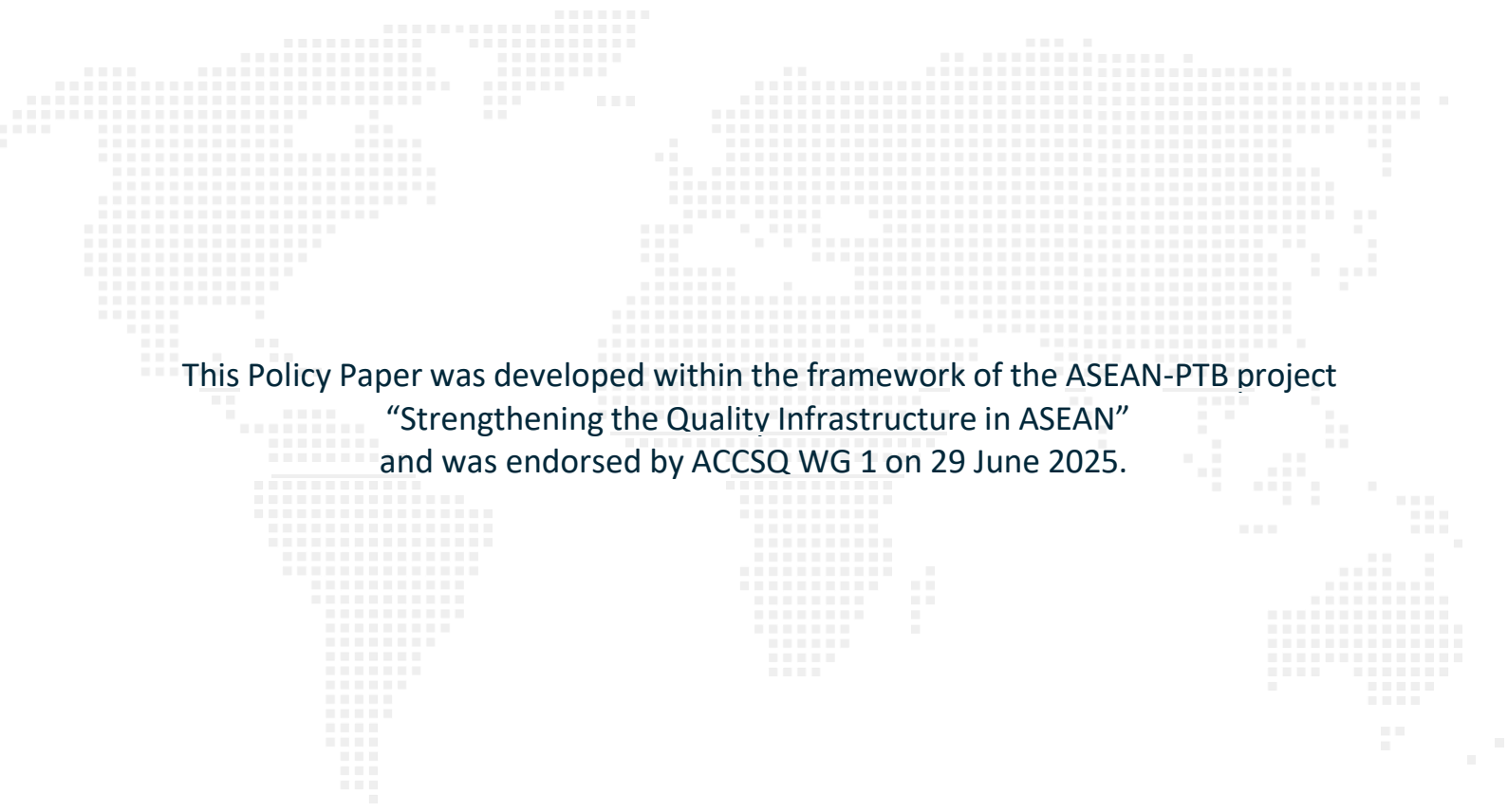


Association of Southeast Asian Nations (ASEAN)

Foresighting Framework

Policy Paper



This Policy Paper was developed within the framework of the ASEAN-PTB project
“Strengthening the Quality Infrastructure in ASEAN”
and was endorsed by ACCSQ WG 1 on 29 June 2025.

Policy Paper: ASEAN Foresighting Framework

The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor-Leste and Viet Nam. The ASEAN Secretariat is based in Jakarta, Indonesia.

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1. ASEAN – Standards – Harmonisation
2. Identification – ACCSQ – Sustainable Development

ASEAN: A Community of Opportunities for All

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1. Introduction

ASEAN Community Vision 2045

- 1.1 ASEAN strives, by 2045, to realise a prosperous and a single market economy, with highly skilled workforce, driven by growth-inducing productivity and innovation, which is inclusive and sustainable across and along the value chains.

ASEAN Consultative Committee for Standards & Quality (ACCSQ) Sectoral Plan 2026 - 2030

- 1.2 Standardisation serves as a basis for market integration, technological development and fosters competitiveness within ASEAN. Harmonising standards with international benchmarks ensure interoperability, facilitates trade, and enables removal of technical barriers to trade. In addition, sustainable development lies at the heart of ASEAN's strategic agenda. Harmonising standards that support sustainability enables the region to promote eco-friendly practices, resource efficiency, and the adoption of renewable technologies, thereby facilitating a transition towards a more sustainable and resilient future. Moreover, by adopting standards with cutting-edge technologies, ASEAN can harness the full potential of digitalisation, automation, and emerging technologies.

2. Objectives and Scope

- 2.1 This ASEAN Foresighting Framework (FF) policy paper is envisioned to provide a systematic approach to early identification of trending areas and technologies relevant to ASEAN identification and of future areas of harmonisation in ASEAN that support sustainable development.

3. Method and Process

- 3.1 The ASEAN FF addresses

- Key assumptions and considerations in developing the ASEAN FF and this policy paper
- The stages of the ASEAN FF process
- Objectives and outputs in each stage
- The roles of key stakeholders involved

4. Key considerations

- 4.1 In the process of establishing the ASEAN FF, two key factors need to be considered:

- a. Rigorous yet resource-efficient environmental scan
 - i. Scanning for sector trends and disruptions as a foundational input for a robust FF process
 - ii. Limited resources and capability constraints of ASEAN

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- b. Transparent and representative processes across all stages of the FF
 - i. Process to be clear and inclusive
 - ii. Process to be representative of ASEAN's priority needs and interests for effective regional harmonisation

5. Stages of the Foresighting Framework

Stage 1: Environmental Scanning

- 5.1 Environmental scanning, also known as trend analysis or horizon scanning, is the first stage in the foresight processes. It is a structured way to look for trends or disruptions (emerging patterns of change) that are occurring in the world.
- 5.2 Considering that ASEAN has limited resources, there are best practices and existing resources that ASEAN can access, in particular from internationally recognised standards development organisations (SDOs). The internationally recognised SDOs and relevant white papers and market research used as benchmarks are, but not limited to the references listed below:
 - a. International Organization for Standardization (ISO): Foresight Trend Report and Foresight Briefs
 - b. International Electrotechnical Commission (IEC): Market Strategy Board (MSB) White papers and Trend reports
 - c. European Committee for Standardization and European Committee for Electrotechnical Standardization (CEN-CENELEC): CEN-CENELEC: High Level Forum (HLF) Workstreams and Strategic Foresight Reports by European Commission's Joint Research Centre (JRC)
- 5.3 In addition, there is a need to take into consideration ASEAN's priorities for effective regional harmonisation. In this regard, the environmental scanning focuses on, but not limited to the following sources:
 - a. ASEAN Chair's past and current focus areas
 - b. ASEAN Trade Data
 - c. Priorities of relevant AEC Sectoral Bodies
 - d. Recent ASEAN standards initiatives (e.g taskforce, workshops, etc.)
- 5.4 There are two benefits with adopting the above recommended approach for Stage 1 Environmental Scanning. First, it enables ASEAN to efficiently narrow its focus to relevant areas identified by the foresighting resources of other internationally recognised SDOs, economic data and areas identified on regional level so that the process is rigorous and done in a resource-efficient manner. Second, it ensures that the scanning process remains transparent, and its outcome are representative of the ASEAN Member States' (AMS) priority needs and interests.

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- 5.5 Based on the consolidation and dissemination of the environmental scan, the compiled pre-identified broad areas are used as a base material for ideation workshops/sprints as elaborated in the next stage (i.e. Stage 2 Ideation).
- 5.6 The objectives, output and frequency for Stage 1 Environmental Scanning are summarized as follows:
- a. Objective: Collection of pre-identified broad areas with future potential for ASEAN standardisation
 - b. Output: Compilation of pre-identified broad areas
 - c. Frequency: Once every three years with flexibility for interim review if needed

Stage 2: Ideation

- 5.7 Ideation involves shortlisting of broad areas that are relevant to ASEAN's priorities, from the compilation of pre-identified broad areas in stage 1.
- 5.8 An "Ideation Workshop" will be conducted over a physical meeting to facilitate discussions and arrive at ASEAN's broad areas via consensus. Up to five broad areas specific to ASEAN needs shall be prioritised.
- 5.9 The shortlisted broad areas for ASEAN facilitate the filtering for the list of sub-areas and standards in the next stage (i.e. Stage 3 Distillation) for a focused response to early identification of trending areas and technologies relevant to ASEAN and those that support sustainable development.
- 5.10 The objectives, output and frequency for Stage 2 Ideation are summarised as follows:
- a. Objective: Shortlist ASEAN's broad areas from the pre-identified broad areas
 - b. Output: Up to five broad areas specific to ASEAN
 - c. Frequency: Once every three years with flexibility for interim review if needed. To coincide/complement with the timeline for Stage 1 Environmental Scanning

Stage 3: Distillation

- 5.11 Distillation involves producing a list of sub-areas and standards in priority areas for the region to focus on, using the shortlisted ASEAN broad areas that were arrived via consensus in the earlier stage. Stage 3 is intended to deepen understanding of upcoming Standards and Conformance (S&C) opportunities and help ASEAN prioritise them.
- 5.12 Distillation will be conducted once a year at the physical Working Group on Standards (WG1) meetings. WG1 will discuss to prioritise ASEAN's sub-areas and consolidate the corresponding list of standards via consensus. WG1 will discuss and agree on the number of sub-areas and standards.

5.13 The compiled broad areas for ASEAN and the distilled list of sub-areas and standards will then be used as reference for harmonisation as elaborated in the next stage (i.e. Stage 4 Review & Harmonise).

5.14 The objectives, output and frequency for Stage 3 Distillation are summarised as follows:

- a. Objective: Distil sub-areas and relevant standards for each ASEAN broad areas
- b. Output: Proposed list of ASEAN's priority areas, sub-areas and standards for harmonisation
- c. Frequency: Once every year at the physical WG1 meeting with flexibility for interim review if needed

Stage 4: Review & Harmonise

5.15 Review & Harmonise involves the assessment of priority list of ASEAN's broad sectors, sub-sectors and standards. In cases where there is an existing Product Working Group, the priority list will be passed on to the relevant Product Working Group (PWG) for their review, inputs and/or recommendations. In cases where there are no existing PWG, the priority list will be submitted to ACCSQ to determine whether a new PWG should be established or whether Working Group 1 on Standards (WG1) should undertake the review and harmonisation of the identified standards, considering factors such as the number of standards involved, the urgency of harmonisation, etc.

5.16 The process for the priority list to be finalised for regional harmonisation will be based on the "ASEAN Guidelines for Harmonisation of Standards". This will be done twice a year at every WG1 meeting.

5.17 The objectives, output and frequency for Stage 4 Review & Harmonise are summarised as follows:

- a. Objective: Assessment of priority areas and list of standards for harmonisation
- b. Output: Approved list of standards for harmonisation in identified broad areas and sub-areas
- c. Frequency: Twice a year at the WG1 meetings

6. Summary of the ASEAN Foresighting Framework (FF) and implementation across 5-year cycles

6.1 The ASEAN FF comprises four main stages: 1) Environment Scanning, 2) Ideation, 3) Distillation and 4) Review & Harmonise. Key details of each stage are summarised in table 1 below.

Table 1: Stages of the ASEAN FF and their characteristics

ASEAN FF Stages	Objective	Output	Frequency
Environment Scanning	Collection of pre-identified broad areas with future potential for ASEAN standardisation	Compilation of pre-identified broad areas	Once every three years with flexibility for interim review if needed
Ideation	Shortlist ASEAN's broad areas from the pre-identified broad areas	Up to five broad areas specific to ASEAN	Once every three years with flexibility for interim review if needed To coincide / complement with timeline for Stage 1 Environmental Scanning
Distillation	Distil sub-areas and relevant standards for each ASEAN broad areas	Proposed list of priority ASEAN's broad areas, sub-areas and standards for harmonisation	Once every year at the physical WG1 meeting with flexibility for interim review if needed
Frequency	Assessment of priority areas and list of standards for harmonisation	Approved list of standards for harmonisation in identified broad areas and sub-areas	Twice a year at the WG1 meetings

6.2 The four stages of the ASEAN FF will be implemented to complement the 5-year plan of the ACCSQ Sectoral Plan (e.g. 2026 – 2030) as illustrated below.

Figure 1: Sequence of implementation of stages

