Foreword

The global energy landscape has been changing drastically. We are in the midst of uncertainty. Last year we witnessed increased international momentum toward net zero 2050, and COP26 in Glasgow played a historic role in this regard, as many governments committed to carbon neutrality either by 2050 or 2060. At the same time, ironically, since the global economy has started to recover from the coronavirus disease 2019 (COVID-19) pandemic, the fossil fuel markets, particularly the natural gas market, have become very tight, making prices high. It was in this environment that Russia began invading Ukraine in February this year. The Russia–Ukraine war has had a huge impact on global energy demand and supply, especially in Europe, where dependency on Russian fossil fuels was and remains very significant. Although international determination to move toward net zero is firm, the possible paths to this goal should be carefully reviewed given this new energy environment.

The governments of the Association of Southeast Asian Nations (ASEAN) countries have taken on ambitious policy goals in relation to emissions; however, like many other countries, the ASEAN member countries have also been severely affected by COVID-19 and by the uncertainty and extremely high energy prices triggered by Russia's invasion of Ukraine. ASEAN is emerging in the global energy arena in terms of energy demand. Its commitment to net zero will have large implications for energy because ASEAN's reliance on fossil fuels, particularly on coal, means that major efforts will be required to improve its energy systems. A rapid rise of clean electricity will be one of the keys to this energy system improvement.

We have conducted research on willingness to pay (WTP) in Myanmar, Lao PDR, Malaysia, the Philippines, Thailand, Viet Nam, and Indonesia. This research started three years ago, when the global energy situation was completely different from now. During this period, the ASEAN countries have made steady progress towards meeting their commitments under the 2015 Paris Agreement and the Sustainable Development Goals (SDGs). As policies to achieve these goals remain in full swing, public perspectives need to be considered. This is exactly what this research aims to contribute, given that it tries to analyse public preferences for renewable energy and other climate change actions in ASEAN, particularly in urban areas.

Net zero 2050 is a goal widely shared at global level. In order to reach this goal, international cooperation is necessary. ASEAN member countries are exerting great efforts to achieve this goal. This WTP study was conducted in collaboration with university professors in the respective countries. The survey in these countries was also affected by the COVID-19 pandemic. Research based on surveys in the ASEAN countries is scant; thus, we believe this report will provide a solid first step to understand the reality of energy in ASEAN. In doing so, we believe this report will also contribute to energy policymaking in ASEAN countries and stimulate a wider discussion on WTP and energy and climate change policy in ASEAN.

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