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## ASEAN in 2026: The Philippines Takes the Helm



*The advent of the new year also marked the official start of the Philippines' ASEAN chairmanship. By setting a 'forward-looking' agenda, Manila is tasked with continuing the progress made during Malaysia's 2025 chairmanship and laying the groundwork for ASEAN's long-term Vision 2045. However, with an international order inching closer to its breaking point, strengthening the region's resilience has become more important than ever. How then can Manila help ASEAN "navigate their future, together"? Photo by Myk Miravalles via Unsplash.*

## FEATURED COMMENTARY

## Regional and Domestic Interests in the Philippines' ASEAN Agenda

By Jose Miguelito Enriquez



ASEAN leaders during the 30th ASEAN Summit in 2017, the last year the Philippines served as chair. In this quarter's featured commentary, Jose Miguelito Enriquez looks into some of Manila's priorities as it takes the chairmanship once again in 2026, particularly in maritime security, ethical AI, and supply chain integration, and how both regional and domestic interests weave neatly in each of these domains. Photo by Philippine News Agency/Wikimedia

*As the start of its chairmanship year approaches, the Philippines has begun to unveil its priorities for ASEAN in 2026. The success of this agenda – especially in maritime security, AI, and supply chains – will be driven by the interplay of regional and local incentives.*

### Commentary

In 2026, all eyes will turn to the Philippines as it assumes the chairmanship of ASEAN. With the theme "Navigating our Future, Together", the Philippines sets an agenda for what President Ferdinand Marcos Jr. describes as a "forward-looking ASEAN". It encompasses a wide range of issues including humanitarian and disaster resilience, climate change,

economic and supply chain integration, and digitalisation and artificial intelligence.

This agenda reflects the shared ambitions of the grouping's eleven members, including the new member, Timor-Leste. It also reflects continuity with that of previous chairs. As the 2026 chair, the Philippines is tasked to kickstart the measures in ASEAN's 2026 Strategic Plans for its political-security, economic, and sociocultural pillars, which were finalised during Malaysia's chairmanship in 2025. From a Philippine perspective, the ASEAN chairmanship also offers an opportunity for it to advance parts of its domestic agenda by linking its national interests to regional

priorities and opportunities.

### Finalising the Code of Conduct on the South China Sea

Many observers will be watching whether the Code of Conduct on the South China Sea can be finalised in 2026. The Philippines' foreign affairs secretary had previously committed to this goal, honouring a deadline China and ASEAN's foreign ministers agreed to three years ago. For the secretary to raise the possibility of weekly negotiation meetings highlights how challenging it is to reach consensus on key differences, especially on its legally binding status, and how important it is that national policymakers view the Code as finalised.

Analysts have already written about what is at stake for the Philippines and ASEAN in achieving this milestone. As Charmaine Misalucha-Willoughby argues, the expectations for the Philippines as chair may come at the expense of its national interests. The South China Sea will place the Philippines in a complex conundrum: How can it facilitate consensus toward an agreement while still securing an outcome favourable to the Filipino public, who have strong opinions on the contested waters?

Solving the conundrum requires considering the bigger picture of Philippine foreign policy. Both ASEAN and external de-

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fence partners serve the Philippines' national security interests through a "dual pillar" strategy, where the country views its network of security partners as necessary to improve its defence posture and ASEAN as the primary driver of a rules-based regional order. The Code of Conduct would be a major step for the latter; the Philippines has considerable interest in finding common ground to deliver with its ASEAN neighbours.

### Advancing Ethical Artificial Intelligence

The Philippines intends to build on the progress made in regional AI policy over the last two years. During its 2025 chairmanship, Malaysia leveraged the opportunity to position itself as a regional leader in AI by hosting the ASEAN AI Malaysia Summit. As early as 2024, Philippine government officials had already hinted that AI would be a major issue during their next ASEAN chairmanship. President Marcos reiterated this pledge during the 46th Leaders' Summit in Malaysia.

Progress on this policy is crucial to steering AI adoption and investment into the region and putting the spotlight on the Philippines' own ambitions for AI. As Malaysia showed last year, the chairmanship can help define where the Philippines places itself within the region's AI industry. It can also pursue foreign partnerships with ASEAN's dia-

logue partners, accomplishing a goal in the Philippines' National AI Strategy Roadmap 2.0 to attract foreign investments to build its AI footing.

How exactly the Philippines intends to expand ASEAN's AI policy blueprint will be clearer as it rolls out its agenda. Previously, it appeared that this would take the form of a regional legal AI framework. However, as the Digital Economic Framework Agreement (DEFA) negotiations demonstrate, finalising such a document can take years. The country also has a less comprehensive national AI governance framework than its ASEAN neighbours, who could be more credible norm entrepreneurs in the AI space.

Instead, frameworks that focus on sector-specific applications of AI ethics in industries such as healthcare and finance still build on ASEAN's previous milestones in ethical AI, which have focused on general principles and applications. It allows the Philippines to maintain its commitments as chair without adding another binding digital agreement alongside DEFA.

### Integrated Semiconductor Supply Chains

An area that has recently gained traction and arguably has the strongest compatibility with the Philippines' domestic policy agenda is supply chains,

especially in semiconductors. Industrial cooperation is a key measure of the ASEAN Economic Community's 2026-2030 Strategic Plan, and the groundwork for regional semiconductor cooperation has been laid with the recently unveiled ASEAN Framework for Integrated Semiconductor Supply Chain (AFISS). The AFISS is a non-binding framework designed to further develop the region's semiconductor industry into a "vertically integrated production base".

While semiconductors are a top export for the Philippines, the country's position in the supply chain is less prominent than that of neighbours like Malaysia and Singapore. The upside is that it implies higher growth potential for the country's semiconductor industry, and the government has taken steps to capitalise on the opportunity. The AFISS coincides with the country's industrial policy, the Tatak Pinoy (Proudly Filipino) Act, which aims to create up to 15,000 new jobs and 10 chip design (or fabless) firms in the local chip industry by 2030.

The Philippines can use its chairmanship to exercise "semiconductor diplomacy" and fulfil some of its Tatak Pinoy objectives, such as securing partnerships between local firms and peers from ASEAN and developing regional supplier certifications. These steps would both grow the local semi-

conductor industry and strengthen links in the ASEAN supply chain, thereby advancing the Philippine domestic and ASEAN agendas.

### Conclusion

The 2026 ASEAN chairmanship may be President Ferdinand Marcos Jr's last chance to score a major foreign policy success before his presidency ends in June 2028. It also comes at a time when the country has started to position itself more aggressively as a middle power by diversifying its defence partnerships and canvassing for a seat on the UN Security Council.

Hence, it is no surprise that the Marcos administration has set forth an ambitious agenda for ASEAN in the year ahead. These priorities reflect deep linkages between the Marcos administration's domestic and foreign policy objectives, but delivering on these goals will require finding areas of mutual agreement, consensus, and compromise with other ASEAN members. ■

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## Multilateralism and Canada's Indo-Pacific Strategy 2.0



*Dr Joel Ng discusses strategies for multilateralism with Dr Nils Schmid, German Deputy Defence Minister, at the Halifax International Security Forum roundtable.*

From 21-27 November 2025, the Head of the Centre for Multilateralism Studies, Dr Joel Ng, travelled to Canada to participate in the Halifax International Security Forum and various thinktank engagements. Canadian Prime Minister Mark Carney and Foreign Minister Anita Anand had both visited Singapore in October 2025 as part of Canada's foreign policy readjustment sometimes labelled as their 'Indo-Pacific Strategy 2.0', and the domestic shifts now taking place were palpable, particularly in trade, indus-

trial, and defence policies.

At Halifax, Dr Ng participated in an informal roundtable with Dr Nils Schmid, Germany's Deputy Defence Minister, and chaired by Canada's former ambassador on Women, Peace, and Security, Jacqueline O'Neill. The theme was 'Real Power: Multilateralism's comeback', and participants discussed the ways in which multilateralism was still a necessary pillar of international cooperation as well as how it was evolving to the geopolitical context.

Dr Ng next travelled to Vancouver to engage in two events. At the Asia Pacific Foundation of Canada (APFC), he engaged APFC's researchers on the topic, "Multilateralism in the Indo-Pacific: Geopolitics and Resilience" in a session chaired by APFC Director of Research, Dr Charles-Louis Labrecque. There was great interest in how Singapore was positioning its own response to uncertainty and volatility in the region, as well as the various multilateral, plurilateral, or unilateral responses that various countries

were working on.

Finally, Dr Ng wrapped up his trip with a public forum alongside Professor Paul Evans and Associate Professor Kai Ostwald, both of the University of British Columbia. The event was organized by the Canadian International Council with the topic, "Multilateralism: Views from Canada and ASEAN". Discussion was wide-ranging but there was special focus on how Canada and ASEAN member states were responding to develop trade and supply chain resilience. ■



## To Negotiate a Labyrinth: Indonesia Within and Without ASEAN During the Third Indochina War (1978-1991)



*Dr Dan McCoy discusses how Indonesia navigated the Third Indochina War by combining ASEAN-based regionalism with selective bilateral engagement. Photo by CMS.*

On 4 December 2025, RSIS hosted a roundtable featuring Dr Dan McCoy, with Dr Joel Ng, Senior Fellow and Head of the Centre for Multilateralism Studies (CMS), serving as chair. Dr McCoy examined how Indonesia navigated the Third Indochina War (1978–1991) through a calibrated diplomatic strategy that combined ASEAN-based regionalism with selective bilateral engagement, operating both “within and without” ASEAN at a time of severe intra-regional strain.

Dr McCoy framed the Third Indochina War as ASEAN’s most significant stress test

since its founding in 1967, shaped by overlapping intraregional conflicts, such as the Cambodian – Vietnamese War, the 1979 Sino – Vietnamese Border War, and Cold War proxy dynamics. Intra-ASEAN rifts were also predominant, with different views over the more pressing security concern and the appropriate balance between deterrence and diplomacy.

Against this backdrop, Dr McCoy posited that Indonesia sought to pursue a dual-track diplomatic approach, anchoring its position in ASEAN consensus and the Kuantan Principle while

pursuing bilateral channels. He traced the interactions of key institutions and their senior leadership and exemplified how under the Suharto Administration, *Bebas Aktif* (Free and Active) and *Wawasan Nusantara* (Archipelago Concept) evolved from revolutionary concepts to pragmatic foreign policy principles. This enabled Indonesia to preserve strategic autonomy while exercising regional leadership, illustrated through Indonesia-Vietnam bilateralism – such as the Jakarta Informal Meetings – which contributed to the 1991 Paris Peace Accords.

To conclude, Dr McCoy

argued that while great-power normalisation remained an important consideration, Indonesia played a key role in shaping ASEAN’s diplomatic approach on the conflict – working across regional and bilateral channels even as ASEAN unity was tested. The discussion reflected on how Indonesia and other ASEAN member states had historically leveraged both collective diplomacy and complementary bilateral relations, and what this implied for ASEAN today to sustain its centrality and credibility in managing key security issues. ■

## Multilateral Matters: News Roundup

The 47th Association of Southeast Asian Nations (ASEAN) Summit and Related Summits, held from 26 – 28 October in Kuala Lumpur, Malaysia, focused on anchoring ASEAN's long-term agenda. Leaders welcomed the Complementarities Initiative 2.0 between the ASEAN Community Vision 2045 and the UN 2030 Agenda, and the Plan of Action to implement the ASEAN–UN Comprehensive Partnership (2026–2030). Agreements to enhance functional cooperation were predominant, with the establishment of an ASEAN AI Safety Network and Leaders' Declarations on combatting money laundering and enhancing cooperation on criminal fugitives, amongst others. ASEAN also reaffirmed the Five-Point Consensus and humanitarian access as key to its approach on Myanmar; and on the South China Sea, progress on Code of Conduct was registered, with emphasis on UNCLOS and practical de-escalatory measures.

The Asia-Pacific Economic Cooperation (APEC) Economic Leaders' Meeting took place from 31 October

– 1 November 2025 in Gyeongju, South Korea. The Gyeongju Declaration was adopted, highlighting the importance of APEC's economic agenda in a more contested geoeconomic environment. Leaders acknowledged demographic shifts and rapid technological advancement as structural economic factors, endorsing the APEC Artificial Intelligence Initiative (2026–2030) and the APEC Collaborative Framework for Demographic Changes.

The inaugural Future of Investment and Trade Partnership (FIT-P) Ministerial Meeting was held on 18 November in Singapore. Leaders welcomed Paraguay and Malaysia as new members, bringing the total membership to 16. The meeting produced a Ministerial Declaration on Supply Chain Resilience, and launched three new workstreams on trade facilitation, strengthening the rules-based trading system, and leveraging technology to address current challenges in customs processes. These initiatives were designed to translate FIT-P's commitment to

open, fair trade and a rules-based multilateral trading system into practical cooperation.

At the 30th Conference of the Parties to the United Nations Framework Convention on Climate Change (COP30), held from 10 – 21 November 2025, Belém, Brazil, Parties adopted the Belém Political Package, with implementation as a key focus. The package included a political commitment to at least triple adaptation finance by 2035 and the adoption of 59 voluntary global indicators for the Global Goal on Adaptation, referred to as the Belém Adaptation Indicators, with follow-on work to operationalise them. Several implementation mechanisms were also advanced, such as the Belém Mission to 1.5°C and a Global Implementation Accelerator. Lastly, the G20 Johannesburg Summit, held from 22 – 23 November 2025 in Johannesburg, South Africa, adopted a Leaders' Declaration that emphasised themes such as disaster resilience, global health, debt sustainability and food security. ■

### SELECTED PUBLICATIONS

#### **The Rules-Based International Order: Trends in Global Trade and Investment**

Dipinder Singh Randhawa | *RSIS Commentaries* | 29 December 2025

*Eight months after US President Donald Trump imposed tariffs globally, some trends in global trade and investment are emerging. How are businesses and markets adapting to the volatility in the new emerging order?*

#### **South Africa's G20 Presidency: A Test for Inclusive Multilateralism?**

Nazia Hussain | *RSIS Commentaries* | 20 November 2025

*As South Africa becomes the first African nation to host the G20 Summit, the focus has turned to whether its presidency can convert Global South momentum into tangible and sustainable development reform.*

#### **The Dragon's Emerging Order: Sino-Centric Multilateralism and Global Responses**

Joel Ng (ed.) | *World Scientific* | November 2025

#### **Seeing Like Airpower: Air-Delivered Attack as an Information Operation**

Alan Chong and Shang-Su Wu | *Comparative Strategy* | 07 October 2025

The **Centre for Multilateralism Studies (CMS)** is a research entity within the S. Rajaratnam School of International Studies at Nanyang Technological University, Singapore. The CMS team conducts cutting-edge research, teaching/training and networking on cooperative multilateralism in the Asia Pacific region. The Centre aims to contribute to international academic and public discourses on regional architecture and order in the Asia Pacific. It aspires to be an international knowledge hub for multilateral cooperation and regional integration.

**Multilateral Matters** is the quarterly publication of the Centre for Multilateralism Studies (CMS), analysing the most recent developments regarding multilateralism by our team. It covers articles on relevant economic and political issues as well as programmes and latest publications from the research centre. The objective of the newsletter is to promote the research being done by our centre, raising awareness of the many events that we hold on a regular basis.

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