

Culture-based and Media Approaches to Enhance the ASEAN Creative Economy

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Executive Summary

This policy brief examines the role of culture-based approaches and the media sector in developing the creative economy of ASEAN Member States (AMS) as the region faces rapid digital transformation and global economic shifts. It provides suggestions on how its rich cultural diversity and creative potential can contribute to sustainable economic development and build a regional identity.

Key Findings

1. ASEAN's rich cultural diversity can support economic development.

- ASEAN is home to over 1,000 languages and dialects, multiple world religions, a diverse cultural heritage, and varied artistic traditions.
- This offers a foundation for creativity and that can enhance economic and social development.
- The estimated value of the global creative economy market was USD 2.25 trillion in 2021 (UNCTAD), presenting a significant opportunity for ASEAN and AMS.

2. Culture-based approaches can boost the region's creative economies.

- ASEAN can encourage AMS to leverage their unique cultural assets and traditional knowledge to generate economic value and contribute to social development.
- AMS should seek to transform their cultural heritage into innovative products and services while preserving their unique identities.
- ASEAN has the potential to enhance its competitive advantage in the global creative marketplace.

- Case studies and best practices from AMS may be relevant to other across the region.

3. Developing AMS creative economies will require media sector help.

- The media can be encouraged to disseminate information about AMS cultural products and creative industries and promote cultural content across traditional and digital platforms.
- ASEAN should encourage cross-border collaborations and knowledge exchange.
- ASEAN should address the challenges of digital transformation, regulatory disparities, and disinformation.

4. Existing policy frameworks must be evaluated and enhanced.

- ASEAN should support regional frameworks, such as the ASEAN Strategic Plan for Culture and Arts 2016-2025 to foster the creative economy.
- Individual AMS have implemented tailored national policies (e.g., Indonesia's 'Making Indonesia 4.0', Viet Nam's cultural industries strategy).
- ASEAN should enhance regional policy coordination and integration.

Challenges

- Balancing cultural preservation with economic growth.
- Addressing the digital divide in and between AMS.

- Limited intellectual property protection and enforcement.
- Mitigating brain drain from less developed to more established creative hubs.
- Ensuring equitable development of creative economies across AMS.
- Difficulty in translating cultural value into data.

Policy Recommendations

This policy brief suggests several recommendations to enhance the creative economies of AMS, to foster sustainable growth, promote cultural vibrancy, and strengthen regional identity.

ASEAN can:

- Enhance regional cooperation through networks and knowledge sharing.
- Balance tradition and innovation in cultural and creative industries.
- Invest in education, capacity building, and digital infrastructure.
- Promote cultural exchange and creative tourism.
- Strengthen intellectual property frameworks across the region.
- Establish regional funding mechanisms for creative projects.
- Improve data collection and analysis for policymaking.

Detailed strategies aligned with these recommendations are contained in the section on Policy Coordination and Integration Strategies. The Appendix provides detailed policy recommendations.

1 Introduction

The creative economy is a significant driver of economic growth and social development in ASEAN. The sector, which comprises industries that use creativity, cultural knowledge, and intellectual property to produce products and services with social and cultural meaning, has shown remarkable resilience and potential for growth, despite global economic challenges. As outlined in the ASEAN Strategic Plan for Culture and Arts 2016-2025, culture has played a significant role in regional development, contributing to social cohesion, economic growth, and the formation of a regional identity.

This policy brief addresses two questions fundamental to developing the ASEAN Creative Economy:

1. How do culture-based approaches contribute to the development and promotion of the creative economy?
2. How can ASEAN enhance contributions from the media sector to build a more informed creative economy?

The brief draws on various ASEAN policy frameworks, including the ASEAN Socio-Cultural Community Blueprint 2025, the ASEAN Strategic Plan for Information and Media 2016-2025, and the ASEAN Framework for Developing Digital Readiness among ASEAN Citizens to enhance the competitiveness and sustainability of AMS creative economies in the global marketplace.

By analysing current policies, identifying best practices, and proposing coordinated strategies, this brief provides policymakers with insights. The recommendations consider the cultural contexts of AMS while promoting regional integration and cooperation in the creative sectors.

The Cultural Context and the Creative Economy

Southeast Asia represents a culturally diverse region, comprising 10 AMS, each with rich languages, religions, cultures, and traditions of artistic expressions. The region is home to over 1,000 languages and dialects, reflecting diverse ethnic groups and historical influences. This is complimented by a complex spiritual landscape, encompassing multiple major world religions that coexist with belief systems and spiritual practices. This diversity presents opportunities for creative and economic development and challenges for cohesive policymaking.

The cultures have a rich and varied array of traditional arts, crafts, performative practices and cultural expressions which are integral to the region's heritage and identity. This diversity is a source of creativity and innovation, and a spur the growth of the creative industries. The digital creative sector has evolved rapidly, expanding opportunities to combine traditional modes of cultural expression with contemporary technologies and global influences. The fusion of traditional knowledge with contemporary approaches provides a new basis for developing distinct products and services to appeal to local and global markets.

However, significant obstacles inhibit the potential of the ASEAN Creative Economy. A primary challenge is how different actors can balance cultural preservation with commercialisation to ensure that economic development does not sacrifice cultural integrity. The digital divide in and between the AMS is another consideration, as uneven access to technology exacerbates existing inequalities. Further, strengthening intellectual property rights protection and enforcement across diverse cultural contexts is a complex task that requires attention. Finally, the region also faces a brain drain from less-developed to more-established creative hubs, hindering the growth of nascent creative economies. Supporting the development of creative economies in less developed AMS to narrow regional gaps is crucial for inclusive growth.

Despite these challenges, ASEAN's creative economy demonstrates promising growth. Indonesia reported that its creative economy contributed 7.4% to GDP and employed 17 million people in 2020, while Thailand's creative industries accounted for 9.5% of GDP in 2019. Singapore has successfully positioned itself as a global creative hub, with its design sector alone contributing 0.8% to GDP.

However, the development of the creative economy is not uniform across ASEAN. Cambodia, Lao PDR, and Myanmar are still in the nascent stages of developing their creative economies. Targeted policies and regional cooperation can ensure more balanced growth of the creative industries across the member states.

2 Culture-Based Approaches to Creative Economy Development

Culture-based approaches to creative economy development leverage unique cultural assets, traditional knowledge, and creative talents to generate economic value while preserving and promoting cultural heritage. The approach recognises culture as an economic sector and as a resource that can drive innovation, entrepreneurship, and sustainable development across the creative industries. In ASEAN, this approach holds promise for creating distinct products and services that compete in the global marketplace and allows AMS to differentiate themselves, strengthen local identities, and foster social cohesion.

Several AMS implement culture-based approaches to develop their creative economies. Thailand's One Tambon One Product (OTOP) initiative to commercialise local crafts and cultural products generated over THB 120 billion (USD 3.8 billion) in 2020, demonstrating how traditional crafts can become economic drivers. Similarly, the city of Bandung, West Java in Indonesia leveraged its cultural assets to become a UNESCO Creative City of Design. The creative economy, particularly fashion and culinary arts, comprised 7.5% of Bandung's GDP in 2019, showcasing how urban areas can become creative hubs by embracing their cultural identity.

Further, the Malaysia Handicraft Development Corporation's modernisation of the traditional crafts for contemporary markets with initiatives that have led to a 24% increase in handicraft exports between 2013 and 2018.

AMS have implemented several policies to support culture-based approaches, including heritage conservation and adaptation, creative cluster development, traditional knowledge protection, development of digital cultural content, and cultural tourism. Several AMS have policies to preserve cultural heritage that allow for contemporary interpretations.

For instance, Singapore's 'Our SG Heritage Plan' includes initiatives to make heritage more accessible and relevant to younger generations through digital platforms. Meanwhile, Indonesia and the Philippines have policies to develop creative clusters or districts. These areas, often centred around traditional cultural practices, provide ecosystems for creative businesses to thrive.

Other AMS have implemented or are developing unique systems to protect traditional knowledge and cultural expressions, such as Thailand's Act on Protection and Promotion of Traditional Thai Medicinal Intelligence B.E. 2542 (1999).

Recognising the importance of digital platforms, Viet Nam has policies to support the digitisation of cultural content. The Viet Nam National Strategy for the Development of Cultural Industries to 2020, Vision 2030 includes provisions for developing digital cultural products.

Other AMS have policies linking cultural heritage to tourism development. Cambodia's National Policy on the Development of Cultural Tourism is an example of how AMS have leveraged cultural assets to boost tourism and the broader creative economy.

The culture-based approaches of AMS are also significant. Viet Nam's craft village tourism initiative integrates traditional crafts into the tourism sector. For example, the Bat Trang ceramic village near Hanoi has become a popular tourist destination, allowing visitors to experience traditional pottery making while providing economic opportunities for local artisans.

The Philippines' the Philippine Experience: Culture, Heritage and Arts Caravans and Philippine Experience Programme (PEP) showcase the country's cultural diversity through immersive tourism experiences, preserving traditional practices while creating economic opportunities in rural areas.

While these policies recognise culture's role in economic development, several challenges remain, such as scalability, quality control, and balancing tradition with innovation.

3 Role of the Media in Building an Informed Creative Economy

The media landscape in ASEAN is experiencing a rapid transformation, driven by technological advancements and changing consumer behaviour. While this transformation presents challenges, it offers unprecedented opportunities for the creative economy. The rise of digital platforms makes content creation and distribution more viable for employment, as it dismantles traditional barriers to entry and allows even small-scale creators to reach global audiences. This trend has been notable in Southeast Asia. Digital adoption has increased dramatically, with 40 million people going online in 2020 alone, raising internet penetration to 70% of the region's population. This digital expansion has reshaped how media is consumed and contributes to the broader creative economy.

The evolution of ASEAN's media sector reflects the complex interaction between technological innovation and cultural preservation. As traditional media outlets and content creators navigate the digital landscape, they must reinvent their business models and develop new capabilities and maintain cultural authenticity. These transformations create an ecosystem where traditional and modern media forms can coexist and converge. The cross-border flow of digital content fosters unprecedented opportunities for regional collaboration, enabling creative professionals to reach diverse audiences across ASEAN. However, this borderless digital environment also raises questions on cultural identity and preservation. AMS need to balance the benefits of open content exchange while maintaining local cultural narratives and content quotas.

The accessibility of content creation, while empowering, introduces additional concerns. The surge in user-generated content and social media platforms heightens the need for media literacy and fact-checking initiatives. These skills are now essential components of a healthy creative economy. There are also concerns about the regulatory landscape across AMS. Some local media policies do not effectively facilitate regional creative collaboration. Increasing reliance on data-driven media also raises privacy and cybersecurity concerns, necessitating a balance between innovation and protection.

These challenges are reshaping how the creative economy operates in ASEAN. The development of new technologies and frameworks prioritise creative freedom over user security. The future of the region's creative economy will rely on the ability of different actors to harness digital opportunities and build robust systems that protect and promote cultural diversity.

Several AMS have implemented policies to enhance their media sectors' contributions to the creative economy. Malaysia has expanded its digital infrastructure through its National Fiberisation and Connectivity Plan (2019-2023). This initiative has been instrumental in supporting the growth of digital media and creative industries, and enabled creators to reach wider audiences and participate more effectively in the digital economy.

Singapore focuses on developing international market capabilities through its Capability Partnership Programme, which provides funding and development support for local media companies. The approach allows local content creators to expand their reach beyond domestic markets, contributing to the nation's position as a regional creative hub. Similarly, Thailand's Content Thailand Club initiative supports Thai content creators in distributing their work in ASEAN markets, fostering regional creative exchange and cultural collaboration.

The Philippines integrated media and information literacy into its K-12 curriculum, recognising that a discerning audience is crucial for sustaining the creative economy. The initiative has been effective in developing critical thinking skills on creative content for young consumers, develop a more sophisticated market for creative products. Meanwhile, Viet Nam's National Technology Innovation Fund supports startups, including those in media technology. This investment in innovation encourages new approaches to content creation and distribution, providing insights on how technological advancement can drive creative sector growth.

4 Policy Recommendations and Integration Strategies

To address challenges, harness the full potential of ASEAN's cultural economy, and foster economic growth and social cohesion, the following strategies are recommended.

Enhance Cross-Sectoral Regional Cooperation

A cross-sectoral approach to regional cooperation is key. The diverse nature of the creative economy—which includes exceptionally diverse activities, ranging from

traditional arts and crafts to digital media and technology requires coordinated action across multiple ASEAN bodies, sectors, disciplines and thematic areas.

Given this complexity, an ASEAN Creative Economy Task Force could be established as a cross-sectoral coordination mechanism. This task force could integrate representatives from ASEAN sectoral bodies, including the ASEAN Senior Officials Meeting on Culture and Arts (SOMCA), the ASEAN Economic Ministers (AEM), the ASEAN Ministers Responsible for Information (AMRI), and the ASEAN Telecommunications and IT Ministers Meeting (TELMIN). Diverse representation would help ensure the development of comprehensive policies to address the multifaceted nature of the creative economy.

The mandate of the proposed task forces should extend beyond traditional cultural sectors to encompass emerging creative industries, digital innovation, and cross-border trade facilitation. Its responsibilities could involve harmonising policies across different sectors, developing regional knowledge-sharing platforms, and coordinating cross-border creative projects. The task force would have to work closely with existing or upcoming ASEAN mechanisms, such as the post-2025 regional work plan for culture and arts and the ASEAN Digital Integration Framework to ensure policy coherence and avoid duplication.

To ensure effective implementation, the task force could establish working groups focused on specific areas, such as digital creative industries, traditional cultural industries, and creative entrepreneurship. Working groups would coordinate with relevant ASEAN bodies and external partners, including ASEAN Dialogue Partners, creative industry associations, and cultural institutions, to develop targeted initiatives and monitor progress. A structured approach would help bridge the gaps in regional coordination while respecting the distinct mandates of existing ASEAN sectoral bodies.

Invest in Digital Infrastructure for Culture and the Arts

Priority should be given to improving connectivity in rural and underserved areas to ensure equitable access to digital resources. ASEAN should support the development of shared digital platforms for creative content to promote regional collaboration and increase market access. Digital skills training programmes should be promoted across all demographic groups to build capacity.

Strengthen and Implement the ASEAN Creative Economy Framework

ASEAN can prioritise realisation of the ASEAN Creative Economy by developing a relevant work plan and mechanisms to measure and monitor the implementation and impact of the initiatives across ASEAN. AMS should be encouraged to align their national policies with this regional framework to integrate national approaches on cultural preservation, innovation, and economic development. Regular reviews and updates to the framework should be conducted to ensure it remains relevant and responsive.

Foster Creative Entrepreneurship

ASEAN can leverage existing funding mechanisms to advance development of the creative economy. For example, the ASEAN Committee on Culture and Information (COCI), which oversees the ASEAN Cultural Fund can encourage AMS to prioritise funding for projects that promote creative start-ups. ASEAN could also provide incentives to encourage investment from non-state actors to support the cultural and creative industries. Development of incubation and acceleration programmes for creative startups could foster innovation and entrepreneurship in the cultural and creative industries.

Coordinate Regulatory Frameworks

ASEAN could discuss developing regional standards for intellectual property protection and enforcement with consideration given to local, legal, cultural and overlapping contexts. Discussions should encompass the changing meanings of traditional knowledge and values. Establishing content classification systems could facilitate regional distribution of creative works. Creating a streamlined processes for cross-border licensing and royalty collection could further support the cross-border growth of creative industries.

Strengthen Media Literacy and Combat Disinformation

Media literacy education should be integrated into national curricula and public campaigns to promote critical engagement with media content. ASEAN should support fact-checking initiatives and promote responsible journalism. Encouraging critical thinking skills development across all age groups would contribute to a more informed and culturally aware populace.

Promote Cultural Tourism and Exchange

Holistic, sustainable tourism models in ASEAN should be developed to harmonise economic opportunities, cultural preservation, and community well-being. Models should prioritise community-led initiatives, where local stakeholders maintain control over cultural assets and tourism development, to ensure that local communities reap economic benefits. Such initiatives include heritage homestay programmes, traditional craft workshops, or cultural immersion experiences that limit environmental impact while maximising authentic cultural engagement.

ASEAN should consider creating interconnected creative networks to facilitate cultural exchanges between AMS, that transcend surface-level tourism to enhance deeper cross-cultural understanding. These networks could be strengthened through artist residency programmes, cultural practitioner exchanges, and collaborative projects between traditional artisans across the region. Existing or proposed creative hubs in major cities could serve as focal points for such collaborations, offering spaces for cultural innovation, artistic experimentation, and tourism engagement. These hubs should showcase both traditional and contemporary creative expressions and combine heritage preservation and modern cultural development.

To amplify the region's cultural visibility globally, ASEAN can develop a coordinated calendar of region-wide festivals and events to highlight the diverse cultural heritage of AMS. Events should be curated to demonstrate the richness of ASEAN's living cultures while ensuring that cultural practices remain authentic and meaningful rather than becoming commodified for tourist consumption. This approach could include rotating cultural capitals, themed years celebrating specific aspects of ASEAN's heritage, or travelling exhibitions that showcase the region's creative achievements. Such initiatives would attract international attention while strengthening regional cultural identity and pride among ASEAN's peoples.

Safeguard Cultural Heritage

ASEAN can consider developing guidelines for the ethical commercialisation of traditional cultural knowledge and expressions to ensure that economic development does not compromise cultural integrity. Support should also be provided for initiatives that facilitate intergenerational knowledge transfer of traditional arts and practices. The establishment of an ASEAN Cultural Heritage List, with mechanisms to prevent overcommercialisation, would provide recognition and protection for significant cultural sites and practices across the region.

Foster Social Cohesion and Peace through Culture

Cultural approaches should be integrated into peace-building efforts and conflict resolution processes across ASEAN. Initiatives that use cultural activities to foster inter-community dialogue and understanding should be promoted. ASEAN should support projects that celebrate cultural diversity while promoting a shared regional identity. The inclusion of minority and indigenous cultures in national and regional cultural policies should be encouraged to ensure inclusive representation.

Improve Data Collection and Policy Evaluation

Common methodologies for measuring the economic and social impact of creative industries can be established to ensure comparable data across AMS. An ASEAN Creative Economy Observatory should be created to provide insights for policymakers and stakeholders. Regular cultural impact assessments for major development projects can ensure that cultural considerations are integrated into development plans.

Implementation Considerations

Implementing these strategies will require sustained commitment from all AMS, along with collaboration with the private sector, civil society, and international partners. The implementation of these ideas may be implemented in a flexible manner, in phases that prioritise strategies based on urgency and feasibility to accommodate the different national capacities of the AMS. These strategies may be tailored to specific cultural, economic, and social contexts while maintaining regional coherence. Capacity building should be prioritised to ensure that all AMS can implement and benefit from these strategies. Regular consultations and collaboration with diverse stakeholders, including cultural practitioners, industry representatives, and community leaders, will be crucial. Mechanisms to enable periodic reviews and adjust strategies should be established to respond to evolving challenges and opportunities.

By implementing these recommendations, ASEAN can enhance its creative economy, foster sustainable economic growth, promote cultural vibrancy, and strengthen regional identity while respecting the unique cultural heritage of the

region. The success of these initiatives will depend on collaborative efforts, innovative approaches, and a shared commitment to ensuring that region's culture contributes to economic development and social cohesion.

5 Conclusion

The creative economy offers opportunities for ASEAN to enhance economic growth, foster social cohesion, and strengthen its global influence. This policy brief examined how culture-based approaches and media sector development could contribute to building a more robust and inclusive creative economy across the region.

AMS have been leveraging their unique cultural assets while balancing preservation with innovation. For example, Thailand's OTOP initiative, Indonesia's creative city development in Bandung, and Malaysia's handicraft modernisation programme demonstrate the potential of culture-based approaches to drive economic growth while maintaining cultural authenticity.

However, transformation of the media sector, particularly rapid digital adoption, create new opportunities and challenges for the creative economy. AMS have responded with innovative policies, including digital infrastructure development, content creation support, and media literacy initiatives.

This policy brief recommends a cross-sectoral approach to regional cooperation acknowledges the creative economy's complexity. The approach combines investment in digital infrastructure, strengthened regulatory frameworks, and sustainable cultural tourism models to establish a comprehensive framework for development that respects the diverse contexts and development stages of member states.

ASEAN's success in developing its creative economy will rely on how it sustains its commitment to implement these recommendations and maintains its flexibility to adapt to emerging challenges and opportunities. It should give priority narrowing development gaps between AMS and ensure that cultural heritage preservation is central to economic growth.

By embracing its cultural diversity as a source of creativity and innovation, fostering regional cooperation, and supporting digital transformation, ASEAN can become a significant contributor to the global creative economy. The ASEAN Creative Economy can create economic opportunities and strengthen regional identity and cultural understanding for its peoples.

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Appendix: Adaptable Policies and Initiatives from AMS

The following list presents existing policies and government initiatives from ASEAN countries that recommendations and may be adapted across the region.

- Creative Economy Support**
 - Indonesia: Creative Economy Agency (BEKRAF) programmes.
 - Philippines: Creative Economy Roadmap (2020).
 - Singapore: Design 2025 Masterplan.
- Creative Entrepreneurship Support**
 - Singapore: Creative Accelerator Programme by National Arts Council.
 - Malaysia: Cultural Economy Development Agency (CENDANA) funding programmes.
 - Philippines: Creative Voucher Programme under the Department of Trade and Industry.
- Traditional Crafts Development**
 - Malaysia: Craft Ecosystem Roadmap by Malaysia Handicraft Development Corporation.
 - Thailand: Support Arts and Crafts International Centre of Thailand (SACICT) programmes.
 - Indonesia: Digital Village programme including traditional craft digitalisation.
- Content Creation and Distribution Incentives**
 - Singapore: Capability Partnership Programme.
 - Thailand: Content Thailand Club initiative.
 - Viet Nam: National Technology Innovation Fund.
- Creative Cities and Clusters**
 - Indonesia: Bandung Creative City Forum initiatives.
 - Thailand: Thailand Creative District Network.
 - Philippines: Creative Cities Initiative under the Department of Trade and Industry
- Cultural Heritage Preservation and Commercialisation**
 - Malaysia: National Heritage Act 2005 and related cultural product development initiatives.
 - Thailand: One Tambon One Product (OTOP) programme.
 - Indonesia: Wastra Nusantara programme for traditional textile preservation and promotion.
- Digital Infrastructure Development**
 - Malaysia: National Fiberisation and Connectivity Plan (2019-2023).
 - Thailand: Digital Economy Promotion Agency (DEPA) initiatives.
 - Indonesia: Palapa Ring Project for nationwide internet connectivity.

8. Intellectual Property Protection
 - Singapore: Intellectual Property Office of Singapore (IPOS) initiatives.
 - Thailand: Creative Economy Agency's IP management support.
 - Viet Nam: National Office of Intellectual Property (NOIP) support programmes.
9. Cross-Border Collaboration
 - Thailand: ASEAN Cultural Centre initiatives.
 - Singapore: ASEAN Intellectual Property Rights Action Plan 2016-2025 (as lead country).
 - Malaysia: Malaysia Digital Economy Corporation (MDEC) regional expansion support.
10. Media Literacy and Education
 - Philippines: Integration of Media and Information Literacy in K-12 Curriculum.
 - Singapore: Media Literacy Council initiatives.
 - Malaysia: National Digital Literacy Programme.
11. Data Collection and Analysis
 - Indonesia: Creative Economy Outlook by BEKRAF.
 - Malaysia: Cultural Economy Satellite Account.
 - Singapore: Annual Survey on the Arts by National Arts Council.
12. Digital Skills Development
 - Singapore: SkillsFuture for Digital Workplace.
 - Malaysia: #MyDigitalMaker Movement.
 - Thailand: Digital Manpower Development under DEPA.
13. Cultural Exchanges for Social Harmony, Cross-Cultural Understanding
 - Indonesia: ASEAN Youth Exchange Programme.
 - Malaysia: CENDANA's ASEAN Residency Programme for artists and cultural practitioners.
 - Philippines: ASEAN Youth Camp focusing on traditional and contemporary arts .
 - Singapore: National Arts Council's Traditional Arts Taster Programme for schools.
 - Thailand: ASEAN Cultural Heritage Digital Archive project .
 - Viet Nam: ASEAN Young Entrepreneurs Carnival promoting creative startups.

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