

**SOUTHEAST ASIAN
AFFAIRS
2026**

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SOUTHEAST ASIAN AFFAIRS 2026

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Introduction

Terence Chong, Daljit Singh and Cha Hae Won

The year 2025 saw a blend of challenges and promising developments for Southeast Asia. On the one hand, the year brought a whirlwind of challenges that tested Southeast Asia's resilience on multiple fronts. The return of a more transactional Trump administration and the imposition of reciprocal tariffs generated economic tremors across the region, while long-standing regional flashpoints, such as the South China Sea maritime disputes and the Myanmar crisis, remained unresolved. New challenges added to the strain, such as the proliferation of scam centres, a series of natural disasters, and a renewed worsening of the Thailand-Cambodian border dispute, which escalated into bloody violence. Domestically, governments grappled with social unrest, fragile coalitions and corruption scandals against the backdrop of rising inflation and widening inequality.

On the other hand, 2025 was not without its positives. The region had reasons to celebrate, most notably Timor-Leste's accession into ASEAN, a historic step that reinforced regional inclusion. Southeast Asia also demonstrated resilience amid shifting geopolitical pressures, with its investment climate remaining favourable, and trade proving unexpectedly robust despite shocks from the US' reciprocal tariffs. Overall, economic growth rates remained strong, albeit slightly below those recorded in 2024. According to the Asian Development Bank (ADB), Vietnam recorded the highest growth rate at 6.7 per cent, followed by the Philippines at 5.6 per cent. Indonesia and Malaysia also demonstrated solid economic performance, with growth rates of 4.9 per cent and 4.3 per cent, respectively. The region took

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decisive steps in strengthening regional architecture to reinforce ASEAN centrality amid growing geopolitical turbulence, and solidified relationships with middle powers to preserve strategic autonomy. Amid challenges both old and new, the region demonstrated its ability to adapt, maintain economic momentum and uphold strategic relevance in an increasingly complex global environment.

Political Developments

Leadership Challenges, Internal Divisions and Large-Scale Violence

The year 2025 saw political instability in a number of countries owing to the combined pressures of leadership challenges and internal fragilities within governing coalitions. In Indonesia and Thailand, leaders struggled with waning popularity and declining support as controversial policies provoked widespread protests and public dissent. In Malaysia and the Philippines, internal rifts within alliances and coalition blocs threatened government cohesion. At the same time, large-scale violence persisted in Myanmar as the civil war showed no signs of abating, while border tensions between Cambodia and Thailand erupted into bloody violence.

For both Indonesia and Thailand, 2025 represented the one-year milestone to evaluate the performance of President Prabowo Subianto and Prime Minister Paetongtarn Shinawatra in office—and the verdict was not reassuring. President Prabowo, who assumed the presidency in 2024 with widespread popularity, faced a turbulent first year as massive protests swept the nation. The “Dark Indonesia” movement erupted in February triggered by austerity measures and controversial amendments to the TNI Law, which expanded the formal role of the military in civilian governance. Public anger flared again in August when the House of Representatives proposed housing incentives for legislators worth ten times Jakarta’s minimum wage, provoking widespread outrage among middle- and lower-class citizens. In Thailand, Paetongtarn Shinawatra, who assumed the premiership in August 2024 following the removal of Srettha Thavisin by the Constitutional Court over an ethics violation, also saw her time in office cut short in 2025. A leaked phone call recording revealed that she referred to Thailand’s Lieutenant General Boonsin Padklang—who oversaw a significant portion of the Cambodian border—as an “opponent”, while deferentially addressing Cambodian Senate President Hun Sen as “Uncle”. The controversy led to her removal, and Anutin Charnvirakul stepped in as prime minister, immediately inheriting the delicate and complex task of managing the border dispute with Cambodia.

In the Philippines, cracks in the Marcos-Duterte “Uniteam” alliance, first visible in 2024, widened dramatically in 2025. The breakdown of the alliance

was epitomized by the contentious impeachment process of Vice President Sara Duterte, who faced multiple complaints over alleged misuse of confidential funds during her time as education secretary and vice president. Marcos-aligned legislators moved quickly to consolidate the cases, citing betrayal of public trust and gross misconduct, while Duterte loyalists decried the process as politically motivated retaliation. Compounding the political turmoil were corruption scandals that engulfed flood control and infrastructure projects, with revelations of inflated contracts and clandestine subcontracting networks tied to prominent legislators. These irregularities cut across districts, implicating local authorities, engineering firms and national agencies, highlighting the deep-rooted nature of systemic graft in the Philippines.

In Malaysia, 2025 marked the third year of Prime Minister Anwar Ibrahim's Unity Government, which has admittedly demonstrated greater stability than many anticipated when the ad hoc coalition was formed following the 15th General Election. Despite this, the Unity Government continued to grapple with periodic resurfacing of internal disunity. Tensions were particularly visible within the United Malays National Organisation (UMNO), with some members of the party openly calling for Anwar's resignation over policy issues. The Unity Government's challenges extended beyond internal divisions to pressures from external parties. Prime Minister Anwar Ibrahim's efforts to promote a vision of national unity repeatedly clashed with Malaysia's deeply entrenched bumiputera framework, which positions Malay-Muslims as the dominant political constituency. Parti Islam Se-Malaysia (PAS) often mounted attacks on Prime Minister Anwar's "liberal" inclinations, with PAS appearing to have solidified its grip on Malay-Muslim narratives.

In Myanmar, the ongoing civil war persisted unabated, with clashes between the military junta and various ethnic armed organizations (EAOs) and resistance forces continuing to cause severe humanitarian and security consequences. In Cambodia, escalating tensions along the border with Thailand led to serious violence, with both sides mobilizing troops, deploying heavy weaponry and launching artillery strikes to assert control over the disputed areas.

Enduring Political Stability in Singapore and Vietnam

Unlike other countries in the region, Singapore and Vietnam demonstrated remarkable political stability. The political landscape in Singapore saw significant consolidation under Prime Minister Lawrence Wong, who secured a near 90 per cent parliamentary supermajority in the 2025 General Elections. Contrary to historical trends, in which newly appointed People's Action Party's (PAP) prime

ministers typically see a decline in vote share and parliamentary representation in their first election, the PAP not only increased its vote share but also managed to retain the majority of parliamentary seats, winning eighty-seven out of ninety-seven seats. The result reflected strong public support for continuity and stability amid global economic uncertainties and rising cost of living. The election served as a litmus test for Prime Minister Wong's leadership, and it successfully reinforced the PAP's dominant position in Singapore governance.

Vietnam similarly experienced a period of political stability in 2025, a sharp contrast to the turbulence of 2022 to mid-2024, when the country experienced rapid turnover among top leaders amid its high-profile "Blazing Furnace" anti-corruption campaign. The year saw sweeping reforms that streamlined the central administrative apparatus—the boldest institutional changes since *Đổi Mới*. Ministries and ministry-level agencies were merged, reducing overlaps that had previously slowed decision-making processes, increased recurrent expenditures and constrained salaries, welfare, and development investments. Supported by the public and enabled by weakened factional influence, these reforms established a leaner, more efficient state that was better equipped for digital transformation, international integration and sustainable development. Vietnam was also able to attain a robust economic performance in 2025 under Secretary-General To Lam's strategic vision of placing the economy at the centre of Vietnam's reform agenda.

Regional Developments

While familiar flashpoints such as the South China Sea maritime dispute and the Myanmar crisis continued to affect the regional security landscape, 2025 witnessed new and destabilizing developments, foremost among them being the renewed escalation of the Thai-Cambodian border dispute. Although a dispute over the shared border has existed for decades, the 2025 iteration proved deadlier because of rising nationalist fervour on both sides, Thailand's approaching general elections, and strategic incentives for the Thai military to project its resolve and consolidate public support. These dynamics were further amplified by widespread media coverage and public engagement through social media. A number of ceasefires were announced over the course of the year, first with an agreement brokered in Kuala Lumpur on 28 July and subsequently an agreement on 26 October during the 47th ASEAN Summit presided over by Prime Minister Anwar Ibrahim and President Donald Trump. Both proved fragile, however, and they ultimately collapsed amid renewed hostilities. Another ceasefire was concluded on 27 December following weeks of deadly clashes that imposed significant economic and humanitarian

costs. While hostilities subsided around the end of 2025, the durability of the current ceasefire remains uncertain given the persistence of underlying political and territorial tensions.

The proliferation of scam centres became a major concern across Southeast Asia in 2025, with Cambodia at the epicentre of the issue. During the Covid-19 pandemic, as international travel ground to a halt, criminal networks in the region shifted from traditional casino gambling to online fraud—a transition that, by early 2025, had become an existential threat for Cambodia, generating estimated annual revenues that amounted to roughly one-third of the formal economy. Cambodia is not alone in facing this scourge. Comparable conditions—including Chinese capital flight, authoritarian protection structure, and special economic zones (SEZs)—that had fuelled Cambodia’s emergence as a scam hub were being replicated in different forms in Laos’s Golden Triangle SEZ and Myanmar’s post-coup grey zones. Even smaller nations were affected: In Timor-Leste, concerns over organized crime escalated in the latter half of 2025 when police raided a suspected scam centre in the Oecussi exclave, arresting thirty foreign nationals from Indonesia, Malaysia and China.

Southeast Asia also faced a devastating series of natural disasters in 2025. In March, a magnitude 7.7 earthquake struck Myanmar, wreaking havoc across Mandalay, Sagaing and Magway. Later in the year, Southeast Asia was battered by an unusual sequence of storms—Typhoon Kalmaegi, Super Typhoon Fung-wong and Tropical Cyclone Senyar. Across Indonesia, the Philippines, Vietnam, Thailand and Malaysia, these natural disasters collectively resulted in more than five thousand fatalities, with total economic losses projected to exceed US\$30 billion.

While the region grappled with new challenges in 2025, long-standing issues of the South China Sea maritime dispute and Myanmar crisis remained largely unchanged. Efforts to establish a Code of Conduct for the South China Sea made little headway, with Malaysia as ASEAN chair continuing to downplay the urgency of the dispute. The Philippines, meanwhile, remained locked in ongoing strategic friction with China and a continuation of tensions from the previous year. In Myanmar, the conflict continued to persist despite official claims of reduced violence, and ASEAN’s Five-Point Consensus (5PC) saw virtually no progress. The two challenges continue to endure as ASEAN’s most intractable problems.

Although the Thai-Cambodian border dispute, scam centres and natural disasters dominated headlines across Southeast Asia in 2025, the year was not without positive developments. A key milestone for the region was the formal accession of Timor-Leste as the eleventh member of ASEAN. As one of Asia’s smallest nations, with a population of just 1.2 million, the inclusion of Timor-

Leste highlighted ASEAN's growing commitment to inclusivity and broader regional engagement. Timor-Leste's accession, concluded after more than a decade of complex negotiations, was widely hailed as a major diplomatic achievement, and it is likely to be remembered as one of Southeast Asia's most noteworthy developments in 2025.

Geopolitical Developments

The year 2025 represented a geopolitical whirlwind for Southeast Asia, driven in large part by the return of the Trump administration and its transactional approach to alliances and partnerships. Nowhere was this more evident than on "Liberation Day", when the Trump administration announced the imposition of sweeping reciprocal tariffs on foreign imports. The move sent shockwaves through the region, unsettling long-standing assumptions about economic openness and injecting renewed uncertainty into the international order. Countries across Southeast Asia quickly scrambled to secure bilateral negotiations with the United States to cushion the immediate economic disruption. Such negotiations yielded tariff reductions for selected countries in the region.

While such policies were widely perceived as destabilizing and detrimental to regional economic and political stability, they did not necessarily compel Southeast Asian states to tilt towards China. Instead, the region continued to pursue a strategy of strategic balancing, maintaining cooperative relations with both the United States and China in order to maximize economic and security benefits. Beyond sustaining trade relations, regional states also sought to safeguard and expand diplomatic and security relations with the United States: Brunei conducted joint military exercises and high-level defence visits with the United States; Cambodia agreed to resume the Angkor Sentinel exercises suspended since 2017; and the Philippines deepened its defence cooperation with the United States through expanded military access, intensified joint exercises and sustained high-level diplomatic engagement. At the same time, countries in the region continued to consolidate relations with China. Singapore celebrated thirty-five years of diplomatic relations with Beijing through high-level exchanges that included further Belt and Road Initiative (BRI) collaborations. President Xi Jinping also made a state visit to Phnom Penh, where both sides reaffirmed their ironclad friendship, with President Xi pledging support for Cambodia's development. In Malaysia, President Xi's April visit—his first visit in more than a decade—produced key agreements on BRI projects, artificial intelligence exchanges and digital cooperation.

Beyond engaging the major powers, the region also moved decisively to strengthen regional architecture to preserve ASEAN centrality amid growing

geopolitical turbulence. ASEAN concluded negotiations on the Digital Economy Framework Agreement (DEFA) in October and adopted Vision 2045 in May, laying out a roadmap for navigating growing geopolitical uncertainty. ASEAN leaders also welcomed the signing of the upgraded ASEAN Trade in Goods Agreements (ATIGA), a comprehensive economic framework that remains the cornerstone of ASEAN economic integration. Regional states also sought to deepen relations with middle powers as a means to hedge and preserve strategic autonomy amid shifting geopolitical and economic dynamics. Indonesia strengthened trade ties with the European Union and Canada, while EU-Malaysia free trade agreement talks resumed after a thirteen-year hiatus. Malaysia also saw the Malaysia-United Arab Emirates Comprehensive Economic Partnership Agreement enter into force in October. Singapore Prime Minister Lawrence Wong's September visit to India further elevated bilateral ties, building on the previous year's upgraded Comprehensive Strategic Partnership. Likewise, Vietnam expanded its network of high-level partnerships, elevating relations with New Zealand, the United Kingdom and Kuwait to the level of Comprehensive Strategic Partnership. Indonesia placed emphasis on strengthening ties with middle powers, signing a security agreement with Australia that pledged regular consultations on joint and individual security threats, and tuning up security relationship with Japan to collaborate on maritime security threats.

Economic Performance

Investment

The investment climate remained broadly favourable in Southeast Asia, with capital inflows continuing to underpin economic growth in various countries, such as Indonesia, the Philippines, Vietnam, Malaysia and Singapore. While the "China Plus One" strategy contributed to the relocation and diversification of FDI from China to the region, proactive government measures were equally instrumental in capturing these flows. In Indonesia, President Prabowo Subianto introduced deregulation plans to simplify non-tariff measures, ease local content requirements and streamline import procedures alongside the finalization of the Comprehensive Economic Partnership Agreement (CEPA) with the European Union, which enhanced market access and investor confidence. Malaysia secured over RM70 billion in semiconductor investments, projected to create thirty-six thousand high-skilled jobs, while major global technology firms expanded data centre investments, reinforcing the country's position as a regional hub. Meanwhile, Singapore's transparent regulatory environment continued to attract significant FDI

inflows from North America and Europe, whereas Vietnam stepped up its foreign investment mobilization strategies to support its revised 2025 GDP growth target of 8.3 to 8.5 per cent.

Trade

Trade in Southeast Asia proved surprisingly robust in 2025 despite the shocks posed by the reciprocal tariffs of the Trump administration. Vietnam, for example, recorded an impressive total goods trade turnover of approximately US\$920 billion, up 17 per cent from the previous year, driven by exports of US\$470.6 billion and imports of US\$449.4 billion, resulting in a trade surplus of US\$21 billion. Cambodia's manufacturing-led exports also held strong, with shipments to the United States—the former's largest market—rising 22 per cent year-on-year and overall exports reaching US\$22.3 billion in the first nine months. Thailand similarly experienced strong export growth, particularly in the third quarter. Several factors underpinned the robust trade performance in 2025: frontloading of shipments to avoid the punitive tariffs by the United States, booming global demand for semiconductors driven by the AI boom, and the partial de-escalation of US-China trade tensions, which helped to stabilize the broader trading environment. As trade shocks often take time to unfold, the full impact of the reciprocal tariffs on the region's trade performance is likely to be felt in 2026.

Inflation

While inflation showed signs of moderation in 2024, inflationary pressures resurfaced in several Southeast Asian countries in 2025. The drivers of inflation in 2025 varied across the region. In Vietnam, rising food prices, construction costs and the cost of medicines and medical services have been the primary contributors. The country's central bank also faced the challenge of maintaining loose monetary conditions and low interest rates to achieve an 8 per cent GDP growth target, at the risk of heightening inflation expectations. Meanwhile, the ongoing civil conflict in Myanmar has continued to fuel inflation in the country, with the World Bank estimating a rate of 31 per cent between April 2025 and March 2026. In Singapore, domestic sources of inflation, particularly the increase in the Goods and Services Tax (GST) from 7 per cent in 2023 to 9 per cent in 2024, have drawn sharp criticism from opposition parties against the government. In Malaysia, concerns of inflation have been exacerbated by subsidy rationalization and cost-cutting measures, which have also prompted social discontent. But unlike

most countries in the region, Brunei and Thailand experienced subdued inflation in 2025, largely the result of deflationary effects associated with slow economic growth.

Tourism

While tourism had exhibited strong growth in 2024, 2025 proved more challenging for several countries due to a combination of factors, such as natural disasters and regional disputes. Natural disasters affected tourism in Vietnam, Thailand, Malaysia and the Philippines, damaging tourism infrastructure and disrupting travel and hospitality services. Typhoon Kalmaegi caused severe flooding and landslides across Vietnam's Central Highlands and South-Central Coast, submerging major tourism hubs such as Hoi An and Da Nang. The Super Typhoon Fung-wong also caused major disruption to transport and tourism in Dinalungan, Philippines, with over 160 domestic and international flights cancelled. Tropical Cyclone Senyar brought extensive flooding to Indonesia's Sumatra and Southern Thailand, with spillover effects reaching Peninsular Malaysia, paralysing key technological and tourism hubs. Additionally, the proliferation of scam centres discouraged tourist flows to countries like Thailand and Cambodia, with safety concerns increasingly influencing travel decisions. Chinese arrivals in Thailand fell sharply, with reports in late September indicating a 35 per cent decline in the first eight months of 2025 compared with the same period in 2024. High-profile incidents, including the kidnapping of Chinese actor Wang Xing from Bangkok to Myawaddy in Myanmar, heightened safety fears and undermined the country's appeal to visitors. Similarly, Cambodia's tourism sector—already affected by the issue of scam centres—faced additional setbacks because of its border dispute with Thailand. Overall arrivals fell by 8.8 per cent, with Thai tourists, usually the largest group, declining by 35 per cent.

Conclusion

In many ways, 2025 was a turbulent year for Southeast Asia. The return of a more transactional Trump administration contributed to an increasingly constrained regional environment shaped by intensified major power competition. At the regional level, ASEAN faced a series of stress tests, including the Thailand-Cambodian border dispute, the persistence of scam centres, recurrent natural disasters and the ongoing civil war in Myanmar. Looking ahead, the region must brace for heightened uncertainty as the sense of unease faced in 2025 is likely to be

carried forward. The full impact of the reciprocal tariffs is expected to materialize more fully in 2026. Moreover, the transition of the ASEAN chairmanship to the Philippines may further alter regional dynamics. Unlike Malaysia, which sought to downplay the urgency of the South China Sea maritime dispute as the ASEAN chair, the Philippines may adopt a different approach given its more direct and sustained friction with China. At the same time, the Myanmar issue will enter a new phase following the elections, which have been widely dismissed by international observers and the Myanmar diaspora as a sham. Taken together, these developments indicate that ASEAN enters 2026 with little room for complacency. With economic aftershocks yet to fully materialize and geopolitical frictions showing little sign of easing, the region will need to strive for greater cohesion to navigate the upcoming political headwinds.