

ASEAN's strategy within RCEP: managing protectionist policies of the second Trump administration

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Abstract: This paper examines ASEAN's strategic response to the Trump administration's second round of protectionist trade policies. This paper analyzes how these policies deliberately undermine ASEAN's economic security, which depends on open and rules-based trade. Using a qualitative comparative framework, this study examines the strategic adaptations of Indonesia, Singapore, and Vietnam, selecting three ASEAN countries that have divergent economic profiles and trade structures with the United States. The study shows that although ASEAN members have adopted their own strategies, they attempt to reduce dependency on the United States through various means. This paper posits the Regional Comprehensive Economic Partnership (RCEP) as a crucial tool to enhance long-term economic stability in the region. This requires ASEAN to strengthen intra-regional unity and implement measured and proactive policy changes to protect shared economic interests in an increasingly fragmented global trade.

Keywords: ASEAN, economic security, RCEP, regional integration, tariff policy, Trump's protectionism

Introduction

Back then when Trump took the POTUS office the first time, he began by quitting the Trans-Pacific Partnership (TPP), renegotiating NAFTA, threatening tariffs to the US companies to bring back the production on US soils and framing those which do not as 'betrayal to US workers'. While he claimed such decision would further secure trade deals and increase the American welfare, and claimed that "protection will lead to great prosperity and strength", his policies can largely be attributed to modern protectionism (Irwin, 2017a). His policies did not aid in manufacturing recovery or trade deficit reduction. Instead, there were steps towards a global trade war that would be detrimental not only to the United States, but also to the allied nations. And such policies weaken such institutions like the World Trade Organization (WTO), which the United States was a founding member of, with the hope to provide an orderly environment for global trade. The "America First" slogan takes on a risk of isolating the United States, which is detrimental to its global

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standing. The argument in favour of economic nationalism is captivating at the surface, but its execution would be devastating for the United States and the rest of the world.

These surprising policies shocked the world, and in response, US allies retaliated forcefully, which created panic among the investors. He reignited a trade war with Canada and Mexico and continued the prolonged dispute with China. In early April 2025, Trump enacted an extensive 10% tariff on almost all countries and increased tariffs to more than 30% on specific nations, such as China and Switzerland (Gamio, 2025). All these retaliatory measures led to a financial crisis that led the global stock crash caused by unilateral action of tariff impositions by a superpower country in this globalised economy.

Southeast Asia has historically managed cycles of political and economic turbulence; the adjustments introduced by the Trump administration were therefore layered upon extant uncertainties. Alarm in the region intensified in the wake of unilateral American measures, underscoring the challenge of maintaining market confidence when Washington's policy inflexions occur with little forewarning. The more significant effect, nevertheless, was the deterioration of the cooperative, rules-based global trading order, or, more precisely, the perception of its vulnerability, compounded by a WTO system that was already experiencing substantial stress. This collapse was spurred by the collection of small, trade-dependent countries that prospered under the global trade framework formed in the aftermath of the Second World War, which provided access to foreign markets and accelerated growth and protected them from hostile, unfair trade practices. However, Trump openly criticised this system, viewing the WTO as a "globalist" entity opposed to American national interests. Therefore, to solve that, the Trump administration's tariffs could initiate the largest trade war since World War II and reverse the trade system, described by Olson (2024) as "big fish eat the little fish". This will pose substantial risks for Southeast Asia's trade-dependent 'small fish' economies.

A study by Setiawan (2020) tried to analyse the impact of the US-China trade war on the ASEAN stock market using an event-study approach. Although the study concludes that the direct impact of the trade war is not significant on the ASEAN stock market, the findings emphasise the interconnectedness of global financial systems, where instability in major economies can indirectly influence investor sentiment and market behaviour in the region. The same results were found by Nidhiprabha (2019), who used Thailand as a case study. Thailand's growth and export activities are affected by the increasing trade disputes with some countries. In addition, the slowing down of the Chinese economy is inflicting additional downward pressure on the prices of goods in the global market. This in turn affect the export performance of Thailand and the economic growth of the country and make the situation more strained. On the other hand, Firdaus et al. (2022), using the GTAP model, show that the cost of the US-China trade hostility is not evenly distributed inside the ASEAN bloc. While countries like Malaysia and Thailand

experience significant harm, Vietnam seems to be in a position to gain relatively, as the re-routing of supply chains and US divestment from China open the space for the expansion of Vietnamese exports. The analysis shows that ASEAN economies, although still vulnerable to cross-border spillover, have the ability to navigate and reorient themselves in the changing global trade environment, depending on how precise their policies are and how fast they can adapt.

It should be noted that the above studies only account for the US-China trade war. What if back then the US imposed tariffs on all ASEAN members? Here, Cheong & Tongzon (2018), using a computable general equilibrium approach, supplemented further with qualitative analyses based on empirical evidence, conclude that if the USA increases its import tariffs by 10 percent on imports from a particular country or region, both the USA and the corresponding nation/region are expected to experience an economic loss. In this simulation, China, South Korea, and ASEAN countries have a higher economic loss compared to the EU and Japan.

This illustrates ASEAN's ongoing susceptibility to shifts within the global marketplace, reinforcing the need to monitor external economic factors persistently, as well as formulate policies aimed at safeguarding ASEAN's robust economic integration while region-wide financial stability, perpetual growth, and capital-sustained development are attained for the entire region.

Moving forward, the current situation is no less, or even worse than Trump's first-term protectionism policy. His tariffs and other 'withdrawal' policies eroded US credibility in Southeast Asia, such as humanitarian commitments, JETPs (Just Energy Transition Partnerships), and many more (Chen, 2025). Unfortunately, many of the ASEAN countries are still unsure on how to respond to this situation. As the ASEAN-US is scheduled on May 26-27, 2025, it is yet to take place. Therefore, ASEAN countries should lobby on their own (Marston, 2025).

While some voices have 'reacted' to the current situation by proposing their ideas on how to navigate the situation (Pitakdumrongkit & Wester, 2024; Pangestu & Armstrong, 2025), a more rigorous study, especially on its relation to the current economic architecture in the region, such as the Regional Comprehensive Economic Partnership (RCEP), remains absent from the discussion.

This article will fill the void by trying to understand how ASEAN's strategy manages Trump's protectionism, especially their approach to RCEP. To note, while the article will generally try to speak on ASEAN's strategy as a whole, in the following comparison section, I will specifically compare its member countries: Indonesia, Singapore, and Vietnam. These countries are selected carefully with the following values in mind. Indonesia is the largest market in the region, Singapore is a global hub, and Vietnam is the largest US trading partner, with a total goods trade estimated at \$149.6 billion in 2024. Therefore, this paper argues that the three selected countries serve as representative cases for analyzing ASEAN's strategic response to maintain a rule-based economic order through the RCEP, particularly regarding respective economic security concerns.

In this research, I am using a qualitative and comparative approach to identify patterns and variations to decode how ASEAN countries respond the shifting US trade dynamics. This paper uses primary data from policy documents, official reports and public statements. I also complement the data with secondary sources from online scholarly peer-reviewed articles and news, all of which published by reputable institution. This will allow me to provide a deeper understanding of ASEAN strategies in adapting to US policy shifts.

1. What does ‘economic security’ mean for ASEAN countries?

National security traditionally refers to the assessments and practices used by a political community to protect itself from potential threats. Initially, this framework legitimized policy interventions and recommendations, but such definitions narrowed the understanding of security to specific mechanisms such as border control, military readiness, and intelligence operations (Busari et al., 2023).

While critics argue that this “traditional” paradigm assume a static state that is not well equipped to deal with rapid systemic changes, such as climate disruption or resource scarcity (Sussex et al., 2017), other scholars have advocated for a more unified understanding of national security. This approach emphasized a shared framework that bring together different actors, including the military, civilian, and private, to work toward common objectives (Clarke, 2020). In this model, fundamental principles and evolving theories come together in a consensus that forms the basis for strategic planning.

In a more encompassing approach, O’Sullivan and Ramsay (2014) have linked homeland security to more recent issues such as the strife for resources, ecological degradation, and international political conflict, thereby broadening the scope that is to be protected. Recent frameworks conceive of risk management as inseparable from national security, prioritising pre-emptive planning, resilience enhancement, and flexible response mechanisms to both anthropogenic and natural hazards (Wijatmoko et al., 2023). In that sense, economic security has been an integral part of the national power, therefore, of national security (Ronis, 2011).

The recent trends show that the intersection between economics and security has grown significantly more pronounced. According to Global Trade Alert (as cited in Hillman, 2025), countries have imposed an average of 3,000 economic restrictions annually over the past five years, a nearly fourfold increase. This surge in state intervention began even before the COVID-19 pandemic and has continued as governments confront growing threats, including national security concerns and pressure from competition, all of which are now increasingly linked to the concept of “economic security.” This trend shows no signs of slowing down as depicted in Figure 1, especially since tariffs, once a minor tool in global trade after World War II, have now become a central element in economic strategy.

Figure 1. Statistics on global restrictive measures from 2014-2024**A Rising Wave Rocks All Boats: Non-liberalizing Interventions in the Global Economy**

Number of restrictive measures announced globally

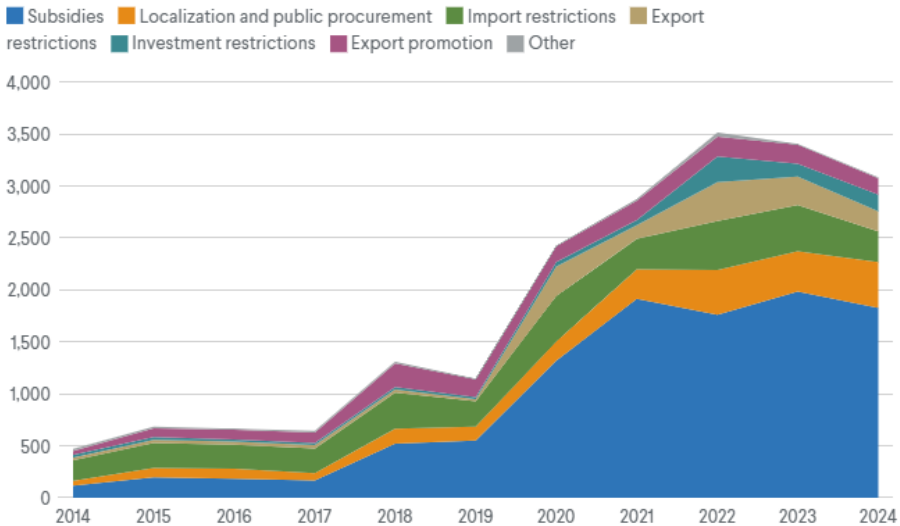


Chart: Andrew Huang and Ishaan Thakker • Source: Global Trade Alert

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Source: Hillman (2025)

As noted by Hillman (2025), the chart reflects only the frequency of economic interventions, not their scale or the resulting costs and benefits for the countries implementing them. Although economic interventions have increased significantly, this does not mean that global trade is declining. Instead, trade continues to grow, but at a slower speed and in a more uneven manner across countries and sectors.

Integrating findings from prior research (Andruseac, 2015; Hnatenko, 2020; Yuzue and Sekiyama, 2025), this research defines economic security as a condition in which a country is protected from any economic threats, to ensure growth, sovereignty, and welfare. This security includes the protection of critical interests, ranging from the survival of the state - sovereign autonomy, to equitable prosperity, in order to deal with disruptions including supply chain disruptions, technological dependence, economic pressures, financial uncertainty, and systemic vulnerabilities associated with globalization.

Table 1. Economic security framework

Category	Description	Example(s)
Goals	Fundamental goals of economic security	<ul style="list-style-type: none"> - Export competitiveness - Protect domestic industries - Trade sovereignty
Threats	Economic vulnerabilities that may arise	<ul style="list-style-type: none"> - Trade wars and retaliatory tariffs - Overdependence on foreign markets - Supply chain shocks
Means	Strategies to maintain or enhance security.	<ul style="list-style-type: none"> - Strategic use of tariffs and trade agreements - Development of local alternatives to imports
Actor(s)	Key entities managing trade and tariffs as tools of economic security.	<ul style="list-style-type: none"> - WTO National trade ministries, customs agencies - Regional blocs (e.g., ASEAN)
Role of Globalisation	Dual nature: increases efficiency but also vulnerability.	<ul style="list-style-type: none"> - Global trade integration increases exposure to external shocks - Tariff changes can trigger chain reactions

Source: author's representation

So, what does this mean, especially for the economic security of ASEAN countries in the middle of Trump's protectionist policy, and how do they protect their own economic security? On the return of US protectionism under a second Trump administration, ASEAN countries need to strengthen their commitment to an inclusive and rule-based economic order, not only to protect their own economic security, but also to keep economic growth in the regions.

As Olson (2024) observes, Southeast Asia consists largely of small, trade-dependent economies that have prospered because of the multilateral, rules-based trading system put in place after World War II. The successive lowering of tariffs, the dismantling of non-tariff obstacles, and the incorporation of disciplines against unfair trade practices have given the region deep and transformational access to global markets, marked by decline in poverty and rapid industrial transformation. However, US protectionism that promotes a more illiberal order now threatens the fragile gains that have been built over the past decades. Because of this, ASEAN need to take more intentional and harmonized actions to strengthen the basic principles of the regional framework; if not, fragmentation can overshadow the prosperity that regional integration has already brought.

In this context, participation in multilateral free trade agreements provides ASEAN countries with a practical means of strengthening their economic resilience. Multilateral free trade agreements enable ASEAN to consolidate tariff preferences, simplify trade procedures, and promote regulatory cooperation among various regional economies, thereby protecting their economic security.

Even though there is no such set up that amounts to an ultimate solution, it reduces reliance on any individual foreign market, and it reduces the disruptive nature of unilateral trade policies. Moreover, the agreements are in support of ASEAN Policy Statement of 2020, which underlined that openness, transparency, and predictability are the ASEAN's most important building blocks of the stable global trading order. Thus, the policies of the ASEAN members aimed at ensuring the transparency and the absence of regional political environment will require the expenditure of their diplomatic capital toward the construction of an inclusive, rules-based economic order. This initiative requires sustained protection of the non-discrimination principle, positive interaction and helpful collaborating with extra-regional partners to promote non-discriminatory and sustainable trade.

2. Analysing US tariff strategies toward ASEAN economies

The tariff policies of the US aimed at the ASEAN countries must be understood as part of a wider scheme of economic, diplomatic, and strategic relations. For a long time, tariffs have been used to correct trade imbalances, protect industries, and further allied or adversarial relations. Such tariffs, framed as demonstrations of economic independence, tend to distort the multilateral system, which, more often than not, triggers retaliatory and escalatory responses spanning long durations (Irwin, 2017b).

Regarding this, American history has already taught us a lesson. The Smoot-Hawley Tariff Act of 1930 is an important part of US trade history because it increased import taxes on more than twenty thousand products. This policy was applied during the Great Depression and was intended to protect local industries and the domestic market from what the government saw as aggressive competition from foreign countries. In practice, however, the law caused quick and harmful reactions. Many affected countries responded by increasing their own tariffs. As a result, global trade fell sharply, and the already serious decline in production became worse. Instead of helping economic recovery, this policy made the situation more severe and showed the risks of applying wide and one-sided import restrictions.

This lesson influenced later US strategy. After World War II, the US became a leading actor in negotiating trade agreements and reducing trade barriers through multilateral negotiations. It also played an important role in creating the GATT and later the WTO. Through frameworks such as the General Agreement on Tariffs and Trade (GATT) and later the World Trade Organization (WTO), the U.S. helped shape a global economic order rooted in free trade and cooperation.

All in all, protectionism sentiment has never fully disappeared; it became stronger when economic slowdown hit, and or during intense political tension. Almost a decade ago, the Trump's 'American First' vision showed this and challenged the very notion of the American foreign policy post-World War II that was once a major supporter of open and liberal order trade regime. Currently, the US

government uses tariffs as a mean to reduce deficits, and to pressure China, that enjoys a surplus and rapid growth against US. As for recent action, US put more broad pressures to its partners, applying trade restrictions to many countries it traded with, including ASEAN. This clearly shows a shift of US trade policy. Despite short-term political or economic gains, history suggests that overreliance on tariffs can have destabilising effects. Trade wars often lead to higher costs for consumers, strained diplomatic relationships, and disruptions in global supply chains which ultimately harm both the countries imposing the tariffs and their trading partners (Madrona Jr, 2025).

Trump already arranged several tariff mechanisms that impose at least 10% tariffs on all goods into the US, while some listed countries are tariffed higher. This results in a complicated environment that affects the ASEAN member countries. The decision was rationalized in Executive Order 14257, which declared a national emergency to confront trade imbalances and, as such, legitimized the tariff regime. The order, as the Trump administration argues, is not baseless. First, this adheres to several statutes, including the International Emergency Economic Powers Act (IEEPA), the National Emergencies Act, the Trade Act of 1974, and section 301 of title 3 of the U.S. Code. Secondly, there are clear reports that US's share of global manufacturing has fallen from 25% to 17% from 2001-2023 (Ostertag, 2025) which increased reliance on foreign supply chains. In the end, this systemic decline within US manufacturing, alongside growing trade deficits has become a solid justification for Trump to call for national emergency, allowing the president to formulate executive orders for more broader punitive measures related to tariffs to restore US interests.

The US itself maintains one of the lowest average Most-Favored-Nation (MFN) tariff rates in the world in approximately 3.3% contrast with many of its trading partners like those in ASEAN that maintain much higher average tariff rates and also impose an array of non-tariff barriers, including burdensome regulatory standards, weak intellectual property protections, and currency manipulation.

The Trump administration argues that such imbalances have persisted for decades under flawed free trade ideology, and that the imposition of reciprocal tariffs is a corrective measure. Thus, the United States aims to pressure foreign governments to remove trade barriers, strengthen legal protections, and adopt more balanced and transparent economic practices. They want to encourage the relocation of manufacturing industries back to the United States by making imports from low-cost manufacturing bases less attractive. This strategy is designed to encourage US and third-country companies to move their production closer to their home countries.

However, this approach is also prone to uncertainty. Many businesses face challenges in shifting production due to infrastructure gaps and higher costs in alternative locations, as some business is very sensitive to labor costs. Moreover, some ASEAN countries, like Malaysia and Thailand, are taking advantage from the

opportunity to attract investments by positioning themselves as alternative manufacturing hubs (Jayaretnam, 2025).

Then, how does the tariff affect the ASEAN member states? The US reciprocal tariff regime placed notable strain upon ASEAN economies, predominantly linked to the American market. The escalation of duties, for example 17% for the Philippines and as high as 49% for Cambodia, upended longstanding supply chains and raised alarms about the region's macroeconomic equilibrium (see Table 2).

Table 2. US Adjusted Reciprocal Tariff toward ASEAN Member Countries¹

Country	Tariff
Brunei	24%
Cambodia	49%
Indonesia	32%
Laos	48%
Malaysia	24%
Myanmar	42%
Philippines	17%
Singapore	10%
Thailand	36%
Vietnam	46%

Source: author's representation based on Executive Order 14257 (2025)

The recent increases in tariff rates have quickly redirected global trade flows. Nations such as Cambodia, Laos, and Vietnam, which built considerable export-oriented sectors around their access to the US market, are now, literally overnight, seeing order books shrink. Cambodia, where shipments to the US account for an influential share of exports and, correspondingly, GDP, is forecasting a 9.2% drop in the value of those exports in 2025, a contraction directly traced to the new 49% tariff (MB, 2025). Equally, Vietnam now contends with a 46% rate and is bracing for reduced turnover in the key categories of electronics, furniture, and garments, sectors that previously underpinned rapid industrial growth (Siviero, 2025).

The US government itself views tariffs as a tool to force ASEAN partners to lower their own trade barriers and become more aligned with US standards in terms of intellectual property rights, labor, and environmental protection. This approach has led to increased diplomatic engagement. Malaysia, for example, has expressed optimism about reaching a trade agreement with the US to reduce tariffs, following recent talks with the US Trade Representative (Lee, 2025).

¹ The development of this tariff policy is still prone to change and highly dynamic, therefore, the number might not be the same. For simplification, the author only provides the initial tariff according to Executive Order 14257 of April 2, 2025

3. ASEAN countries' reactions in navigating the strain

The tariff regime by Trump in 2025 prompted ASEAN countries to adopt new strategies. Although the ASEAN bloc has expressed their deep concern over US tariffs, they have proffered dialogue in lieu of tit-for-tat measures. This is emphasized in a joint statement, about how the communication and collaborative actions place importance on ensuring positive relations with the US. This careful approach can also be attributed to their trade dependence on the US, making them arguably the most disadvantaged party in this tariff disaster.

Table 3. ASEAN member countries' trade with the United States in 2024 (in billion USD)

Country	Total Trade	Trade Balance	Export	Import
Vietnam	149.6	+123.5	136.6	13.1
Singapore	89.2	-2.8	43.2	46.0
Thailand	81.0	+45.6	63.3	17.7
Malaysia	80.2	+24.8	52.5	27.7
Indonesia	38.3	+17.9	28.1	10.2
Philippines	23.5	+4.9	14.2	9.3
Cambodia	13.0	+12.3	12.7	0.32
Laos	0.84	+0.76	0.80	0.04
Myanmar	0.73	+0.58	0.66	0.08
Brunei	0.37	+0.11	0.24	0.13

Source: author's representation based on USTR (2025)

According to the trade data provided in Table 3, almost all ASEAN countries enjoyed trade surplus against US. This clearly shows that these nations exported significantly more to the U.S. than they imported, underscoring their reliance on the American market as a key destination for goods such as textiles, electronics, machinery, and agricultural products. Countries like Vietnam, Malaysia, Thailand, and Cambodia enjoyed substantial trade surplus, with Vietnam leading at over \$123 billion. As such, the introduction and continuation of reciprocal tariffs during Trump's administration could prove disastrous for these export-driven economies. The tariffs would likely reduce ASEAN's competitiveness in the American market and cause export volumes to decline sharply. For worse, the economic consequences might include slowed GDP growth, factory closures, and rising unemployment. Furthermore, deteriorating trade relations could undermine years of diplomatic and economic cooperation between both parties.

Earlier, ASEAN greatly benefited when supply chains moved out of China during Trump's first-term tariffs, which were not aimed at them, and rising geopolitical tensions created trade wars against China. However, such benefits rapidly disappeared with the export-driven development model in the region and now face serious economic threats. With renewed tariffs and trade barriers under consideration, ASEAN nations risk losing critical access to the US market. This shift

could disrupt manufacturing, lower export revenues, and stall economic growth across the region. What once was a strategic advantage is turning into a vulnerability, jeopardizing ASEAN's long-term economic stability (Rajah, 2025).

However, some members still do have some trick under their sleeves and intensively engage in bilateral talks. To that end, in this section I tried to compare three of ASEAN members: Indonesia, Singapore, and Vietnam during their very first responses when hearing Trump's new tariff regime. Several factors are considered here, such as institutional, sectoral economic dependence, and diplomatic maneuvers that are considered capable to influence the vulnerability and adaptation of country's economy.

The protectionist trade policies by Trump put Indonesia in critical geopolitical realignment. As US continued the economic confrontation with China, Indonesia finds it a necessity to navigate the complex trade dynamics that pose serious risks on Indonesia's economic security. Some major sectors in Indonesia, like textiles and agriculture, are heavily impacted by the 32% tariffs, especially with US status as 2nd major trade partners, accounting for 10.3% of Indonesia's annual export (Gabriela, 2025). These tariffs risk disrupting Indonesia's export competitiveness and supply chains (Achmad, 2025).

Initially, Indonesia focused on minimizing the short-term disruption when the 32% tariffs hit hard. The Prabowo Administration quickly announced some concessions, such as a pledge to increase imports of US goods to about \$19 billion, which was expected, as a sign of goodwill, to avoid further punitive measures (Sood, 2025). This aimed to stabilize relations and to buy time for future negotiations. In parallel, Indonesia also diversified its export markets to reduce its reliance on US market by accelerating trade agreements such as CEPA and various other FTAs. Some key partners include South Korea, Australia, Middle East and African countries. Not only that, but they also further attempted to strengthen the ties with multilateral platforms, in which both were already members, like RCEP and BRICS, alongside efforts for anticipated OECD membership (Harianto, 2025).

As for now, Indonesia and the US are at the tariff negotiation stage. The two countries agreed to develop a trade roadmap with a deadline in the next 60 days. The technical discussion of the Indonesia-US negotiations will consider five focuses, namely maintaining national energy security, fighting for export market access, encouraging the ease of doing business through deregulation, building strategic industrial supply chains, including critical minerals, and expanding access to science and technology (Saputra, 2025a).

From the Indonesian government's point of view, it can be understood why they do choose negotiation. Unlike China and the European Union (EU), which responded with countermeasures, Indonesia took a more pragmatic approach. This is mainly attributed to its relatively weak bargaining power compared to both China and EU. Consequently, diplomatic engagement remains the most prudent course in light of mounting pressures, with negotiation emerging as the most viable tactics. As

of now, Indonesia and the Office of the US Trade Representative have signed a formal non-disclosure agreement, which initiates the first round of technical discussions (Saputra, 2025).

However, this strategy is not without risks. The strategic option is to become limited, and the China factors need closer attention. Indonesian diplomats face the risk of accepting clauses that might weaken their competitive advantage of domestic industries, while also further expose sensitive sectors to high tariffs and radical policy changes. What it needs to happen is for the Indonesian government to be attentive to key industries, to support them by providing clear policy measures. This is important to strengthen national economy in a changing international relations environment.

Among ASEAN countries, Singapore has the lowest tariff level imposed by the US at 10%. However, the inclusion of Singapore in this tariff framework is particularly significant given the country's role as a major trading hub and financial center in Southeast Asia. Singapore's economy, which is heavily dependent on international trade and services, particularly with US, faces potential disruptions from these measures. The Trump unilateral trade actions are likely to disturb global trade flows and pose serious risks for the country that depend on trade like Singapore.

As a response, Singapore quickly organized a national task force to help businesses and workers deal with possible economic impacts and rising global uncertainty. The task force is led by Deputy Prime Minister and Minister for Trade and Industry Gan Kim Yong and is responsible for monitoring global trade developments and reducing their negative effects. The task force included officials from key economic agencies, representatives from business groups, employers' associations, and the national labor union. The involvement of labor unions reflects concerns that economic restructuring could affect jobs in the medium and long term. Private sector leaders are also involved to share practical challenges faced by companies. The task force focuses on three main goals: helping firms and workers manage current uncertainty, strengthening economic resilience, and improving the ability to adjust to global changes. At the same time, the Singapore government continues to engage with local and foreign companies, as well as trading partners, to exchange views and seek new forms of cooperation in response to the changing situation (Kit, 2025).

Prior, some short-term policies such as corporate income tax rebates and Community Development Council (CDC) vouchers actually have been introduced even before the tariff to address Singaporean economic challenges. These tools will remain effectively deployed to manage the impact of global trade disruptions and supporting households with rising living costs to ensure both economic stability and resilience amid growing uncertainty (Ng, 2025).

Deputy Prime Minister and Minister for Trade and Industry, Gan Kim Yong, has conducted virtual meeting in April 25 with US Secretary of Commerce Howard Lutnick, described it as "productive." The discussion addressed the deepening of

bilateral economic and commercial relations. While the United States remains unprepared to reduce its 10 per cent baseline tariff, both parties confirmed a willingness to identify areas for constructive economic cooperation. Continuous dialogue will be maintained, and the parties will jointly pursue practical measures to advance cooperation and to progress the economic partnership in ways that are mutually advantageous (Lee, 2025).

Singaporean PM, Lawrence Wong himself has already warned that rising protectionism threatens global norms, shifting international relations from cooperative “win-win” approaches to a self-centred “me first, win-lose” mindset, as more countries prioritise national interests over collective progress and multilateral economic cooperation (Kit, 2025). He describes such a situation as a “seismic change in the global order” (Baharudin, 2025).

Therefore, Singapore must be prepared for a world marked by more frequent and unpredictable shocks, and Singapore should be especially prepared for the possibility of a trade network without the US or at least be less dependent on them by increasing market diversification. It should be noted that these conditions are not driven by Singapore’s alignment choices, but by the persistence of current trends in the absence of a corresponding willingness from the other side to pursue a ‘win-win’ solution, Singapore should pursue a pragmatic approach for their foreign policy to preserve their own economic security (Wong, 2025).

To that end, it is more than necessary for Singapore to reinforce their role as a global hub by securing partnerships with fellow countries that support a rule-based order, including RCEP or other multilateral and bilateral FTAs.

The formal tariff declaration from the United States has elicited a multifaceted response within Vietnam, combining astonishment with mounting frustration, manifest anger, and widespread apprehension regarding the possible economic fallout, should diplomatic negotiation fail to produce a reprieve. Prime Minister Pham Minh Chinh led an emergency cabinet meeting, stating that the 46% tariff, which is among the highest in the Executive Order’s list among ASEAN members, “did not reflect the strong bilateral ties between the two countries”. Despite the unfavorable context, Vietnamese authorities remain steadfast in their commitment to the GDP growth target of 8% for 2025 (Vu & Nguyen, 2025).

The spokesperson for the Vietnamese Ministry of Foreign Affairs (MoFA) stated that tariffs do not reflect the spirit of mutually beneficial trade and economic cooperation and are contrary to the objectives of the Comprehensive Strategic Partnership that has been agreed in 2023. Vietnam has also asked the Trump administration to postpone the tariffs and return to the negotiating table to discuss issues related to Vietnam’s trade surplus with the United States (VLLF, 2025).

In addition, Vietnam’s Deputy Prime Minister was reported to visit the US to seek a better agreement. The Vietnam stressed that the diversification of its export market now put another height of importance, especially after the US tariff hit the

Vietnam illusion with the said partner, marking a strategic moment to adjust its future direction and expanding into new markets (Strangio, 2025).

For Vietnam, the US tariffs feel like backstab, and they do have good reason to feel dissatisfied with this outcome. Moreover, Vietnamese officials have actively invested with Trump Administration to respond to the trade imbalance concerns, hoping for the minimum tariffs (Ha, 2025). Vietnam even reduced tariffs on several US products like ethanol, cars, liquefied natural gas, while also committing to further cuts on other goods (Vu, 2025). Vietnam also approved US company operations, such as Starlink services, and the Trump-linked business near Hanoi. Despite all of these non-confrontational approaches, the country faced stronger economic strains than some US partners that openly challenged Trump's trade policies (Strangio, 2025).

Instead of pulling back, Vietnam's leadership quickly adjusted its strategy to respond to Trump's policy changes. They tried to balance national pride with quiet and careful diplomatic efforts. They used a dual approach, first its state-controlled media to promote messages of restraint and continued cooperation, to manage optimistic sentiments for business while avoiding public confrontation. On the other hand, Vietnam approved social media voices to express their public anger in a more controlled manner to manage domestic sentiments, which helped support the government while shifting attention away from broader criticism of its economic compromises. All in all, this approach had three clear aims: to keep communication open with the United States, to avoid appearing weak in diplomacy, and to control rising nationalism so it would not turn into long-term anti-American sentiment (Luong, 2025).

Domestically, Vietnam's strong reliance on foreign trade leaves it economically exposed. In 2024, over 70% of its manufacturing export value came from foreign-invested enterprises. To withstand the global economic shock, Vietnam needs to evolve into a mature industrial economy by building its own capabilities beyond cost competitiveness. As global trade grows more unpredictable, the country needs to shift from being a low-cost exporter to a high-performance economy. This transformation requires raising industry standards across the board, from small workshops to high-tech multinational operations.

Regarding its foreign policy to maintain economic security, Vietnam has already increased their economic ties with several countries, particularly China (Balenieri, 2025). However, it would be an exaggeration to claim that Vietnam will lean closer to China in its foreign policy because of the tariffs, as Vu (2025) has said, that although economic growth and trade relations are important to Vietnam, the country has built its foreign policy on its own security interests, the most important of which is to maintain balanced relations among the major powers.

In this situation, Vietnam's industries and businesses are encouraged to enhance market diversification, as rising trade tensions and unpredictable fluctuations could threaten export performance. Lower-risk and more stable alternatives include the EU, Japan, South Korea, ASEAN Plus frameworks, and

using the already established regional economic integration initiative like the RCEP could be a viable option.

4. ASEAN and the RCEP-driven economic integration

All ASEAN countries face diverse difficulties, yet they share a similar problem posed by US tariffs, primarily market diversification. I contend that the RCEP represents the most practicable strategic architecture available to ASEAN states for counteracting the destabilising impact of US tariff policies while simultaneously cultivating enduring economic robustness. With 15 countries in Asia Pacific linked by RCEP, framing them into a major trade framework will allow ASEAN countries to increase their export destinations. This will result in improved regional supply chains, as well as reduce dependence on the US as main trading partners. This can be seen in countries such as Indonesia, Singapore, and Vietnam, where RCEP supports existing bilateral trade efforts by opening up more access to the Asia-Pacific region. In this way, the agreement contributes to strengthening regional manufacturing and more connected supply chain (Damayanti et al., 2018).

As RCEP aimed to support development by various means (among them technological transfer, investments, and trade liberalisation), it also incentivizes members to elevate from low-value production into higher-value roles in regional supply chains. With this, RCEP can be used to serve ASEAN economic by helping to protect the region from external economic shocks, maintain strategic autonomy, and reduce the risk of becoming less relevant in a fast-changing global trade.

The ASEAN nature of wide geographic scope and vast resources, and also its 661 million population, can allow them to have stronger bargaining power compared to only using bilateral agreements. While disparity within the ASEAN members does exist, RCEP offers gradual tariff reduction and a clear dispute settlement system to manage these risks. By promoting regional integration instead of protectionist policies, RCEP becomes a tool for ASEAN to respond to external trade pressures and change them into long-term economic growth and a better strategic position.

In relation with current dynamics, the most direct benefit for ASEAN under the 2025 Trump's tariff regime are the ability to shift trade away from the more restrictive US market toward regional markets with lower tariffs. As within RCEP the 90% of tariffs has been removed, it gives ASEAN countries a safer zone to adjust their exports to the RCEP members.

To offer an example, the automotive sector in Thailand, which is affected by US steel tariffs can shift its exports to RCEP countries such as Indonesia where tariffs on electric vehicles and parts are lower. In a similar way, Indonesia's SMEs industry, which makes up around 97% of the total jobs and businesses (Gultom et al., 2024), can utilize the e-commerce rules within RCEP to get a more favorable option. These provisions help firms avoid many traditional export barriers that have become stronger under US trade policies.

As such, the ASEAN can be positioned at the core of regional economic governance within RCEP framework, not a peripheral one. Assuming inclusive structure in RCEP, it will also allow ASEAN members to play the role to balance great power rivalries in Asia, killing two birds with one stone. The RCEP also promotes diversification among partner countries and reduces overreliance on any single nation, despite concerns that China, due to its sheer economic and population size, might have dominant influence. This is critical to preserving a multilateralism culture, especially during fragmented global trade caused by US that pushed binary logic of “us” and “them” (Cooper, 2025). Again, another benefit is that RCEP reviews mechanisms that enable the members (as in here, ASEAN countries), to renegotiate terms and makes sure they are capable to adapt in evolving geopolitical-economic pressure (ASEAN, n.d.).

While ASEAN countries’ growth most likely will benefit RCEP, it doesn’t mean the agreement will become a panacea to neutralize all external shocks that the ASEAN currently have, and also the coming threats. The benefits also certainly will not be distributed evenly among members, as the least developed might find it difficult to meet the RCEP’ standards or compete with other members (Liu, 2025). One thing can be achieved by ASEAN, that is to improve their internal coordination on policies, technical assistance, and capacity building initiatives. It should be noted that this should not result from dependency on a singular partner. Above all, while RCEP promise a great deal to the ASEAN, it is not sufficient. The future of ASEAN depends on bold and visionary leadership, leaders who can communicate clearly, make tough decisions, and actively engage their citizens (Kaloko, 2025).

Conclusion

The return of US protectionist policy under President Trump, including the plan to increase tariffs in 2025, has created new uncertainty for the global economy. This situation brings serious challenges for ASEAN countries. Even though the “America First” approach may give political benefits inside the United States, it weakens cooperation in international trade.

Many ASEAN economies depend a lot on exports and are closely linked to global supply chains, so they are more affected by these tariff decisions. Unilateral tariff increases make the region more vulnerable to external shocks and reduce economic stability. Large and wide, tariffs not only disrupt certain trade routes, but also damage the rules-based trading system that has supported Southeast Asia’s economic growth for many years.

ASEAN member states reacted to the return of US tariffs in different ways, depending on how much their exports depend on the US market and how close their economic ties are with the United States. Indonesia, which focuses on export-led growth and has limited fiscal space, tried to seek tariff exemption through negotiation and at the same time speed up bilateral trade agreements with regional

partners. Singapore used its strong policy capacity to apply contingency tariffs and legal measures to reduce fiscal risks, while also strengthening cooperation with alternative partners. Vietnam, whose supply chains are highly connected to US consumers, submitted formal complaints and increased engagement with other ASEAN countries and East Asian partners. Overall, these responses show a shared regional pattern: ASEAN countries still want to maintain good relations with the United States, but they no longer see the US market as a fully stable source of growth.

In the current situation, this paper argues that ASEAN's embrace of the RCEP appears not just strategic, but essential. As RCEP offers a multilateral framework, it helps ASEAN member states to further strengthen their economic security through various means, such as enhancing market access, streamlining regulatory cooperation, and stabilizing supply chains within the region.

The 15 diversified economies among all RCEP members can be seen as an opportunity to maximize ASEAN's bargaining power and economic autonomy, providing a credible alternative to the volatility of US trade policy. This, in turn, enables ASEAN members to preserve their centrality in regional governance while avoiding the binary logic of great power competition.

Yet, as I showed in the discussion earlier, RCEP is not, and will not be, a panacea for ASEAN economic security. Its benefits might not be evenly distributed, and less developed members face structural and institutional challenges in fully taking advantage of the RCEP. But one sure thing is that RCEP could bring massive benefits if ASEAN, within itself, could effectively organize itself as a proper association with deeper policy coordination and capacity building among member states.

Therefore, the future of ASEAN amid this shifting international relations must rely on two complementary pillars: regional solidarity and strategic multilateralism. One to ensure the bloc withstand external shocks with proper coordination, and the second to open possibilities for engagement with new partners, diversification, and preserve the rule-based order.

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