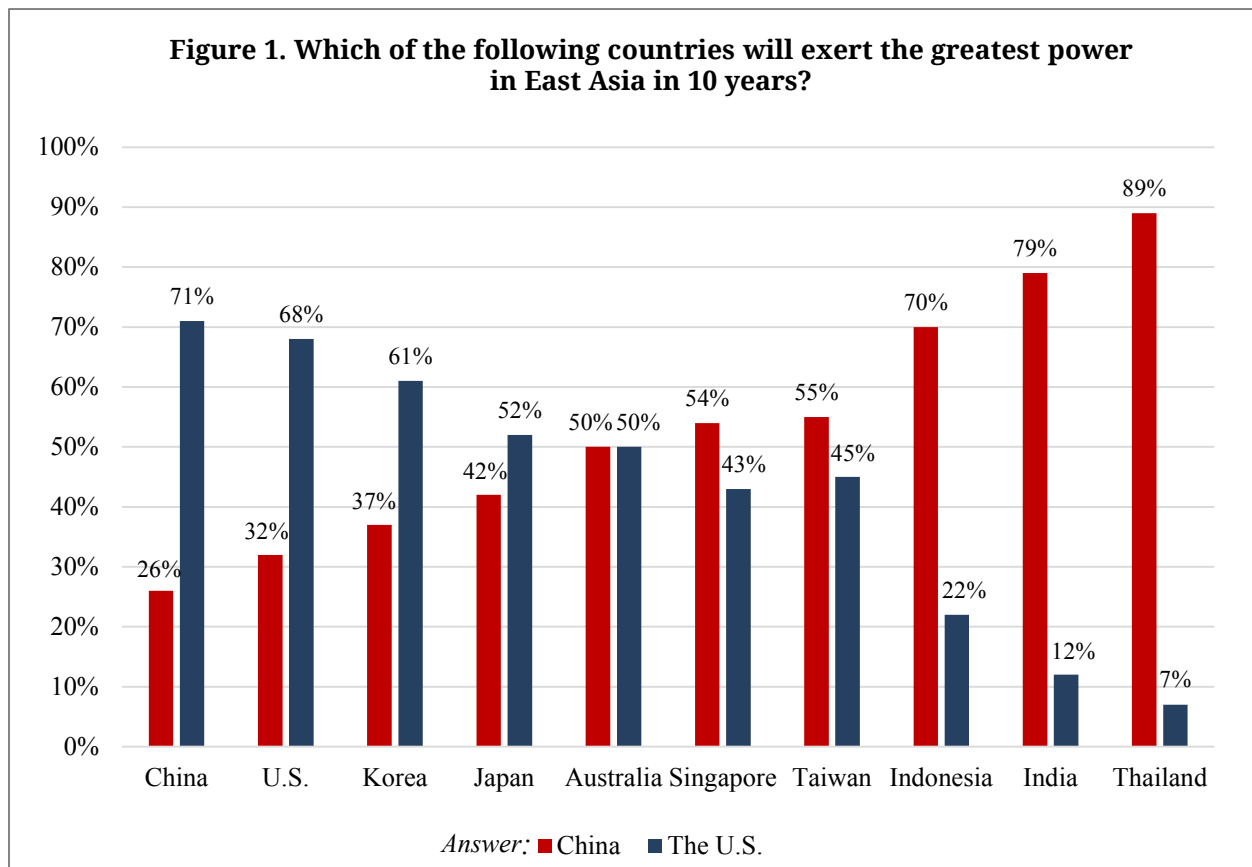
sample does not necessarily reflect the full range of elite views. While derived from a carefully constructed survey and methodological approach, these elite-oriented surveys cannot be compared with large public opinion surveys in terms of precision or margin of error.

Despite these limitations, the project team is confident the results will enhance understanding of the strategic landscape in Asia with respect to questions of power, norms, and regional institutions. In our view, the survey reveals nine key findings, which are analyzed below and depicted graphically in the pages that follow.

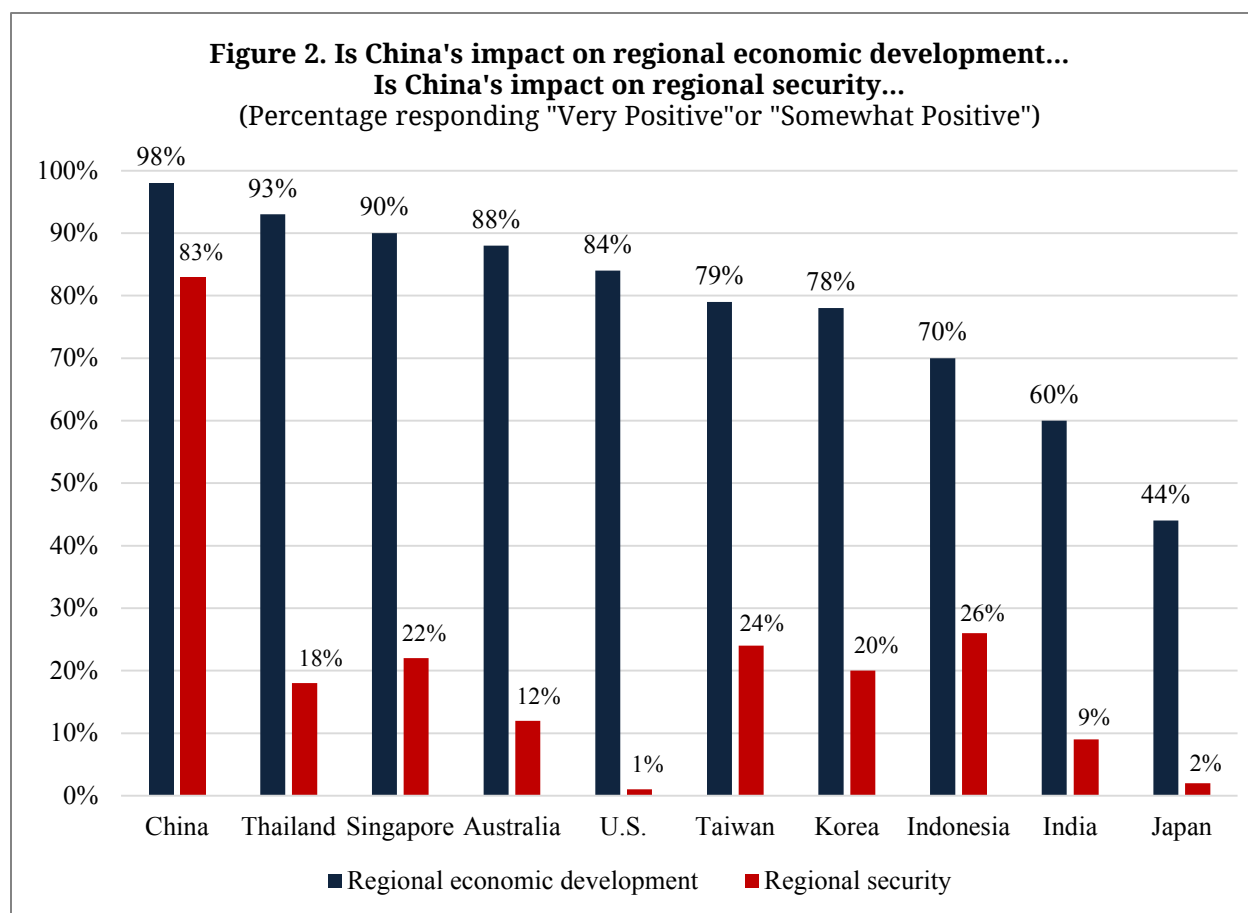
2 | Key Assessments

Finding One: Power Will Shift to China

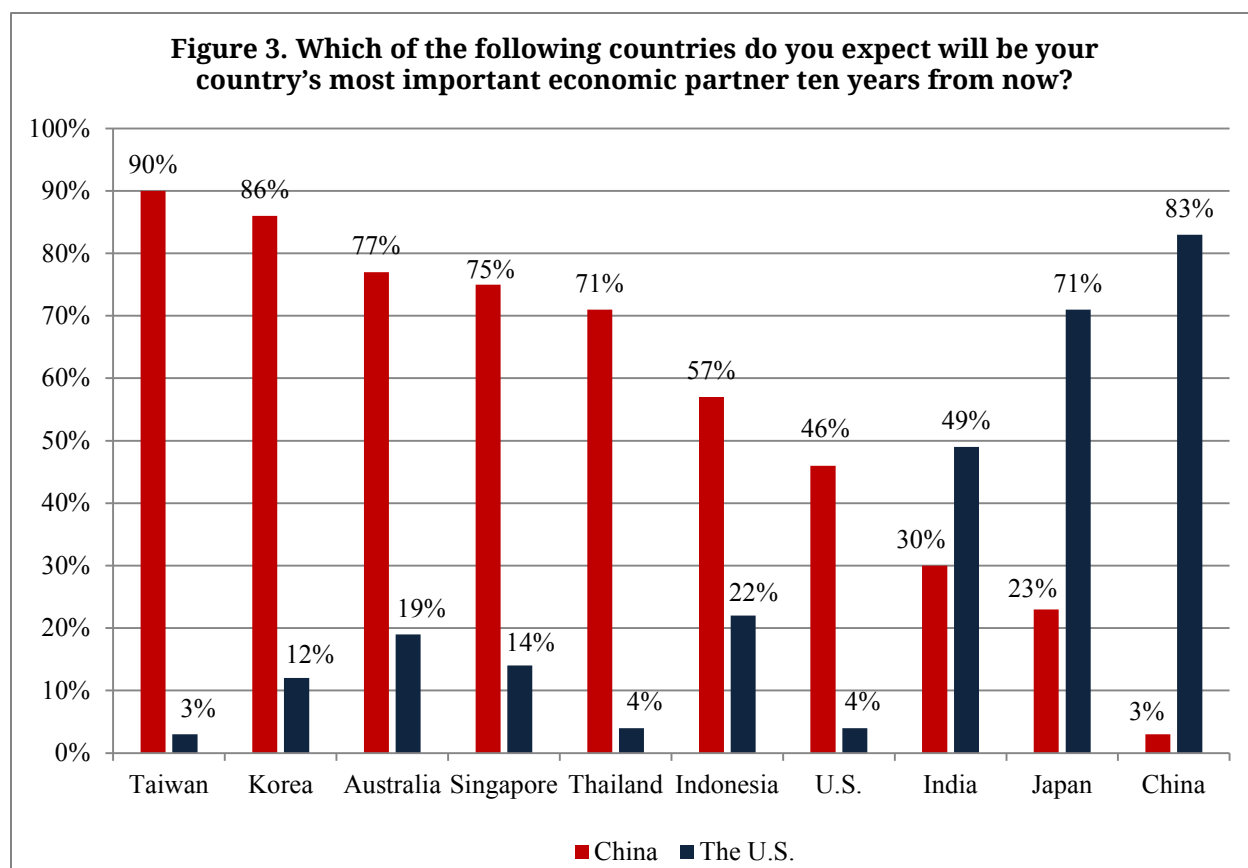
As in the previous 2008–2009 CSIS survey, regional experts expected that power will continue shifting to China within Asia, with generally positive impact on economic development but a negative impact on regional security. Fifty-three percent of respondents on average believed China will exert the greatest power in East Asia in 10 years, followed by the United States with 43 percent. The percentage of national responses for China and the United States is depicted in Figure 1.



The divergence between views of China's economic and security impact is demonstrated in Figure 2. Seventy-nine percent considered China's impact on regional economic development to be either very or slightly positive but 61 percent felt China is having a very or somewhat negative impact on regional security.



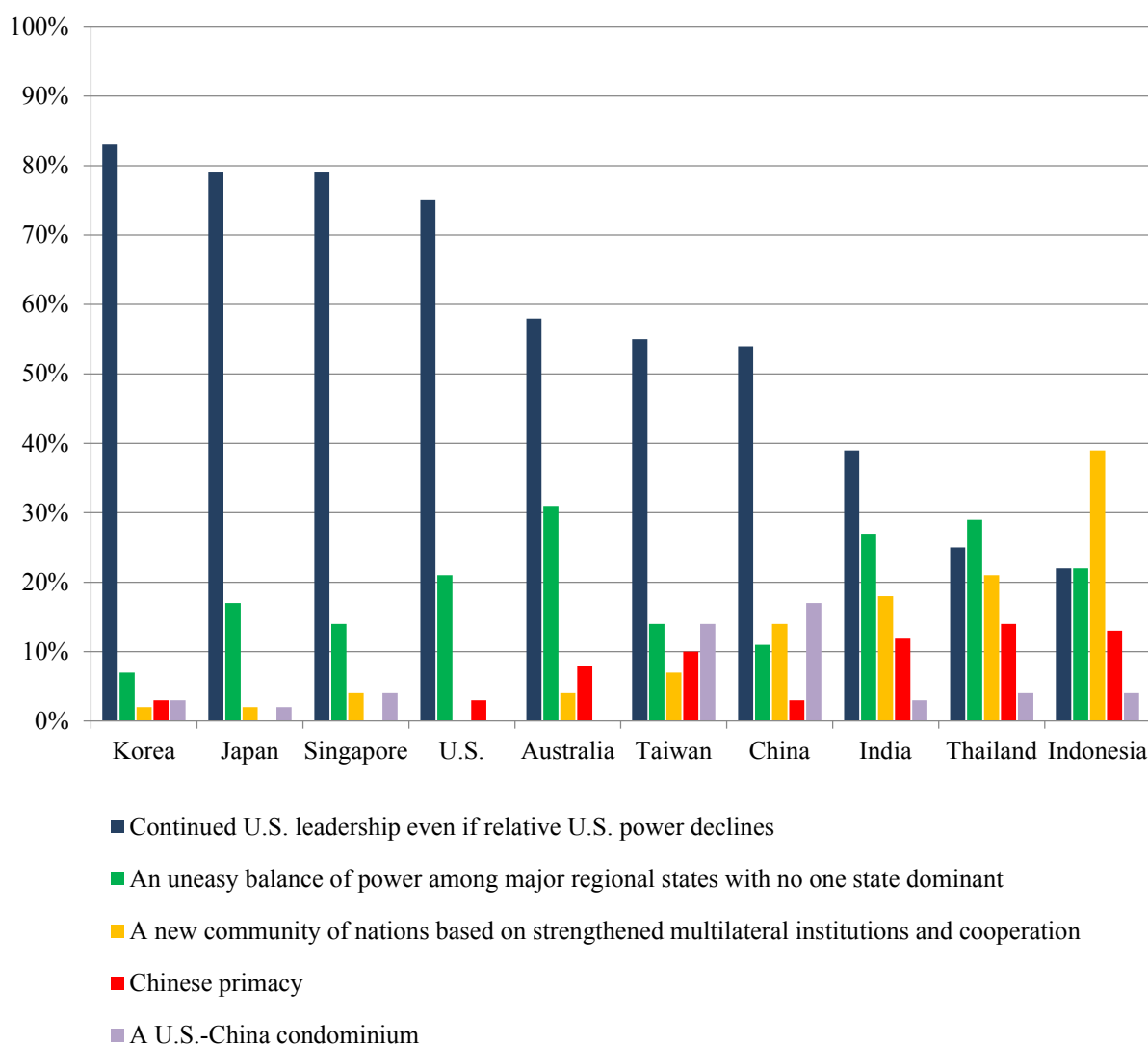
The reason that a majority of respondents across the region expect China to exert the greatest power in 10 years is evident in Figure 3, in which 56 percent of respondents expected China to be their country's most important economic partner in 10 years, followed by the United States at 28 percent. Among American allies, Australia and South Korea stood out for their expectations that China will be their major economic partner (77 percent for Australians and 86 percent for South Koreans). However, both Australian and South Korean experts expressed strong support for and expectations of a continued U.S.-led regional order as seen in Figure 4. Japanese respondents predicted that the United States will be their country's closest economic partner in 10 years, which also stands out and likely reflects not only growing anxiety about political and economic risk within China, but also anticipation of increased investment in American energy and infrastructure over the coming decade. It is worth highlighting that Chinese respondents overwhelmingly saw the United States as their major economic partner in 10 years (83 percent of respondents), while only 46 percent of Americans saw China as being their nation's most important future economic partner. This picture of asymmetrical dependence, though based on impressions rather than market predictions *per se*, might suggest one reason that Beijing will seek to avoid a dangerous confrontation with the United States for the foreseeable future.



Finding Two: U.S. Leadership Will Nevertheless Remain Strong

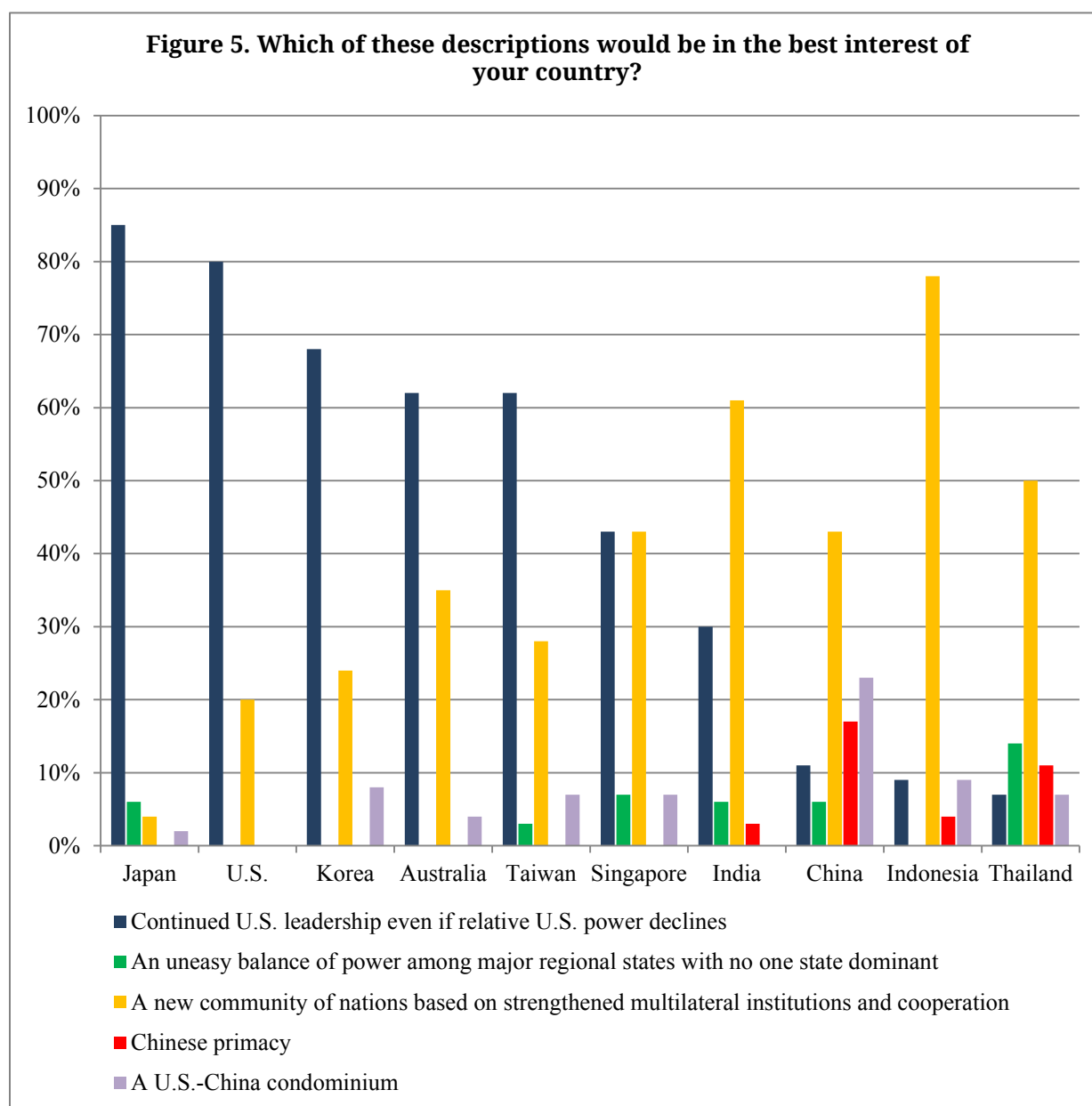
Despite expectations that China will be the most powerful country in the region in 10 years, experts continue to see continued U.S. leadership even with declining U.S. relative power. As Figure 4 indicates, when asked about the future dynamics of international relations in East Asia over the next decade, 57 percent of respondents predicted continued U.S. leadership. South Korean and Japanese respondents were most certain of continued U.S. leadership, but a majority of Chinese experts also agreed. Although this result may seem to contradict the earlier data indicating that regional experts expect China to surpass the United States in terms of power, the question asked respondents to describe the dynamics of international relations in the region (not which country would have the most power). Very few respondents could picture anything other than continued U.S. leadership, with only 7 percent predicting a Sino-centric system and 5 percent predicting a Sino-U.S. condominium. The sources of U.S. leadership, in other words, depend on more than perceptions of relative or absolute U.S. power alone.

Figure 4. What is your expectation for the dynamics of international relations in East Asia over the next decade?



The expectation that Asia will continue to see a U.S.-led regional order almost certainly reflects the desire of most regional actors to sustain that U.S.-led order. As Figure 5 indicates, a plurality of respondents felt that continued U.S. leadership is not only likely, but would be in the best interests of their country. Respondents in India, Indonesia, and Thailand all expressed a preference for a regional community based on multilateral institutions, but as Figure 4 indicated, few of those experts expect such a community in the coming decade (with the exception of Indonesians).

Meanwhile, U.S. allies and partners such as Japan, Australia, Korea, and Taiwan—and of course Americans themselves—had a strong preference for a U.S.-led regional order, regardless of the expectations they had for economic relations with China. American influence in the region rests on the combination of those who want that leadership and



those who desire a regional community but do not yet think such a community is likely. Only 11 percent of Chinese respondents preferred a U.S.-led regional order, though this still was higher than the number of Indonesians and Thais. In contrast to the Indonesian and Thai respondents, however, Chinese experts were more divided on what regional order they wanted to replace a U.S.-led order. The clarity of American respondents' preference for a U.S.-led order (80 percent) stands in contrast to the Chinese respondents' ambivalence about a Sino-centric order (17 percent).

Finding Three: Broad Support for the U.S. Rebalance, but Concern about Implementation

Given the broad expectation of and desire for continued U.S. leadership, it follows that an average of 79 percent of respondents expressed support for the Obama administration's strategic rebalance to Asia, as seen in Figure 6. The broad backing among American experts (96 percent) indicates that support for the rebalance to Asia has strong bipartisan support—at least among experts—and is therefore likely to be sustained by future administrations. China was the only country where a majority of respondents disapproved of the rebalance, by a margin of 77 to 23 percent. By presenting the responses geographically, Figure 6 suggests: (1) how out of sync Chinese views of the rebalance are with the rest of the region; (2) the “demand pull” for the rebalance from states within the region concerned about China; and (3) the reason Chinese observers might see the policy resembling containment. It is worth noting here that not all regional states could be surveyed and these results do not include the Philippines and Vietnam, which are now in stand-offs with China in the South China Sea and would likely demonstrate strong support for the rebalance if surveyed. On the other hand, the survey also does not include the Russian Federation, where support for the rebalance could be low in light of recent events in Ukraine.

Despite broad support for the rebalance outside of China, there are mixed views about its effectiveness to date—particularly among Americans and close U.S. allies and partners. When asked to evaluate the rebalance, 51 percent of respondents suggested it is the right policy but is not being resourced or implemented sufficiently, followed by 24 percent who felt it is reinforcing regional stability and prosperity. The consensus among CSIS experts observing this result was that allies and partners continue to have questions about: (1) the influence of extra-regional crises such as Syria and Ukraine; (2) the lack of presidential engagement with the Congress on Trade Promotion Authority and the Trans-Pacific Partnership; (3) the future of the U.S. defense budget; and (4) the commitment of the second-term Obama foreign policy team to the rebalance. However, other observers may draw different conclusions.

Notably, China was the only country where a majority of respondents believed the rebalance is too confrontational toward China (74 percent compared with a regional average of 18 percent). Chinese impressions of the rebalance remain a problem for the United States, but experts in Beijing should take note of the strong support for the rebalance elsewhere in the region.

Figure 6. Do you support the Obama administration's goal of a strategic U.S. "rebalance" to Asia?

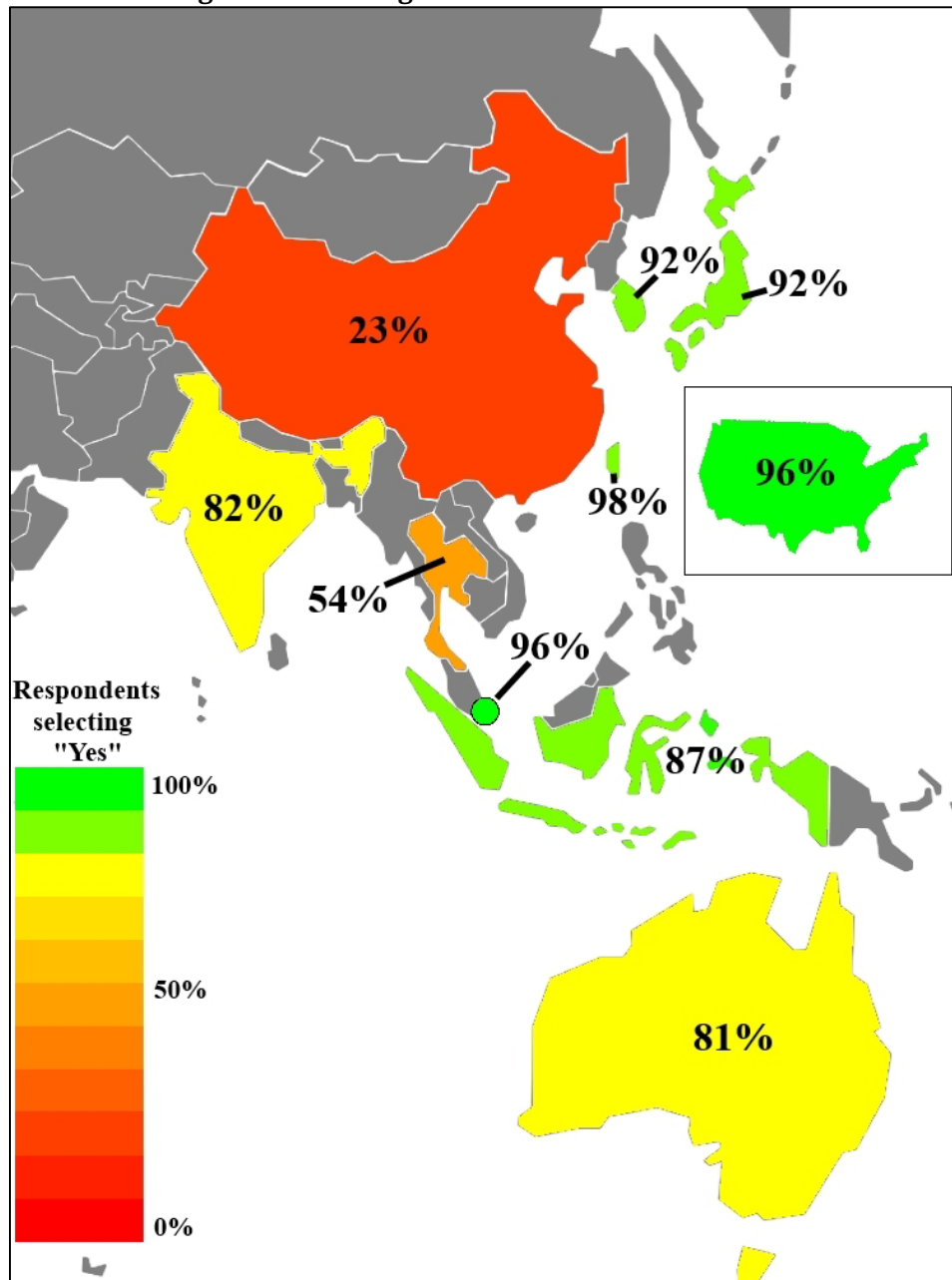
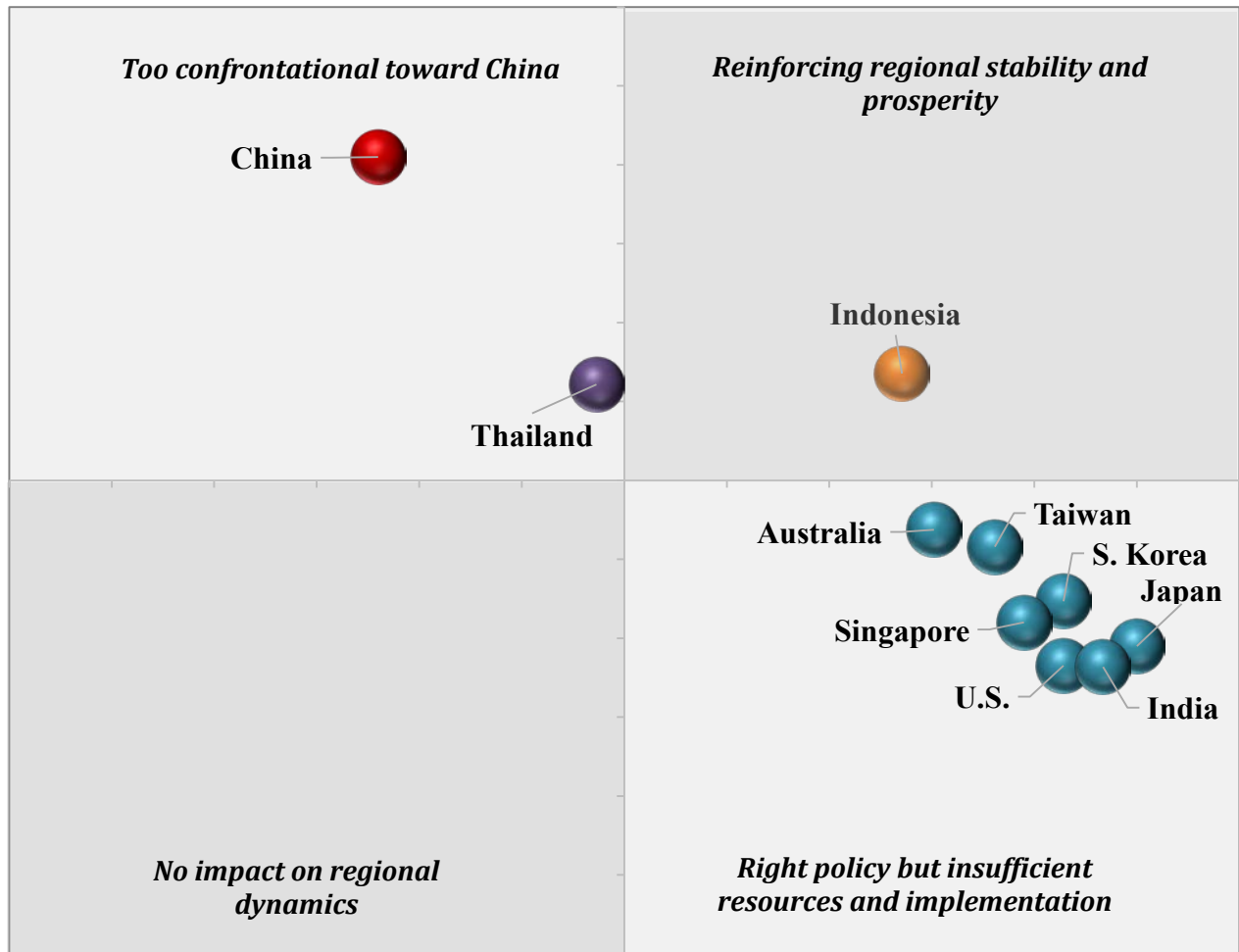


Figure 7. Which of the following statements best represents how you would evaluate the U.S. “rebalance” to Asia?



Finding Four: Territorial Confrontations Are the Greatest Obstacle to Regional Community Building

The survey found strong support for the goal of establishing an East Asia Community, with 89 percent of respondents in favor—a marked increase from the 2008–2009 survey result of 81 percent (although “strong support” held relatively steady at 36 and 37 percent, respectively).³ However, the 2014 survey once again showed skepticism about actually building a regional order around multilateral institutions. Most respondents (54 percent) in 2014 did express the view that there had been “limited” progress towards the goal of an East Asia Community in recent years. However, when asked to characterize the dynamics of international relations they expect in the region in 10 years (see Figure 4), only 11 percent expected a community of nations based on strengthened multilateral institutions and regional cooperation.

³ The 2008–2009 survey targeted strategic elites in nine Asia Pacific countries: Australia, China, India, Indonesia, Singapore, Thailand, Japan, South Korea, and the United States.

Figure 8. Rate the following as obstacles to community building in East Asia Average response on a scale of 1 to 10, with 1 shown in green meaning “Not an obstacle at all” and 10 in red meaning “A very significant obstacle.”											
	Average of all countries	Australia	China	India	Indonesia	Japan	Korea	Singapore	Taiwan	Thailand	U.S.
Failure to resolve territorial issues	7.9	8.2	7.8	7.6	8.4	6.9	8.1	8.4	8.1	7.3	8.0
Failure to resolve historical issues	7.6	7.4	8.2	7.5	6.7	6.1	8.6	8.3	8.0	6.9	7.8
Uncertainty about a rising China	7.2	7.3	5.5	7.7	6.3	8.6	7.3	7.5	7.9	6.0	8.0
Lack of common values	6.7	6.5	6.3	6.5	7.0	7.2	6.8	6.4	7.1	6.0	7.0
Uncertainty about continued American preeminence	6.1	5.8	5.9	6.7	5.7	6.2	6.3	6.1	6.3	5.8	6.4
Uncertainty about North Korea	6.4	5.3	6.5	7.3	6.2	5.8	7.8	5.9	7.6	6.4	5.2
Uneven levels of economic development	6.2	5.9	4.5	6.7	7.0	5.8	6.4	7.0	6.3	6.8	5.8
Uncertainty about Japan	5.8	5.4	7.3	5.2	5.5	4.3	7.3	6.1	6.2	5.3	5.2
Uncertainty about India	4.6	4.6	4.3	4.9	4.6	4.1	4.4	5.0	5.2	5.1	3.7

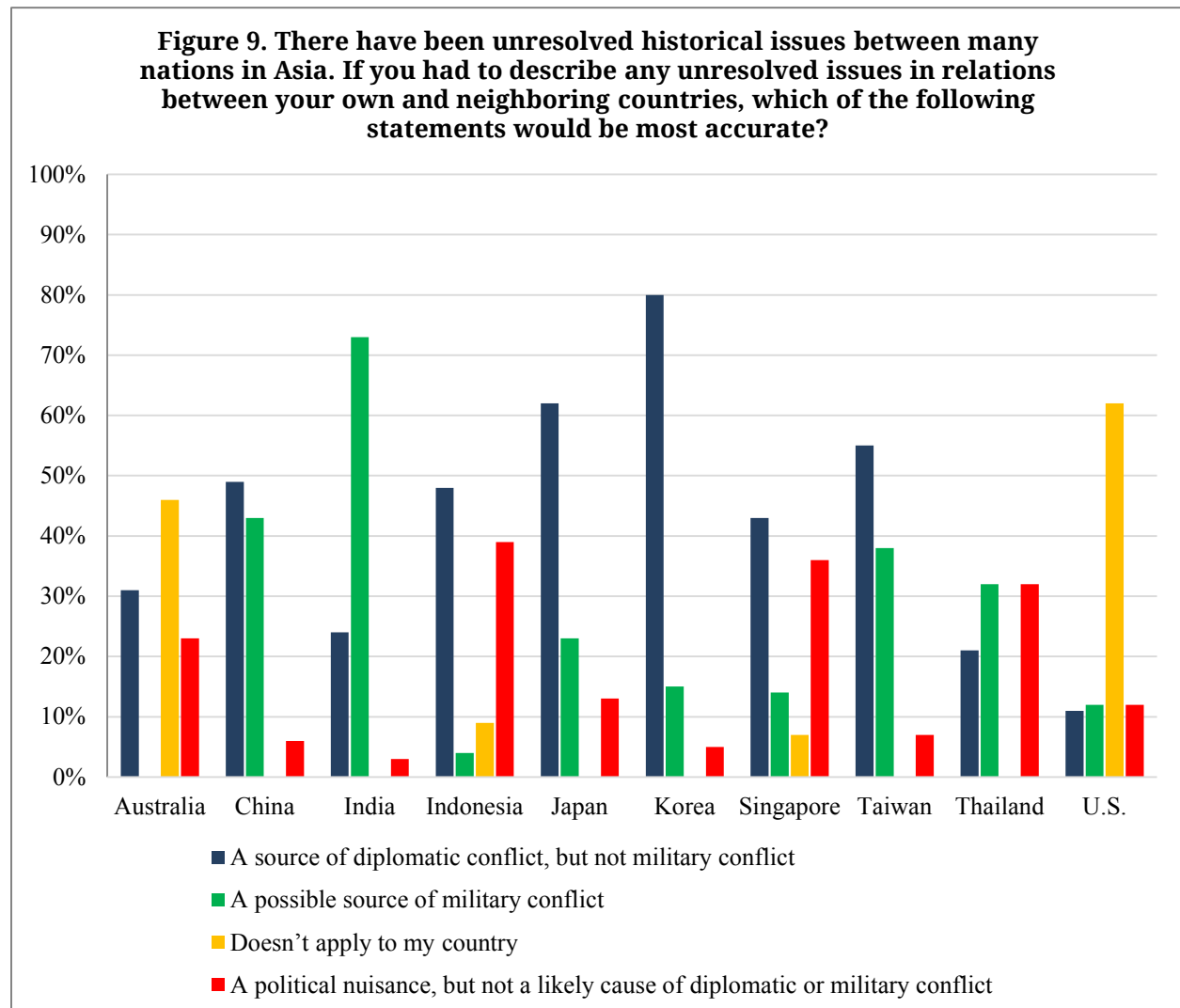
Japanese respondents are now most skeptical of the East Asia Community concept, but this could reflect former prime minister Yukio Hatoyama’s use of the phrase in 2009 as an implicit attack on the U.S.-Japan alliance. As Figure 8 indicates, experts identify the most significant obstacle to community-building as territorial and historical disputes, followed closely by uncertainty about China.⁴ In other words, Asia’s past is increasingly obstructing its future. Uncertainty about Japan is not seen as a major obstacle, except in China and Korea. However, concern about territorial disputes across the region is not misplaced. When asked whether their country should resort to military force to reverse a hostile takeover of territory by the other side should diplomacy fail, over 80 percent of Chinese and Japanese respondents said yes.

⁴ Participants were asked to rate nine potential obstacles to community building in East Asia on a scale of 1 to 10, with 1 meaning not a major obstacle at all and 10 meaning a very significant obstacle.

Finding Five: Northeast Asia Struggling with History

Respondents in South Korea and China were even more concerned about historical issues than territorial issues. In addition, 88 percent of respondents in China, 62 percent in Taiwan, and 60 percent in South Korea said Japan's impact on regional security was very or slightly negative. In the 2008–2009 survey, respondents ranked Japan sixth as a problem for regional security, and Figure 8 indicates that Japan is not seen as a major obstacle to regional community building. Nevertheless, the Japanese government should be concerned about the apparent alignment of Korean and Chinese views on the history problems with Japan, even if these views are generally out of sync with the rest of the region.

At the same time, Korean and Chinese views of historical issues with Japan diverge in important ways. Where 80 percent of Korean respondents expect historical issues with Japan to remain a purely diplomatic or political issue, 43 percent of Chinese thought these issues could be a source of military conflict (only 15 percent of Korean respondents thought so).



Finding Six: Regional Economic Crises Seen as the Greatest Challenge to National Security

While territorial and historical disputes clearly worry Northeast Asians and are seen across the region as the greatest obstacle to community building, Figure 10 indicates that strategic elites are most worried about economic and financial crises. Ultimately, economic prosperity remains the key to continued stability just as much as the reverse. Indonesian respondents, perhaps facing less of a traditional state-based threat than Northeast Asian respondents, exhibited the greatest concern about economic and financial challenges.⁵ Territorial and historical disputes came in second on average, with South Korea, China, Taiwan, India, and Japan expressing the most concern, in that order. India, of course, faces multiple territorial and historical disputes, not only with China but also with Pakistan. Climate change emerged as the third-greatest challenge on average,

Figure 10. How concerned are you about the following challenges to your nation's security?											
Average score from a ranking on a scale from 1 to 10, with 1 shown in green meaning "Not concerned at all" and 10 shown in red meaning "Extremely concerned."											
	Average of all countries	Australia	China	India	Indonesia	Japan	Korea	Singapore	Taiwan	Thailand	U.S.
Regional economic and financial crises	7.2	5.4	7.2	7.1	8.3	6.9	7.3	8.1	7.4	7.7	6.2
Territorial and historical disputes	6.9	5.1	7.9	7.4	6.7	7.1	8.1	6.7	7.5	6.8	5.6
Climate change	6.8	6.7	6.5	7.8	7.1	5.9	6.0	7.8	6.8	6.9	6.3
Nuclear proliferation	6.5	5.2	7.0	7.5	5.3	7.2	8.2	6.2	5.7	6.4	6.7
Terrorism	6.5	5.5	7.2	8.3	7.8	5.8	5.6	7.6	4.9	6.8	5.7
Human security needs, such as water, food, and education	6.5	5.5	7.0	7.9	8.5	5.2	5.5	7.0	5.9	7.0	5.0
Natural disasters	6.4	5.3	6.0	6.7	8.2	7.9	4.8	5.9	7.0	7.3	4.7
Health pandemics in the region	6.2	5.5	6.2	6.5	6.4	5.5	5.3	7.6	6.6	7.0	5.0
Lack of natural resources	5.8	3.1	6.9	7.2	5.9	6.3	5.9	6.5	6.7	6.5	2.9
Collapse of North Korea	5.6	4.9	6.3	5.0	3.3	7.4	8.3	4.9	5.9	4.0	6.0
A military attack on your country by a foreign country	5.2	2.6	4.1	6.4	5.2	6.1	6.5	6.0	6.9	4.9	2.9
Internal ethnic conflict	5.1	3.2	6.6	6.8	7.1	3.0	3.4	6.0	5.2	6.5	3.1

⁵ Participants were asked to rate their level of concern about 12 potential challenges to their nation's security on a scale of 1 to 10, with 1 meaning not concerned at all and 10 meaning extremely concerned.

led by India and Singapore, with Northeast Asians relatively less concerned. South Korean respondents stood out, understandably, for being transfixed by the problems of proliferation, military attack, and the possible collapse of North Korea.

Finding Seven: Support for Trans-Pacific Regional Economic Framework Strong

When asked about the importance of various economic frameworks to their country's economic future,⁶ respondents ranked the Asia-Pacific Economic Cooperation (APEC) forum and the Group of 20 (G-20) highest, with 82 percent considering them either very or somewhat important, followed by the Association of Southeast Asian Nations Economic Community (81 percent) and the Trans-Pacific Partnership, or TPP (75 percent).

At the same time, Figure 11 also suggests that there is less of a “winner-takes-all” view of regional trade and economic groupings. With the exception of American respondents' views of regional agreements that exclude the United States and some East Asian respondents' views of the G-7/G-8, over 50 percent of respondents in all countries identified *each* regional grouping as important, even if the respondents' own country was not included. For example, while Chinese respondents assigned higher importance to the Regional Comprehensive Economic Partnership (RCEP) and other intra-regional groupings that exclude the United States, 63 percent of Chinese respondents also identified the success of TPP as “important” to their country's future. While it is possible that this was interpreted to mean “important” in a negative way, the result still probably reflects other anecdotal evidence CSIS experts have found that Beijing no longer views TPP as purely a threat. Indeed, Chinese economic experts now appear to see TPP as a possible external source of leverage for internal reforms, much as the World Trade Organization was in the 1990s.

The fact that APEC has the broadest support is particularly striking given expectations in some parts of the region and the United States that APEC might become irrelevant with the rise of the East Asia Summit. The strong support for the G-20 also parallels findings in the 2008–2009 survey that experts in Asia often have more confidence in global institutions than their own regional forums. Of course, it goes without saying that failure to complete TPP would lead to a different result on this question in the future. TPP remains the most important new economic development in Asia.

⁶ Participants were asked to rate the importance of seven economic frameworks on a scale of 1 to 4, with 1 meaning very important and 4 meaning not at all important.

Figure 11. How important is the success of each of the following economic frameworks to your country's future?

Percentage responding “Very important” or “Somewhat important,” with green representing more importance and red representing less importance.

	Average of all countries	Australia	China	India	Indonesia	Japan	Korea	Singapore	Taiwan	Thailand	U.S.
Asia-Pacific Economic Cooperation	82	81	71	76	95	85	73	93	93	79	73
G-20	82	81	71	76	95	85	73	93	93	79	73
ASEAN Economic Community	81	77	80	91	95	88	60	96	72	93	54
Trans-Pacific Partnership	75	54	63	69	43	92	83	82	100	68	98
Regional Comprehensive Economic Partnership	72	54	83	75	74	79	68	83	100	75	24
China-Japan-Korea Trilateral Free Trade Discussion	69	54	85	45	56	75	86	82	87	72	47
G-7/G-8	58	50	26	79	43	94	64	64	41	43	79

Finding Eight: Robust Regional Support for Democratic Values, but now Americans More Doubtful

In the 2008–2009 survey, respondents listed democratic norms as a high priority for regional community building, with Americans near the top and Chinese respondents most uncertain about these priorities. In a surprising change, Americans now rank at the bottom of the surveyed countries in the priority they placed on these norms for regional community building. On human rights and women’s empowerment, American experts ranked last, below Chinese counterparts. On promoting free and fair elections, Americans were second from the bottom. The declining American enthusiasm for these democratic norms stood in stark contrast to increased support among Asian respondents since the 2008–2009 survey, as indicated in Figures 12 and 13. For example, respondents assigned greater relative importance to human rights in 2014 (84 percent) than in 2008–2009 (80 percent). Indonesia (96 percent), Japan (94 percent), and Australia (88 percent) were most enthusiastic, and the United States expressed the least support (72 percent). Support for strengthening domestic political institutions increased from 78 to 82 percent relative to 2008–2009. Thailand and Indonesia topped the list at 96 percent, followed by

Taiwan and Singapore at 89 percent. Japanese respondents were least enthusiastic at 71 percent.

It is possible that American experts' skepticism about the efficacy of these norms in the process of community-building in Asia reflects setbacks in the Middle East, particularly in Iraq, Afghanistan, and Egypt. It is also possible that American experts are channeling the diminished public attention to these issues by the Obama administration in the context of the rebalance to Asia. Whatever the cause, the American views are oddly out of sync with fellow democracies in the region. Support for democratic norms in Asia has always been an important pillar of U.S. foreign policy toward the region and the survey results suggest there is now probably more support for these norms within the region than at any point in history. There is one important caveat indicated in Figure 14—developing nations like India and Indonesia also want continued respect for noninterference in internal affairs. This presents a challenge in terms of implementation and tactics, but strategically U.S. experts may be missing an important trend and opportunity within the region.

Figure 12. How important are each of the following to the establishment of an East Asia Community?

(Percentage responding "Very Important" and "Somewhat Important")

U.S. Respondents

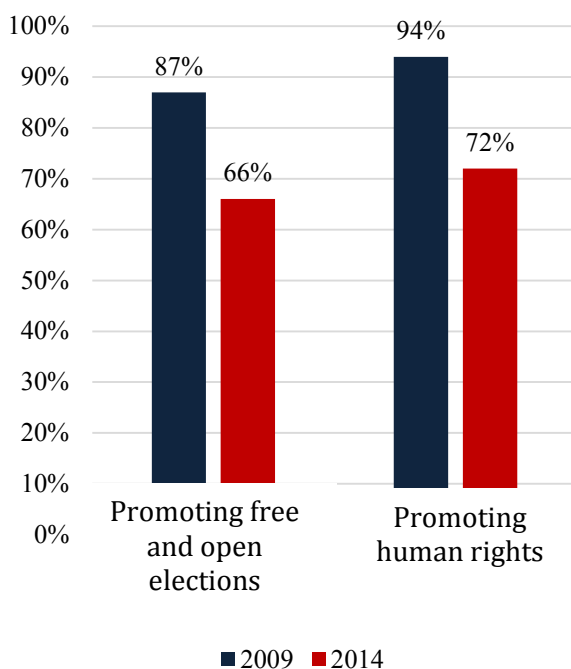


Figure 13. How important are each of the following to the establishment of an East Asia Community?

(Percentage responding "Very Important" and "Somewhat Important")

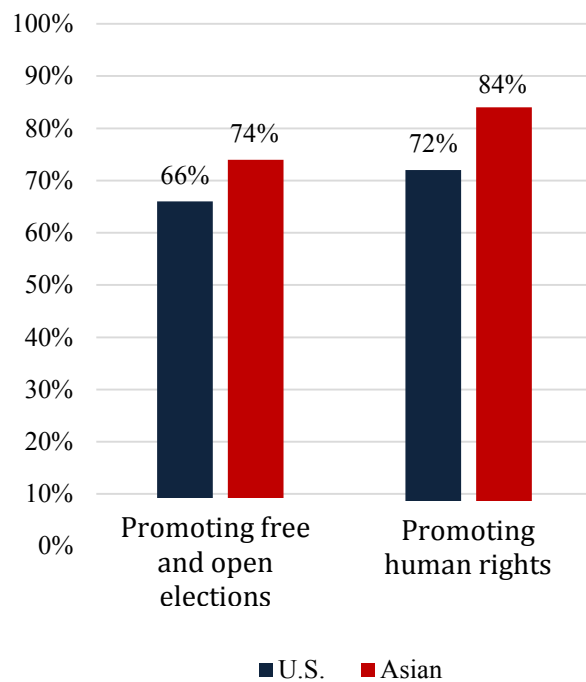


Figure 14. How important are each of the following to the establishment of an East Asia Community? Percentage responding “Very Important” and “Somewhat Important” with green representing more importance and red representing less importance.											
	Average of all countries	Australia	China	India	Indonesia	Japan	Korea	Singapore	Taiwan	Thailand	U.S.
Establishing a framework for trade and regional economic integration	98	93	100	100	100	98	95	100	100	93	98
Preventing inter-state conflict	97	100	100	100	91	96	99	100	100	93	95
Promoting confidence and mutual understanding	97	100	100	88	100	98	99	100	97	93	94
Promoting good governance	91	92	88	79	100	97	92	100	94	82	88
Promoting greater defense and security cooperation	86	85	85	88	82	81	90	100	90	68	86
Promoting human rights	83	88	80	82	96	94	81	78	83	78	72
Strengthening domestic political institutions	82	81	80	88	96	67	71	89	89	86	76
Developing a regional identity	80	66	94	91	69	75	88	89	87	82	62
Maintaining national unity	78	77	85	91	96	55	57	93	79	79	64
Promoting free and open elections	73	77	37	76	87	87	69	72	83	75	66
Promoting common diplomatic policies	73	57	80	76	82	61	77	79	79	71	67
Noninterference in internal affairs of other countries	73	73	83	91	79	45	51	86	90	75	53
Promoting women’s empowerment	63	61	57	72	74	59	52	64	76	61	52

CSIS found other interesting developments with respect to regional views of future community building:

- Though a majority of respondents to this survey, 58 percent, felt progress has been made toward establishing an East Asia Community, only 4 percent cited “significant progress.” Japanese respondents were least enthusiastic, with 62 percent concluding there has been a limited or significant setback in working toward that objective. This suggests Japanese strategic elites may be souring on what was once a popular concept in Japan.

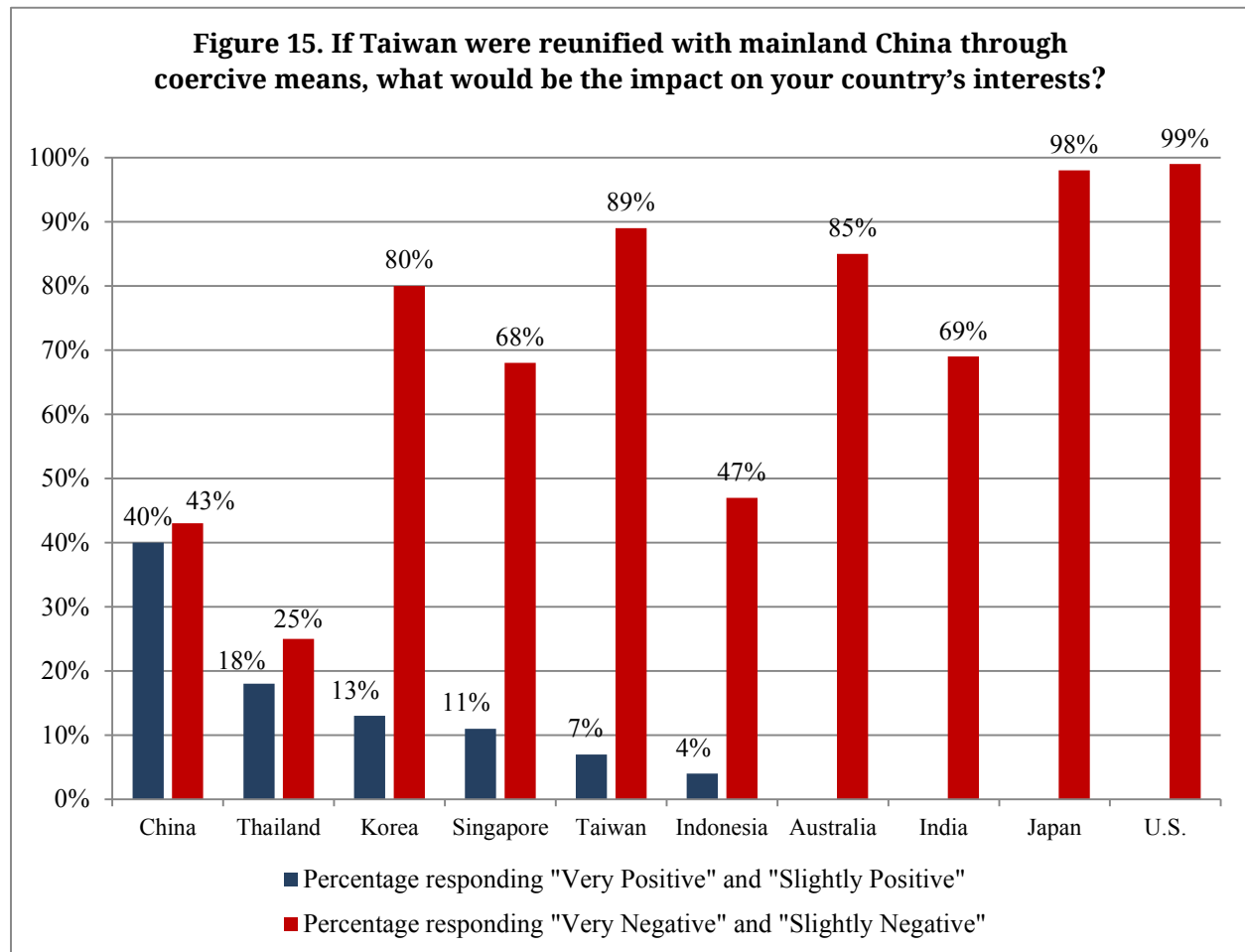
- When asked to rate important elements for regional community building, establishing a framework for regional trade and economic integration (98 percent “very” or “somewhat” important on average), preventing inter-state conflict (98 percent), and promoting confidence and mutual understanding (97 percent) ranked highest, which tracks exactly with the 2008–2009 survey.⁷
- Good governance rose to fourth most important, rising to 91 percent in 2014 from 85 percent in 2008–2009. Most enthusiastic for good governance were Indonesia (100 percent), Singapore (100 percent), and Japan (97 percent). Least enthusiastic was India (79 percent).
- Support for the relative importance of defense and security cooperation increased from 76 percent to 86 percent, an encouraging development reflecting a greater focus on security in multilateral gatherings such as the ASEAN Defense Ministers Plus (ADMM+). But this can also be interpreted as a sign that the region has become more unstable.
- Developing a regional identity emerged as more important relative to 2008–2009, with 80 percent in 2014 identifying it as very or somewhat important, compared to 60 percent in 2008–2009. China (94 percent), India (91 percent), and Singapore (89 percent) were most supportive.
- Respondents were more supportive of maintaining national unity, at 78 percent in 2014 compared to 73 percent in 2008–2009. Indonesia (96 percent), Singapore (93 percent), and India (91 percent) were most enthusiastic, while Japan (55 percent) and South Korea (57 percent) were least enthusiastic.
- Promoting common diplomatic policies garnered more support, 73 percent compared to 63 percent in 2008–2009. China (80 percent), Singapore (79 percent), and Taiwan (79 percent) assigned the greatest importance, with Japan (61 percent) the lowest. This may reflect efforts within the ARF to establish principles for conduct in the South China Sea, as well as the East Asia Summit’s addition of U.S. and Russian leaders in recent years.
- Women’s empowerment was new to this survey and over half of respondents in every country ranked it as very or somewhat important to regional community building. However, of the options listed it was considered the least important element for regional community building with 63 percent support. Taiwan was most enthusiastic (76 percent), followed by Indonesia and India. Americans and South Koreans were least enthusiastic (52 percent). Given studies demonstrating the importance of women’s inclusion to economic growth and the comparatively low level of women’s labor force participation in Asian economies, it will be interesting to see whether this theme rises in priority in subsequent surveys.
- Experts across Asia also seem to accept the concept that the region should be thought of as an “Indo-Pacific” sphere. Overall, 21 percent said the concept was very relevant and 44 percent answered somewhat relevant. Maritime powers (India, Japan, Australia, and the United States) were most enthusiastic, with 58 percent of Indians

⁷ This survey listed 13 elements of regional community building compared to 12 in 2008–2009. Some elements differed.

saying the Indo-Pacific concept was very relevant, while continental powers (China, South Korea, and Thailand) were less enthusiastic. Chinese experts were most skeptical with 43 percent responding that the concept was not very relevant and 11 percent responding that it was not relevant at all.

Finding Nine: Peace in the Taiwan Strait Matters to the Entire Region

Though cross-strait relations have not been a major topic of conversation outside of Taiwan and China (and sometimes the United States and Japan) in recent years, respondents nevertheless continue to see peace and stability in the strait as critical to their national interests. Seventy percent of respondents felt that if Taiwan were reunified with mainland China through *coercive* means that would have a slightly or very negative impact on their country's interests. The United States and Japan expressed the most concern (99 and 98 percent either slightly or very negative, respectively), followed by Taiwan (89 percent), Australia (85 percent), and South Korea (80 percent). Respondents in China were more negative than positive by a margin of 43 to 40 percent. Given the controversy over the trade and services agreement between Beijing and Taipei and upcoming elections in Taiwan in 2016, this space will be important to watch.

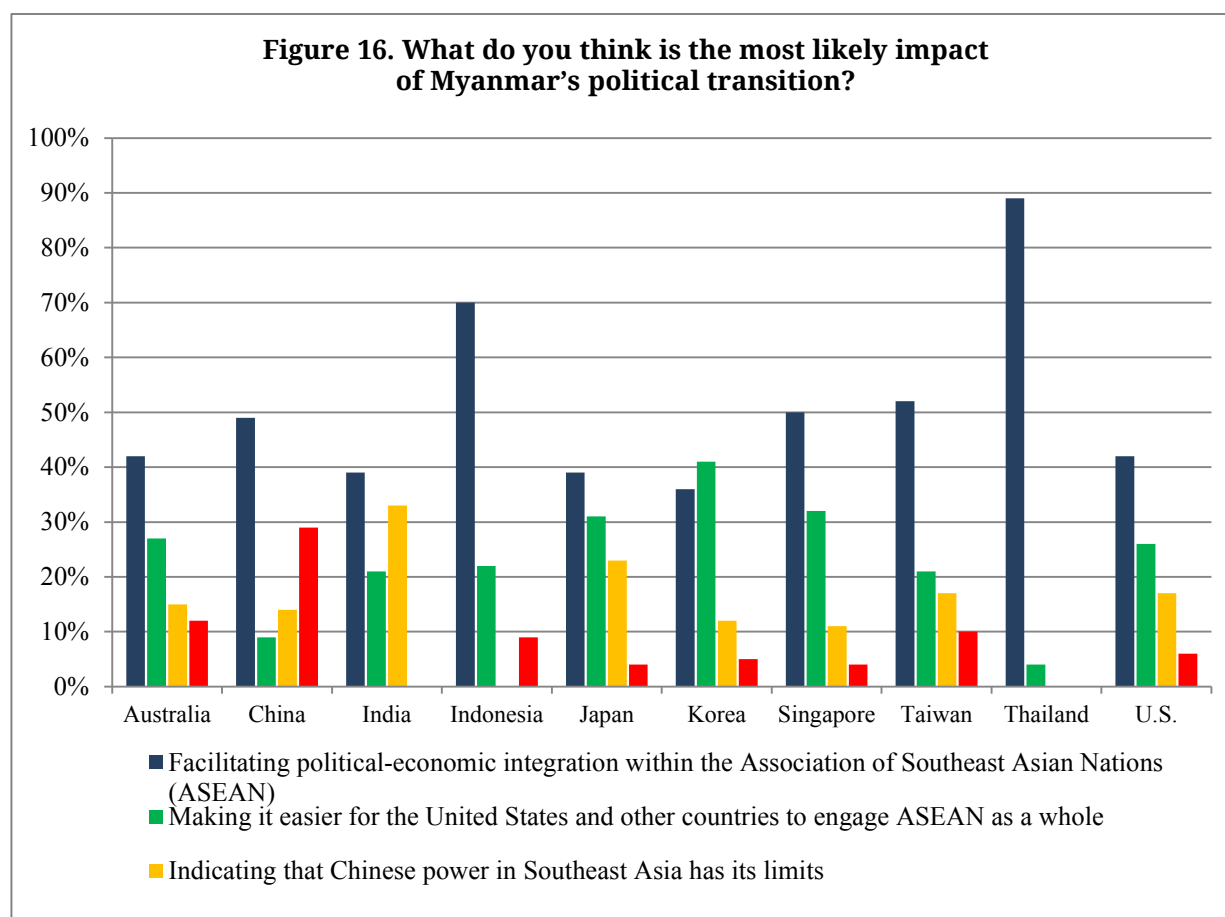


Observations on Burma/Myanmar

Burma/Myanmar was excluded from average responses because of a low response rate, due perhaps to intermittent Internet access and the still relatively few private foreign policy and security experts following decades of military rule.

The military government of Burma/Myanmar installed a quasi-civilian government in 2010 followed by a dramatic series of political and economic reforms, including the release of political prisoners and peace talks with the ethnic minorities. These steps resulted in the easing of economic sanctions and the launching of aid programs by the United States, European Union, and others, which allowed the government to ease its longtime dependence on China for investment and aid.

Survey respondents generally considered these developments important for ASEAN and broader diplomacy in the region. In response to a question about the likely impact of Burma/Myanmar's political transition, a majority of respondents (51 percent) felt it is facilitating political-economic integration within ASEAN. A plurality of Chinese respondents agreed with that assessment, but 29 percent saw no significant impact, the highest among all countries, as indicated in Figure 16. Overall 23 percent of respondents believed Burma/Myanmar's political transition is making it easier for the United States and other countries to engage ASEAN as a whole.



3 | Conclusions and Recommendations

- *Demonstrate Implementation of the Rebalance.* Although regional elites (outside of China) tend to be supportive of the U.S. goal of rebalancing to Asia, most of those in the region question the administration's implementation of the rebalance. U.S. leaders need to convince allies and partners that the rebalance is real and that it is being properly resourced, not only in the military sphere, but also in the economic and values areas. Asian elites are judging the U.S. rebalance based on deeds rather than words.
- *Build U.S. Political Support for the Trans-Pacific Partnership.* Most Asian elites believe that the Trans-Pacific Partnership is an important economic framework for countries in the region, even elites in countries that are not currently engaged in TPP negotiations. The administration should work both to conclude existing negotiations and then to expand the number of TPP participants. At the same time, however, it will be critical that U.S. leaders demonstrate the intent and capability to build U.S. domestic political support for TPP and to make the political arrangements necessary to ratify an agreement if one is concluded.
- *Return Values to the U.S. Agenda in Asia.* Asian elites have a demonstrated interest in promoting the values that undergird the existing international order, such as human rights and free and open elections. Americans continue to treasure the values of their founding fathers, but have become more reticent about articulating them as a goal of U.S. policy in Asia. It is important for the administration to restore these values in their articulation of the purpose of the rebalance, not only because there is resonance in the region, but also because the American interest in these values is seen as evidence of the American commitment to democratic allies within the region.
- *Continue Efforts to Ameliorate Tensions from Historical Issues.* Asian elites remain concerned about historical issues, particularly in Northeast Asia. These problems will prove intractable going forward because of domestic politics in all countries concerned, but Japan would do well to continue demonstrating caution and sensitivity, particularly toward South Korea, which aligns with Japanese views of the region's future order in most other respects.
- *Focus on Thailand.* Thailand's domestic instability is a continuing challenge, but equally concerning from the perspective of the U.S.-Thai alliance are Thai elites' remarkably negative views of the United States. Shared interests, objectives, and expectations are the foundation of a strong alliance, but Thailand is a consistent outlier in its assessment of the U.S. role in the region. Without an improved political climate (this survey was completed prior to the military coup on May 22, 2014), the U.S. alliance with Thailand will not be sustainable. The allies must dedicate themselves to rebuilding relationships once the Thai political situation stabilizes. At the same time, the United States and other democracies must stand by the principles

of civilian rule and free and fair elections. This is a delicate balancing act that will require close coordination with other concerned states in the region.

- *Strengthen the U.S.-India Relationship.* India's incoming Bharatiya Janata Party (BJP) government provides the United States an opportunity to improve bilateral ties with India. The two largest democratic states are natural partners, particularly given that Indian and American elites share many common views on economics, security, and values in Asia. The BJP may want to move slowly on bilateral ties with the U.S. government, at least initially, due to the hangover effect of revoking the new prime minister's visa back in 2005. However, business relations should grow quickly, realizing the expectation of a plurality of Indian respondents that the United States will be India's main economic partner 10 years from now. Of course, there are also differences with respect to how strategic elites in both countries view the desirability of a multilateral-based security order in Asia and the saliency of noninterference in internal affairs. Nevertheless, the United States should work to deepen its relationship with India and broaden cooperative efforts with other countries that share similar values, such as Japan, Australia, and ASEAN members.
- *Encourage China to Play a Constructive Security Role.* Although most Asian elites view China's economic role as positive, China's neighbors are growing increasingly concerned about China's security behavior. The United States should continue its efforts to work with regional states to encourage China to play a constructive role, particularly in the East and South China Seas. The United States should continue to stress to China the importance of respecting and strengthening the existing rules-based system that encourages openness, transparency, and peaceful dispute resolution. Chinese suspicion of the rebalance to Asia will prove difficult to deflect, but surveys like this one may help to indicate why the United States and countries in the region are taking steps to preserve the status quo against coercion. At the same time, it is worth noting that Chinese experts' negative views of future American leadership in the region are not offset by any enthusiasm for Chinese leadership. In many areas in this survey, Chinese and American elites demonstrate overlapping concerns. It will be important to continue exploring ways to deepen bilateral cooperation in such areas.
- *Continue to Support Regional Institution Building.* In the last five years, regional elites (particularly in ASEAN) have grown even more focused on promoting regional economic integration, confidence and mutual understanding, common diplomatic policies, and defense and security cooperation. The United States should continue its efforts to encourage and support regional institution building, which can help to tie the region together and reinforce regional stability and security despite changing regional dynamics. U.S. leadership on the TPP and APEC and participation in the East Asia Summit have helped to reduce what was once seen as a binary choice between trans-Pacific and East Asian architecture. Now implementation and sustained engagement will be key.

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