

Barral, Mark Anthony A.; Quimba, Francis Mark A.

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ASEAN's ascent: A global power in the making

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ASEAN's Ascent: A Global Power in the Making

Mark Anthony A. Barral and Francis Mark A. Quimba

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CONTACT US:

RESEARCH INFORMATION DEPARTMENT
Philippine Institute for Development Studies

18th Floor, Three Cyberpod Centris – North Tower
EDSA corner Quezon Avenue, Quezon City, Philippines

 <https://www.pids.gov.ph>

 publications@pids.gov.ph

 (+632) 8877-4000

ASEAN's Ascent: A Global Power in the Making

Mark Anthony A. Barral
Francis Mark A. Quimba

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Abstract

This study investigates the potential of ASEAN to emerge as a global power by evaluating its composite capabilities, strategic positioning, and the multifaceted challenges it faces in an increasingly multipolar world. Using a framework that utilizes Principal Component Analysis (PCA) and Least Absolute Shrinkage and Selection Operator (LASSO)-regularized ordinal logistic regression, the paper quantifies ASEAN's economic, political, cultural, and technological positioning relative to existing global powers.

Findings suggest that ASEAN collectively aligns most closely with emerging powers but exhibits statistical tendencies bordering polar status under refined LASSO models. ASEAN centrality enhances its leverage in regional and inter-polar cooperation, particularly in trade, diplomacy, and digital governance. However, internal asymmetries, limited strategic autonomy, and institutional inertia pose barriers to its ascent. Policy implications call for deepened integration, green and digital leadership, and normative assertiveness to sustain ASEAN's trajectory toward polar influence.

Keywords: AEC, ASEAN, ASEAN centrality, consensus-building, cooperation, DEFA, digital economy, digital transformation, geopolitics, international relations, institutional framework, multipolarity, norm-entrepreneurial, polarity, power, strategic partnerships

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ASEAN's Ascent: A Global Power in the Making

Mark Anthony A. Barral and Francis Mark A. Quimba¹

1. Introduction

As the Association of Southeast Asian Nations (ASEAN) navigates an increasingly complex geopolitical landscape brought about by intensifying rivalry of US and China, shifting global power dynamics, and pressing regional challenges, this grouping of ten diverse Southeast Asian nations, is now at a critical juncture. Historically, ASEAN has played a pivotal role in maintaining regional stability and fostering economic integration through mechanisms such as the ASEAN Regional Forum (ARF), the East Asia Summit (EAS) and Asia Pacific Economic Cooperation (APEC).² Across all these regional cooperation initiatives, the importance given to ASEAN centrality has allowed ASEAN to act as a bridge between major powers, balancing competing interests and promoting a rules-based order.

However, ASEAN's traditional strategies such as hedging and bandwagoning are proving inadequate in addressing the complexities of modern geopolitical pressures.³

ASEAN has been extensively studied concerning its role in regional integration, economic development, and geopolitical dynamics. Cockerham (2010) investigates regional integration in the region by analyzing the agreements developed within the ASEAN framework; Plummer (1997) demonstrates the dynamic benefits of integration, including macroeconomic stability, increased investment flows, technology transfer, reduced transaction costs, and policy reform, all contribute to long-term regional resilience and crisis management; Amin, Hamid, and Saad (2009) analyze trade flows within ASEAN, finding that economic size and distance significantly influence intra-regional trade patterns; and Hix (2010) examines how regional organizations balance the delegation of authority and member state representation to enhance cooperation and integration. A more recent publication by Koga (2022) highlights ASEAN's strategic importance in managing great power politics in East Asia, particularly through its institutional strategies in the South China Sea disputes.

Recognizing the disparity of the AMS in terms of economic development, ASEAN's efforts in narrowing development gaps among member countries have also been researched and analyzed, emphasizing the need for concrete policy recommendations to address disparities. Disparities in income, infrastructure, and development levels within ASEAN present challenges to achieving cohesive regional cooperation and competitiveness. Strategies to address these gaps include targeted investment, capacity building, and enhanced connectivity initiatives, while leveraging regional frameworks and partnerships to promote equitable growth

¹ Francis Mark A. Quimba is a Senior Research Fellow at PIDS (fquimba@pids.gov.ph); Mark Anthony A. Barral is a Supervising Research Specialist at PIDS (mbarral@pids.gov.ph).

² The ASEAN Regional Forum (ARF) promotes dialogue and cooperation on political and security issues; the East Asia Summit (EAS) is a strategic leaders-led platform addressing regional challenges, while APEC supports sustainable economic growth and integration across the Asia-Pacific, complementing ASEAN's broader trade and diplomatic goals.

³ Hedging and bandwagoning are among the main forms of alignment. Bandwagoning is when a weaker state align itself with a stronger one, while hedging is a balancing act of maintaining leverage and security at the same time (Szalai 2023).

across all member states. This approach is critical for strengthening ASEAN's unity and collective global standing (Thanh 2008).

ASEAN has always displayed a delicate balancing act between major powers, particularly the United States and China. Historically, the United States has been a strong security ally and economic partner for ASEAN, fostering regional security, economic growth, and people-to-people ties. Mechanisms such as the ASEAN Regional Forum and the East Asia Summit illustrate the United States' support for ASEAN's efforts to promote regional cooperation and uphold a rules-based order, aligning with its vision for a free and open Indo-Pacific. The strategic presence of the United States in the Asia-Pacific plays a vital role in ASEAN's soft balancing strategy against China's growing influence (Chea 2023).

This great power competition between US and China and ASEAN's strategic positioning raises fundamental questions about the bloc's future trajectory in the international system. While ASEAN has successfully maintained its centrality through diplomatic balancing and economic integration, the intensifying US-China rivalry presents both unprecedented challenges and unique opportunities for the organization's evolution. The question emerges: can ASEAN leverage its current strategic position to transcend its traditional role as a regional facilitator and develop into an independent pole of global influence?

Thus, this study examines ASEAN's readiness to transcend its role as a facilitator and emerge as a global polar power. In international relations, polarity refers to the distribution of power among states within the global system, categorized as unipolarity (one dominant power), bipolarity (two dominant powers), or multipolarity (multiple significant powers). A global polar is a nation or a bloc that holds substantial influence in international affairs, shaping global norms, maintaining robust military capabilities, and exerting significant economic, political, and cultural sway (Jiang 2013).

Evaluating ASEAN's capacity to leverage its economic integration, institutional frameworks, and strategic partnerships to influence regional and global decision-making helps assess the region's economic cohesion, geopolitical positioning, and institutional resilience. The research addresses critical gaps in understanding how ASEAN can adapt to global multipolarity and assert its influence amidst major power competition.

In view of this, this paper addresses the question "How is ASEAN positioned to become a significant global power amidst current global political and economic dynamics?" Specifically, the paper addresses the questions:

- What are the critical factors enabling ASEAN's rise as a polar economy in terms of economic, political, and cultural influence?
- How does ASEAN's centrality in regional cooperation contribute to its global positioning?
- What challenges and opportunities do ASEAN face in solidifying its status as a polar?

Guided by these questions, this paper has the following objectives:

General Objective: To analyze ASEAN's potential as a global polar by assessing its capabilities, regional centrality, and the challenges it faces in the evolving global landscape.

Specific Objectives:

- To identify and evaluate the economic, political, and cultural factors that enable ASEAN's ascent as a polar.
- To assess the role of ASEAN centrality in enhancing regional cooperation and its impact on ASEAN's global positioning.
- To examine the key challenges and opportunities ASEAN encounters in achieving polar status and propose strategies to address these.

2. Theoretical and Empirical Foundations of ASEAN's Global Ascent

The literature on the evolution of ASEAN's role in global affairs draws upon both theoretical perspectives on international power dynamics and empirical assessments of regional integration. Traditional frameworks offer competing views of realism, emphasizing the state-centric and strategic alignments, and liberal institutionalism, highlighting the importance of institutions and alliances in fostering regional influence, both in pursuit of regional cohesion. Yoshimatsu (2022) articulates the way ASEAN navigates among major powers by driving them into regional initiatives, which helps it maintain its organizational legitimacy through socio-cultural norms and impartial engagement. Rahman et al. (2022), on the other hand, assess how the region relied on physical capital and labor to push for the economic growth of Cambodia, Indonesia, Malaysia, Philippines, Thailand, and Vietnam; providing empirical evidence of the contributions of energy, human capital, and financial development.

2.1. Strategic Realignment and Institutional Hedging in ASEAN's Security Position

ASEAN's traditional strategies of hedging and bandwagoning are increasingly becoming inadequate in the face of intensifying U.S.-China competition. The lack of substantial political and security cooperation between ASEAN and China further complicates the region's strategic landscape. Employing soft balance theory, the research examines the adjustments in ASEAN's policies within the context of great power geopolitics. By analyzing the political and security dynamics between ASEAN, China, and the United States, including trends in arms imports from these major powers, this study offers valuable insights into ASEAN's strategic responses to evolving geopolitical pressures and its implications for regional security and cooperation (Chea 2023).

The growing competition between US and China has put substantial pressure on ASEAN's capacity to uphold a balanced policy approach. Maintaining dual dependency – ensuring crucial economic ties with China while preserving vital security partnerships with the US – has become more challenging (Scott 2024).

In response to these challenges, ASEAN has sought to maintain its centrality and autonomy by engaging in institutional hedging. This strategy involves the collective pursuit of institutional binding, buffering, and building processes vis-à-vis the major powers. ASEAN's group agency is manifested through its institutional offspring, such as the ASEAN Regional Forum (ARF), the ASEAN Plus Three (APT), the East Asia Summit (EAS), and the ASEAN Defence Ministers' Meeting-Plus (ADMM-Plus). These mechanisms serve as platforms for ASEAN to engage with major powers, manage regional security dynamics, and mitigate the risks associated with great power competition (Kamaruddin and Kuik 2023).

The increased tension in the South China Sea and Taiwan Strait highlights the region's geopolitical importance. ASEAN's stability commitment aligns with the Free and Open Indo-Pacific (FOIP) vision that promotes the rule of law, economic prosperity, and freedom of navigation along vital maritime routes (Wu 2024).

Increased geopolitical tension, particularly in the South China Sea and Taiwan Strait, highlights the region's importance. ASEAN's stability commitment aligns with the Free and Open Indo-Pacific (FOIP) vision, which promotes the rule of law, economic prosperity, and freedom of navigation along vital maritime routes.

The increasing importance of institutional mechanisms like the ASEAN Regional Forum and the East Asia Summit highlights the organization's potential to act as a stabilizing force in the Indo-Pacific. However, the question remains whether ASEAN is ready to transcend its current role and emerge as a global polar capable of influencing the regional and global order.

Thus, this study is crucial for assessing ASEAN's readiness to take on this role, examining its strengths, weaknesses, and the adjustments needed to solidify its position as another polar in the multipolar world. Such an evaluation will provide valuable insights for policymakers and stakeholders, offering a roadmap to strengthen ASEAN's influence and resilience in an era of complex global challenges.

2.2. ASEAN and Regional Integration

Established in 1967, ASEAN has evolved into a comprehensive community encompassing cooperative economic, political-security, and socio-cultural dimensions, becoming a pivotal force in the promotion of regional integration across the region, and fostering stability, economic growth and a collective identity among members states. This integration has gained momentum in recent years, particularly in response to global economic and political shifts and regional challenges.

The ASEAN Economic Community is the primary driver of ASEAN's economic integration. Envisioning a single market and production base characterized by free flow of goods, services, investment, labor, and capital, AEC aims to boost competitiveness and deepen its integration globally. The AEC has made significant strides in reducing tariffs and non-tariff barriers, facilitating trade among member states. The ASEAN Free Trade Area (AFTA), among the most important regional trade agreements in Asia and the Pacific, aimed at eliminating trade barriers through the Common Effective Preferential Tariff (CEPT) on products listed in Inclusion List (IL), or products that have at least 40 percent ASEAN content (Sukegawa 2021, and Hapsari and Mangunsong 2006). Today, intra-ASEAN tariff is effectively zero (Hong et. al. 2025).

A landmark initiative in the region, the Regional Comprehensive Economic Partnership (RCEP), signed in November 2020, encompasses 15 Asia Pacific Nations, including all of ASEAN, making it the world's largest free trade agreement. RCEP aims not only to reduce tariffs but covers not only traditional trade sectors but also investment, e-commerce, intellectual property, environment, among others, and harmonizes the rules of origin across its members, including its five FTA partners China, Japan, South Korea, Australia, and New Zealand (Park et al. 2021 and Sukegawa 2021). The agreement enhances regional supply chains and economic resilience by not only reducing tariffs but also streamlining customs procedures and establishing common rules for trade and investment.

ASEAN has also pursued political and security integration through the ASEAN Political-Security Community (APSC), which seeks to ensure that countries in the region are at peace with one another and with the rest of the world in a just, democratic, and harmonious environment. This highlights the importance of rule of law, good governance, and respect for human rights (Royal Thai Embassy, Copenhagen 2022, and ASEAN 2009). The APSC promotes security cooperation through various mechanisms, including the ASEAN Regional Forum (ARF), the ASEAN Defense Ministers' Meeting (ADMM), and the ADMM-Plus, which involve dialogue partners such as the US, China, and Russia. These platforms facilitate dialogue and confidence-building measures to address security challenges in the region (Tomotaka 2022).

The ASEAN Socio-Cultural Community (ASCC), which represents the third pillar of ASEAN integration, focuses on building a people-oriented and socially responsible ASEAN community. ASCC aims to promote social justice, environmental sustainability, and cultural heritage preservation through various initiatives including programs on education, health, disaster management, and labor mobility, which are all designed to improve the quality of life for ASEAN citizens (ASEAN 2009).

ASEAN has made notable progress; however, it still faces several challenges arising from differences in political systems, economic disparities, and varying levels of development among its member states. External pressures, such as geopolitical tensions and global economic tensions, also pose risks to the regional cohesion and stability. These challenges hinder the consensus-building and policy implementation.

By enhancing institutional frameworks, however, these challenges can also present opportunities for ASEAN. For instance, promoting inclusive growth and deepening cooperation can help strengthen ASEAN's integration efforts, bolstering its resilience and global standing. Ensuring the successful implementation of its mechanisms and agreements, such as RCEP, and continuing the commitments underlined in AEC and APSC, can be critical in ASEAN's vision of fully integrated community.

2.3. ASEAN Centrality and Strategic Role

ASEAN centrality has long been recognized in regional and global affairs as a pivotal platform for dialogue and cooperation, significant in ASEAN's strategic role amid evolving geopolitical dynamics, especially the intensifying competition between major powers like the US and China.

ASEAN's centrality is the primary driver of regional processes that make ASEAN its ability to convene and lead multilateral initiatives. This concept is institutionalized in the ASEAN Charter, mandating the maintenance of ASEAN's central role in its relations and cooperation with external partners. This characteristic is evident in ASEAN's leadership in various regional mechanisms, such as the ASEAN Regional Forum (ARF), the East Asia Summit (EAS), and the ASEAN Defense Ministers' Meeting Plus (ADMM-Plus), which facilitate political, security and economic dialogues (Valockova 2025).

ASEAN's role in regional architecture is strategic and multifaceted, encompassing its function as a convener, mediator, and norm-setter. This makes ASEAN instrumental in maintaining regional stability and preventing the escalation of conflicts. ASEAN centrality allows it to

manage relations among major powers in a neutral manner of engagement, reducing the risk of polarization. Moreover, ASEAN's initiatives, such as the ASEAN Outlook in the Indo-Pacific (AOIP), reflect its proactive approach of shaping regional norms and promotion of rules-based order (Kwon 2024 and Zhiyenbayev 2024).

Despite its achievements, ASEAN's centrality faces several challenges, including increasing strategic competition between the US and China, which puts pressure on ASEAN to steer the complex geopolitical tensions while maintain neutrality and unity. The differing threat perceptions and the varying levels of economic developments also lead to divisions among member states, hindering consensus-building and effective policy implementation. In addition, the principle of non-interference and consensus-based limit ASEAN's ability to provide a prompt response on emerging issues, such as the tension in Myanmar.

These instances require the reinforcement of ASEAN centrality. Enhancing institutional effectiveness through reforms may allow for more flexibility in the decision-making process, improving responsiveness to regional challenges. Strengthening partnerships with external factors, such as the US, China, and EU, can help leverage additional support for ASEAN-led initiatives. Deepening economic integration through mechanisms like the RCEP can also bolster ASEAN's role in shaping regional economic norms and standards.

To maintain ASEAN centrality, deepening regional integration, diversifying partnerships beyond traditional partners and major powers, upholding neutrality through the AOIP, and asserting ASEAN's leadership on external platforms, strengthening a unified ASEAN identity, and promoting sustainable, inclusive development – ensuring ASEAN remains a resilient, credible, and strategic actor in an evolving multipolar global order Quimba and Barral (2024). FTA networks, like RCEP and CPTPP, have been vital contributing factors in maintaining ASEAN centrality. FTAs have been the engine of growth, unlocking new markets, eliminating barriers, and boosting the kind of innovation and investment that has powered the region's prosperity (Abdullah et al. 2024). In fact, ASEAN frameworks, such as the ASEAN Plus Three Summit, the East Asia Summit, and the RCEP, were established as planned to maintain the strength of ASEAN centrality (Nishimura, Ambashi, and Iwasaki 2019).

2.4. ASEAN and the Architecture of Global Power

Assessing a country or regional grouping's status as a polar involves evaluating multiple dimensions of influence, including economic strength, military capabilities, political and diplomatic reach, cultural impact, and technological advancement. These dimensions collectively determine an entity's ability to shape international norms, policies, and events (Bloor 2022 and Hartono 2021).

Economic Power is foundational, encompassing metrics such as Gross Domestic Product (GDP), trade volume, and control over natural resources. Additionally, control over critical natural resources enhances a nation's leverage in global markets (Bloor 2022 and Hartono 2021). For instance, the United States and China, with their substantial GDPs and extensive trade networks, exemplify economic prowess.

Military Strength is another critical dimension, measured by defense expenditures, technological sophistication, and global deployment capabilities. A robust military enables a nation to project power, deter adversaries, and contribute to international security (Bloor 2022,

Hartono 2021, and Beckley 2018). The U.S., with its extensive defense budget and global military presence, serves as a prime example.

Political and Diplomatic Influence reflects a nation's role in international organizations and its ability to build alliances. Active participation in international bodies like the United Nations Security Council and the G20 indicates significant diplomatic clout. Furthermore, the capacity to mediate conflicts and lead international initiatives showcases political influence (Bloor 2022, Hartono 2021, and Beckley 2018).

Cultural Influence, or soft power, involves the global reach of a nation's culture, values, and institutions. This includes the international popularity of its media, educational institutions attracting foreign students, and the global appeal of its lifestyle and values. Culture has a pervasive global presence through its entertainment industry and technological innovations (Cevik and Padilha 2024, Bloor 2022, Hartono 2021, and Beckley 2018).

Technological Advancement is increasingly vital, encompassing leadership in innovation, digital infrastructure, and contributions to global scientific research. Nations at the forefront of technological development, such as advancements in artificial intelligence and biotechnology, hold significant sway in setting global standards and driving economic growth (Cevik and Padilha 2024, Aslam et al. 2018, and Beckley 2018).

To determine polar status, these dimensions are benchmarked against existing powers. For example, comparing ASEAN's combined GDP, military expenditures, diplomatic engagements, cultural exports, and technological innovations with those of established powers like the U.S., China, or the European Union provides insight into its relative standing. Such comprehensive analysis helps to ascertain whether a country or regional grouping possesses the multifaceted strengths characteristic of a global polar.

Moreover, the concepts of ASEAN centrality and ASEAN's ascent to global polar are pivotal in understanding the organization's role and influence in regional and global contexts. ASEAN centrality refers to the Association of Southeast Asian Nations' (ASEAN) position as the primary driving force in fostering regional cooperation and integration within Southeast Asia (Petri and Plummer 2014). This centrality is characterized by ASEAN's ability to convene, mediate, and lead dialogues among regional and external partners, thereby maintaining stability and promoting economic growth in the region. For instance, ASEAN's role in establishing forums like the East Asia Summit and the ASEAN Regional Forum exemplifies its central position in regional diplomacy (ASEAN 2024a and ASEAN 2024b).

In contrast, ASEAN's ascent as a global polar involves expanding its influence beyond regional boundaries to play a significant role in global economic, political, and security affairs. This ascent is measured by ASEAN's collective economic strength, strategic partnerships, and contributions to global governance. However, equating global power solely to alignment with existing major powers, such as the United States or China, oversimplifies ASEAN's potential. While strategic alignments are essential, ASEAN's polar status should be assessed based on its autonomous capabilities and initiatives (Sta. Maria, Urata, and Intal 2017, and Severino 1999).

3. Methodology

Assessing ASEAN's readiness to emerge as a polar power in the evolving geopolitical landscape necessitates a comprehensive and multifaceted methodological approach. This

evaluation involves analyzing ASEAN's economic capabilities, political cohesion, security frameworks, and socio-cultural integration. Employing a combination of quantitative and qualitative research methods provides a holistic understanding of ASEAN's current position and its potential trajectory toward becoming a significant global player.

A critical component of this assessment is the analysis of ASEAN's geopolitical relevance and strategic positioning. This involves examining ASEAN's role in regional stability, its interactions with major powers, and its capacity to navigate geopolitical rivalries. Scholars have highlighted the importance of ASEAN's centrality in maintaining regional order, particularly amidst U.S.-China competition. Analyzing ASEAN's diplomatic engagements, security partnerships, and participation in regional forums provides insights into its geopolitical influence. For instance, ASEAN's approach to managing geopolitical competition among major powers has been viewed as a valuable example for the developing world (The Star 2024).

Evaluating ASEAN's economic integration is essential to understand its readiness to become a polar power. This involves analyzing intra-regional trade, investment flows, and economic policy harmonization among member states. The Asia-Pacific Regional Cooperation and Integration Index (ARCII) serves as a valuable tool in this context, offering metrics to assess the depth and breadth of regional economic integration (APRU 2020). By examining indicators such as trade openness, investment linkages, and infrastructure connectivity, researchers can gauge the economic cohesion of ASEAN and its capacity to act as a unified economic bloc.

Assessing the institutional capacity of ASEAN is also important. It involves examining its organizational structures, decision-making processes, and the effectiveness of its secretariat. This includes evaluating the implementation of agreements, dispute resolution mechanisms, and the ability to respond to regional challenges. The concept of 'ASEAN Centrality' is pertinent here, as it reflects ASEAN's role in regional cooperation and its capacity to lead initiatives (Buddell, Cursham, and Vasiljeva 2023). Analyzing policy documents, organizational charters, and the outcomes of ASEAN-led initiatives can provide insights into the institutional robustness of the organization.

Employing quantitative indicators is essential for a data-driven assessment of ASEAN's readiness. Indices such as the Global Competitiveness Index, Human Development Index, and the ARCII provides measurable data on various aspects of ASEAN's development. These indices offer benchmarks to compare ASEAN's performance with other regional organizations and global powers. For instance, the Global Competitiveness Report assesses countries' readiness for economic transformation, which can be applied to evaluate ASEAN's economic preparedness (WEF 2020).

Network analysis can also be employed to map ASEAN's diplomatic and economic relationships. By visualizing the network of ASEAN's interactions with member states and external partners, researchers can assess the organization's centrality and influence within regional and global networks. This method provides a graphical representation of ASEAN's position in international relations, highlighting its connectivity and potential as a polar power. Network analysis has been applied in various geopolitical studies to understand the complexities of international alliances and partnerships (Rahman 2024).

Comparing ASEAN with other regional organizations, such as the European Union or the African Union, can provide insights into best practices and areas for improvement. This involves analyzing organizational structures, policy frameworks, and integration processes to

identify factors that contribute to the effectiveness and influence of regional bodies. Comparative analysis offers a broader perspective on ASEAN's readiness to become a polar power by situating it within the global context of regional organizations (Marx et al. 2021).

3.1. Conceptual Framework

The paper will utilize the following conceptual framework, which provides a structured approach to understanding ASEAN's readiness to emerge as a global polar power. It highlights the interplay between internal factors, external factors, opportunities, and challenges, all of which collectively influence ASEAN's trajectory toward achieving greater global influence. At the center of this framework lies "Readiness," which integrates these dimensions into a comprehensive assessment of ASEAN's current state and future potential (Figure 1).

Figure 1. Conceptual Framework



Source: Authors' Construct

The internal factors focus on ASEAN's intrinsic strengths and capabilities, encompassing economic integration, institutional capacity, and cultural cohesion.

- **Economic Integration:** ASEAN's ability to function as a cohesive economic bloc is a critical determinant of its readiness. Initiatives such as the ASEAN Economic Community (AEC) aim to reduce trade barriers, harmonize regulations, and create a single market and production base. For example, the Regional Comprehensive Economic Partnership (RCEP), driven significantly by ASEAN, demonstrates its commitment to promoting intra-regional trade and strengthening economic linkages.
- **Institutional Capacity:** ASEAN's effectiveness depends heavily on its institutional mechanisms and governance frameworks. The ASEAN Secretariat, for example, plays a vital role in coordinating policies and ensuring the implementation of regional

agreements. However, limited financial resources and reliance on consensus decision-making often pose challenges to its operational efficiency.

- Cultural Cohesion: ASEAN's diverse member states encompass various languages, religions, and political systems. Despite these differences, ASEAN's ability to foster unity under the principle of "One Vision, One Identity, One Community" highlights its strength in cultural cohesion. Initiatives like the ASEAN Socio-Cultural Community (ASCC) aim to deepen this unity by promoting shared values and addressing common social challenges.

External factors relate to ASEAN's interactions with the global environment, particularly its geopolitical positioning, strategic partnerships, and response to global economic trends.

- Geopolitical Positioning: ASEAN occupies a strategic location in the Indo-Pacific, acting as a bridge between major powers like the United States, China, Japan, and India. This positioning enables ASEAN to influence key security and economic discussions. However, managing the competing interests of these powers, particularly amid U.S.-China rivalry, presents both opportunities and complexities.
- Strategic Partnerships: ASEAN's relationships with external partners enhance its leverage on the global stage. For instance, frameworks like ASEAN Plus Three (with China, Japan, and South Korea) and the East Asia Summit allow ASEAN to engage with influential powers. These partnerships not only strengthen ASEAN's influence but also provide avenues for technical and financial support to address regional challenges.
- Global Economic Trends: External economic dynamics, such as digital transformation and sustainability, shape ASEAN's readiness. The region has embraced initiatives like the ASEAN Digital Economy Framework to capitalize on opportunities in e-commerce and digital trade. However, global economic shocks, such as supply chain disruptions or climate-related challenges, can significantly impact its growth trajectory.

Opportunities reflect favorable external conditions or internal dynamics that ASEAN can leverage to advance its readiness.

- Growing Economic Influence: ASEAN is one of the fastest-growing regions globally, with a combined GDP exceeding \$3 trillion. The region's young and dynamic population, coupled with increasing foreign direct investment, positions it as a global economic powerhouse. For example, ASEAN's prominence in global manufacturing and trade continues to attract multinational companies seeking stable and cost-effective production hubs.
- Digital Transformation: The rapid adoption of digital technologies across ASEAN presents a unique opportunity for economic and social development. Platforms like Grab and Gojek exemplify how homegrown digital innovations are driving growth in e-commerce, ride-sharing, and financial services, enhancing ASEAN's global competitiveness.
- Geopolitical Neutrality: ASEAN's principle of neutrality enables it to act as a mediator in regional and global disputes. For instance, its efforts to establish the ASEAN Regional Forum and the Code of Conduct in the South China Sea illustrate its commitment to maintaining regional peace and stability.

Challenges represent barriers or threats that ASEAN must address to achieve its aspirations.

- **Internal Disparities:** Wide economic and development gaps among ASEAN member states pose significant hurdles to regional integration. Countries like Singapore and Brunei are far more advanced than others like Cambodia, Laos, and Myanmar, creating imbalances in resource allocation and policy implementation.
- **Geopolitical Tensions:** ASEAN's ability to maintain neutrality is increasingly tested by the intensifying U.S.-China rivalry. For instance, disputes in the South China Sea have exposed ASEAN's limitations in adopting a unified stance, with some member states aligning more closely with one superpower than others.
- **Environmental Vulnerabilities:** ASEAN is highly susceptible to climate change, with frequent occurrences of extreme weather events like typhoons, floods, and droughts. These environmental challenges threaten the region's economic resilience and undermine efforts to achieve sustainable development goals.

The concept of readiness encapsulates ASEAN's ability to harness opportunities and address challenges through its internal strengths and external engagements. A high level of readiness would mean ASEAN can assert its influence in global governance, navigating geopolitical complexities, and sustaining economic growth amidst uncertainties.

The insights gained from analyzing internal and external factors, along with opportunities and challenges, inform actionable policy recommendations to enhance ASEAN's readiness. These may include:

- **Strengthening Regional Integration:** Addressing development disparities through targeted investments and capacity-building programs can enhance cohesion and ensure that no member state is left behind.
- **Enhancing Institutional Capacity:** Allocating more resources to the ASEAN Secretariat and adopting flexible decision-making mechanisms can improve policy implementation and responsiveness to emerging issues.
- **Leveraging Strategic Partnerships:** Deepening collaborations with external partners in areas like digital transformation, climate resilience, and infrastructure development can amplify ASEAN's global influence.

3.2. Research Design

To ensure a comprehensive and precise analysis of ASEAN's ascent as a global power, Descriptive statistics and principal component analysis (PCA) are used in summarizing and prioritizing the diverse economic, political, and cultural indicators, enabling the identification of key drivers of ASEAN's progress. Comparative analysis complements this by benchmarking ASEAN's strengths and weaknesses against other global competitors, directly addressing the need to assess its position in the global landscape.

To explore the challenges and opportunities ASEAN faces, SWOT analysis is used to integrate both quantitative and qualitative data to identify actionable insights, while scenario analysis effectively models potential future scenarios, addressing uncertainties in global dynamics. Gap analysis complements these by pinpointing areas where ASEAN falls short of global benchmarks, guiding targeted interventions.

3.3. Measurement Framework

The rise of regional and global powers, or "polars", is a defining feature of the contemporary international economic landscape. Assessing ASEAN's readiness to become a global polar requires robust quantitative methodologies to evaluate how its economic integration indicators compare to those of established polars.

This study employs a three-stage quantitative framework to assess ASEAN's potential to become a global polar: (i) similarity measurement using Composite Index-based Euclidean Distance, (ii) ordinal logistic regression using Principal Component Analysis (PCA), and (iii) ordinal logistic regression using Least Absolute Shrinkage and Selection Operator (LASSO). These methods collectively evaluate how close ASEAN is to existing global polars and which structural factors statistically predict polarity status.

These procedures are critical for two reasons:

- **Benchmarking ASEAN's Progress:** Comparing ASEAN to established polars highlights its strengths and gaps, creating a clear roadmap for policy reforms and investments.
- **Strategic Policy Focus:** By identifying the indicators that drive polar status, the results guide ASEAN in allocating resources to areas with the highest impact, such as trade facilitation, digital infrastructure, or governance improvements.

3.3.1 Similarity Index using Composite Index

To empirically assess ASEAN's readiness to emerge as a global polar, the paper first establishes a reference polarity framework grounded in both conceptual definitions and global benchmarks. A total of 20–25 countries were selected as candidate polars based on consistent performance in multidimensional global rankings: the Global Soft Power Index (Brandirectory)⁴, Military Strength Ranking (Global Firepower)⁵, Globalization Index (KOF Swiss Economic Institute)⁶, and the World Power Index⁷, and a custom Distance-Weighted Trade Intensity Index (DTII). These indices reflect distinct yet complementary dimensions of modern polarity, encompassing soft power and cultural projection, hard power and defense capabilities, global connectivity, geopolitical influence, and spatially adjusted economic integration. This holistic profiling approach aligns with recent academic literature that redefines "polarity" beyond traditional metrics (e.g., GDP or military expenditure), incorporating normative, institutional, and geo-economic capacities.

These five metrics were standardized and combined into a composite similarity matrix, using Euclidean distance from the United States, a generally accepted as an established polar, as the reference. This generated an empirical polarity ladder, grouping countries into four ordinal tiers, Core Polars, Emerging Polars, Inspiring Economies, and Peripheral Economies.

⁴ Global Soft Power Index (2020, 2021, 2022, 2023, 2024, and 2025).

<https://brandirectory.com/softpower/2025/map?metric=1&fromRegion=1>

⁵ Military Strength Rankings (2020, 2021, 2022, 2023, 2024, and 2025).

<https://www.globalfirepower.com/countries-listing.php>

⁶ KOF Globalisation Index (2018, 2019, 2020, 2021, and 2022). <https://kof.ethz.ch/en/forecasts-and-indicators/indicators/kof-globalisation-index.html>

⁷ World Power Index (2018, 2019, 2020, 2021, and 2022). Morales Ruvalcaba, D. 2023. *WPI Database*. Available at World Power Index: <https://www.worldpowerindex.com/wpi-database/>

ASEAN and its member states were then evaluated by computing their Euclidean distance from the Core Polar composite profile, which formed the basis of our ordinal dependent variable in subsequent econometric models.

The Euclidean distance method is applied to measure the deviation from the core polar composite. For each candidate country i , the distance D_i from the U.S. (as the polar reference) is computed as:

$$D_i = \sqrt{\sum_{j=1}^p (Z_{i,j} - Z_{US,j})^2} \quad (1)$$

Where:

- $Z_{i,j}$ = standardized value of country i for indicator j (e.g., globalization, military strength, trade openness).
- $Z_{US,j}$ = standardized value of the U.S. for the same indicator.
- p = number of indicators.

Lower values of D_i indicate greater similarity to the US-defined polar profile, suggesting higher polarity potential. Countries were then ranked and grouped according to distance thresholds, establishing their ordinal polarity category (1 to 4), which serves as the dependent variable in our modeling.

3.3.2 Ordinal Logistic Regression Framework

To estimate the probability that a country, especially an ASEAN Member State (AMS), belongs to a given polarity tier $y \in \{1,2,3,4\}$, we apply the Ordinal Logistic Regression (OLR) model with a proportional odds specification. The OLR is particularly suited to ordered outcomes and assumes that the relationship between predictor variables and the log-odds of the response being in a higher category is the same across thresholds.

$$P(y_i \leq k \mid x_i) = \frac{1}{1 + \exp(-(\theta_k - x_i^T \beta))}, k = 1, \dots, K - 1 \quad (2)$$

$$P(y_i = k \mid x_i) = P(y_i \leq k \mid x_i) - P(y_i \leq k - 1 \mid x_i) \quad (3)$$

Where:

- x_i = vector of predictors for country i (economic, institutional, governance indicators).
- β = vector of coefficients.
- θ_k = threshold (cut-point) between categories k and $k + 1$.
- $K = 4$ = Total number of ordinal categories (polar tiers).

The outcome y captures ASEAN or AMS proximity to global polar characteristics as a function of multidimensional predictors.

Given potential multicollinearity and noise among high-dimensional predictors, two approaches were used for dimensionality reduction and predictor selection, the PCA and LASSO.

3.3.3.1 PCA-Based Model

Principal Component Analysis (PCA) was applied to transform the original predictor matrix X into a lower-dimensional set of orthogonal components $Z = XW$. The top m components were retained based on the Kaiser-Guttman rule (eigenvalues > 1) or cumulative variance thresholds (e.g., 85%).

The regression becomes:

$$P(y_i = k \mid z_i) = \sigma(\theta_k - z_i^\top \gamma) \quad (4)$$

Where:

- z_i = principal components for country i ,
- γ = coefficients for component weights.
-

This model captures latent structures in the data and ensures interpretability despite potential collinearity among input variables.

3.3.3.2 LASSO-Based Model

To retain only the most relevant predictors while penalizing less informative ones, we applied the Least Absolute Shrinkage and Selection Operator (LASSO). This shrinks the coefficient vector β by minimizing the penalized log-likelihood:

$$\hat{\beta} = \arg \min_{\beta} \{L(\beta) - \lambda \sum_{j=1}^p |\beta_j|\} \quad (5)$$

Where λ controls the level of regularization. LASSO selects a sparse set of non-zero coefficients, thus offering a compact, interpretable model.

3.3.3 Variables and Data

To comprehensively capture ASEAN's influence and readiness to become a global power, additional variables beyond the core economic integration indicators can be included in the model. Geopolitical variables, such as the UN Voting Alignment Index, measure ASEAN's diplomatic alignment and strategic behavior in global governance. The number of strategic partnerships, including free trade agreements and security collaborations (e.g., RCEP, ADMM-Plus), reflect ASEAN's networked influence and ability to engage with global powers. Similarly, defense cooperation agreements highlight ASEAN's strategic positioning in the Indo-Pacific region.

Institutional strength indicators, such as the Rule of Law Index and Corruption Perception Index, evaluate governance quality, which affects ASEAN's credibility and trustworthiness as a global player. Socioeconomic variables, including the Human Capital Index and urbanization rates, assess workforce readiness and modernization, crucial for sustained influence. Environmental variables, such as the Environmental Performance Index and renewable energy share, reflect ASEAN's alignment with global sustainability goals. Lastly, cultural connectivity

indicators, like tourism flows and cultural affinity indices, measure ASEAN’s soft power and regional cohesion.

The study assesses ASEAN’s readiness to become a polar, by adopting a multidimensional approach, drawing from existing frameworks that measure global influence. A combination of quantitative indicators and qualitative assessments will be used to evaluate ASEAN’s positioning relative to existing global polars.

The methodology presented encompasses key dimensions and indicators, including global polar status, which is typically determined by influence in economic, political, military, and cultural domains. The study will assess ASEAN’s readiness across these dimensions using the following indicators:

- Economic Power: GDP, FDI inflows/outflows, trade openness, intra-regional trade, digital economy adoption.
- Political & Diplomatic Influence: UN Voting Alignment Index, strategic partnerships, participation in global governance (e.g., ASEAN’s role in the UN, G20, RCEP).
- Military & Security Influence: Defense agreements, military spending, regional security initiatives (e.g., ADMM-Plus).
- Cultural & Soft Power: Cultural exports, tourism flows, linguistic influence, and educational collaboration.
- Technological & Environmental Leadership: Innovation indices, digital transformation, environmental performance, and renewable energy adoption.

Considering this framework, the paper utilizes the following datasets (Table 1).

Table 1. List of Data and Variables

Indicators / variables	Data Set	Source
Economic Indicators: GDP, FDI inflows/outflows, trade volumes, export/import composition, infrastructure indices	- World Development Indicators (WDI) - UNCTADStat - ASEANStats Database	- World Bank - United Nations Conference on Trade and Development (UNCTAD) - ASEAN Secretariat
Political Indicators: Global governance rankings, political stability, diplomatic engagements	- Worldwide Governance Indicators (WGI) - Diplomatic outreach reports	- World Bank - Reports from ASEAN member states' ministries of foreign affairs
Cultural Indicators: Soft power indices, cultural exports, participation in international cultural events	- Soft Power Index - UN cultural trade statistics - UNESCO cultural participation data	- Soft Power Report - United Nations (UNESCO)
Regional Cooperation: Trade agreements, ARCI, intra-	- ASEANStats	- ASEAN Secretariat

ASEAN trade and investment flows	- Regional Cooperation and Integration Index (ARCII)	- Asian Development Bank (ADB)
Geopolitical Influence: Major power influence (e.g., US, China, EU), participation in global forums	- UN voting data - Bilateral and multilateral agreements	- UN General Assembly records - ASEAN Secretariat reports
Social Data: Demographics, human capital indices	- Human Development Index (HDI) - ASEANStats Database	- United Nations Development Programme (UNDP) - ASEAN Secretariat

Source: Compiled by authors

3.3.4 What and Who is a Polar?

Schools of thought view Polarity differently. Neorealists view polarity based on power distribution that determines outcomes, emphasizing the need for material and hard power to be a true power (Roren 2024; Lobell 2017; and May, Rosecance, and Steiner 2010). For liberalists, order emerges through norms, laws, and mutual gains, and that states can cooperate through institutions and rules. Liberalists provide little attention to polarity per se but believe that institutions reduce conflict regardless of power configuration. Liberals maintain that domestic politics, international institutions, and economic interdependence matter (Barnett and Duvall 2005, Keohane 2012, and Mahmood 2025). For constructivists, polarity is not an objective fact but depends on how states perceive and accept others as poles. It does not only recognize power to be material (military, economy) but also *ideational* power, and how a state sees itself (Mengshu 2020, Jung 2019, and Theys 2018). Poststructuralism, on the other hand, challenges the very language and discourse of international relations and sees global order as a product of discourse, exclusion, and dominance. It recognizes the role of marginalized voice, non-Western perspectives, and colonial legacies, and that the concept of polarity is western-centric that marginalizes alternative ways of thinking about power, raising the question, “Who gets to define a ‘pole’ and why?” (Gillespie 2022, McMorrow 2018, and Dixon and Jones 2007).

Considering these perspectives, the chance and readiness of ASEAN becoming a polar vary: (a) unless ASEAN accumulates sufficient hard power, it can only be viewed as a minor player or balancer (neorealism/structural realism); (b) ASEAN’s institutional frameworks provide mechanisms and valuable tools for shaping global order, even without traditional power (liberalism); (c) ASEAN can shape a “normative” polarity based on centrality, neutrality, and regional identity – not just GDP or firepower – if it redefines itself, it can be seen as a apolar and be recognized as such (constructivism); and (d) ASEAN may redefine what polarity means and could reject the binary or tripolar logic and propose alternative models of regionalism and influence rooted in Southeast Asian values, pluralism, and non-intervention (poststructuralism).

While this paper does not explicitly reference these theoretical perspectives, it is important to recognize that the analysis presented may still be interpreted through these lenses to better understand the implications of ASEAN's role and its potential emergence as a polar actor within the international system.

Beyond theoretical debates, the operational challenge lies in empirically identifying which countries qualify as poles in today's international system, and how ASEAN may be situated within that structure. Rather than relying on subjective or declarative classifications of power,

this study adopts a Composite Index-based and a PCA-based similarity indices approach to determine the polarity status of countries. Using the United States, a widely acknowledged polar, as the reference, the study evaluates the degree of similarity between the US and a curated list of major economies based on standardized indicators across multiple domains: economic scale and intensity, technological capacity, governance quality, digital readiness, and military strength.

4. Results and Discussion

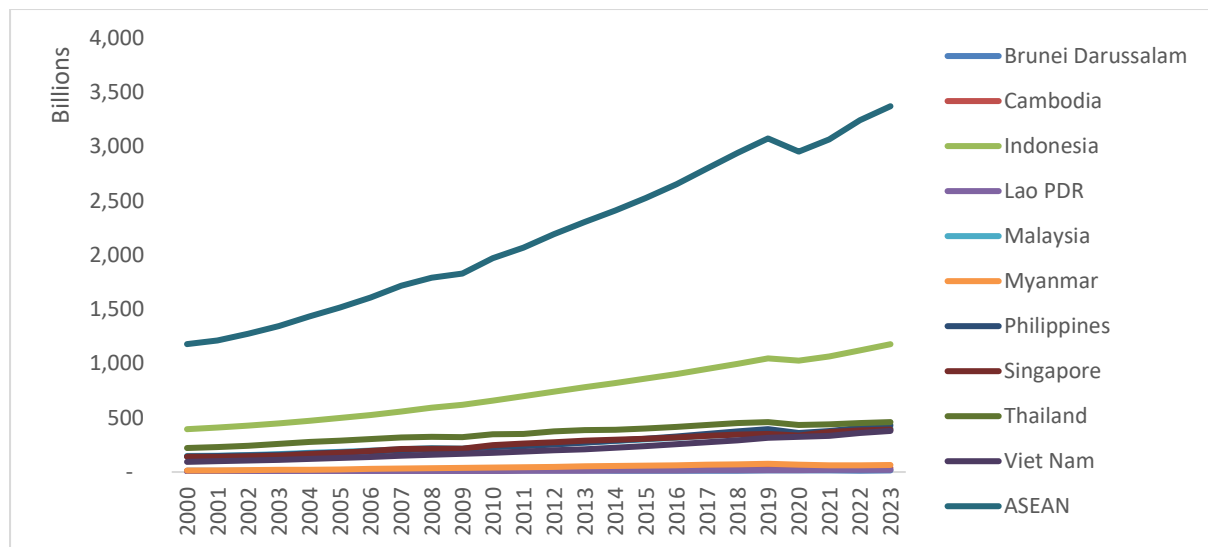
4.1. ASEAN's Profile

4.1.1 Gross Domestic Product

ASEAN has experienced a steady growth in GDP from 118 to 3.37 trillion USD in 2000 to 2023 (Figure 2). During the 2008-2009 global financial crisis, it slightly slowed but did not contract significantly. It experienced significant contractions during the 2020 pandemic but was able to rebound in 2021.

Major contributors of ASEAN GDP include Indonesia, owning about 35 percent of the region's GDP in 2023, followed by mid-sized economies of Thailand, Malaysia, the Philippines, and Singapore.

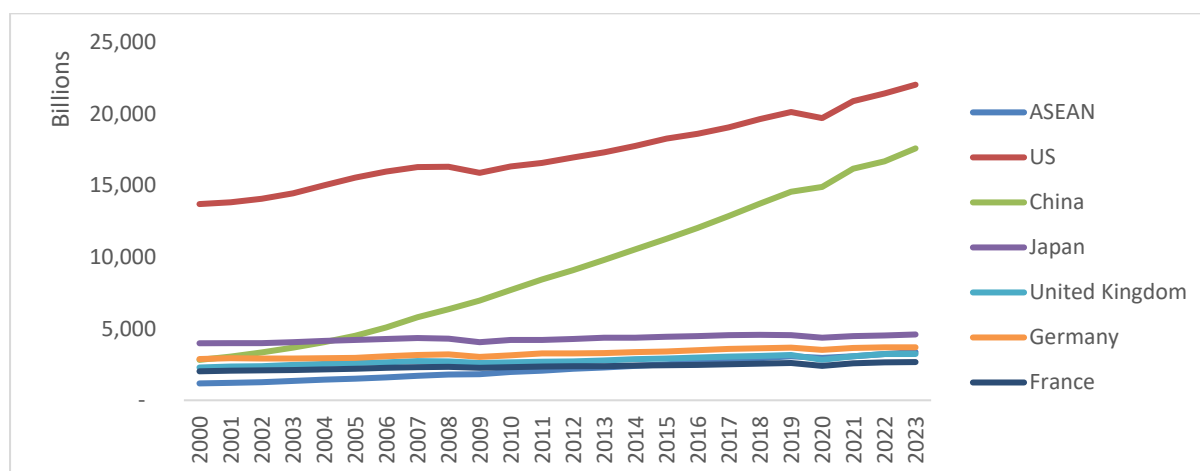
Figure 2. GDP of ASEAN Members (constant 2015 USD, in billions)



Source: Authors' construct, based on data from the World Bank

The US has constantly the highest GDP, rising from 13.7 to 22 trillion USD. China, however, displayed the fastest growth, six times over during the same period, from 2.8 to 17.6 trillion USD. As for the rest, their GDP appear to plateau (Figure 3).

Figure 3. GDP of ASEAN and Select Major Economies (constant 2015 USD, in billions)



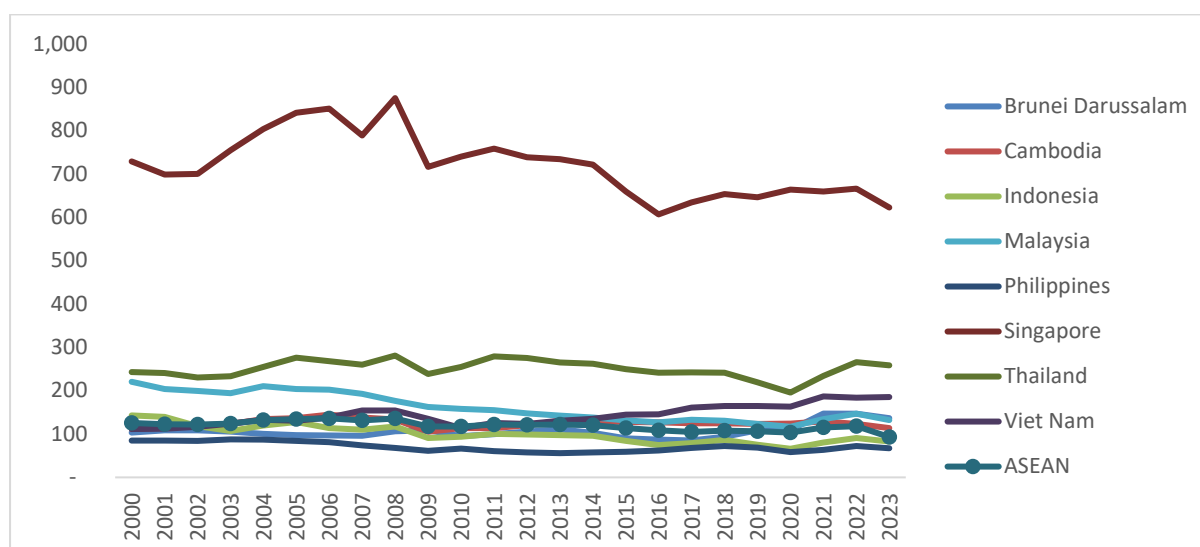
Source: Authors' Construct, based on data from the World Bank

4.1.2 Trade Openness

On average, the region has strong levels of trade openness, especially during the early 2000s, peaking in 2008, although it experienced slight tapering off. Even during the 2020 pandemic, the region remained relatively open despite slightly dipping and rebounding in previous years (Figure 4).

Among the member states, Singapore's trade openness has been far above the regional average, followed by Thailand that is consistently above the regional average. The rest, on the other hand, are either below or are fluctuating around the regional average. The Philippines has been consistently the least open in the region, indicating a more domestically driven economy or limited trade scale.

Figure 4. Trade Openness of ASEAN Members (percent)



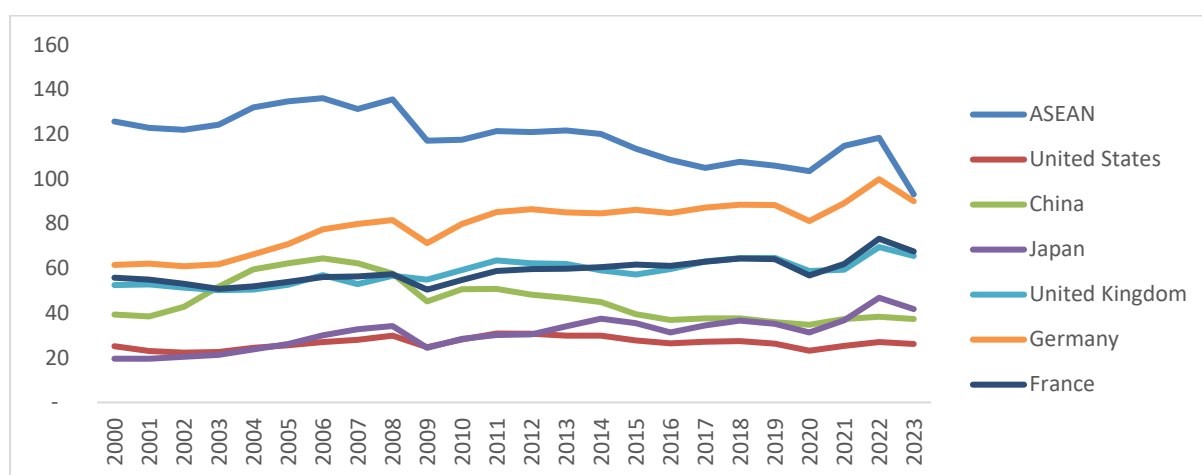
Note: Lao PDR and Myanmar are excluded due to limited data.

Source: Authors' construct, based on data from the World Bank

Comparing ASEAN’s trade openness with other major economies, surprisingly, ASEAN appears to be more open, reflecting its global importance. It is followed by Germany, which shows consistent growth since 2000. France and the UK follow at a virtually similar fashion.

ASEAN’s openness remains higher, but it is clearly shifting away from globalization. Germany, France, and the UK are relatively more open but are also experiencing downward pressure. On the other hand, China, Japan, and the US are on cautious or strategic decoupling from global trade reliance (Figure 5). In addition, after rebounding from the pandemic, economies’ trade openness declines in 2023 potentially due lingering supply chain disruptions brought about by trade tensions (e.g., US-China) and geopolitical uncertainties (e.g., Russia-Ukraine, Taiwan Strait risks), leading to fragmentation of global trade systems and reshoring and diversification strategies of economies.

Figure 5. Trade Openness of ASEAN and Select Major Economies (percent)

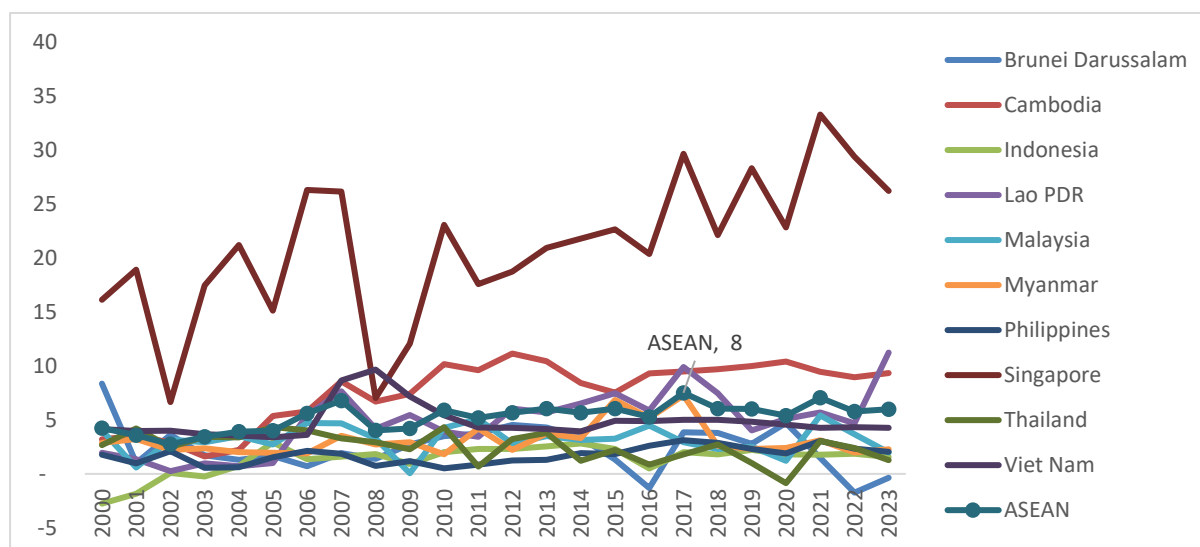


Source: Authors’ construct, based on data from the World Bank

4.1.3 Foreign Direct Investment

ASEAN’s FDI performed steadily moderately, hovering between 3 and 8 percent of the GDP, peaking in 2017. Despite the pandemic, it maintained a resilient 6 to 7 percent during 2020-2023, showing relative strength amidst global volatility (Figure 6). This implies that ASEAN remains an attractive investment destination potentially due to efforts in regional integration, supply chain diversification, and digital economy growth.

Figure 6. FDI of ASEAN Members (net inflows, % of GDP)

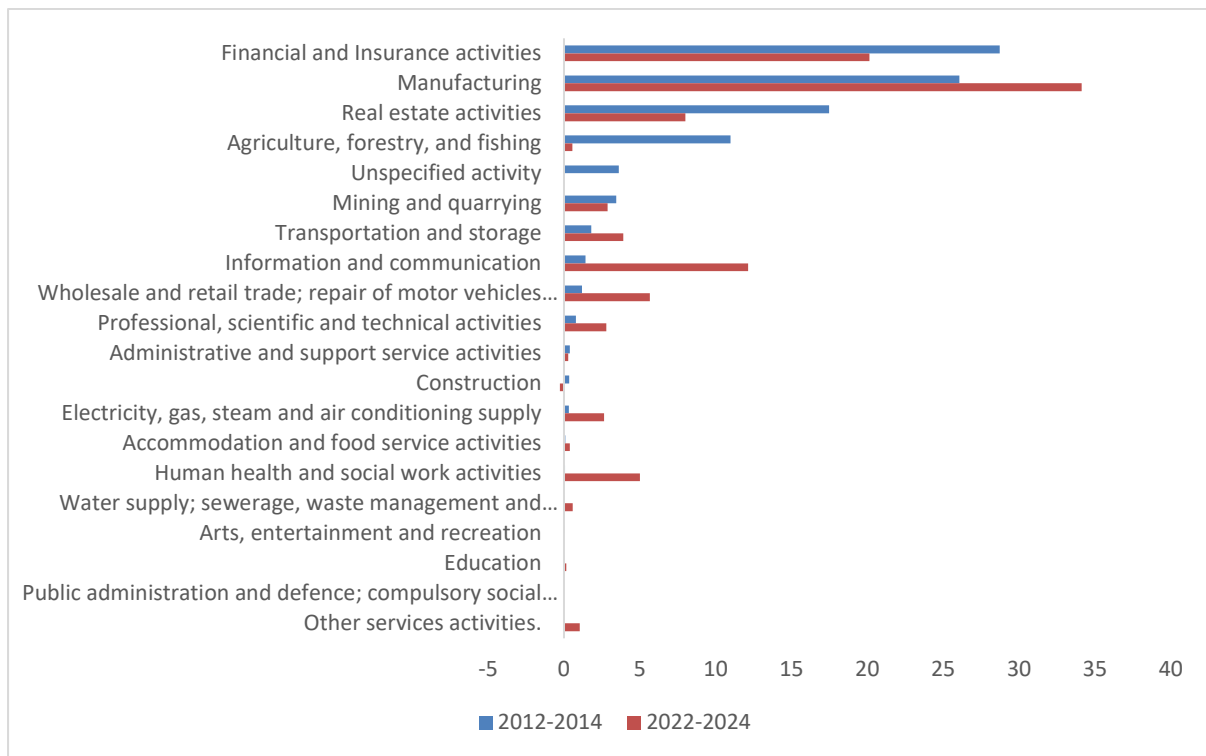


Source: Authors' construct, based on data from the World Bank

The majority of ASEAN FDI is mainly from financial, manufacturing, real estate and agriculture. Manufacturing is the largest contributor at 34 percent average of 2022-2024, increasing from 26 percent average of 2012-2014. Financial and insurance activities followed, contributing 29 percent in 2012-2014, but dropping to an average of 20 percent in 2022-2024, a 9-percentage point difference. Similar trends can be observed in real estate and agricultural activities, with agriculture dropping to 10 percentage points, the top loser among sectors (Figure 7).

While the shares of traditional sectors (real estate and agriculture) drop, increases can be observed in modern and growth sectors, such as ICT, wholesale and retail trade, and healthcare, alongside manufacturing. The shifts from finance and real estate to these sectors indicate sectoral rebalancing or investor caution, owing to geopolitical uncertainties, and the growing importance of digitalization, regional integration, and supply chain shifts.

Figure 7. ASEAN FDI by Sector (percent share)



Source: Authors' construct, based on data from ASEANStats

Comparing it with select major economies, the contribution or intensity of foreign investments in the ASEAN economy is relatively larger, from around 3 to 4 percent in the early 2000s to consistently 6 to 8 percent post-2010 (Figure 8), even during the pandemic, indicating the region as an emerging key FDI magnet, likely to benefit from global supply chain and diversification. FDI remains a key growth driver, supporting infrastructure, manufacturing, digital economy, and service sectors in the region.

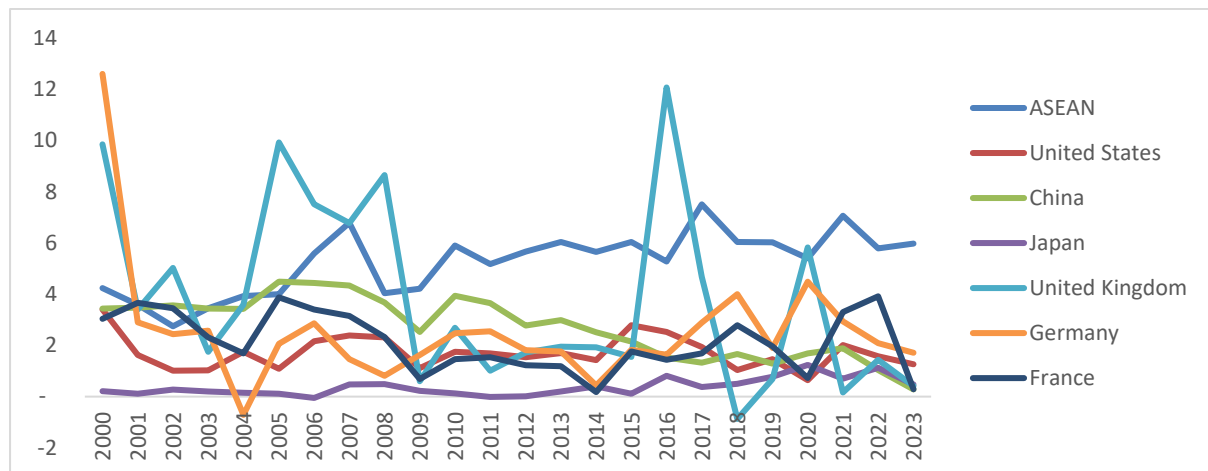
US FDI remained low at 1 to 3 percent across all years. This, however, does not indicate that US FDI is small relative to its GDP; instead, US' massive economy relies heavily on domestic economy and portfolio investment, implying that FDI is not a primary growth engine.

The UK's FDI is highly volatile, ranging from 10 percent in the early 2000s, potentially benefitting from EU membership and London's role as a financial hub, to negative in 2018, possibly a product of Brexit uncertainties, regulatory shifts, and loss of EU access, indicating how FDI can be vulnerable to policy changes and investor confidence.

China's FDI boom at around 3 to 4 percent until 2010s, potentially due to export-led industrialization, but has since declined to near zero percent in 2023, which may reflect rising domestic self-reliance, the US-China tensions, and capital controls and regulatory tightening. China's model is shifting away from FDI-reliant growth to domestic demand and innovation.

Japan has a similar trend, flatting between zero to 1 percent with almost no change across the period, indicating Japan's self-reliance as fueled by domestic and outbound investment, not foreign inflows.

Figure 8. FDI of ASEAN and Select Major Economies (net inflows, % of GDP)

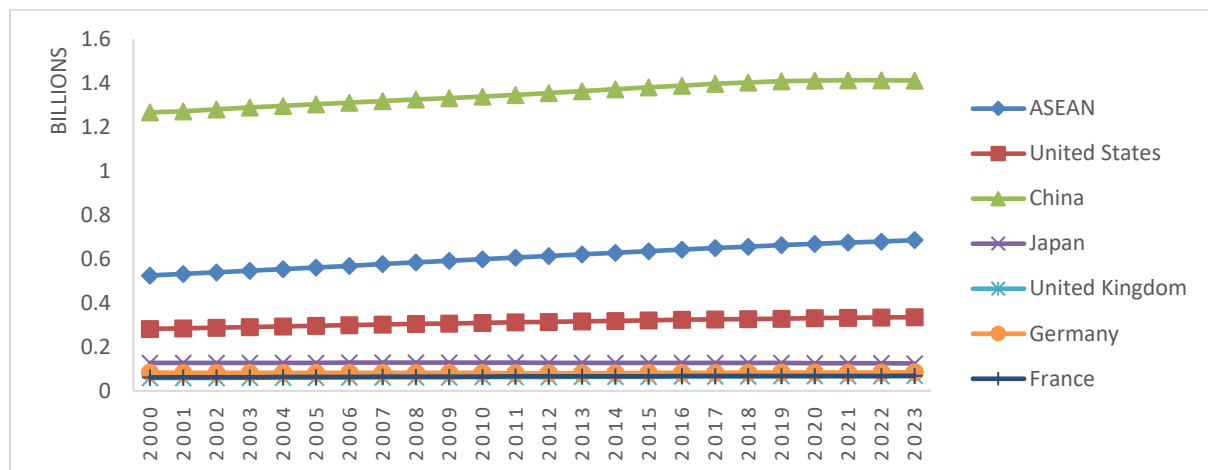


Source: Authors' construct, based on data from the World Bank

4.1.4 Population

Since 2020, ASEAN has added over 160 million people, surpassing 685 million (Figure 9), making the region a growing domestic market attractive to investors, and a greater regional economic weight, enhancing its geopolitical and trade influence.

Figure 9. Population of ASEAN and Select Major Economies (in billions)



Source: Authors' construct, based on data from the World Bank

China, unsurprisingly, has the largest population but its growth has plateaued, which may indicate shrinking labor force that may shift its economy from labor-intensive to high-tech and capital-intensive industries. This may also mean domestic demand remains strong but slower growth may dampen long-term GDP expansion.

The US population remains above major developed peers, maintaining a strong domestic consumer demand and sustained economy dynamism.

Meanwhile, Japan has been experiencing a continuing demographic contraction, losing approximately 3 million people since 2000. This may result in a shrinking workforce and rising dependency ratio and limited long-term economic growth, unless productivity compensates.

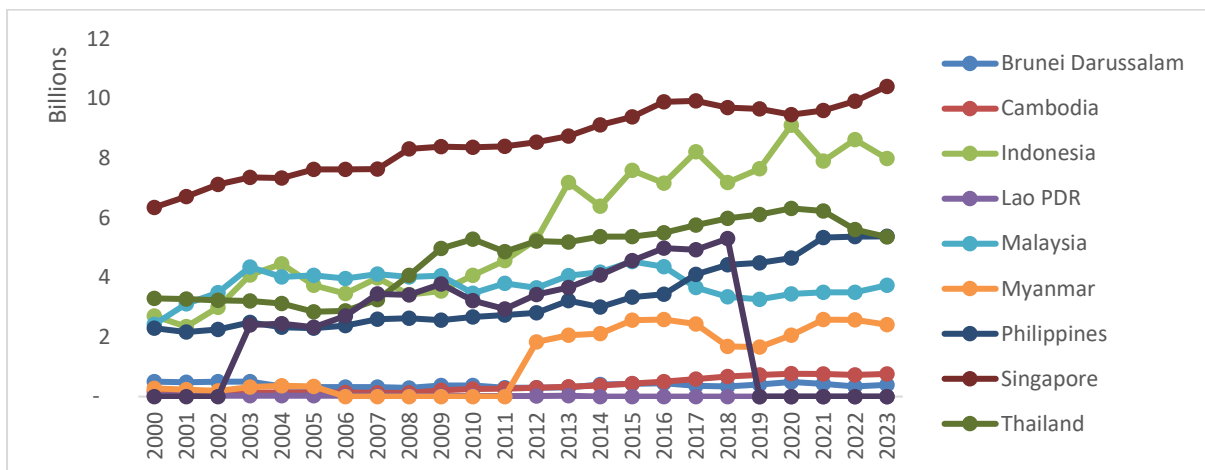
For the EU countries, UK and France posted moderate growth, while Germany shows stagnation, although it avoids major decline.

4.1.5 Military Expenditure and Armed Forces

Military spending in the region has more than doubled for the past two decades, from 24.9 billion USD in 2000 to 65.6 USD in 2023. Singapore has been the leading investor followed by Indonesia and Thailand. The Philippines comes fourth during past years, surpassing Viet Nam and Malaysia (Figure 10).

While the growth in military spending in the region mirrors growing economic trends, especially in Singapore, Indonesia, and Thailand, it also indicates an emphasis on defense modernization efforts and growing concern over territorial disputes, internal insurgencies and political unrest.

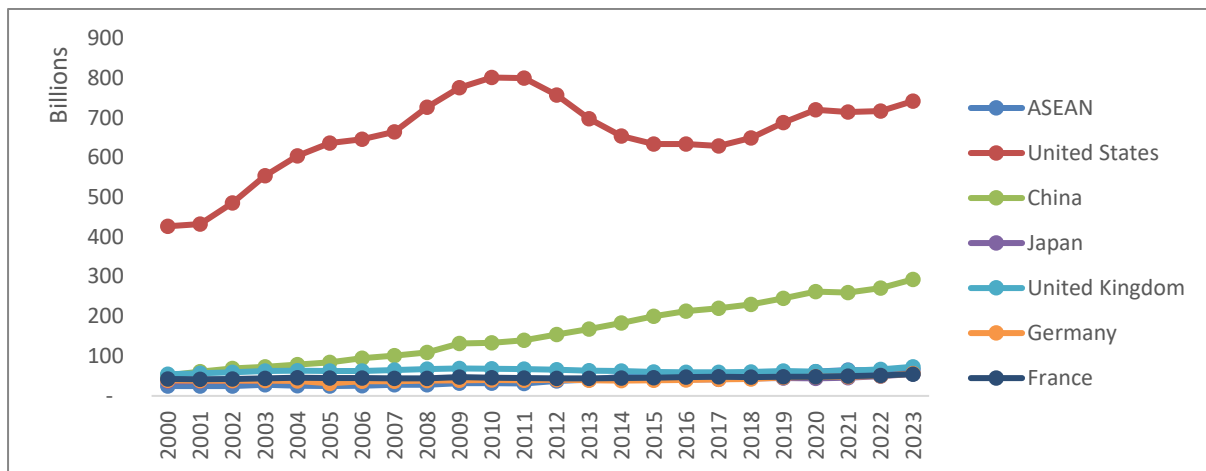
Figure 10. Military Expenditure of ASEAN Members



Source: Authors' construct, based on data from the World Bank

The military growth in the region, however, is only minimal compared with the US and China. US spending noticeably surged post-9/11, peaking at 801 billion USD in 2010, indicating its serious counter-terrorism efforts, and potentially as part of its efforts to pivot Indo-Pacific and as a support to the North Atlantic Treaty Organization (NATO). China, on the other hand, has not come half of the US' military spending but has the highest growth at 466 percent, with only 51.9 billion USD in 2000 to 293 billion USD in 2023 (Figure 11).

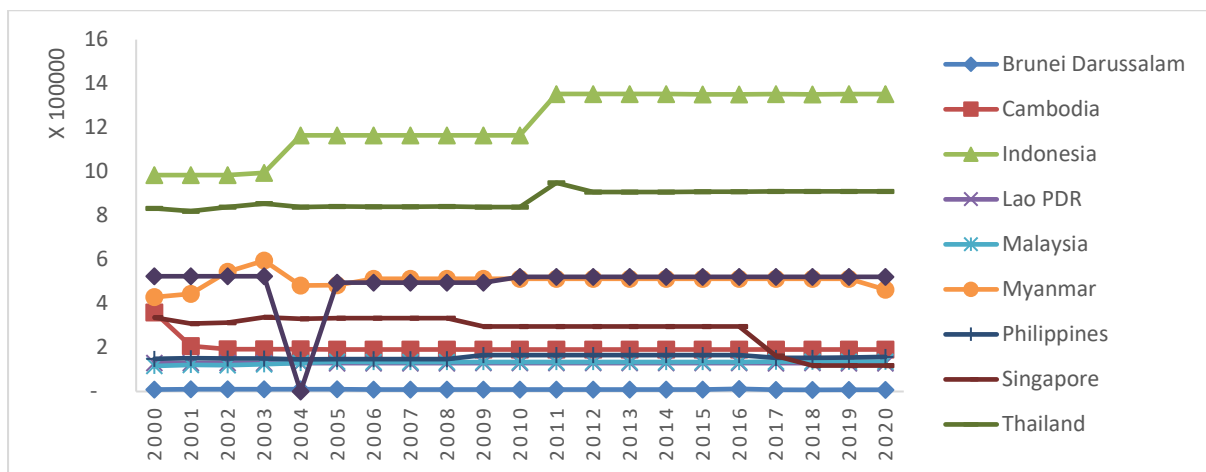
Figure 11. Military Expenditure of ASEAN and Select Major Economies



Source: Authors' construct, based on data from the World Bank

In terms of the armed forces, Indonesia has the largest military size, followed by Thailand. Among the member states, only Indonesia's military has significantly increased from 984,000 to 1.34 million troops from 2000 to 2020 (Figure 12). Indonesia maintains a large and stable force potentially due to its geography and strategic position. The Philippines, on the other hand, has one of the smallest military armed forces, slightly lower than Cambodia and Malaysia.

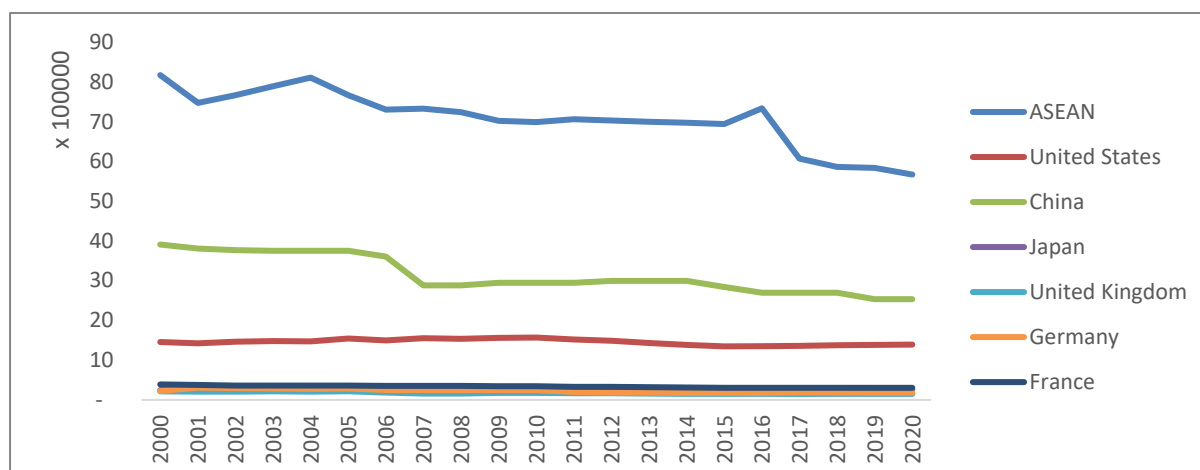
Figure 12. Armed Forces of ASEAN Members



Source: Authors' construct, based on data from the World Bank

Despite Indonesia's consistent dominance in armed forces in the region, overall armed forces in ASEAN declined from 8.2 million in 2000 to 5.7 million in 2020, a 31 percent difference (Figure 13). The combined number of armed forces of the member states, however, still substantiates how the region could have become a potential military power. Leaving out ASEAN, China has the largest armed forces at 2.5 million in 2020, although it has declined by 35 percent from 3.9 million in 2000. The US only comes half of China's at about 1.4 million in 2020, only experiencing a negligible 4 percent decline from 1.5 million in 2000.

Figure 13. Armed Forces of ASEAN Members and Select Major Economies



Source: Authors' construct, based on data from the World Bank

4.2. Quantifying ASEAN's Readiness to Global Power Status

4.2.1 Results of the Similarity Index

While the paper makes no attempt to delineate or classify polar economies, similarity analysis is conducted to compile a working list of economies that are indicative of a polar profile to facilitate the analysis. The list is as follows:

Table 2. List of Reference Economies⁸

Core Polar	Emerging Economy	Inspiring Economy	Peripheral Economy
United States	Australia	Brazil	Costa Rica
United Kingdom	Norway	Mexico	Sudan
Germany	Denmark	Romania	Zambia
France	Belgium	Qatar	Libya
Japan	United Arab Emirates	Egypt, Arab Rep.	Moldova
Canada	Finland	Luxembourg	Malta
China	Israel	Ukraine	Mozambique
Italy	Austria	Indonesia	Turkmenistan
Switzerland	Portugal	Slovak Republic	Mongolia
Netherlands	Greece	New Zealand	El Salvador
Sweden	Saudi Arabia		
Spain			

Source: Authors' construct

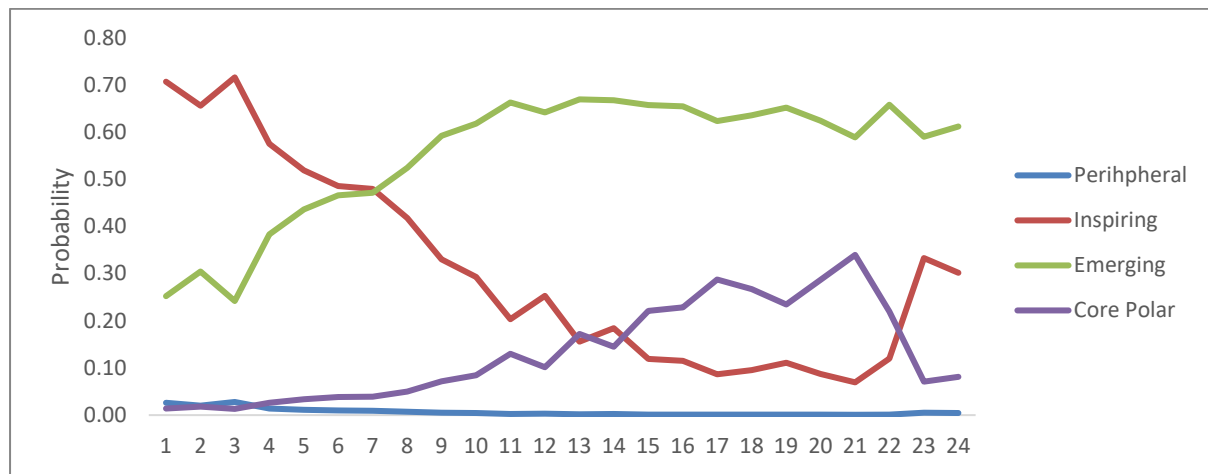
⁸ The list was compiled based on the average similarity scores of compound index and PCA-based index.

4.2.2 Results of the PCA-based Logistic Regression

The PCA shows more conservative results that suggest ASEAN is firmly in category 3 and slower movement into category 4, an indication of polar potential. With the probability starting around 0.30 in observation 1 and rises above 0.70 in the middle observations (10–20), ASEAN is most consistently classified as an emerging economy throughout the model (Figure 15), suggesting that the bloc has a significant economy and institutional progress.

Although initially, the probability of ASEAN belonging to an inspiring economy is high, it declines sharply and remains low, indicating that the region has progressed beyond that stage.

Figure 15. Predicted Probability of ASEAN’s Polarity Status (PCA Model Output)



Source: Authors’ construct

The likelihood of ASEAN being categorized into such status is summarized as follows:

Table 3. Likelihood of ASEAN’s Polar Status (PCA Model Output)

Category Number	Description	Probability Range	Interpretation
1	Peripheral Economy	~0.001 – 0.027	Very low likelihood
2	Aspiring Economy	~0.070 – 0.710	Moderate
3	Emerging Economy	~0.100 – 0.660	Strong and persistent
4	Core Polar	~0.010 – 0.340	Growing and developing

Source: Authors’ construct

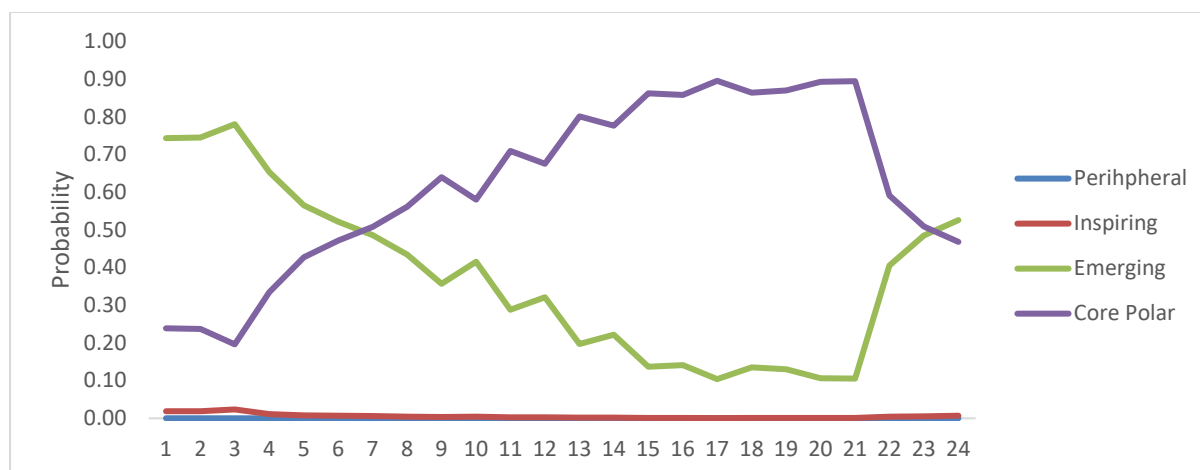
The PCA logistic regression results indicate that ASEAN maintains a persistent and dominant probability of being in the “emerging” category, with only a modest and gradual rise in the likelihood of being a polar economy. Across all observations, ASEAN’s core identification remains statistically centered within category 3, although category 4 (polar) probabilities increase slightly in later observations. Thus, ASEAN is empirically situated within the emerging economy tier, with only early signs of potential polarity, suggesting that while progress is evident, it has yet to cross the threshold into core polar classification under PCA-based modeling.

4.2.3 Results of the LASSO-based Logistic Regression

The probabilities for ASEAN belonging to each category (from peripheral to polar) are provided across 24-year observation. Based on the results of the LASSO logistic regression, ASEAN has a fair chance of being classified as a core polar. The probabilities progress significantly from observation 4 to 20, peaking between 15 to 20, close to 0.9, indicating very strong confidence before dying out after observation 21, suggesting a possible reversal in the recent years (Figure 14).

The probability of ASEAN being classified as an emerging economy starts high above 0.7 before a steady decline as the core polar classification rises. From observations 8 to 20, the emerging probability drops below 0.5, suggesting a transition away from an emerging status. The probability increases again after observation 21, which may indicate that the factors supporting the core polar classification have weakened, causing a regression in ASEAN's perceived status.

Figure 14. Predicted Probability of ASEAN's Polarity Status (LASSO Model Output)



Source: Authors' construct

The likelihood of ASEAN being classified into polarity classification is summarized in the probability range in Table 3, showing dominant probabilities for category 3, but also growing values in category 4.

Table 4. Likelihood of ASEAN's Polar Status (LASSO Model Output)

Category Number	Category	Probability Range	Interpretation
1	Peripheral Economy	~1e-7 – 1e-6	Very small likelihood
2	Aspiring Economy	~0.001 – 0.018	Low but detectable
3	Emerging Economy	~0.100 – 0.780	Moderate to high
4	Core Polar	~0.190 – 0.890	Low to very high

Source: Authors' construct

The LASSO logistic regression suggest that ASEAN begins as clearly “emerging” but increasingly resembles a polar economy in later specifications. Thus, ASEAN is statistically at the boundary of category 3 and 4, leaning toward polar status.

Table 5. Most Important Indicators Base on the LASSO Output

Variable	Coefficient	Interpretation Summary
GDP	5.609	Higher GDP increases odds of being classified as a polar
Corruption	1.768	Lower corruption (higher index) strongly correlates with polarity
ArmedForce	1.228	Military personnel size positively contributes
MilitaryExp	1.222	Defense spending correlates with power potential
RnD	1.199	R&D effort contributes to polarity
InternetAccess	0.496	Digital connectivity is positively associated
TradeOpen	0.275	Greater trade openness positively contributes
RuleLaw	0.263	Governance quality is moderately influential
Health	0.126	Minor contribution from health spending
FDI	0.007	Slight positive effect from foreign investment
Electric	0.000	Excluded by LASSO – not predictive in presence of others
LaborForce	0.000	Excluded – weak effect when others are included
EducExp	-0.354	Education alone may not shift status
Patents	-0.687	Negative loading suggests innovation alone doesn't determine power
UN_votesim	-0.766	Dissimilarity in UN votes from core may indicate strategic independence
Intercept	-0.812	Baseline log-odds when all predictors are zero
Population	-1.024	Large populations may not guarantee polarity

Source: Authors' construct

4.2.4 SWOT Analysis

To complement the quantitative analysis with strategic depth and practical insight, a SWOT analysis is conducted (Table 5). ASEAN's strengths lie in its significant economic size, strategic location controlling key sea lanes, and established centrality in regional forums, supported by its normative power. However, its weaknesses include internal asymmetries among members, limited military capabilities, and slow decision-making processes. For opportunities, ASEAN can leverage rising geopolitical tensions to become a third strategic force and lead in the green and digital economies. Conversely, the threats it faces include the risk of becoming a battleground for great power rivalry and institutional stagnation if it fails to reform.

Table 6. SWOT Analysis of ASEAN's Polar Potential

Strengths	Weaknesses
Economic Size and Growth – combined GDP and population make ASEAN one of the largest economic regions.	Asymmetry Among Members – disparities in development, governance, and capacity among AMS hinder coherence.
Strategic Location – controls vital sea lanes (e.g., Malacca Strait); proximity to global polars.	Limited Hard Power – comparatively low military and technological capabilities vs. established poles.
Centrality in Regional Cooperation – ASEAN-led mechanisms (ARF, EAS, AFTA) enhance institutional reach.	Slow Decision-Making – consensus-based diplomacy delays action on strategic or contentious issues.

Normative Power – promotion of non-interference, neutrality, and regional identity.	Fragmented External Relations – varied external alignments reduce unified geopolitical influence.
Opportunities	Threats
Geopolitical Realalignments – rising US-China tensions allow ASEAN to act as a third strategic force.	Great Power Rivalry Spillover – ASEAN may become a battleground rather than a pole if it lacks autonomy.
Green and Digital Economy Leadership – momentum in ESG, renewables, and digital trade.	Institutional Stagnation – if ASEAN doesn't reform, its centrality risks erosion by faster-moving blocs.
Deepening Intra-ASEAN Integration – potential to form a more cohesive economic and political bloc.	Internal Conflicts and Authoritarian Drift – political instability in some AMS undermines ASEAN credibility.
Partnerships with Emerging Poles – collaboration with India, Africa, and Latin America can amplify role.	Marginalization in Global Forums – underrepresentation in G7/BRICS-like groups limits global influence.

Source: Authors' construct

Strengths and opportunities show that ASEAN's potential transition from emerging to polar is plausible, especially when ASEAN can leverage centrality, normative influence, and the 'power' it possesses. However, the fragmentation, weak hard power, and lack of decisive institutions present recurring bottlenecks. ASEAN's polarity will likely depend on institutional reform, strategic neutrality, and cohesive regional leadership, not just economic metrics.

ASEAN's strength lies in its collective weight and strategic role. As a region, it boasts a large and growing economy, positioned at the crossroads of some of the world's busiest maritime trade routes. Its long-standing practice of convening and leading regional platforms, from the ASEAN Regional Forum to the East Asia Summit, has given it centrality and a subtle form of influence rooted in normative power – its ability to shape behavior through principles like consensus, neutrality, and non-intervention.

Yet, ASEAN is not without its internal struggles. Its members are vastly different in economic development, political systems, and capacities, which make collective action uneven and often slow. The region also lacks a unified military or hard power capability, which limits its deterrent strength in times of heightened tension.

Looking forward, ASEAN has real opportunities to rise further. The intensifying rivalry among great powers creates space for a third force, an actor that can balance without taking sides. At the same time, ASEAN's young population and push toward digitalization and sustainability offer pathways for leadership in the green and digital transitions.

But there are serious risks too. If it fails to adapt and reform, ASEAN risks being sidelined or used as a proxy battleground by bigger powers. Institutional inertia, if left unaddressed, may weaken its relevance. In a fast-moving world, its credibility as a central force will depend not just on where it stands, but how quickly and cohesively it can move.

5. Conclusion and Policy Recommendations

5.1. Summary of Key Findings

Beyond theories and traditional frameworks, polarity in the international system cannot be solely defined by material capabilities but is also a function of agency. Although it is important that a country or a region possess global influence, it must also demonstrate the intention and strategy to act as a global leader. For ASEAN, this means asserting its own interests, strategic narratives, and autonomy in shaping regional and even global governance norms, a distinctive path emphasized in ASEAN's consensus-building, non-interference, and regional centrality. Rather than mimicking Western or traditional models, ASEAN may seek recognition through its functional centrality and convening leadership.

Considering the multi-dimensionality of polarity, contemporary order is no longer defined solely based on military and economy might, as influence spans across technological dominance, norm entrepreneurship, and control over digital, environmental, and knowledge systems. The EU, for instance, is often seen as a global pole, not because of its military capabilities but due to its regulatory power and norm-setting. If ASEAN strengthens its role in shaping global digital governance, trade standards, environmental policy, or South-South cooperation, asserting itself as a functional pole is viable, especially in areas where rulemaking requires collective actions beyond great powers.

Polarity is relational and political – a pole does not exist in a vacuum but is often identified in relation to others. This implies that ASEAN's polar potential relies on dual tasks of maintaining internal coherence and capabilities and external self-assertion in the global community and how other economies outside the region engage with it and recognize its identity. Thus, institutional reforms, policy coherence, and regional capacity-building must be paired with strategic diplomacy that positions ASEAN as a necessary stakeholder in global governance.

ASEAN, however, is composed of internal diversity and institutional limitations, with wide asymmetries in economic size, political systems, and strategic orientations, among others, which present a critical conundrum that complicates efforts to forge unified foreign policy and collective strategic identity. While the ASEAN Charter and its consensus-based decision-making principles promote inclusiveness, its own bureaucracy can also delay responses to crises or dilute collective action. Addressing these structural bottlenecks, by enhancing institutional coordination, identifying policy domains where deeper integration is necessary, and strengthening leadership mechanisms, will be essential for the region to operate credibly in a polar capacity.

ASEAN's consensus-based model, while effective in fostering unity and averting conflict, poses structural limitations to its evolution into a legally binding, supranational entity akin to the EU. Decisions are made through *musyawarah* (consultation) and *mufakat* (consensus), which are culturally rooted in Southeast Asian norms. While this enhances inclusivity and buy-in, it also means many agreements are non-binding, and enforcement mechanisms are weak or absent. This "ASEAN Way" emphasizes non-interference and national sovereignty, which can slow down decisive regional action.

Nonetheless, ASEAN has demonstrated institutional evolution, particularly through economic integration initiatives like the ASEAN Economic Community (AEC), which includes efforts

toward harmonizing standards, liberalizing services and investments, and building a single production base. Notably, the ASEAN Single Window (ASW), Mutual Recognition Arrangements (MRAs), ASEAN Trade in Goods Agreement (ATIGA) and ASEAN Comprehensive Investment Agreement (ACIA), and the ASEAN Digital Economy Framework Agreement (DEFA).

Moreover, the question of “who gets to define a polar” remains central, considering postcolonial and Global South contexts. Historical non-alignment of ASEAN, its rejection of Cold War bipolar logic, and its commitment to regional autonomy all suggest the region may not aspire to polarity in traditional terms. Instead, ASEAN may propose a new understanding of multipolarity that highlights interdependence, inclusiveness, and co-leadership – a model that would resonate with other regions seeking voice and influence without succumbing to great-power rivalry. If ASEAN succeeds in institutionalizing that vision through regional architectures, development partnerships, and diplomatic leadership, it may well define a new category of polarity – a norm-entrepreneurial, consensus-based polar actor in a fragmented but interconnected global order.

While ASEAN’s consensus-driven diplomacy and normative influence, through its mechanism like the ASEAN Way, Treaty of Amity and Cooperation, and the ASEAN Outlook in the Indo-Pacific (AOIP), is recognized in the region, these norms have limited resonance outside Southeast Asia; they do not fundamentally shape international rules and are still reactive rather than transformative. ASEAN needs to develop the ability to design, enforce, and sustain international norms, and have the legal authority or supranational power to bind members.

5.2. Implications for ASEAN’s Global Position

5.2.1 Shaping Regional Stability and Global Trade

The increasing probability of ASEAN approaching polar status indicates a growing capacity to mandate regional stability, especially through diplomatic convening platforms like EAS, ARF, and ADMM-Plus, and leveraging these is vital amid rising tensions in the Indo-Pacific.

As ASEAN remains a key production hub and connector of supply chains, it benefits from frameworks like RCEP and ASEAN Single Window, which bolsters ASEAN’s ability to drive norms and coherence in global trade.

5.2.2 ASEAN’s Strategic Advantage: Centrality and Neutrality

While major powers and economies exert power through dominance, ASEAN trusts its centrality, a position earned from trust and neutrality among major powers, allowing the region to act as bridge among competing polars, offering a neutral and open platform for dialogue and cooperation. The results of the analysis verify ASEAN’s growing polar alignment and validate its non-hegemonic form of polarity that is rooted in multilateral diplomacy and soft balancing.

5.3. Policy Recommendations

To secure its trajectory, even not as a polar status, ASEAN must reinforce its internal economic structure and external strategic leverage, such as its intra-ASEAN economic linkages. Fast-tracking the implementation of RCEP can deepen trade integration, particularly through

harmonizing rules of origin and supply chain standards. Building on initiatives like the ASEAN Smart Cities Network, expanding digital IDs and e-commerce interoperability, especially between Singapore, Malaysia, and Thailand, can help reduce friction in cross-border transactions. In security, expanding joint maritime patrol (e.g., in the Sulu-Sulawesi Seas) and boosting disaster response coordination through ASEAN Coordinating Centre for Humanitarian Assistance on disaster management (AHA Centre) can help grow collective capacity and resilience.

While infrastructure disparities remain to be an issue in the region, accelerating digital transformation through the Master Plan on ASEAN Connectivity 2025 provides a strategic anchor to develop digital highways and promote cross-border data flow. With the ASEAN Digital Economy Framework Agreement (DEFA), which aimed at ASEAN to be positioned as a global digital rules-setter, akin to the EU's General Data Protection Regulation (GDPR), harmonizing digital and AI regulations can reduce fragmentation and better prepare the region for the agreement.

As part of trade and investment strategies, sustainability can be integrated by promoting ESG criteria into infrastructure, such as through the ASEAN Taxonomy for Sustainable Finance, which can be expected to attract green capital and support energy transition efforts in CLMV. This will also further promote regional dialogues on carbon border adjustments, biodiversity trade, and sustainable source (e.g., palm oil from Malaysia and Indonesia), allowing ASEAN to shape emerging trade norms. Business compliance with sustainable finance principles, supported by platforms like the ASEAN Capital Markets Forum, must be incentivized.

Externally, ASEAN should diversify strategic partnerships beyond the US and China. Strengthening ties with India via the ASEAN-India Comprehensive Strategic Partnership and operationalizing ASEAN-EU dialogues and Mekong-Japan initiatives can reduce dependency and open multipolar options. Minilateral arrangements such as the Indonesia–South Korea CEPA or the Vietnam–EU FTA provide blueprints for complementary engagements.

Internally, ASEAN must close development gaps and enhance institutional cohesion. The Initiative for ASEAN Integration (IAI) Work Plan IV remains essential to uplift CLMV economies. As institutional reforms are equally crucial, empowering the ASEAN Secretariat with clearer mandates, a larger budget, and enforcement mechanisms will be key to faster and more coherent regional responses. Promoting ASEAN identity, particularly through education exchanges, shared media, and public diplomacy campaigns, will foster a collective sense of purpose aligned with its growing global role.

5.3.1 Political Dimension: ASEAN's Normative Soft Power and Democratic Gaps

To enhance ASEAN's political credibility and influence globally, ASEAN must reconcile its internal diversity in governance systems with its external messaging of regional leadership. This requires promoting stronger democratic norms and good governance through mechanisms such as peer review, regional scorecards, and a more empowered ASEAN Intergovernmental Commission on Human Rights (AICHR) capable of monitoring compliance. It also entails building genuine enforcement capacity for regional declarations, particularly those concerning political rights, civic participation, and adherence to the rule of law, so that commitments translate into tangible action. Equally important is achieving greater strategic alignment in responding to political crises (e.g., the situation in Myanmar) to preserve ASEAN's credibility as a neutral yet effective mediator. Together, these reforms strengthen ASEAN's political

cohesion and reinforce its capacity to act as a legitimate and influential pole in the emerging global order.

The “ASEAN Way” of non-interference, while preserving regional unity, must evolve toward more principled pragmatism if ASEAN wishes to be perceived as a political pole.

5.3.2 Cultural Dimension: Building a Shared ASEAN Identity

Cultural integration remains one of ASEAN’s softest yet most potent levers for enhancing regional influence. ASEAN has actively promoted a shared identity through initiatives such as the ASEAN Socio-Cultural Community (ASCC), cultural exchanges, and educational collaboration. To amplify its role in this dimension and move toward cultural polarity, ASEAN can invest in regional cultural products, creative industries, and digital content that reflect Southeast Asian values, potentially through mechanisms like an ASEAN Creative Economy Fund or a regional streaming platform akin to Netflix. People-to-people ties should be deepened via youth mobility programs, volunteer corps, and expanded scholarship opportunities under the ASEAN University Network (AUN). Additionally, ASEAN can take a more proactive role in protecting and exporting its shared cultural heritage, akin to how the European Union promotes “European values” abroad. A strong and cohesive regional identity will make ASEAN more globally recognizable and enhance its soft power beyond purely economic metrics.

5.3.3 Geopolitical Dimension: Convening Power and Strategic Autonomy

ASEAN’s geopolitical influence has traditionally rested on its role as a neutral convener rather than a coercive force, a model well-aligned with its current institutional capacity and normative foundations. However, to enhance its standing as a geopolitical pole in a multipolar world, ASEAN must evolve from reactive diplomacy to proactive agenda-setting. This includes asserting its centrality in Indo-Pacific dialogues by operationalizing the ASEAN Outlook on the Indo-Pacific (AOIP) through concrete projects that shape regional norms and cooperation, rather than merely responding to major power competition. Strengthening ASEAN-led security cooperation is also essential, such as through joint maritime patrols, early warning systems, and conflict mediation mechanisms in flashpoints like the South China Sea or Myanmar. Furthermore, ASEAN must build strategic resilience in energy, food, and digital infrastructure to mitigate dependency on any single global actor. To reinforce its global orientation, ASEAN should deepen engagement with non-traditional partners like India, the African Union, and Latin America, thereby positioning itself not only as a regional anchor but also as a globally relevant bloc.

The multidimensional model of polarity assessed in this study demonstrates that ASEAN’s trajectory toward becoming a global pole cannot rely solely on economic capabilities; rather, it must harness its distinctive strengths in convening power, cultural influence, and regional diplomacy. Advancing this goal requires deeper internal coherence through stronger legal enforceability, shared norms, and more effective regional mechanisms, while simultaneously investing in cultural and digital platforms that project Southeast Asian narratives to the world. At the same time, ASEAN must cultivate strategic autonomy, navigating major-power rivalry through an open and multipolar engagement strategy that reinforces its centrality. Ultimately, ASEAN’s ascent as a global power will depend not on replicating traditional major-power

models, but on developing a uniquely Southeast Asian form of influence grounded in inclusivity, cooperation, and collective resilience.

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