



GLOBAL EXPERT SURVEY

GLOBAL AND REGIONAL DYNAMICS
AFTER COVID-19

2020



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This survey report is designed to gain expert insights and assessments from all over the world on how the pandemic has and will shape global and regional order.

The report accepts input which can be addressed to the authors. The views in this research are personal opinions of the researchers involved and do not represent the institutional view of CSIS Indonesia.

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Foreword

The year 2020 will be remembered as an essential turning point. Observers and analysts of strategic issues worldwide will likely agree that the unprecedented onslaught of the COVID-19 pandemic is much more than a public health crisis. Instead, the health disaster has been massively influential in state relations, prompting changes in their political-security and economic dynamics and putting shade over the future of global governance.

Indeed, the disturbance to the mobilization of people and goods has not only been influential towards the landscape of economic interaction, such as in triggering changes in the global supply chain and accelerating digitalization. It has also exacerbated some of the political dynamics that have been brewing in recent years. Geopolitical tensions are rising between neighbors seeking to assert control over territories. Unilateralism and even protectionism made a big comeback as states' borders rigidify. As people look to authorities to save lives, leadership at different levels is being questioned.

Governments are under immense pressure to respond to the health crisis, while their leadership towards various other social, economic, and political problems is constantly being put in the spotlight. As we have observed around the world, they have also responded with varying policies and behaviors. Under such context of acting amidst pressure from extraordinary challenges, views and perceptions have become essential elements to observe. These elements seem to play more role in determining the priorities, methods, and eventually, strategies employed by decisionmakers in an unprecedented time.

Within such background, we in CSIS decided to conduct a survey on the developing views of experts to learn about the current popular opinion from among these experienced observers on the future of international relations and global issues. Participants were asked questions on their views of COVID-19 and its impact on the international economy and international politics and security. We also follow these general questions with further specific questions to dive into how they correlate these views with various issues. These follow-up questions discuss global governance and leadership matters, the changing role and expectation towards actors (including states and institutions), or the patterns of interactions they expect would come in state relations.

The result of the survey we received has been a revelation in describing the many challenges decisionmakers face with COVID-19. For instance, our survey suggests that experts are pretty much split in half when it comes to assessing the cost of strategies like long-term strict prevention and control (e.g., lockdown) when employed in the management of COVID-19. There are also mixed responses on experts' expectations on how long the impact of the pandemic will last. These opinions portray our governments' dilemmas on day-to-day decisions as we bide our way through the pandemic. With immense pressure to look inward, it may not be strange to see how the respondents have singled out the "lack of global leadership" (32.5%) as the main challenge in global governance.

The post-pandemic world may also see some shifts in the interaction and relationship between states. For instance, the survey suggests that experts showed a growing optimism towards regional financial mechanisms (e.g., ADB) in comparison to global ones. Added with the optimism towards certain regions like Southeast Asia and Northeast Asia, we may see in the future a form of regionalization in the pursuit of pandemic recovery. Furthermore, with the divided opinions on the prospect of developing countries like the United States and China, we see a possibly rising trust and proliferation of interaction to alternative leaders like Germany, Japan, or even South Korea in specific contexts and more.

Lastly, we may yet to see what the future holds for some of our international institutions. For instance, while acknowledging a declining trend to multilateralism was apparent between the respondents, trust towards institutions like the United Nations remains relatively high. Likewise, while it may be highlighted for its “limited” success in responding to major regional issues during and before the pandemic, ASEAN and its mechanisms enjoy the trust of many. Its virtue, though, maybe dependent on how it manages to reform itself to deal with the post-COVID-19 regional order.

Overall, we hope that the findings from the survey can provide a baseline for further analysis and be taken into consideration in reading the current growing sentiments from among seasoned observers of international relations in the region (Southeast Asia) and beyond. Moreover, these opinions should depict the subjective reality that is currently developing, which could potentially tell us about the future we can expect. Of course, as a caveat for studies towards opinions, some of the views that have come up inside the survey, which refers to the more objective realities, should also be taken compared to other objective assessments involving facts on the ground.

Jakarta, May 2021

Philips J. Vermonte

Executive Director

Centre for Strategic and International Studies

This is a baseline survey aimed at mapping expert views on the COVID-19 pandemic and its impact on the global and regional economy, politics, and security. It also attempts to capture the extent to which the pandemic impacts global leadership and geopolitical rivalry.

This survey is specifically targeted at expert groups with considerable professional experience on strategic, economic, and international relations issues across continents to obtain diverse views.

Survey Method

This survey employs a non-probability approach through convenience sampling. Respondents consist of scholars based in research institutions and universities, and government officials. The survey is conducted from 10 June to 14 July 2020 through SurveyMonkey, an online survey platform. The link was disseminated across CSIS networks of scholars and to professional colleagues of CSIS researchers. Respondents are encouraged to pass the link to their respective network.

The questionnaire was distributed to around 1000 respondents, 206 of whom responded and filled the survey (response rate = 20.6%). After validation, there are 194 eligible survey responses for analysis (19.4%). During the data analysis phase, this survey uses a descriptive data analysis method.

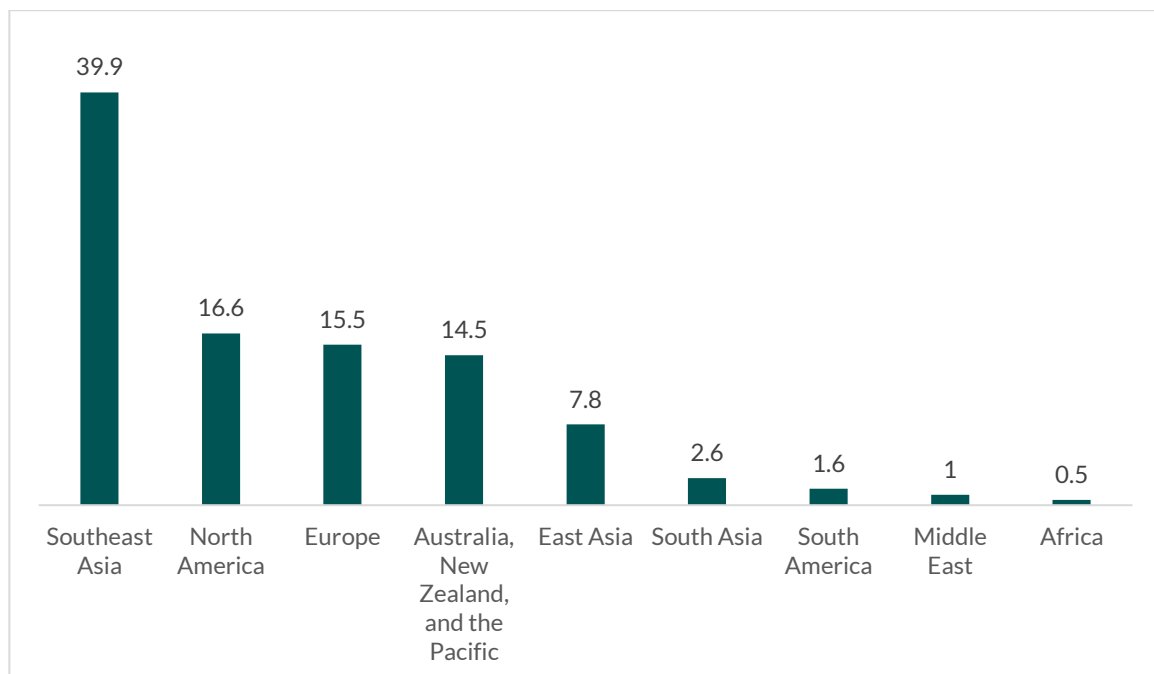
Disclaimer

As this survey uses a non-probability sampling, it is not intended to make generalization at the regional and global level. Nevertheless, the survey may predict regional and global trends that may occur.

Part I: Demographic

Figure 1 describes the demographic data of the experts who participated in the survey. About 40 percent are from the Southeast Asian region; 16.6 percent from North America (U.S. and Canada); 15.5 percent from Europe; 14.5 percent from Australia, New Zealand, and the Pacific; and 7.8 percent from East Asia. Meanwhile, South Asia, South America, the Middle East and Africa contributed less than two percent of the total number of respondents.

Figure 1. Demographic Information



In terms of their educational background, 60.3 percent of the respondents are Ph.D. degree holders, 31.4 percent have Master's degree, and about 8 percent have Bachelor's degree (see Figure 2). Male is over-represented (about 75 percent of the respondents are male), while there are only 22 percent female experts participating in the survey. About three percent of the respondents, however, chose not to reveal their gender identity (see figure 3 below).

Figure 2. Educational Background

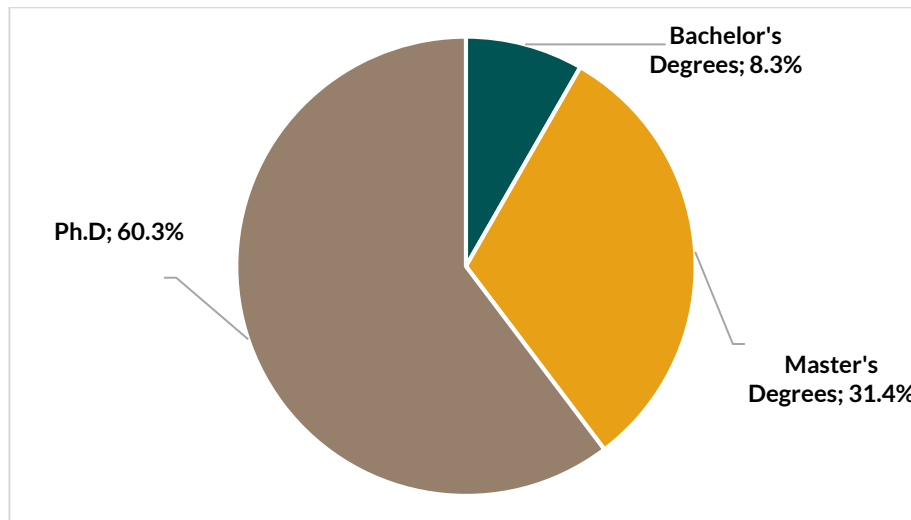
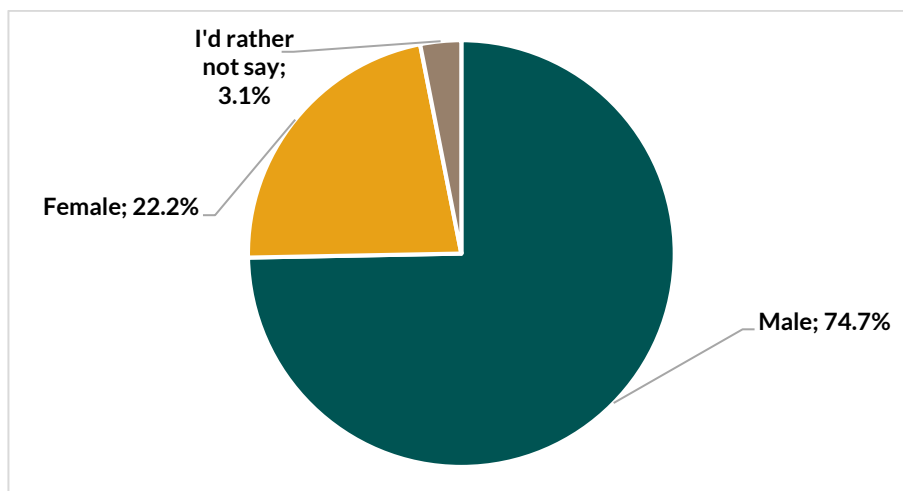
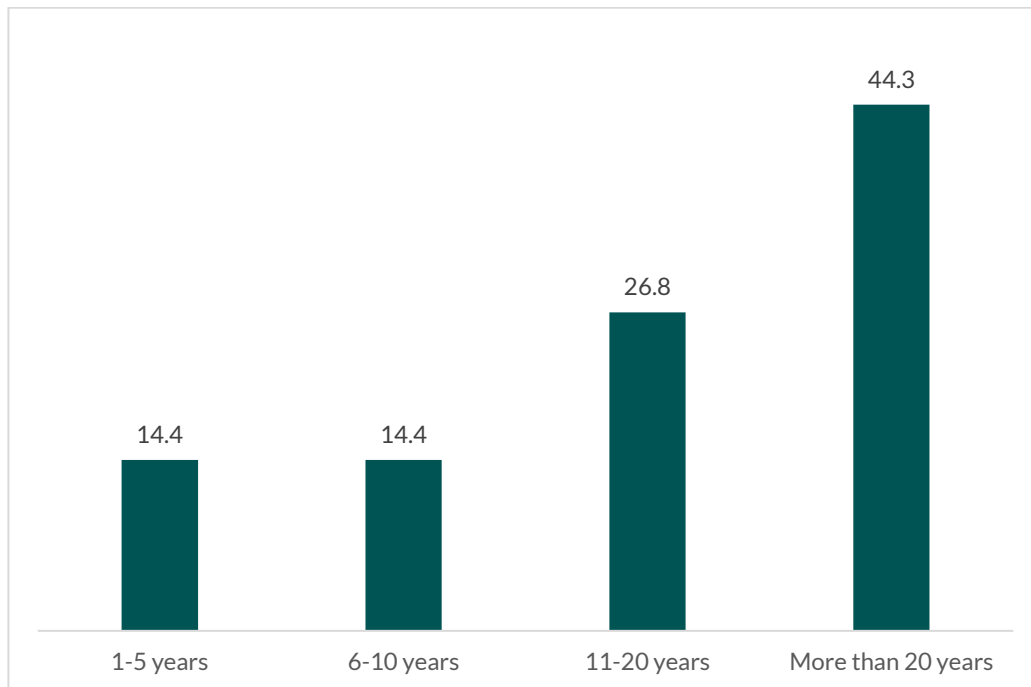


Figure 3. Respondents' Gender



The data that we gathered indicates that the respondents are long-time observers, analysts, practitioners of international relations and global issues. More than 70 percent of the respondents say that they have been observing global issues for more than 10 years. In other words, the survey generated responses from keen and experienced observers.

Figure 4. How long have you been a keen observer, analysts, or practitioners of international affairs and policies?



Part II: Views on the COVID-19 Pandemic

There seems to be a general agreement among the large majority of the respondent who state that the international community was not prepared to handle the COVID-19 pandemic (see Figure 5 below). In terms of the most serious challenges in the global governance in dealing with the pandemic, 32.5 percent of our expert respondents think that the international community is currently suffering from a lack of leadership. (See Figure 6). This is consistent with the trend of declining global leadership, which has been expressed by many experts and leaders. In June 2020, for example, WHO Chief lamented that “The lack of global leadership and unity to fight the coronavirus is a bigger threat than the outbreak itself.”

Meanwhile, 27.3 percent says that the most serious challenge is the lack of cooperation among countries; 16 percent believe that international institutions that are not effective is the biggest challenge to handle the pandemic. Only about 14 percent think that the increasing major powers competition pose the biggest challenge. (see Figure 6).

Figure 5. How prepared do you think the international community was to handle the COVID-19 pandemic?

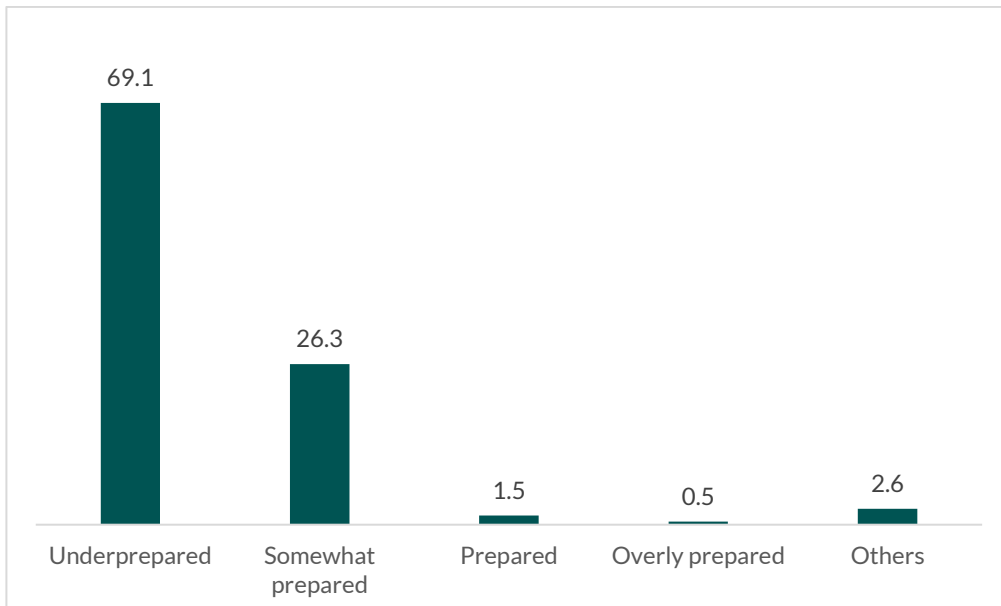
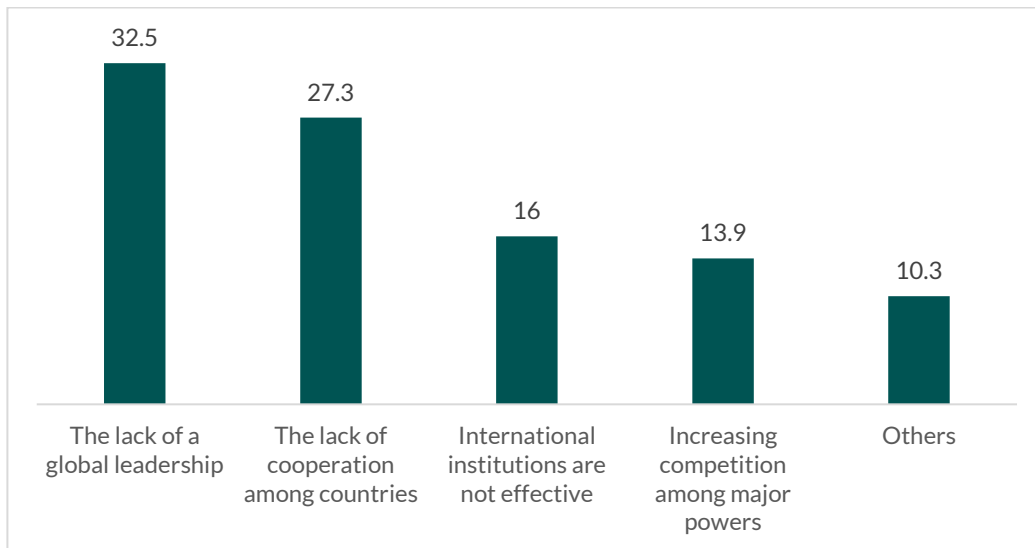
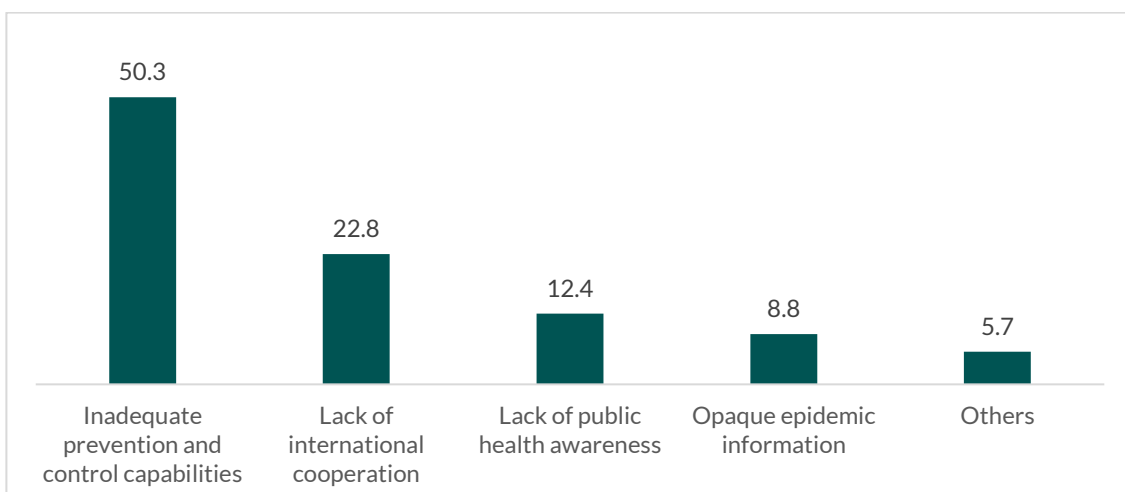


Figure 6. What is the biggest challenge in global governance in dealing with the pandemic?



Our experts who participated in the survey cite two most serious challenges in the global efforts to contain the pandemic: 50.3 percent say that inadequate prevention and control capabilities is the most serious challenge, while 22.8 percent say that the lack of international cooperation is the most serious challenge that we are facing in containing the pandemic. On the other hand, 12.4 percent say that the lack of public awareness and 8.8 percent refer to opaque epidemic information are the most important challenges (see Figure 7)

Figure 7. What do you think is the most important challenge in containing pandemic?



Our experts are almost equally divided in their view about the oft-cited herd-immunity strategy in dealing with the COVID-10 pandemic. 42.3 percent is of the opinion that “heard immunity will cause a large number of deaths and is irresponsible”, while 35.1 percent agree with the statement that “herd immunity can be avoided through strict prevention and control” mechanism. Meanwhile, only about 4 percent of our expert respondents conform that “herd immunity is the only way to overcome the pandemic” (see Figure 8).

Figure 8. Regarding herd immunity, and strict prevention and control, which of the following statements do you most agree with?

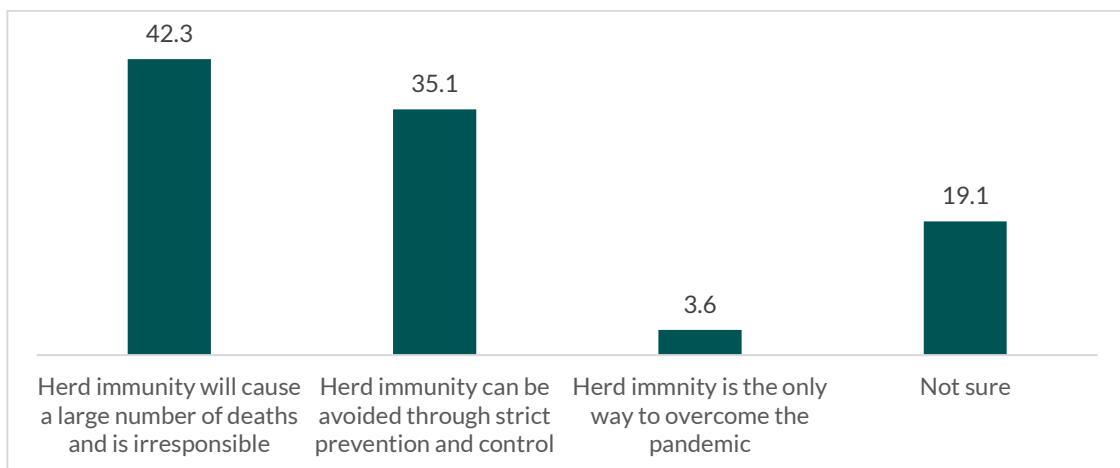
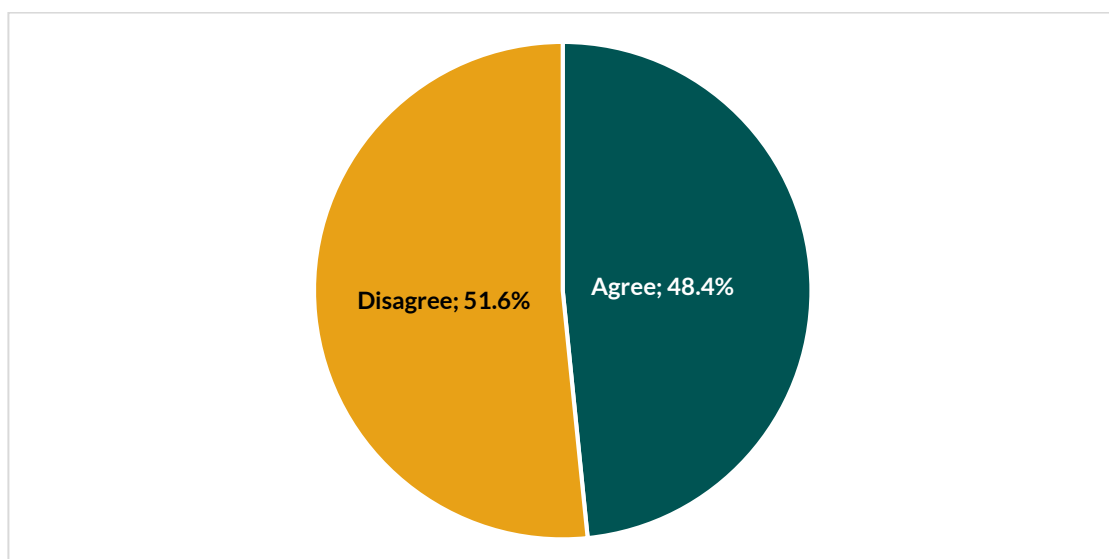


Figure 9. Do you agree/disagree with the following statement: The economic cost of long-term strict prevention and control is too great



The experts are also divided on their view about the economic consequences of long-term strict prevention and control. 51.6 percent of the experts agrees with the statement “the economic cost of long-term strict prevention and control is too great”, while 48.4 percent disagrees.

Given the circumstances and their views on the on-going pandemic, the overwhelming majority of the experts, about 74 percent of them, believe that a global pandemic like the COVID-19 will likely occur again in foreseeable future, while 21 percent say that they do not know (refer to Figure 10 below).

Figure 10. Do you think that a global pandemic like COVID-19 will likely occur again in the foreseeable future?

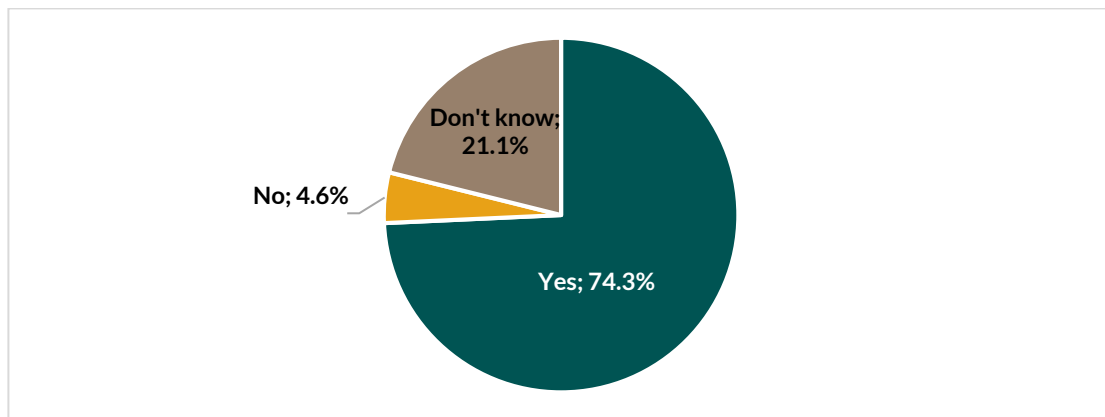
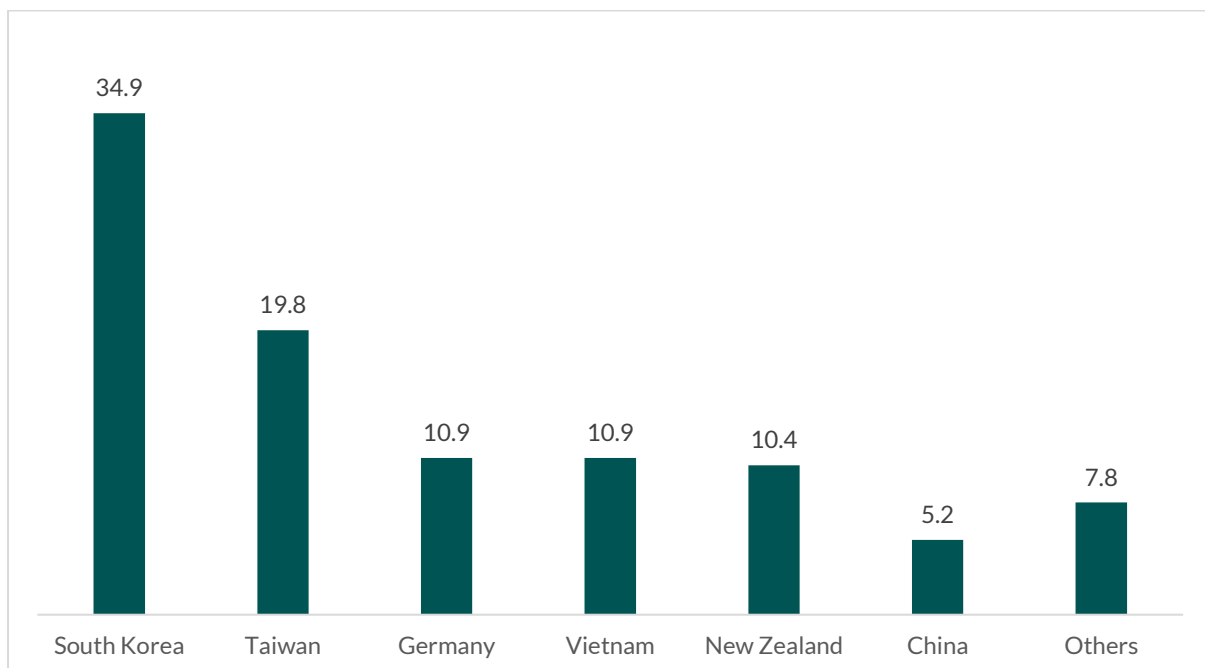


Figure 11. The most vulnerable region to a global pandemic risk in the future



Figure 11 indicates the most vulnerable region to a global pandemic risk in the future, according to the experts. Sub-Saharan Africa is thought to be the most vulnerable region, followed by East Asia and South Asia. Meanwhile, when asked about the most successful country in dealing with the pandemic so far, about 35 percent of the experts think that South Korea is the most successful one (see Figure 12 below). One important note related to Figure 12 is that “Taiwan”¹ comes in as second in the list. Taiwan’s success in dealing with COVID-19 (as of early September they have 5-months streak of no local transmission) is widely reported in the media, thus would be familiar to most respondents. Although most countries uphold the One China Policy, thus no diplomatic ties with Taiwan, it is widely regarded as a political/economic entity and participates in various international forum such as APEC. In this regard, it is logical that many respondents would answer Taiwan even though the question specifically asked to name a country.

Figure 12. Which country do you think has successfully and effectively handled its domestic COVID-19 pandemic?



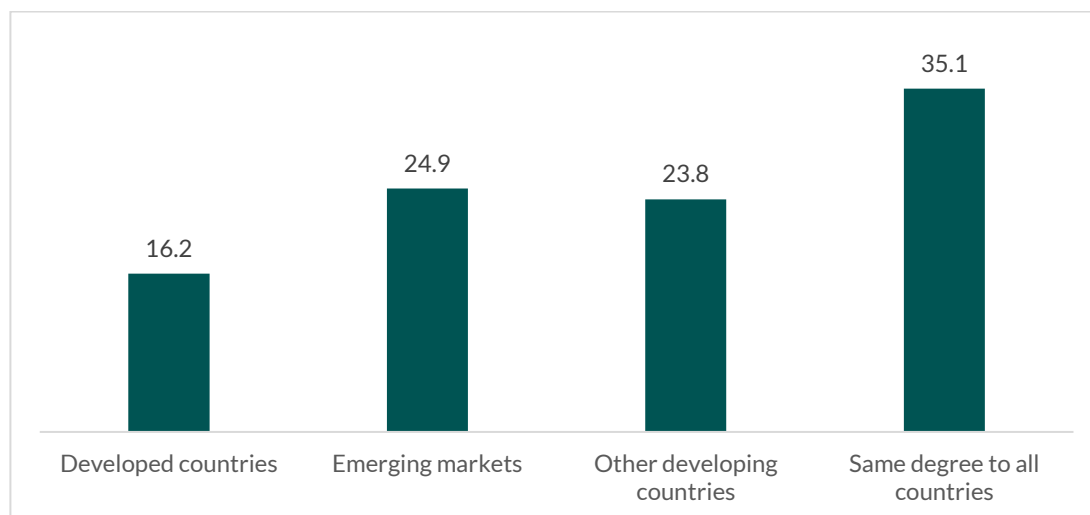
¹ Most countries mentioned in the survey (including Indonesia) adopts the One-China policy.

Part III: Impact on the International Economy

The world economy has been slowing down since 2018 due to the increasingly populist policies of major countries in the world, which includes trade wars between the U.S. and China. Other external factors, such as falling commodity prices and trade volumes, complicate the matter more. It has made several the country runs out of ideas to keep pushing its economic growth into a positive direction. Furthermore, in late 2019 and early 2020, the world economy was increasingly burdened by the COVID-19 pandemic, which had a more devastating impact on the economy in general.

Based on the survey, most of the respondents believe that the epidemic has a significant impact on the economy. 35.1 percent of them think that the epidemic is going to hit to the same degree to all countries in the world. Moreover, more than 20 percent of respondents believe that COVID-19 will hit emerging markets and other developing countries' economies. Meanwhile, only 16.2 percent of the respondent believe that the epidemic will also hit developed countries' economies.

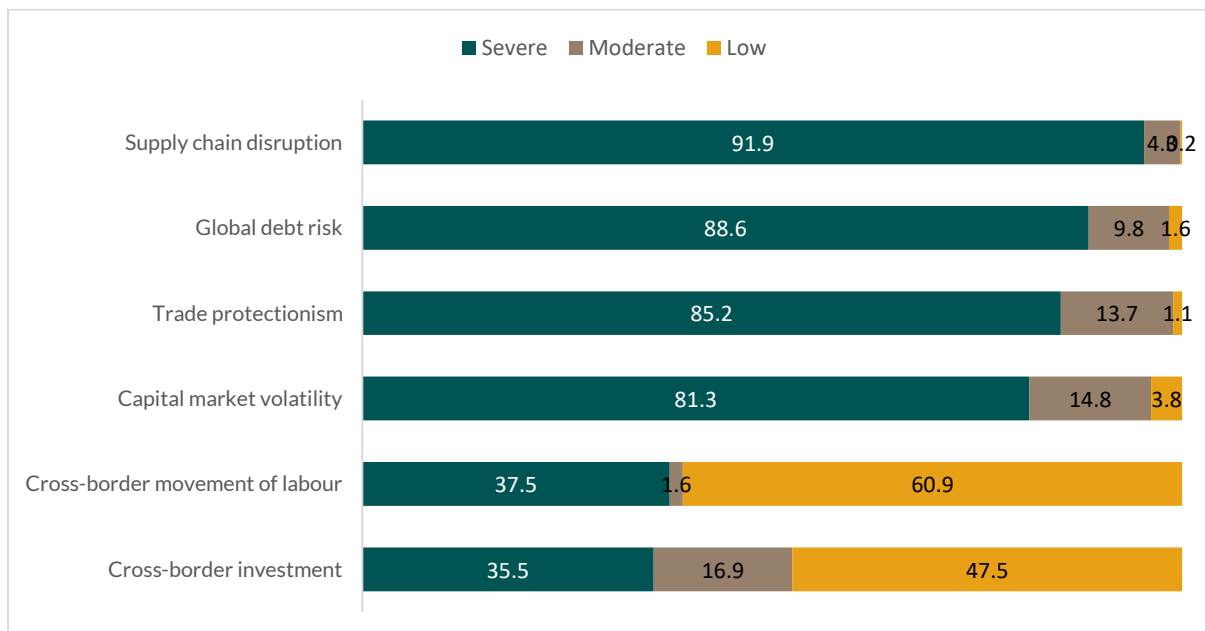
Figure 13. The epidemic has a greater impact on the economy of:



As far as the state of global economy is concerned, the survey results show that four aspects, namely supply chain disruption, global debt risk, trade protectionism, and capital market volatility, might be severely hit by the COVID-19 pandemic. Most of the respondents (91.9 percent) believe that the pandemic has disrupted the supply chain due to the distortion of almost all input markets in the world.

During the pandemic, most countries have to deal with liquidity issues that force them to seek new debts. Thus, 88.6 percent of respondent place global debt risk as one of the aspects that might be severely hit by the pandemic. This is followed by trade protectionism and capital market volatility, as believed by 85.2 and 81.3 percent of the respondents respectively, to be the other issues of very crucial importance. Meanwhile, cross-border movement of labors and cross-border investments seem not to become a serious issue since most of the respondents think both aspects might have been low impacted by the pandemic.

Figure 14. How has the COVID-19 pandemic impacted these aspects of the global economy?



Aside from the aspect of the global economy that might be hit by the pandemic, the survey also examines the impact of COVID-19 pandemic by sectors. The survey categorizes the impact from moderate to severe, and from slow recovery to fast recovery. Table 1 provides information about 13 sectors that are being examined in this survey. Most of the respondents (83.4 percent) think that the hotel and restaurant sector is the sector that will suffer from severe impact and slow recovery. For the sector that will experience a severe impact but is expected to have fast recovery, 34.1 percent of respondents believe that transportation and logistics is the sector that will

experience these characteristics. It is followed by retails and textile, garment, and footwear sector with 30.3 percent.

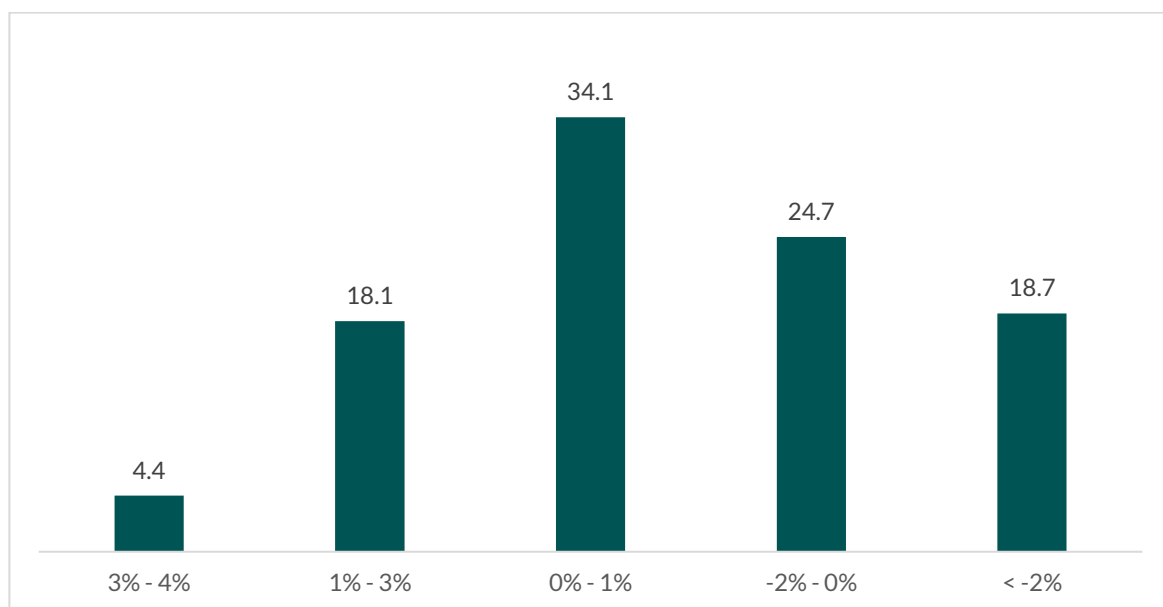
On the other hand, when the respondents are asked which sector they think will experience a moderate impact and fast recovery, more than 80 percent perceive that pharmacy and health equipment, as well as the telecommunication sector, are the sectors that might have that characteristics. Furthermore, for the sector that experience a moderate impact but slow recovery, 41.8 percent of the experts participating in the survey respond that the chemical sector as the sector that has those characteristics. It is followed by the machinery and electronics sector (37.9 percent of the experts say so) and the mining and energy sector (36 percent).

Table 1. What do you think the impact of COVID-19 pandemic to the following economic sectors

Sectors	Moderate impact and fast recovery	Moderate impact but slow recovery	Severe impact but fast recovery	Severe impact but slow recovery
Hotel and restaurants	1.1	1.7	13.8	83.4
Retails	7.9	7.9	30.3	53.9
Motor vehicle	10.9	20.7	25.9	42.5
Transportation and logistics	11.9	15.9	34.1	38.1
Education services	16.4	25.4	24.9	33.3
Textiles, garments, and footwear	12.0	28.6	30.3	29.1
Construction	18.3	25.4	27.8	28.4
Mining and energy	30.3	36.0	17.4	16.3
Machinery and electronics	21.3	37.9	26.4	14.4
Food and agriculture	50.3	22.3	15.6	11.7
Chemical	38.8	41.8	14.5	4.8
Pharmacy and health equipment	80.6	4.6	12.0	2.9
Telecommunication	82.6	9.3	7.0	1.2

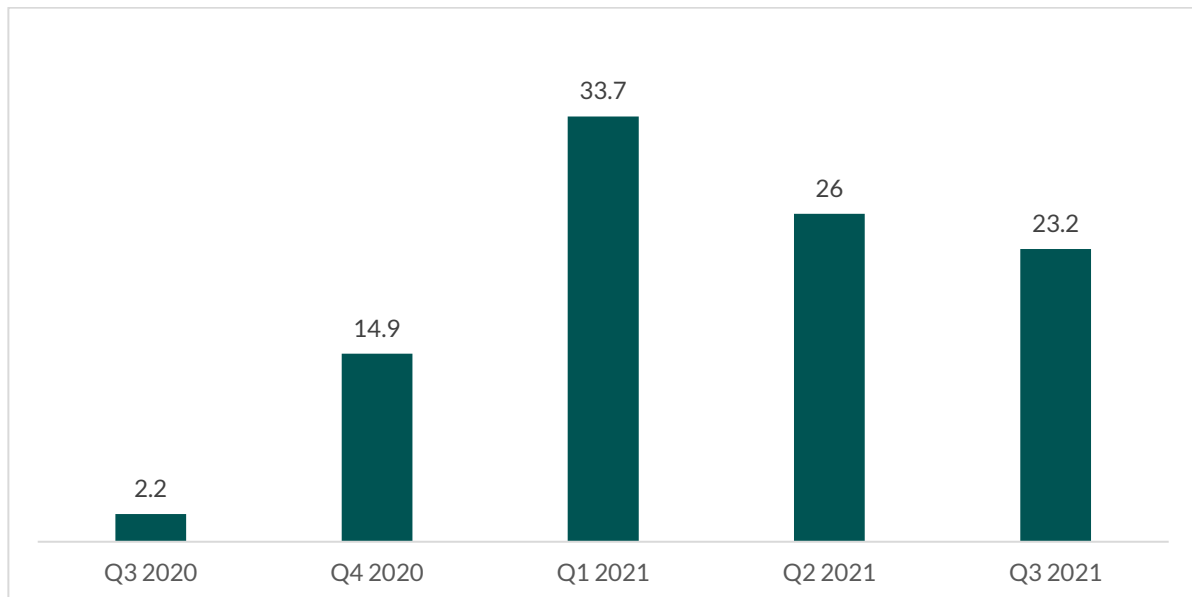
The survey also asks the question regarding their prediction of the economic growth of East Asia and the Pacific in 2020 bearing in mind that the COVID-19 pandemic is in the background. Less than 5 percent of respondents are optimistic that the economic growth of the region can hover around 3-4 percent. Meanwhile, 18.7 percent of respondents think that the region might record very low economic growth rate, possibly even worse than minus 2 percent. However, most of the respondents (34.1 percent) still expect that the region can have a positive growth, even though will be only within the range of zero to one percent.

Figure 15. In your opinion, what is the predicted economic growth for East Asia and the Pacific in 2020 due to the coronavirus pandemic?



Regarding the expected economic recovery to happen in East Asia and the Pacific, it seems that the experts being surveyed have taken a lesson learned from several previous economic slowdown occurrences in the region, such as the SARS outbreak during 2002-2003 and the earthquake in Japan in 2011. Most of the respondents seem to believe that there will be either a V-shaped or U-shaped recovery after COVID-19 pandemic since 33.7 percent of the respondents project that the East Asia and Pacific region will recover in the first quarter (Q1) 2021. The experts think that the region needs at least 3-4 quarters for the economy to recover.

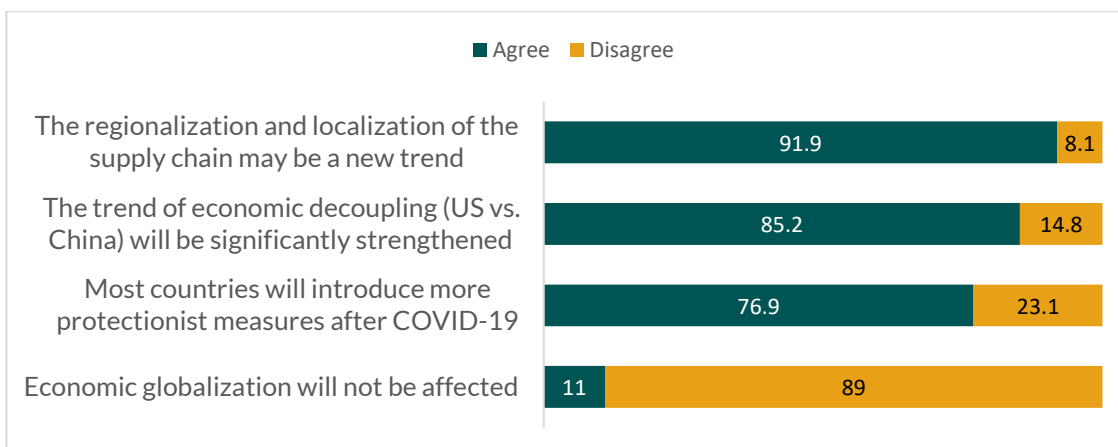
Figure 16. When do you think the economies in East Asia and the Pacific will start to recover?



The COVID-19 pandemic has pushed most of the countries to focus more on their domestic economy and turns inward-looking. The survey results show that 89 percent of respondents think that economic globalization will be affected due to the pandemic. Only 11 percent of them believe that this not going to be the case.

The trend of the inward-looking orientation of most of the countries in the world is strengthened by the finding of this survey that shows 76.9 percent of respondents believe that most countries will introduce more protectionist measures after COVID-19. Nevertheless, the spirit of regionalization remains since more than 90 percent of respondents feel that, after the pandemic, the regionalization and localization of the supply chain may become a new trend. Moreover, the tension between China and the United States in terms of the economy also seems to become a severe global issue since 85.2 percent of respondents think that the trend of economic decoupling will be significantly strengthened.

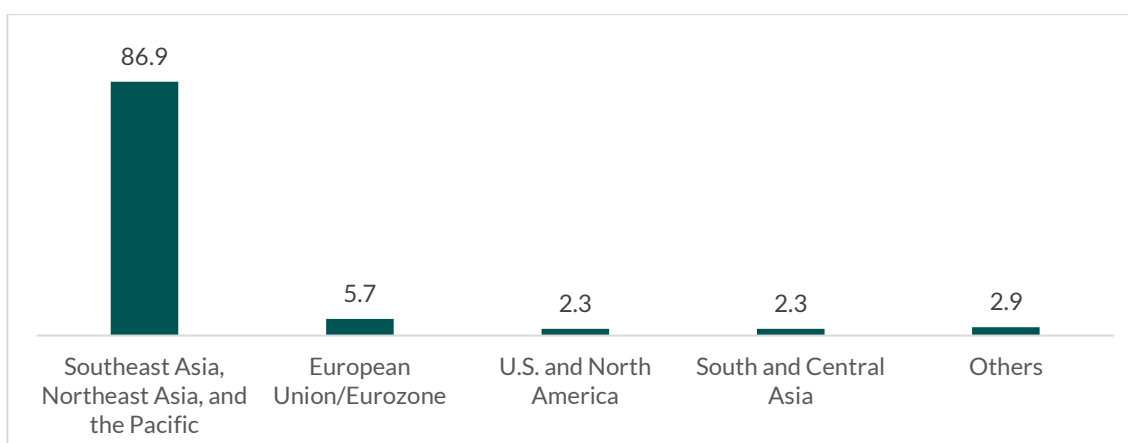
Figure 17. What do you think of these following statements?



Economic Recovery Period

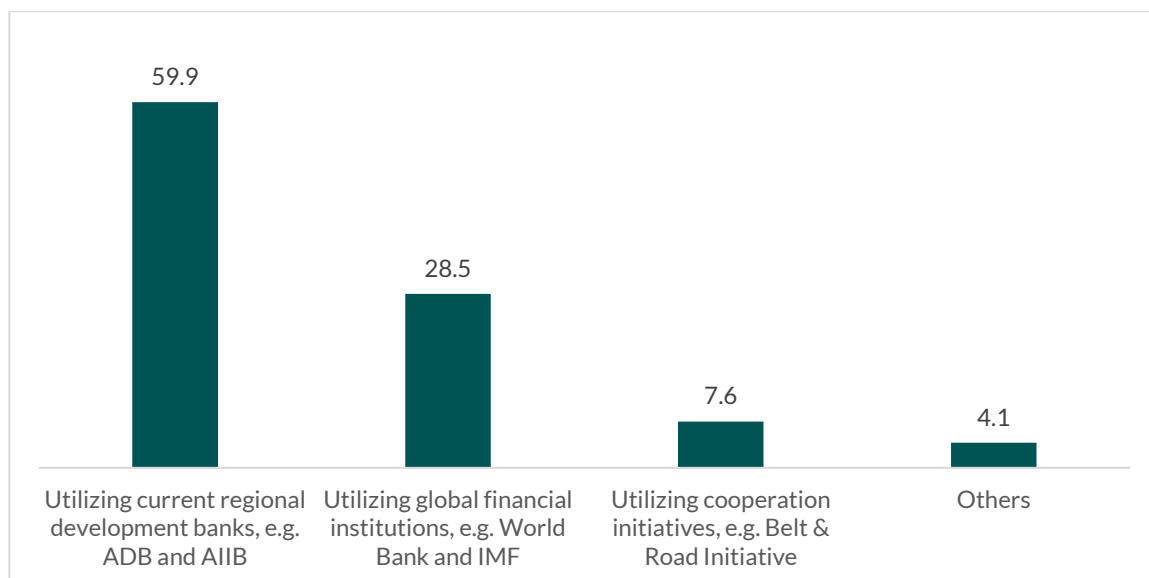
From the context of the economic recovery period, instead of debating whether the economic recovery after the pandemic will be V-shaped or U-shaped, the other valuable insight that this survey tries to figure out is related to the main engine for global growth during the recovery period. The survey results show that most of the respondents (86.9 percent) believe that the Asian region, specifically Southeast Asia, Northeast Asia, and the Pacific (including Australia and New Zealand), can become the main engine for global growth after the pandemic. This finding suggests that those regions will become the dominant economic powers in the near future.

Figure 18. Which part of the world do you believe can become the main engine for global growth during the recovery period?



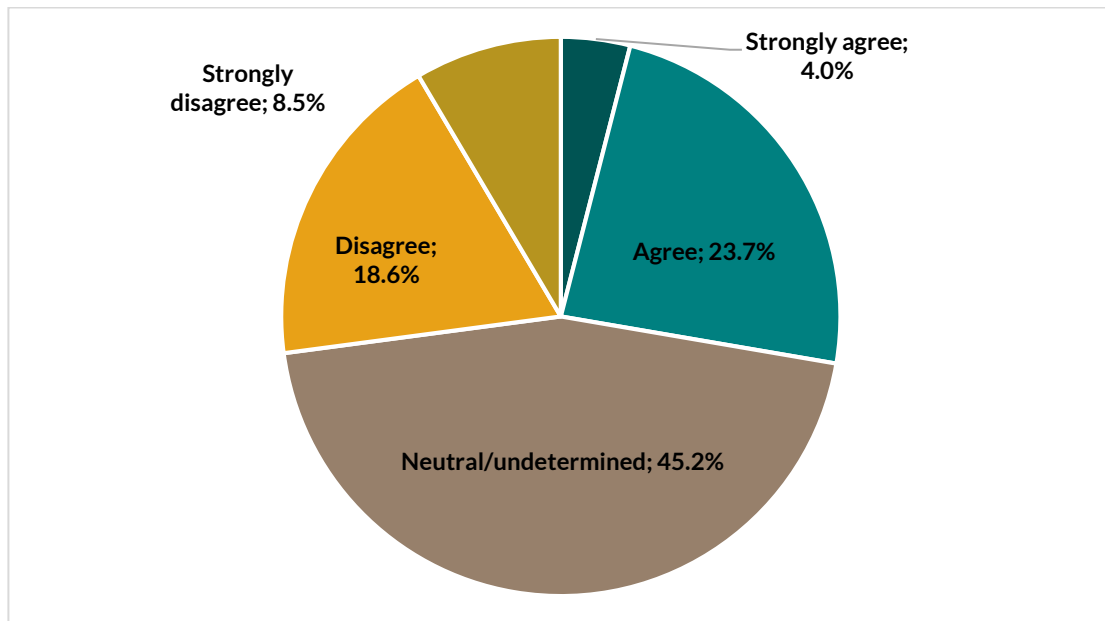
The trend of regionalization in East Asia and Pacific has also driven the experts participating in the survey to concern more on how to promote and develop supporting assistance in the region. More than 50 percent of the respondents (59.9 percent) think that the most appropriate and effective mechanism to promote and develop assistance in the region is by utilizing existing regional development banks, such as Asian Development Bank (ADB) and Asian Infrastructure Investment Bank (AIIB). Meanwhile, only 28.5 percent of respondents believe that those mechanisms should be utilized by global financial institutions, such as the World Bank and International Monetary Fund (IMF).

Figure 19. What do you think is the most appropriate and effective mechanism to promote and develop such supporting assistance in East Asia and the Pacific?



In the context of cooperation initiatives, Belt and Road Initiative (BRI), introduced by China’s President Xi Jinping in 2013, could become the example on how China as the new economic power house may improve regional integration by increasing trade, developing infrastructure, and stimulating economic growth. However, based on the survey, only 23.7 percent of respondents agree that the BRI will promote global and regional economic development after the pandemic. Most of the respondents (45.2 percent) are being neutral or undetermined, whether the BRI will promote global and regional economic development post-COVID-19 or not (see Figure 20).

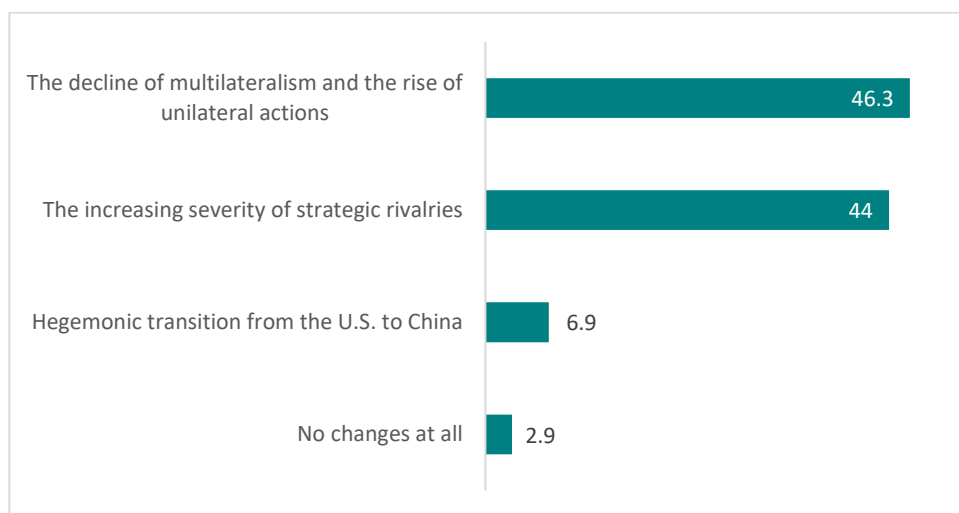
Figure 20. Do you think the Belt and Road Initiative will promote global and regional economic development in the post-COVID-19 world?



Part IV: International Politics and Security

COVID-19 to a certain degree impacts the international order. Figure 21 shows that 46.3 percent of the experts who responded to the survey think that the pandemic accelerates the decline of multilateralism and the rise of unilateral actions. Meanwhile, 44 percent of them think that it increases the severity of the strategic rivalries. Regardless, it must be underlined that only about three percent think that the pandemic will accelerate the hegemonic transition from the U.S. to China.

Figure 21. The COVID-19 is accelerating structural changes to the global order in the form of...



However, the experts' opinion is divided regarding the durability of the changes indicated in Figure 21. Figure 22 indicates that approximately 53 percent of them think that the changes are temporary in nature, while around 44 percent believes that it will be permanent. Still around two percent says that there have been no changes at all. It is interesting to note that although the vast majority of respondents view that important changes are occurring in world politics, less than half view that such changes are here to stay.

Figure 22. Do you think that the structural changes to the global order (see previous question) caused by COVID-19 will be temporary or permanent?

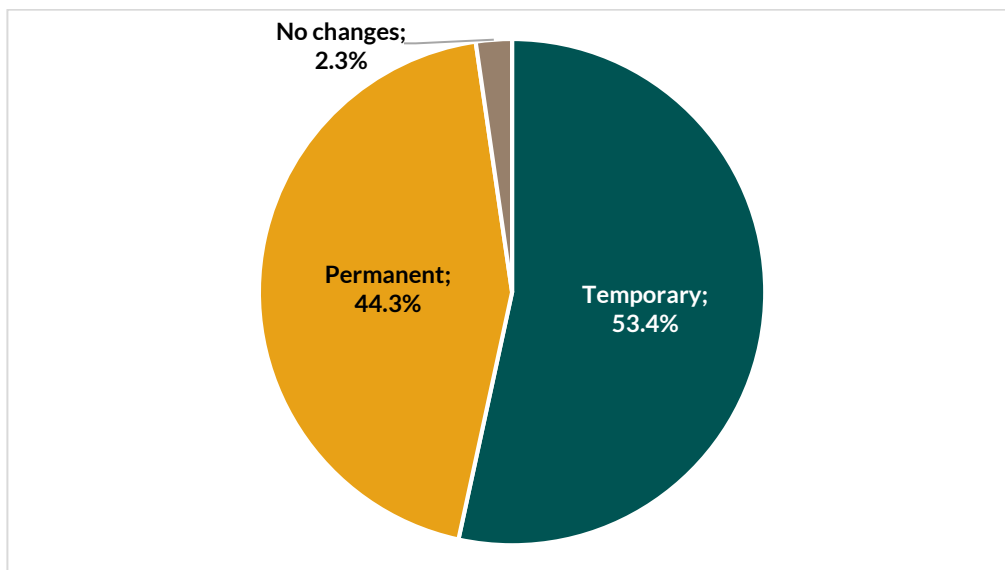
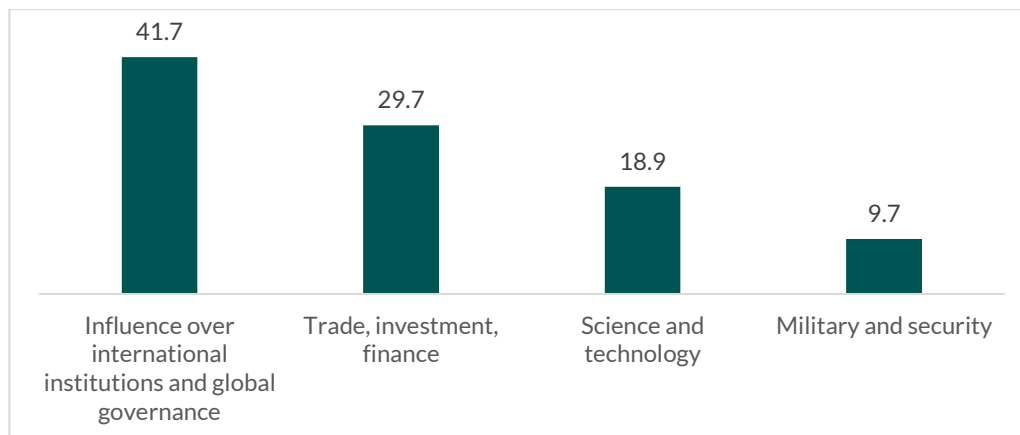


Figure 23 highlights the issue of strategic rivalry between the U.S. and China, specifically the areas which would have the most negative impact from the pandemic. Approximately 42 percent of the respondents view that the pandemic will increase the competition for influence over international institutions and global governance. Prior to the pandemic, U.S. and China were already involved in heightened competition in this area. Both countries had voiced their dissatisfaction of the existing global governance and their aspiration to change some of the ways the international system works. For example, since Donald Trump took office, the U.S. has threatened to pull out of various international organizations and agreements, including the Paris Agreement, as he views that these organizations and agreements do not benefit the U.S. On the other hand, China has on numerous times complained that the current rules-based order is created by the West, thus puts countries like China in a disadvantaged position. One example is the UN Convention on the Law of the Seas (UNCLOS).

On other issues, around 30 percent of the experts think that trade, investment and finance will also be an arena in which the competition between the two superpowers will be worsened, about 19 percent think that the rivalries between the two in the area of science and technology will be hardened. Meanwhile, interestingly, only less than 10 percent of the respondents think that the military and security competition between the U.S. and China will increase because of the pandemic. This shows that while heightened

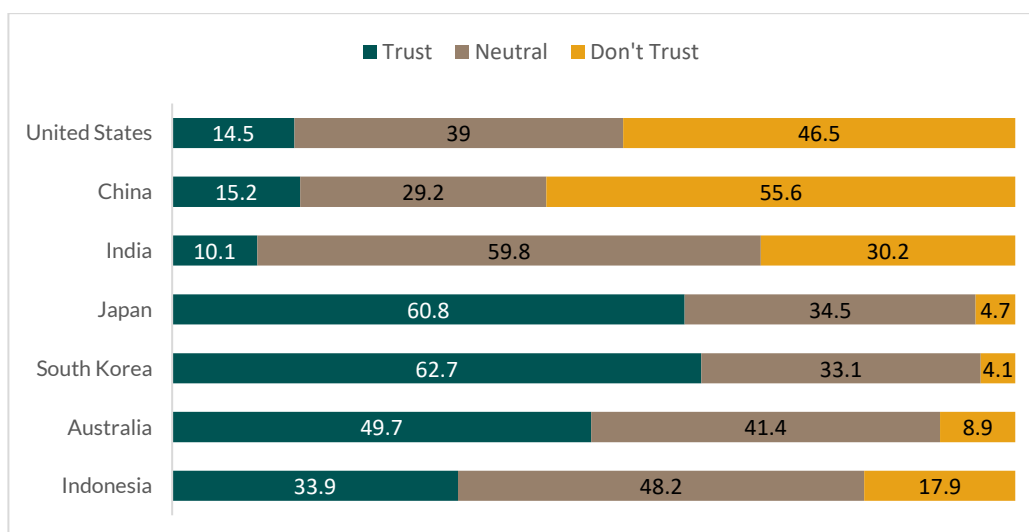
competition is expected, there is still confidence from the respondents that both major powers would avoid military competition. Another interpretation is that the fight against COVID-19 has exhausted resources in both countries; hence, military competition is low on the priority.

Figure 23. In what areas will the pandemic increase or worsen the strategic rivalry between the U.S. and China?



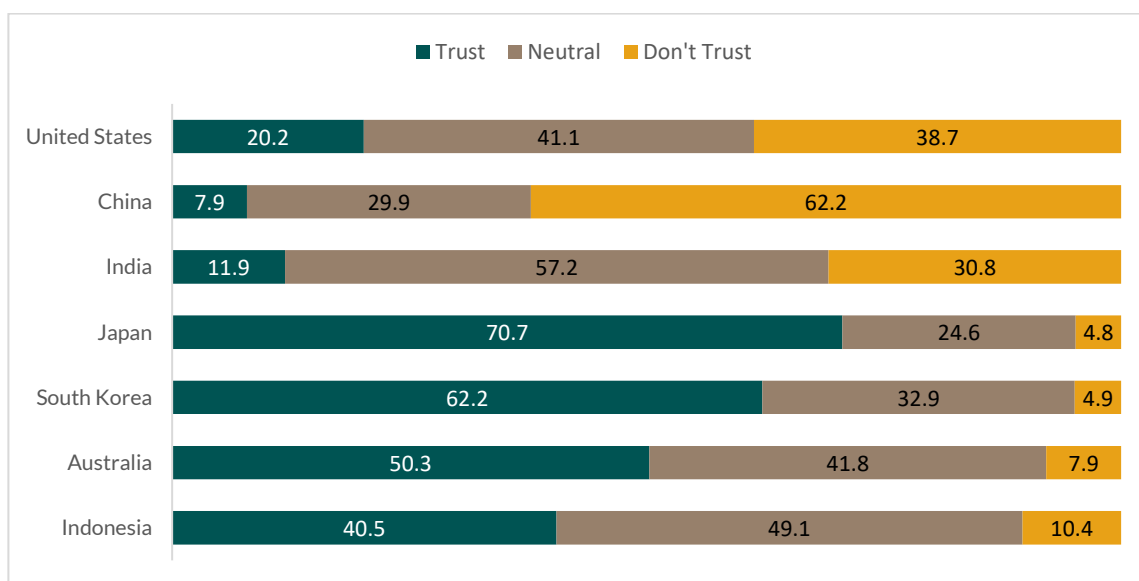
The survey also asks for the experts' opinion regarding which country in the Indo-Pacific region they trust to increase its leadership role in the region after the COVID-19 pandemic. Figure 24 reveals top three countries that the respondents trust to assume this leadership role: South Korea (62.7 percent thought so), Japan (60.8 percent), and Australia (49.7 percent).

Figure 24. Which Indo-Pacific country do you trust to increase its leadership role in the post-COVID-19 regional order?



On the question of which Indo-Pacific country would be a responsible leader to sustain a common cooperative security and shared regional prosperity, as it can be seen from Figure 25, again the three countries are chosen but in a rather different order: Japan (70.7 percent), South Korea (62.2 percent), and Australia (50.3 percent).

Figure 25. Which Indo-Pacific country do you trust the most to be a responsible leader to sustain a common cooperative security and shared regional prosperity?



Meanwhile, the experts seem to agree that the leadership role of both superpowers, the U.S. and China, will bring negative impact on the regional order in the post-COVID-19 era, when they are compared to each other. About 49 percent of the respondents say that China’s leadership role will impact the regional order negatively/very negatively (combined) in the post pandemic era, while 18 percent say otherwise: that China will bring positive/very positive impact on the order.

The same is more or less true for the U.S. as 32.6 percent of the respondents say that the U.S.’ leadership role in the post-pandemic will negatively/very negatively (combined) impact the regional order, while 18.6 percent say they opposite (see Figure 26 and 27). Interestingly, more than 30 percent answered “neutral/undetermined” on both questions.

Figure 26. How would you describe the potential impact of China's leadership (compared to America's) in a post-COVID-19 regional order?

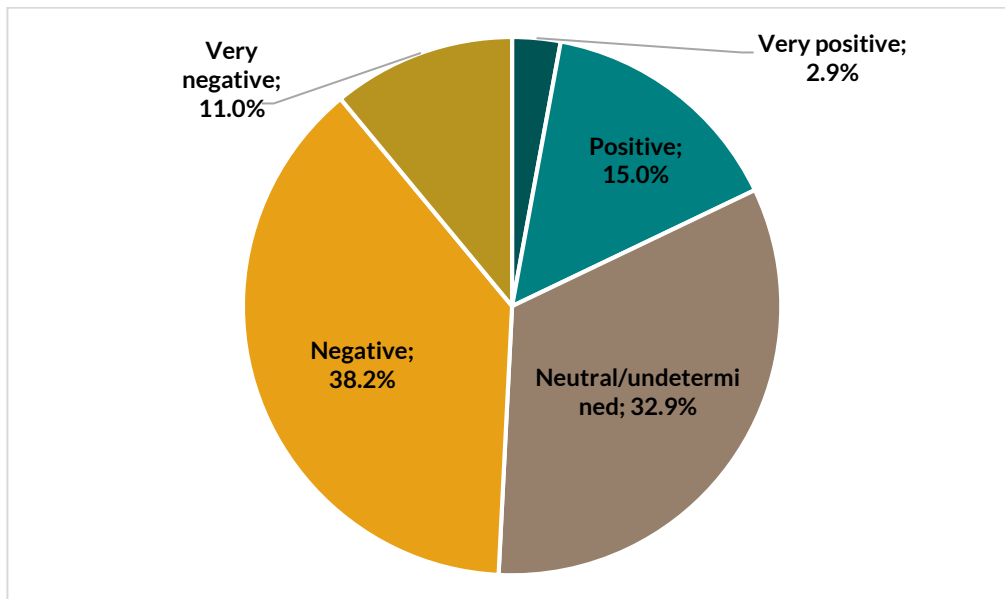
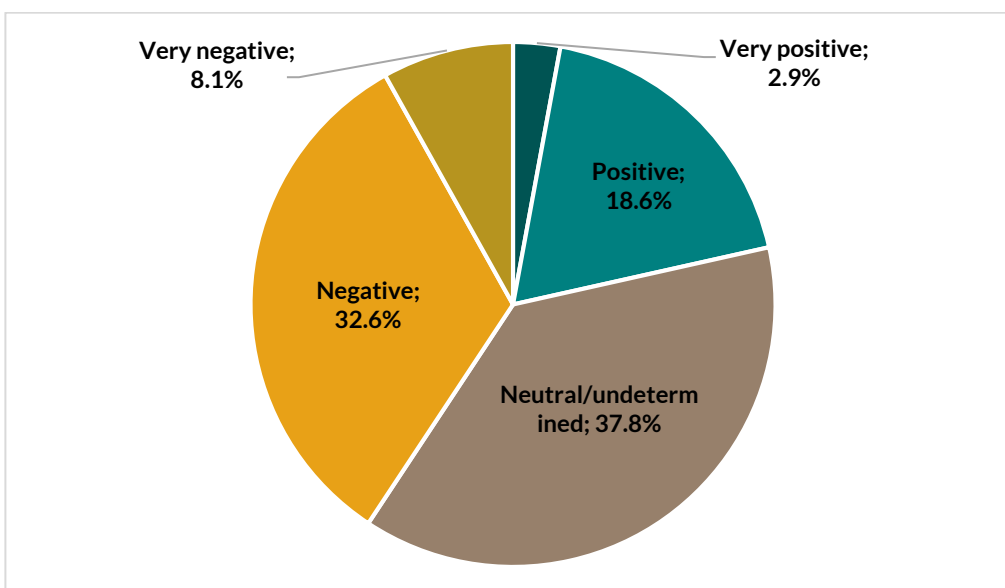


Figure 27. How would you describe the potential impact of America's leadership (compared to China's) in a post-COVID-19 regional order?



The survey also asks the respondents questions specific to Southeast Asia. The experts point out that there are two countries that have been most helpful to the Southeast Asian countries dealing with the COVID-19: South Korea (21 percent) and China (19.5 percent). Regardless, it has to be noted that as a matter of fact more respondents name many other countries (39.7 percent). Some also note that Southeast Asian countries have been self-reliance and helping themselves (see Figure 28). However, China and

South Korea are the two countries that, according to the experts who participate in the survey, have been most helpful to the world in dealing with the COVID-19 pandemic (see Figure 29).

For South Korea to be seen as the country that has been most helpful to both Southeast Asia and the world is consistent with the result found in Figure 12, which shows that South Korea is viewed as the country that has been most successful and effective in handling its domestic pandemic. Although South Korea endured one of the worst early outbreaks of COVID-19, it is viewed to have brought the outbreak under control as early as May thanks to an extensive ‘trace, test and treat’ program, and has been hailed by many countries and experts as a model for handling pandemic. Such positive image seems to have convinced the respondents of this survey to acknowledge South Korea’s contribution to other parts of the world.

Figure 28. Which country, in your opinion, has been effectively helping Southeast Asia to deal with the COVID-19 pandemic?

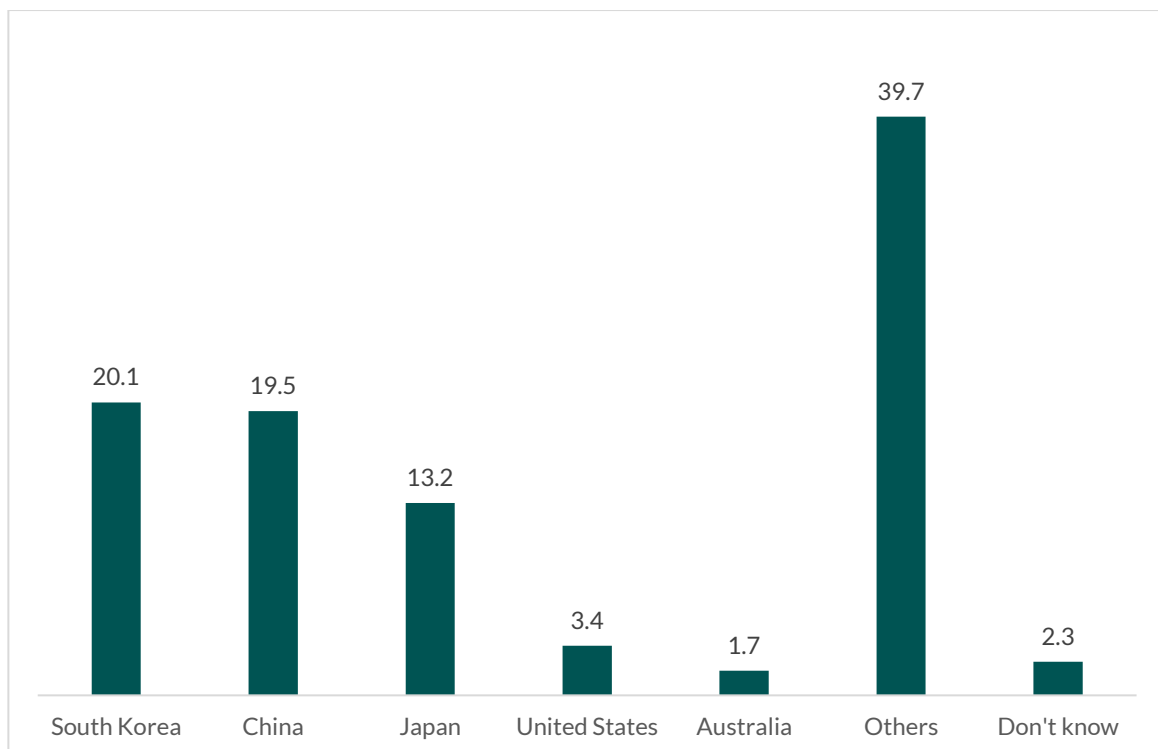
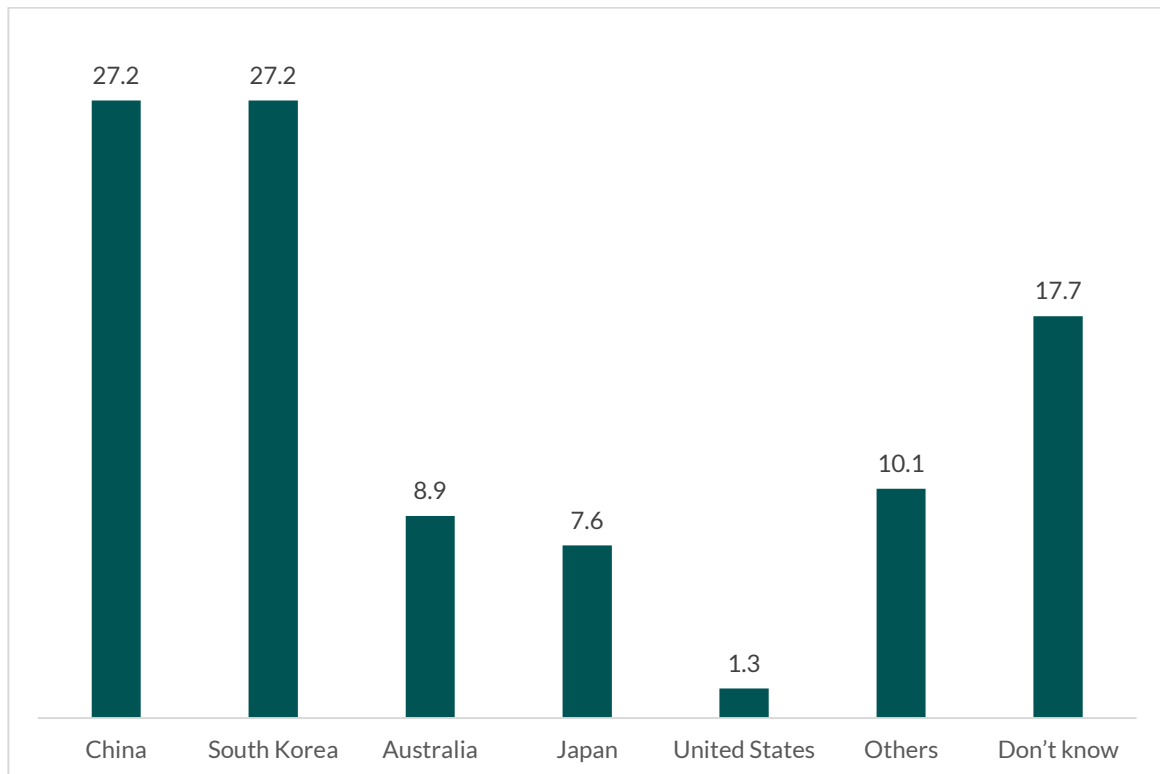


Figure 29. Which country, in your opinion, has been effectively helping the world to deal with the COVID-19 pandemic?



Part V: Global Governance

In terms of potential global leadership, other than the US and China, most of the experts being surveyed believe that Germany, South Korea, Japan, and Australia are among the potential leader countries in a post-COVID-19 global order (see Table 2).

Table 2. Other than the US and China, how would you describe the potential global leadership of the following countries in a post-COVID-19 global order?

Country	Very positive	Positive	Neutral/ undetermined	Negative	Very negative
Germany	31.52	50.30	16.97	1.21	0.00
South Korea	26.22	52.44	19.51	1.83	0.00
Japan	23.64	52.12	21.82	1.82	0.61
Australia	14.20	46.30	35.19	4.32	0.00
Indonesia	4.85	29.09	53.94	9.70	2.42
India	1.82	17.58	61.21	18.79	0.61
UK	1.20	22.29	43.98	28.31	4.22
Brazil	0.61	4.85	26.06	40.61	27.88
South Africa	0.61	13.94	60.00	21.82	3.64
Russia	0.00	8.48	28.48	40.00	23.03
Saudi Arabia	0.00	4.91	39.88	31.90	23.31
Iran	0.00	3.03	30.30	40.00	26.67
Turkey	0.00	4.27	42.68	35.37	17.68

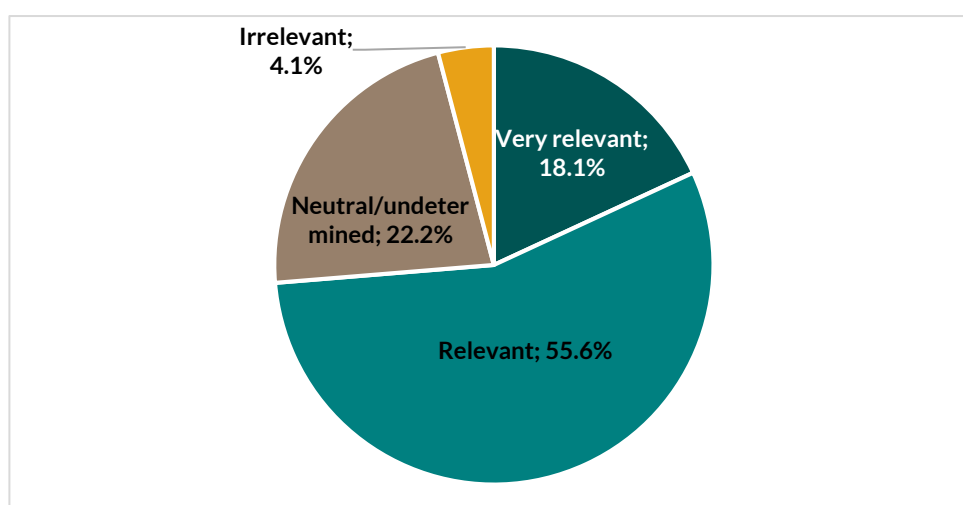
In the context of international organizations, most of the respondents think that the United Nations (UN) and its specialized agencies are potential global leader in a post-COVID-19 global order. Other organizations, such as the IMF and the World Bank, European Union (EU), G-20, and ASEAN, are also among the potential global leaders post-COVID-19 based on survey results.

Table 3. How would you describe the potential global leadership of the following international organizations in a post-COVID-19 global order?

Organization	Very positive	Positive	Neutral/ undetermined	Negative	Very negative
United Nations and its specialized agencies	17.9	44.0	29.8	8.3	0.0
IMF and the World Bank	13.6	51.5	29.6	5.3	0.0
European Union	11.8	50.3	30.8	5.9	1.2
G-20	9.5	41.4	42.8	5.9	1.2
ASEAN and its institutions	8.9	53.3	30.8	5.9	1.2
G-7	5.4	29.2	50.0	13.1	2.4

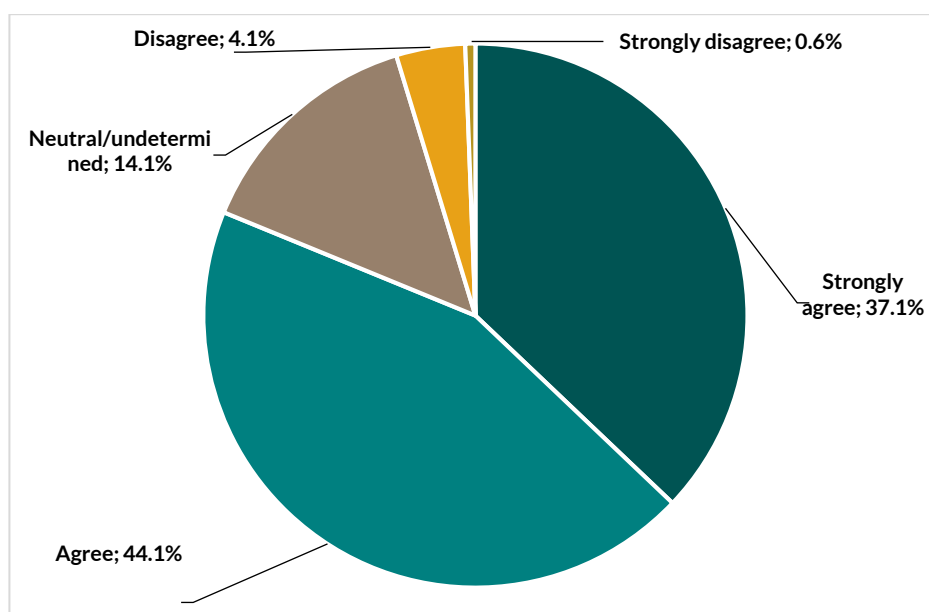
Moreover, when the experts were asked whether the U.N. and its specialized agencies stay relevant in the post-COVID-19 world or not, respondents' views lean towards the optimistic side. Almost three quarters think that the U.N. is still relevant (55.6 percent) and very relevant (18.1 percent) to deal with several development issues after the pandemic. Only 4.1 percent of them believe that the U.N. is no longer relevant (see Figure 30 below). This shows high expectation still exist for the UN, albeit the majority of respondents acknowledging the trend of declining multilateralism, as shown previously in Figure 21.

Figure 30. Will the United Nations and its specialized agencies stay relevant in the post-COVID-19 world?



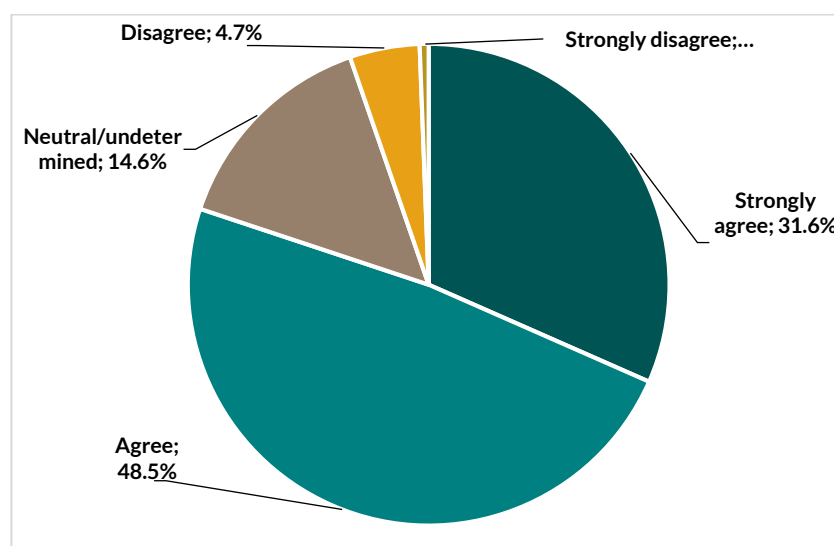
Similar to the high expectation for the UN at the global level, in Southeast Asia there is also still high expectation for ASEAN. 44.1 percent of respondents agree that ASEAN should remain central in regional architecture and governance in the Indo-Pacific region. Even 37.1 percent of the respondents strongly agree that ASEAN could play a central role in the region. Only less than five percent of them think ASEAN has no role in regional architecture and governance in the Indo-Pacific region.

Figure 31. Do you agree that ASEAN should remain central in regional architecture and governance in the Indo-Pacific region?



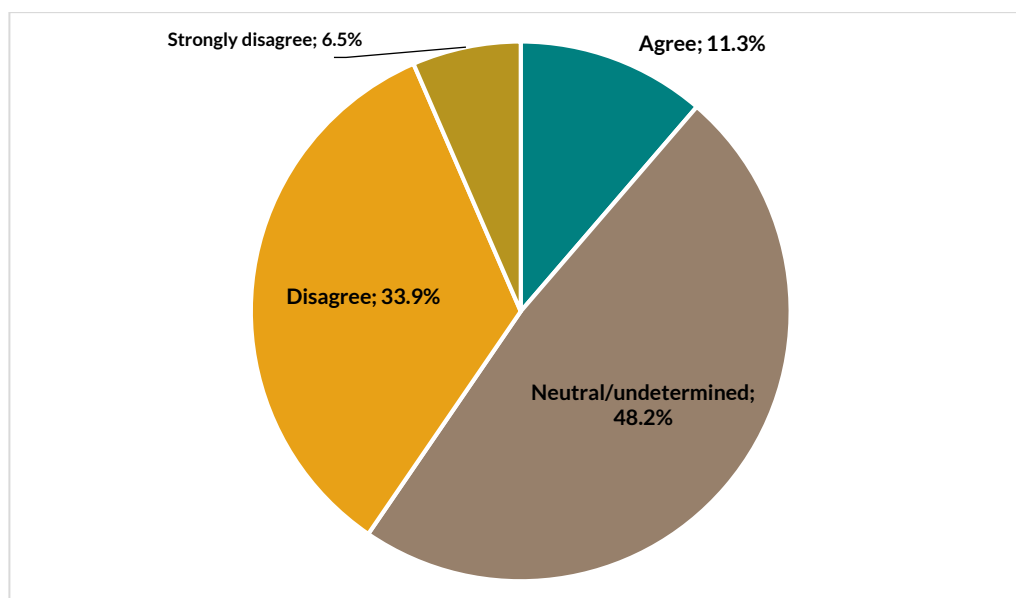
Even though the majority of respondents still believe in the important role of ASEAN in the Indo-Pacific region, most of them also think that ASEAN must be reformed to deal with a post-COVID-19 regional order as revealed by Figure 32. Almost 80 percent of the respondents agree that ASEAN should be reformed. Meanwhile, only around 5 percent of the respondents think that ASEAN runs a status quo in dealing with a post-COVID-19 regional order. This is consistent with the existing criticisms towards ASEAN and its (in)effectiveness in responding to major regional issues.

Figure 32. Do you think ASEAN should be reformed to deal with a post-COVID-19 regional order?



Unfortunately, when the experts are asked whether ASEAN as a regional organization has been successful in dealing with the COVID-19 pandemic or not, most of the respondents (48.2 percent) answer neutral or undetermined. The other 40 percent of the respondents seem to disagree that ASEAN has been successful in dealing with the pandemic. Meanwhile, only 11.3 percent of respondents think that ASEAN is successful (see Figure 33 below).

Figure 33. Do you think ASEAN as a regional organization has been successful in dealing with the COVID-19 pandemic?





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