

Overview of ASEAN Countries' Recovery Plans and Energy Transition

Melinda Martinus
Lead Researcher, Socio-Cultural Studies
ASEAN Studies Centre
ISEAS-Yusof Ishak Institute





Are ASEAN's recovery measures aligned with energy transition targets?

Energy transition targets in ASEAN countries

Country	Energy targets	Plan
Brunei	<ul style="list-style-type: none"> • Increase total share of EVs to 60% of total annual vehicle sales by 2035 • Increase total share of renewable energy to at least 30% of total power capacity by 2035 • Reduce GHG emissions by at least 10% through electricity consumption management by 2035 	NDC
Cambodia	<ul style="list-style-type: none"> • Reduce GHG emissions by 13.7MtCO₂e in the energy sector 	NDC
Indonesia	<p>Primary energy supply mix as follows:</p> <ul style="list-style-type: none"> • new and renewable energy at least 23% in 2025 and at least 31% in 2050; • oil should be less than 25% in 2025 and less than 20% in 2050; • coal should be minimum 30% in 2025 and minimum 25% in 2050; and • gas should be minimum 22% in 2025 and minimum 24% in 2050. 	NDC
Laos	<ul style="list-style-type: none"> • 1 GW of installed solar and wind • 300 MW of installed biomass • 30% EV penetration, biofuels to meet 10% of transport fuels 	NDC
Malaysia	<ul style="list-style-type: none"> • Increase the share of renewable energy in installed capacity to 31% in 2025 and 40% in 2035 	Announcement by Minister of Energy and Natural Resources
Myanmar	<ul style="list-style-type: none"> • Conditional: avoid 144.0 million tCO₂e emissions by 2030; • Increase the total share of renewable energy to 53.5%; • Decrease the share of coal by 73.5% • Unconditional: avoid 105.24 million tCO₂e by 2030 	NDC

Energy transition targets in ASEAN countries

Country	Energy targets	Plan
Philippines	<ul style="list-style-type: none"> • Increase renewable-based capacity to 15,304 MW by 2030 (almost triple of 2010 levels) • Additional specific targets for geothermal, hydropower, biomass, wind, solar, ocean energy 	National Renewable Energy Program
Singapore	<ul style="list-style-type: none"> • Reach GW-peak of solar energy by 2030 	NDC
Thailand	<ul style="list-style-type: none"> • Increase renewables to 30% of the country's final energy consumption by 2036 • Renewables (final energy consumption): 39 389 ktoe, or 30% of TFEC in 2036, i.e. 131 000 ktoe • Fuel/generation capacity mix (2015- 36): • Gas: 64% - 37% • Coal: 20% - 23% • Nuclear: 0% - 5% (2035) • Imported hydropower: 7% - 15% • Renewable energy: 8% - 20% 	Alternative Energy Development Plan 2015, Thailand Power Development Plan 2015-2036, Thailand Energy Efficient Development Plan 2015-2036
Vietnam	<ul style="list-style-type: none"> • Unconditional: reduction of about 5.5% compared to BAU • Conditional: reduction of about 16.7% compared to BAU 	NDC

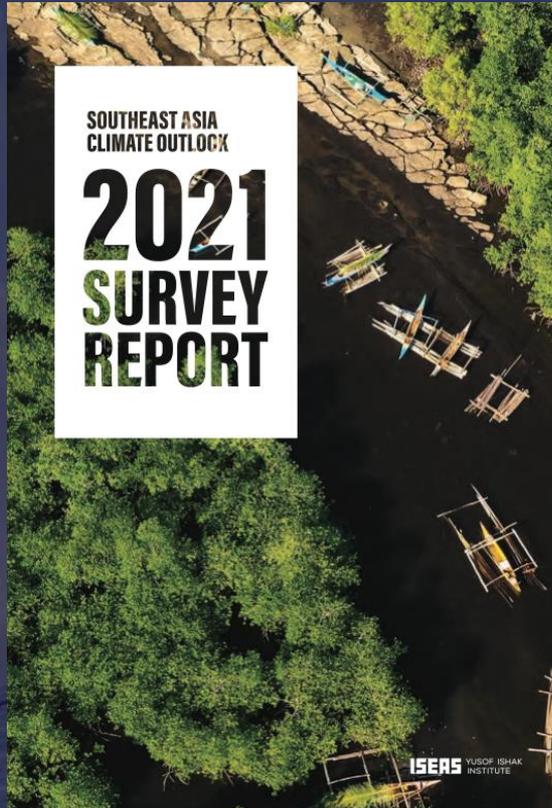
Are ASEAN countries pursuing a green recovery in energy?

Country	Total Announced Spending (US billion)	Estimated loans from development partners (US billion)	Examples of pro-climate stimulus spending	Examples of counter-climate stimulus spending	Rating (relative to NDC)
Brunei	0.3				No alignment
Cambodia	3.1	0.396			No alignment
Indonesia	258.4	6.863	Disaster management	Unconditional tax incentives to oil and gas sector, removed luxury tax on cars	Partially aligned
Lao PDR	0.0033	0.078			No alignment
Malaysia	83.5		Energy efficiency, renewable energy	Infrastructure projects with environmental consequences	Partially aligned
Myanmar	0.5	1.244	Renewable energy		Partially aligned
Philippines	122.5	5.408	Food security, disaster management		Partially aligned
Singapore	92.2		Energy efficiency, electric vehicles, food security, green bond issuance		Partially aligned
Thailand	106.4	1.500			No alignment
Vietnam	19.8	0.184		Reduced environmental taxes on jet fuel	No alignment

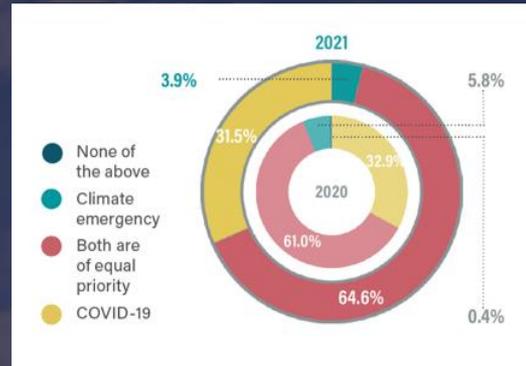
Understanding the Public Perceptions

The image features a close-up, low-angle shot of a solar panel array. The panels are dark blue with a visible grid pattern of thin white lines. They are arranged in rows that recede into the distance, creating a strong sense of perspective. The background is a clear, deep blue sky filled with soft, white, fluffy clouds. The overall lighting is bright and natural, suggesting a clear day.

Prioritising COVID-19 or the Climate Emergency



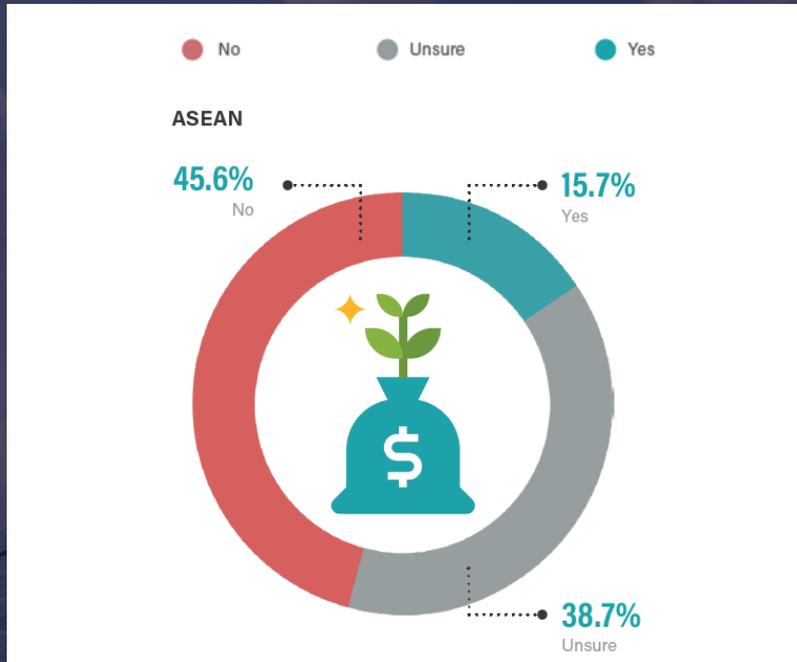
Which of the two crises – COVID-19 or the climate emergency – should governments prioritise?



- Sentiments have remained **similar** from 2020 to 2021 - majority prioritise both
- This is despite worsening COVID-19 situations in many ASEAN countries
- 76.5% of Cambodia respondents prioritise both - the highest among ASEAN countries
- 42.3% of respondents aged 46-60 prioritise COVID-10, compared to 25.6% of respondents aged 21-35

COVID-19 Stimulus Spending and a Green Recovery

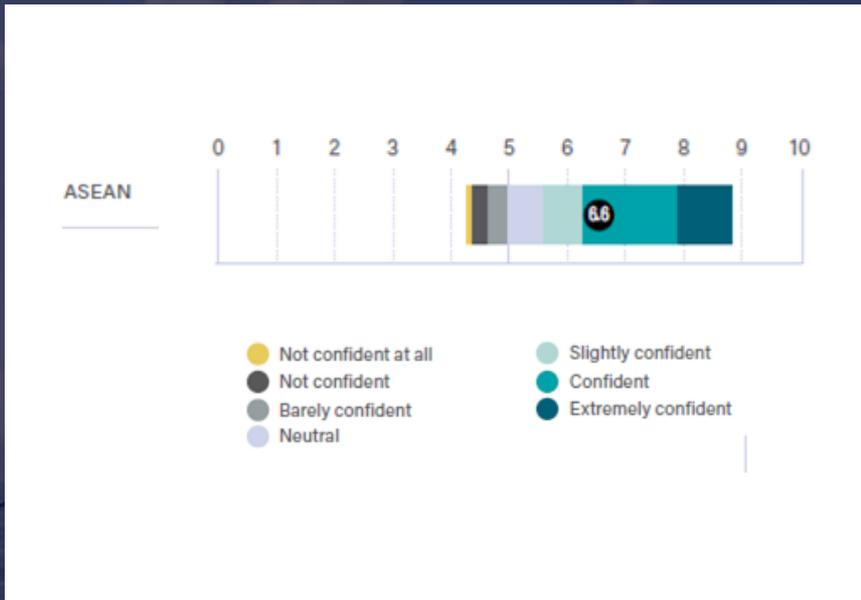
Do you think your government's COVID-19 stimulus spending contributed to a green recovery?



- Nearly half of respondents feel that their government's stimulus spending did not contribute to a green recovery
- 55.9% of respondents from **business, finance and industry** chose "No", the highest among all affiliations
- 50.0% of **Laos** respondents and 37.5% of **Vietnam** respondents chose "Yes"
- 67.3% of **Malaysia** respondents and 74.3% of **Thailand** respondents chose "No"

Climate Policies, Innovation and Competitiveness

On a scale of 0-10, how confident are you that adopting climate change measures and policies will drive the innovation and competitiveness of your economy?



- **Vietnam (7.5), Singapore (6.9) and the Philippines (6.8)** are the most confident that climate policies will boost innovation and competitiveness in their economies
- By affiliation: students (7.4), regional organisations (7.1) and media respondents (7.0) are the most confident

A photograph of a solar panel array under a blue sky with white clouds. The solar panels are in the foreground, and the sky is in the background. The text "Hope for a green recovery?" is overlaid on the image.

Hope for a green recovery?

ASEAN Comprehensive Recovery Framework

Broad Strategy 5: Advancing toward a more sustainable and resilient future

Key priorities	(Selected) initiatives and programmes	Lead / Relevant sectoral bodies
Promoting sustainable development in all dimensions	Develop ASEAN Sustainable and Consumption (SCP) Framework	ASEAN Senior Officials on Environment / ASEAN Working Group on Environmental Education
	Study green jobs policy readiness in ASEAN	Senior Labour Officials Meeting
Facilitating transition to sustainable energy	Complete and implement ASEAN Plan of Action on Energy Cooperation Phase 2: 2021-2025	Senior Labour Officials Meeting
Building green infrastructure and addressing basic infrastructure gaps	Capacity building for active transportation policy development	Senior Transport Officials Meeting
	Study diversified options for sustainable financing for cities; organise training to share best practices from EU, Singapore, Malaysia	ASEAN Senior Officials on Environment / ASEAN Working Group on Environmentally Sustainable Cities

Key priorities	(Some) initiative and programmes	Lead / Relevant sectoral bodies
Promoting sustainable and responsible investment	Implement ASEAN Guidelines on Promoting Responsible Investment in Food, Agriculture and Forestry	ASEAN Technical Working Group on Agricultural Research and Development
	Pilot implementation of ASEAN-EU Natural Capital	ASEAN Senior Officials on Environment, ASEAN Working Group on Nature Conservation and Biodiversity
Promoting high-value industries, sustainability, and productivity in agriculture	Develop ASEAN guidelines on utilisation of digital technologies for food and agriculture sector	ASEAN Senior Officials Meeting on Agriculture and Forestry , ASEAN Technical Working Group on Agricultural Research and Development, ASEAN Climate Resilience Network
	Implement the ASEAN Regional Guidelines for Promoting Climate Smart Agriculture Practices	
Managing disaster risks and strengthening disaster management	Regional and national action plans to support ASEAN Guidelines on Disaster-Responsive Social Protection	ASEAN Committee on Disaster Management, Senior Officials Meeting on Social Welfare and Development, Senior Officials Meeting on Health Development
Promoting sustainable financing	Formulate and adopt ASEAN Sustainable Banking Principles	ASEAN Senior Level Committee on Financial Integration

More opportunities for a just green recovery in ASEAN's energy sector

Other areas of partnership within and beyond ASEAN

- ASEAN Power Grid
- ASEAN Green Taxonomy
- Asia Energy Transition Initiative (ASEAN-Japan)
- Japan-US-Mekong Power Partnership
- Japan-US-Clean Energy Partnership
- ASEAN-China Joint Statement on Enhancing Green and Sustainable Development Cooperation (carbon market, mangrove conservation, and clean energy)

Opportunities for investment

- Renewable energy projects (deployment, storage capacity, grid connectivity)
- Enhancing energy efficiency
- Rural electrification
- Sustainable options for public transport, last-mile connectivity, electric vehicles and charging stations

New initiatives:

- ASEAN Framework on Circular Economy
- Blue Economy (under development)



Thank you

Melinda Martinus
Lead Researcher, Socio-Cultural Studies
ASEAN Studies Centre
ISEAS-Yusof Ishak Institute