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From Sri Lanka to South Korea, Asia elects new leaders in 2024

A momentous election year lies ahead for Asia — expected to shape the future of the rules-based international order, economic prosperity and security

A momentous election year lies ahead not only for the US and Europe but also for many other countries across the globe, including the continent of superlatives. With almost 60 per cent of the world's population and gross domestic product, and two-thirds of its growth, the Indo-Pacific region is the world's economic centre of gravity. Politically, Asia also plays a key role in the multipolar world order of tomorrow, in which the strategic rivalry between China and the US is systemically relevant, but (supra-)regional centres of power are becoming more and more important. The future of the rules-based international order, economic prosperity, peace and security will be decisively shaped in the Indo-Pacific.

A sovereign and geopolitical Europe needs broad global partnerships more than ever for its political strength and economic resilience — more than enough reason to take a closer look at the 2024 elections taking place in at least nine Asian countries.

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While Ukraine and the Middle East remain in the spotlight for Europe, it is important not to lose sight of the major developments in Asia. Six hotspots and trends stand out in particular: first, the continued efforts by the US and China to reach at least a minimum level of understanding in the management of their conflicts, coupled with growing concerns about increasing tensions in the South China Sea and the Taiwan Strait. Second, the renewed threat to global supply chains stemming from the security crisis in the Red Sea and around the Horn of Africa — a significant proportion of global cargo traffic passes through Asia, where

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Third, the escalating provocations by North Korea and Pyongyang's new axis with Moscow, which are fuelling concerns about stability on the Korean peninsula. Fourth, India's successful performance and growing self-confidence on the world stage and the difficult relationship between New Delhi and Beijing, which is not least an Achilles heel for formats dominated by China such as the BRICS+ or Shanghai Cooperation Organisation. Fifth, the significant, and possibly irreparable, reputational loss of Western countries across the so-called Global South, most recently as a consequence of Israel's war in Gaza following the terrorist attacks by Hamas. And finally, the retreat of democracy and the rise of authoritarianism and populism, which is also evident in Asia.

What is at stake in the region?

Geopolitically, the challenges governments and societies in Asia face are similar to those in Germany and Europe: how can they preserve and strengthen their own independence in the midst of dominant great power rivalries? What impact do the seismic geopolitical and geo-economic changes of our time have on national development paths, particularly in developing and emerging countries? How can one-sided dependencies be reduced and partnerships diversified? Of course, not all of these questions are at the centre of electoral campaigning.

As elsewhere, elections in Asia are primarily characterised by domestic issues — be it youth unemployment and mass labour migration in Bhutan, social inequality in South Korea, the economic crisis in Sri Lanka or the fight against corruption in Mongolia. That said, geopolitics is always in the back of everyone's mind — most countries do not want to choose between the superpowers or larger neighbours, and yet, many fear that this balancing act may no longer be a viable option one day. So, what is at stake in Asia's 2024 elections when it comes to foreign policy? And what can German and European policymakers expect for their strategic partnerships across the region?

The start of the election season could hardly be more geopolitical. In Bangladesh, Prime Minister Sheikh Hasina managed to secure her fifth term in office, as widely expected, amid an opposition boycott and international concerns for the country's democratic future. Strategically positioned as a bridge between South and Southeast Asia, and skilfully balancing its large neighbours India and China, the country has seen rapid economic development in recent decades. The victory of Hasina's Awami League is welcome news for her closest ally India. The challenges for both German development cooperation and the implementation of

the Supply Chain Due Diligence Act are likely to become greater.

In neighbouring Bhutan, former Prime Minister Tshering Tobgay was the second election winner of the new year. Close relations with India remain the foundational pillar of Bhutan's foreign policy. The ongoing border disputes with China are of geostrategic importance for Thimphu, Beijing and Delhi.

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Not surprisingly, the elections in Taiwan are set to attract the most international attention in January and might have implications for regional and global stability in the superpower conflict between China and the US. In the polls, the incumbent Vice President and Beijing-critical candidate of the Democratic Progressive Party (DPP), William Lai Ching-te, had the lead. However, the largest opposition party, Kuomintang (KMT) under Hou Yu-ih, was catching up. In Taiwan, no polls are published in the final 10 days before the election. For the first time since 2008, there is also the possibility of a hung parliament without an absolute majority if the third presidential candidate Ko Wen-je and his Taiwan People's Party (TPP) succeed in breaking the two-party dominance.

Of course, Beijing's reaction and the US elections in autumn will be almost as relevant as the election outcome itself. For Germany, Taiwan is the fifth-largest trading partner in Asia and, as a leading semiconductor hub, of systemic importance. Berlin and Brussels are well-advised to plan in short, medium and long-term scenarios when it comes to future developments in the Taiwan Strait.

In February, the elections in the world's fourth and fifth most populous countries will take centre stage: Indonesia and Pakistan. In Indonesia, Prabowo Subianto, defence minister and ex-son-in-law of former military ruler Suharto, is in the lead in a joint ticket with Gibran Rakabuming, eldest son of outgoing popular incumbent Joko Widodo. At the same time, it remains to be seen which alliances with or against the two competitors – ex-Jakarta governor Anies Baswedan and the former governor of Central Java Ganjar Pranowo, who criticised Prabowo for his human rights record – will be formed in the event of a run-off election.

In foreign policy terms, all three contenders are certain to stick to

Indonesia's neutral and balancing posture. Prabowo advocates for more defence spending and greater military capacities. Close economic ties with China remain a priority, but Prabowo's fairly pragmatic take on the nuclear submarine deal between Australia, the UK and the US (AUKUS) is noteworthy. Regarding the EU, he seems less accommodating and recently called out Brussels for alleged double standards as well as disagreements over trade and environmental issues. Indonesia is a key partner for Germany. Mutual trust has grown substantially during Berlin's and Jakarta's parallel G7 and G20 presidencies, with the important Bali Declaration on Ukraine in November 2022. Southeast Asia's regional body, ASEAN, even though it has a hard time maintaining relevance and consensus, remains a priority partner for the implementation of Germany's Indo-Pacific guidelines.

Expectations of big change

The situation ahead of the elections in Pakistan remains unpredictable. Three-time Prime Minister Nawaz Sharif, who has returned from exile, is once again seeking office. His strongest opponent, the popular ex-cricket star and former head of government, Imran Khan, is excluded from the elections. An election victory for Sharif, a surprise prime minister or a postponement of the polls — many scenarios seem conceivable just a few weeks before the election. Ultimately, the powerful security apparatus will probably have the final say. Germany should not give up on Pakistan, though, despite the ongoing political chaos. Notwithstanding its pivotal role in China's Belt and Road Initiative, Islamabad is clearly endeavouring to put itself back on a broader footing with the political West and to position itself as a connectivity hub.

The largest election in the world will be held between April and May. Voters in India are heading to the polls to elect a new parliament in several stages. A victory for popular Prime Minister Narendra Modi and the National Democratic Alliance (NDA) led by his Bharatiya Janata Party (BJP) seems the most likely outcome. For the opposition alliance I.N.D.I.A. led by the Congress Party, it will be a tough race, even though surprises cannot be ruled out especially in individual states. Be it a successful G20 presidency or the first Indian moon landing — Delhi has arrived on the world stage. Its new international self-image can be studied in External Affairs Minister S. Jaishankar's recently published book 'Why Bharat matters'.

The agenda in 2024 for the strategic partnership between Germany and India is full: inter-governmental consultations, the Asia-Pacific Conference of German Business, defence cooperation, military exercises, and green and sustainable development. That said, it is equally important

for Germany's most decisive partnership in the Indo-Pacific to handle disagreements respectfully and within a proper framework.

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In South Korea, the parliamentary elections scheduled for April are overshadowed by the assassination attempt of opposition leader Lee Jae-myung. Since the closest presidential election in the country's history in March 2022 – the winner Yoon Suk-Yeol and Lee were less than one per cent apart – the traditional polarisation of Korean politics has increased even further. President Yoon and Japan's Prime Minister Fumio Kishida are taking bold steps with their attempt at historic reconciliation between South Korea and Japan. Though, the rapprochement remains controversial in the eyes of many, especially in South Korea.

For relations with North Korea, deterrence will be the *modus operandi* for the foreseeable future. Pyongyang's ever-more aggressive stance leaves Seoul little other choice. President Yoon and his conservative People Power Party (PPP), which does not have a majority in the National Assembly, are facing a crucial test. If the opposition Democratic Party remains the largest faction, Yoon will be irreversibly weakened for the remainder of his tenure. For Germany, South Korea is one of the most important value and trade partners in the Indo-Pacific. Whether in terms of relations with China, economic security or industrial and technology policy — both sides have much to learn from each other.

The same is true for Japan, where elections are not due until 2025, but dissolving parliament early remains a possible scenario. Prime Minister Kishida is struggling with weak poll numbers and a party donation scandal. He also has to stand for re-election as chair of his Liberal Democratic Party (LDP). Japan's political landscape might be up for bigger changes. No matter what the outcome will be, continuity can be expected in German-Japanese relations. Rarely has the strategic partnership between Berlin and Tokyo been so close. Chancellor Scholz's first trip to Asia took him to Japan and government consultations were held for the very first time. The efficient coordination between the successive German and Japanese G7 presidencies was central to finding common positions on global challenges such as Russia's war against Ukraine or climate change.

Expected continuity

The packed electoral calendar in the first six months of the year will end in June with the elections in Mongolia. A victory for the ruling Mongolian People's Party (MPP) under its young Prime Minister Oyun-Erdene is likely, even though an absolute majority is far from certain. This makes the recent electoral law changes spearheaded by him and reform-minded actors across parliament all the more remarkable: more parties will have a fair shot of entering parliament, and a women's quota of 30 per cent is to be introduced. Mongolia's young democracy, uniquely situated between China and Russia, has to perform a demanding balancing act in its foreign, security, economic and energy policy. On this journey, Ulaanbaatar deserves every support from Germany, its most important 'third neighbour' in Europe.

In the second half of the year, apart from elections in Sri Lanka, which has become a geopolitical hotspot in the competition between India, China and the US, next year's elections are already casting their shadows. In Singapore – a key regional partner for Europe in promoting multilateralism, free trade and maritime security – Prime Minister Lee Hsien Loong is expected to hand over to his designated successor Lawrence Wong after 20 years in office.

For Germany, Australia, like neighbouring New Zealand, is a natural partner in the region.

Campaigning for state-level and federal elections in Australia will start as well. The Labor Party under Prime Minister Anthony Albanese is seeking re-election in May 2025, but could also call an election much earlier. Weakened by the lost 'Voice' referendum on indigenous rights and struggling with falling approval ratings, the second term in office is far from a done deal. For Germany, Australia, like neighbouring New Zealand, is a natural partner in the region. Albanese's pragmatic and principled restart in relations with China – with the first visit by an Australian head of government to Beijing in seven years – as well as New Zealand's first National Security Strategy, offer worthwhile opportunities for closer coordination among friends.

All things considered, the elections in the Indo-Pacific this year and next year should largely produce continuity in foreign policy terms for Germany's and Europe's most important partnerships. This is not bad news in view of the expected geopolitical turbulences, ongoing wars

elsewhere and potential new hotspots in the region. We will need all our strength and strong global partnerships for the challenging times ahead.



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