Inaugural Ros McGovern Lecture

‘Navigating strategic choices during global order transition’

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Followed by ‘in conversation’ segment with Professor Khong Yuen Foong, Lee Kuan Yew School of Public Policy, Co-Director of the Centre on Asia and Globalisation and Li Ka Shing Professor in Political Science

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The text below is a lightly revised version of the lecture, edited for brevity and clarity, with links to relevant resources. The points conveyed are Professor Goh’s personal reflections. They do not reflect the position of the Australian High Commission in Singapore or the Australian Government.

Your Excellencies, friends, colleagues, New Colombo Plan scholars. Thank you for that very kind introduction, High Commissioner. And thank you all for being here and taking time out of your schedules to join us this evening for this lecture. It's my very great pleasure and honour to be here to help celebrate the 60th anniversary of Australia-Singapore relations.

I feel quite a bit of pressure, having to exercise diplomacy and execute national service in both directions as well. But I'll try my best to add some value from my rather interesting position of being a Singaporean living and working in Australia for over a dozen years.

I’ve decided to speak about a topic which I know to be the cause of much hand wringing across the entire region – not just in Australia and in Singapore. My short presentation will hopefully raise some relatively interesting new ways of thinking about these challenges that I'm going to argue that we all share; highlight some existing differences in how Singaporeans and Australians view these challenges; and set us all a common challenge to think new thoughts.

And then I'm going to rely on Professor Khong to do what he does best. He was my teacher in Oxford, so I know that he’s going to ask lots of difficult questions. Professor Khong, thank you very much for agreeing to be my partner in crime for this exercise.

Let me start with something that is not news to any of you: the world is changing rather too rapidly for our comfort. It's changing not just in one dimension, but in multiple dimensions, all at once, in different ways, and quite often with reinforcing dynamics between factors that we might not have previously thought were connected.

I have been arguing for a while now that we're living and trying to navigate our way through an "age of uncertainty". This era of unpredictable change is marked by three intersecting dynamics. In the geopolitical realm, the rise of China, the growing role of other major powers, and declining US hegemony disrupt existing geopolitical bargains and create intensifying great power competition and revisionism. At the same time, the huge benefits of globalisation also bring the flip sides of vulnerability and risk from extreme interdependence – something we have experienced acutely with the pandemic and the Russia-Ukraine war. And the tart garnishing to all that are the reifying effects of what some like to call the Fourth Industrial Revolution, the range of technological changes which help us increasingly, to blur the divide between human and machine. It's the intersection of these trends create that sharp edge of this age of uncertainty we're living through now.

Now I know that the geopolitical story is where a lot of people like to start delving, so I'll take it from there.

For close to a decade now, I have used an architectural analogy when explaining what we are transitioning out of. This is a house that sits on a single pillar. This image best signifies what, for me, is the unusual condition of US hegemony that the region (and the world) has been having to move out of in recent years. Some people prefer to refer instead to US unipolarity; in any case, it is that single pillar that we've grown accustomed to taking for granted, planning around, leaning on, etc.

In the geopolitical realm, we commonly hear debates about whether we are moving from a unipolar system to a bipolar system, or to a multipolar system. This question about poles is really a question about how many great powers are jostling for control in our world. I don't think this is the most useful question to ask if we are interested in the character of international order, because there are multiple theories that try to explain how stability can be achieved under any polarity. Order doesn't simply depend upon the number of great powers; it is determined in part by the purposes and roles of the leading power(s) in the international system.

That the debate about polarity is esoteric - and a very selective debate - is particularly well illustrated in Southeast Asia.

Historically and geographically, as we all know, Southeast Asia is a crossroads. It's a thoroughfare linking the Indian and the Pacific Oceans, India and China. Being this crossroads means that the lived reality in Southeast Asia always featured many great powers of different types. There is no way for a thoroughfare to keep out superpowers, great powers, offshore powers, regional powers, aspiring powers, rising powers, etc. We've got them all in this part of the world. They operate with stakes, with interests. Often they cooperate with each other, sometimes they get into disputes with each other - and certainly, at times, with us. A few are our perpetual neighbours, others come, some stay a while, a lot will go with time, and new ones then appear.

Thus, from a Southeast Asian perspective, life is more complicated than simply counting how many dominant great power 'poles' we have in the system.

On top of that, Southeast Asia is a region that is significantly reliant on overseas markets, production partners and investors for its economic growth and development. A region like this constantly navigates

a range of other powerful international actors, including international financial institutions, multinational national cooperations, standard setting agencies, etc. That diffused and multifaceted power structure is evident in the day-to-day business and political reality of a region like this.

So, sticking with my architectural analogies, Southeast Asian conceptions and experiences of international order is more akin to a different kind of building structure. [Singaporeans, think about the old-fashioned raised kampung houses; Australians, bring to mind the classic Queenslander house.] It doesn't have just one pillar. Yes, the US is definitely a significant part of this order, but there are other great and significant powers and international actors. The building here is more like a house that sits on multiple stilts or pillars. These pillars are of different sizes; they have different functions, some of them more crucial than others. If you take one away, the building might collapse; take another away and it might not.

Now, I've been hawking this pair of images for a number of years. We had Singapore's Foreign Minister Vivian Balakrishnan open the 2023 Southeast Asia Regional Geopolitical Update conference at the ANU. He looked at my pair of slides, and without missing a beat, prefaced his prepared remarks by observing: *"…while there are going to be multiple stilts, you are not going to witness the symmetry where all poles are equal. It is going to be multipolar but asymmetrical… those stilts are going to be changing their heights quite dynamically because of all the transformations which are occurring economically, politically, in science, and in society… Achieving balance, achieving stability in such an environment is extremely difficult".*

So he combined the stilts and the poles with disregard for my dislike of polarity, but he made the stilts do a lot more. Heights that are changing dynamically because of those multiple intersecting transformations that I alluded to at the start of this talk. He conveys quite clearly the sense of the political and economic and societal grounds shifting unpredictably, making it difficult to know how to design or build even a multi-pillared house.

Because my picture of the cosy, standard multi-stilted house is too comfortable to capture the reality that he thought he was operating in, it occurred to me that the more suitable image would be of those long-stilted houses in Los Angeles we have seen in action or disaster movies, perched precariously on steep mountain-sides with half the house overhanging deep canyons. Those houses better convey the sense of there not just being multiple power centres and actors in the system, but of the ground shifting, of the soil falling away underneath us, and of the stilts that we have constructed probably not quite being enough. Even within the short two years that have elapsed since our exchange, it increasingly strikes me as quite reflective of what we're having to deal with today in terms of strategic challenges.

This leads me to my big argument for this evening. To paraphrase Bill Clinton, "it's all about the *mindset*, stupid". To put it more politely, mindset is everything when dealing with this rapidly changing age of uncertainty that we're condemned to having to navigate for some time.

First off, when thinking about the changing geopolitical realities, it's quite common to take a defensive attitude and worry about how to maintain an imagined liberal world order. We assume that there's something called the status quo that lots of us like and are comfortable with. It is also common to import

frameworks of containment, encirclement, etc, to explain current enterprises by various great powers, and then to assert a binary of there being something that pre-exists, which needs to be defended against others who are threatening it.

I want to mess up this reflexive mindset.

I'll start with the geopolitics part. When we think about the confluence of geopolitical challenges, it is common to start and stop with “the China threat”. Undoubtedly, China has risen and has significantly changed the international landscape. But there is a variety of other significant changes going on geopolitically in the world and in our region today. There has also been the parallel resurgence and importance of a variety of major powers that operate across the geopolitical, geoeconomic, technology and other realms. At the same time, we've had clearly declining US hegemony. And alongside all that, we have what I call dissolving social compacts.

At any one time, international order is held together by a series of vital mutual understandings between key players in the international system. When these mutual understandings begin to dissolve and become untenable, we have order transition. As I have explained elsewhere, these are more fundamental than changes in the distribution of power by the mere handing over from one hegemon to another. Transitions of order involve renegotiations and fights over changing the values underpinning international society. They involve the balance of rights and responsibilities for the powerful changing. They involve the terms of leadership and supporter-ship changing. And they involve changes in what constitutes acceptable and unacceptable behaviour in the international system. In other words, transitions of order involve changing how we collectively believe things should be done in the international world. So it's a more fundamental thing than simply how many poles or who's going to be the next hegemon.

Now we turn to the other really big force in the international system: globalisation, which brings connectivity and vulnerability in equal measure. The extreme interdependence that globalisation has enabled has also made a series of bargains on the political-economic side of the story more tenuous. The international order that we are transitioning out of has been underpinned by some key bargains, or social contracts.

First, at the end of the Cold War, a series of understandings and deals were struck to enable Russian economic development and rehabilitation as a political actor in the international system after the demise of the Soviet Union and the communist bloc. These bargains are clearly frayed to an unprecedented degree today, in the third year of Russia's war in Ukraine. Second, and even more important for this region, are the fraying political and economic bargains between the US and China negotiated between the 1970s and the 1990s, which facilitated normalisation of their diplomatic relations and China's economic development and rise as a great power.

Third, we are now in an era after one and a quarter Trump Administrations when the US’ social compacts with key allies – for so long the centrepiece of the US-led international order – are lying in bits and pieces across Europe, Asia, and elsewhere.

Finally, at the domestic level, social contracts across a series of important countries that we would think of as important to the international system are also coming under strain, with the rise of populist, far right, and other radical forces in countries spanning the US, Germany, etc.

These observations led me to make the claim that we're now living in a revisionist world. It's a world with 100 per cent of the leading powers in the international system being revisionist in a variety of different ways. At one level, there is, in principle, nothing to be worried about. Change is normal. Revisionism is, after all, change.

But of course, it sounds alarming. It sounds most alarming to those of us who have grown accustomed to thinking about the world as something that's defined by a status quo which we all liked and which we all want to protect. Hence that sense of discombobulation actually comes from the realisation that that assumption probably wasn't quite right. Otherwise, why the dissolving social compacts?

In that article, I took some opportunity to note that, according to some Singaporean observers and practitioners, the US has been an offshore power for Southeast Asia for quite a long time. And one about which we've always had to be concerned about its commitment and level of interest, etc. I've also made the point that Southeast Asian states don't necessarily identify that closely with an imagined existing international liberal order. They are, after all, post-colonial states living in an international environment not of their own making. They belong, in that sense, to the global majority.

And I've also made a point that Southeast Asian strategic worlds are not circumscribed solely by US-China rivalry, as some of our interlocutors may want to believe. There is a lot more going on. If you buy my proposition that we now live in a great power revisionist world, the spectre of a potential Chinese sphere of influence recedes as a central worry, when the world is filled with revisionist powers all trying to revise different things.

Even those who are psychologically more prepared for this kind of world of change find it very, very hard, and when you move into the realm of US allies, it gets a lot worse. The Canadian case gives a sense of some of the difficulties of fundamentally reimagining economy, community and society outside of the embrace of a previously benign United States. The British and German cases show that retooling and rethinking for such a world is going to take decades, and it's going to involve some very painful sacrifices in terms of alternative domestic spending.

The responses to my revisionist powers article can be used as a foil to help us highlight some differences between Singaporean and Australian perceptions. Just as a sample, a friend at the Singapore Foreign Ministry kindly wrote and said, "*You've given us here plenty of food for thought as we are grappling with the very same issues you have so precisely articulated in the piece*". A very kind acquaintance in the Defence Department in Australia, told me: "*What appears more pertinent to me is not that we face revisionist powers but that, for the first time in Australia's history, we potentially lack strategic alignment with any of the competing global powers. And that's the policy problem we should be answering…"*

Let me unpack a little the different starting points in Australia when thinking about the complex challenges in our age of uncertainty. My first observation is that a great deal of the Australian debate about some of

the strategic challenges that I've very briefly outlined here, tends to concentrate, in the first instance, on conflict.

Yes, the worry is about US-China conflict particularly, and specifically over Taiwan. This is connected to my Defence interlocutor's point above about the primary concern being: who do we align with? And so we find debates about broader order transition coagulating around this particular issue: what do we do if there's a Taiwan contingency? And this is a debate that generates significant heat as the main political parties compete to demonstrate that there are good defenders of Australian national interests as well as good allies. We witnessed the latest iteration of this in July this year, when the Pentagon reportedly sought guarantees from allies about their response in the event of a conflict in the Indo-Pacific, and officials in the current Australian government refused to provide advance commitments, to loud criticisms from the opposition.

Of course, the Australian landscape is a loud, vociferous one, and Australia has its own 'greybeards' just as Singapore has its retired, very experienced policy makers who continue to contribute to national debates. I have two examples of some blunt criticisms recently, reflecting the foment and reactions to the kind of changes that I've been describing, even within the Australian political system.

Heather Smith in March this year:
"The fragmentation of the international economic system is now a fact. The post-cold war order isn't collapsing, it has collapsed. The US is dismantling the foundations of its global hegemony, along with the norms and values that have underpinned the US-Australia relationship. And this dismantling cannot be reversed by a change of administration … To say that Australia is not well positioned is an understatement…the biggest challenge to overcome is the inability of our political class to position Australia for this new world."

Peter Varghese last October:
"[T]here is a large difference between recognising the benefits to date of US primacy and fixing Australian policy around the retention of US primacy. However desirable US primacy has been for Australia, it is not a vital Australian interest…the loss of US primacy may be regrettable, but it does not pose an existential threat to Australia. To assume it does is to handcuff ourselves to whatever the US decides it must do to retain its primacy."

Like I said, mindset is everything.

When it comes to Singapore and Australia – are we really looking at two cases of radically different mindsets stemming from separate and irreconcilable strategic cultures, geographies, and histories?

It's possible to make this argument, of course. Geographically, Southeast Asia is a trans-regional crossroads, while Australia is a continent at the far end of Asia. In terms of strategic choices therefore, Southeast Asia has made hedging a bit of a specialty, in contrast to Australia's persistent search for a great and powerful friend to align with. This is significantly influenced by their different historical experiences – Southeast Asia as a largely post-colonial region marked by the imperatives of

independence, autonomy and state-building, versus Australia as a British dominion that hasn't had to undergo that vital process of post-colonial transition.

And yet, others have argued that Australia is part of the region, and can learn important lessons in strategic imagination and practice from the region.

I would go further and argue that because we are now facing some fundamental common conditions – the interlocking geopolitical, globalisation, and technological transitions and changes I sketched earlier – Australia and Southeast Asia face common basic challenges. How to manage the costs of extreme interdependence? What do we do about contracting plural interests and allegiances in this more complex world? And how do we build new pillars in the post-US hegemonic order?

I think these are common challenges, regardless of our different starting points. This becomes even more obvious if we consider the large systemic challenges which I haven't time to touch upon here. I'll just highlight what now-Singapore President Tharman Shanmugaratnam pointed out in 2022: given the pandemic, ecological emergency, and geo-political crises, we face "a confluence of lasting structural insecurities - geopolitical, economic, and existential - each reinforcing the other. We have entered a perfect long storm…" These compounding structural insecurities will outlast whatever version of great power rivalry we are currently living through.

Given these common challenges, we need to develop ideas about the future that don't assume a status quo that is static; we need to evolve the status quo so that it can become more sustainable overall. In this regard, I leave you with one final architectural analogy, which I like very much: a house that architectural engineers are trying to develop, which doesn't sit on pillars at all, but instead relies on new technology to 'float' off the ground using, for example, magnetic levitation. This nicely captures my strong recommendation for *new mindsets* about how to construct a new international order out of the current uncertain transitions. As I said, I don't have any clear answers, but I do have some pretty pictures that may help us develop some ideas.

Thank you very much.

‘In conversation’ segment with Professor Khong Yuen Foong

Khong Yuen Foong: I'm really delighted to be here this evening to share some thoughts on Evelyn’s excellent presentation, which I thought was superb and an original take on the geopolitical and economic situation in which we find ourselves today. Evelyn - it reminds me of your book, The Struggle for Order: Hegemony, Hierarchy, and Transition in post-Cold War East Asia, in which you presented a layered hierarchy thesis about how the region was ordered. And what you have just shared with us, it seems to me, is your new statement on how things look today, in big picture terms, with all your diagnosis of all the important variables given the momentous changes we have seen around this, in the last decade or last 15 years or so. And I find it really refreshing and thought-provoking.

Several questions came to mind as I was listening to you, especially on your notion of hegemony; on your arguments about the revisionist powers; and on your comments about Southeast Asia.

You have always been one of the most thoughtful analysts of US hegemony. So I wonder if you want to say a bit more about your notion of the post-US hegemonic world. Because if you look at some of the measurements out there, for example, my favourite, the Lowy Institute Asia Power Index, it says that the US remains the most powerful actor in Asia, with a score of 82 out of 100 and China at 73, which means China is catching up. China is very close – it is close to 90% of US power, if you buy that kind of analysis. And with the next five, India, Japan, Australia, Russia and South Korea hovering around the 30s, way behind the top two dogs. So in comprehensive power terms, the US remains ahead. China is closing in, but the rest are still far behind.

But your point, I think, is that being the top dog in comprehensive power doesn't equate to being a hegemon. So just in case that there are some friends here who think that the US is still hegemonic, when would you say the US ceased being the hegemon, and what would you point to as indicating the end of US hegemony?

Evelyn Goh: Thank you. I did say that Prof Khong can be relied upon to ask hard questions. Without getting too academic about it, hegemony is, of course, not the same as power. So you can't determine hegemony based on counting beans. It's not about what your GDP is. It's not about how much military might you have compared to number two, etc.

Hegemony is a term I use in a classic way to indicate accepted authority of a global leader. Authority, of course, is a very different word than power alone. So when you think about the indices, what they give us is a sense of resources. What power resources do these great powers have, and who's got more than that? But hegemony is really about the turning of those resources into legitimate authority, and legitimacy comes from recognition and acceptance. This draws from the Gramscian notion that hegemony involves “consent” by others in the international system.

Therefore, we gauge the degree to which hegemony declines by the degree of acceptance, understanding and acknowledgement that the US is hegemonic – by other parts of the world. Some of the answers are that simple. Now, a very simple question we can pose to states is “how much of your

day-to-day life is dependent upon the US doing X or Y or otherwise wielding its power?" The other way we can determine that is to ask a particular state, say, in this region: "what is your main security or survival or strategic concern? In this main area of concern, what role does the United States play?" This question gets us closer to this sense of claimed centrality and authority that we think that a hegemon might have, or must have, over strategic affairs that matter to followers or others in the system.

In terms of turning-points, I'd put the decline of US hegemony as becoming marked around the Global Financial Crisis, so circa 2008-9, after which I would say that US hegemony was a lot less marked in the international system for a variety of issues. It's because the number of states and other international actors wielding authority over key international affairs was much more diffused after that point.

Khong Yuen Foong: Quick follow up on that. Then, if you time it around the financial crisis, what's your take on the state of the region or the world post the financial crisis, in terms of the kind of regional order that you think about? Is there a correlation between the decline of US hegemony and uncertainty - this age of uncertainty and instability - and the great power contentions that we're seeing around this?

Evelyn Goh: The question is, is it all about the US? No, it's not all about the US. As I said, a number of different things are changing. Of course, it's important when we're transitioning out of a hegemonic system that the hegemon no longer is hegemonic.

But that alone is not the only thing that's been in transition. The other great problem, of course, has been how to how to make room for, and live with, China as the kind of global great power that it is. And, of course, another problem has been what to do with a Russia that has been problematically challenging different elements of the international order for much of its contemporary manifestation as the post-Soviet Russian state.

So a variety of these unresolved and growing issues have coalesced at the same time as declining US hegemony. So the US is a very big part of the story, but not the only story. And that's why it's a *compound* transition. It's not simply a transition in the sense of "oh, here's a decline in great power, who's the baton going to be handed over to next?". We're not simply going to transition from US hegemony to a Chinese hegemony. It's not going to happen that way.

Khong Yuen Foong: That leads me to your fascinating characterization of the great powers, both in your talk and in the essay that you wrote that you shared with me. You are introducing a really fascinating vocabulary: in this new world, we have three great powers who are all revisionists. In the past, we used to be very careful about labelling the US as a revisionist; but, for you, the US, China and Russia, are revisionist powers. And although we say that change is natural among those of us who study international politics, revisionism is always a dangerous sort of approach or a dangerous strategy, which we associate with upsetting accepted norms and compacts. And so revisionist powers are normally seen as rogue powers who will upset the international system.

What was interesting about one of your statements during your talk was that, if all the three are revisionists, then you say that a potential Chinese sphere of influence recedes as a central worry in a world filled with revisionist great powers. Can you tell us a little bit more about that?

Evelyn Goh: Policymakers in the room – what have you been working on most in the past three or four months? Have you been worried about US tariffs one way or the other? Or have you been planning for a Taiwan contingency? I'd say what President Trump has been doing in terms of attacking the fundamentals of the international economic order outweighs the long lasting and serious but putative concerns about whether China wants to form some sort of *tianxia* system over its periphery. The latter look speculative now that the day-to-day challenge is, how do we get ourselves an exception or adjust to the imposed tariffs, and what are we going to do about industrial blockages that are resulting from US policies?

And similarly, when we compare what Russia has been doing for a number of years beyond its borders, it helps puts into context other worries about what other great powers might do, which they haven't done yet. One of the greatest puzzles for me at the moment is how there is not enough panic about the significance of the challenge by Russia to fundamental international norms like sovereignty and territorial integrity, over the past three years. We instead want to worry about the potential eruption of any one of the 'flashpoints' in our region, which hasn't happened yet.

So I think there's a little bit of an adjustment necessary, back to the reality of 'rule-breaking' that has already happened and is currently happening.

Khong Yuen Foong: I think this introduction of revisionist vocabulary into thinking about the new geopolitical situation is absolutely important. Thank you so much for doing that.

One last question before we open it up to the audience. You contrast Southeast Asia's choices, which shouldn't be binary, given US-China competition; and then Australia's choices, in terms of usually going with the US, based on history, based on the wars it has fought, together with the US. But if I may just press you a bit on the Southeast Asia part, you are probably familiar with some recent findings which suggest that, based on some measures of Southeast Asia's alignment, the direction of travel of the way the Southeast Asians are aligning themselves, seems to be in China's favour. There are still a few Southeast Asian states that hedge very nicely – Singapore, Malaysia, Vietnam and Brunei being the main ones. But even then, if you look at the direction of travel over the years, they are inching in China's direction, although they're still very much in their hedging parameters. But the Philippines is basically in the US camp, and all the others that I haven't mentioned are basically with China. So in a way, some people can say that, whatever ASEAN says, many of them actually are with China today, and the rest are leaning in that direction. What's your advice and what do you say?

Evelyn Goh: First thing to say is Professor Khong, with our good friend, Professor Joseph Liow, has finished his project on charting Southeast Asian choices. So please read their articles and forthcoming book. That's where you'll find the data.

I guess I have a slightly different take on alignment. I don't actually think that Southeast Asians think in terms of alignment in that binary way. I have a PhD student in the room who's doing some really interesting work on enduring Southeast Asian ways of engaging with multiple authority centres throughout history and today.

I'm choosing my words carefully because alignment comes with a particular baggage and certainly for the Australians in this audience, everyone knows what alignment means. It's Alliance. But that's just not the way Southeast Asians thinks about strategic choices. It's not about contracting permanent friends. It's about knowing what it is that you want to achieve, looking around the landscape and thinking, “who can help me?”. And realizing that who can help me relies upon my ability to persuade them that our agendas kind of coincide, at least for a while. And that for the time period within which our agendas coincide, there's stuff we can do together. But this is neither permanent nor definitive.

So I tend to have a bit of an issue with the alignment thing. And again, it comes back to mindset, and it affects how we code our observations. So, if somebody votes with you on a number of UN General Assembly resolutions, does that mean that they're aligned with you, or could it just mean that they happen to feel the same way about that issue? But political scientists tend to take that kind of data as alignment which, for me, is a bit problematic.

So I would need to explore a baseline question – what does alignment actually mean in Southeast Asia? If you polled the region, and asked: “who's going to line up head-to-head with the United States against China in a Taiwan contingency?” The answer is probably close to zero, with some maybe asking, “can we just send some medical personnel?”. I don't mean to make a light of something very serious, but I think that sometimes has tended to be the experience when the US has called upon its Southeast Asian allies.

Khong Yuen Foong: Thank you. I think your points are very well taken. In fact, one of the findings of the project is that a lot of Southeast Asian countries don't strategically think about alignment. They just have a la carte deals with either China or the US or other countries. The issue then is when you have you deal with issues that are economic, geopolitical, political, diplomatic, and you deal with them in a la carte fashion, you may find that over time you are basically dealing mainly with one of the two powers.