

The ASEAN Creative Economy, Digitalisation and Sustainability

**ASEAN Socio-Cultural Community Trend Report
No. 24 (2026)**

ASCC Research & Development Platform on Media, Culture, and Arts



one vision
one identity
one community



ASEAN Socio-Cultural Community Trend Report

ASCC Research and Development Platforms Programme

The ASEAN Secretariat
Jakarta

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The ASCC Research and Development Platforms Programme is the proactive response of the ASEAN Socio-Cultural Community (ASCC) to analyse, understand, and formulate strategic responses to multifaceted challenges in the region. ASCC's R&D Platforms focus on diverse sectors crucial to the socio-cultural fabric of the ASEAN Community, with the media, culture, and arts, as one such focus.

The ASCC R&D Platform on Media, Culture, and Arts aims to develop a robust body of research outputs and identify and develop a pool of experts more aware of the ASEAN context. Its primary objective is to incorporate external perspectives to foster an increased awareness of blind spots, identify gaps and trends, and facilitate policy and advocacy engagement on cross-sectoral issues. The ASCC R&D Platform on Media, Culture, and Art received support from the Government of People's Republic of China Through the ASEAN-China Cooperation Fund (ACCF).

This report, as part of the ASCC Research and Development (R&D) Platform on Media, Culture, and Arts, aims to provide a strategic space for dialogue on emerging and cross-cutting issues in ASEAN. In particular, it highlights key challenges and trends that are likely to shape the post-2025 landscape; these include, among others, digital transformation for media industry, preservation and promotion of cultural heritage, ASEAN Creative Economy, and ASEAN Identity.

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We invite readers to engage with the findings and analysis presented in this publication. We believe this research offers valuable insights for business, educators, individuals, policymakers, and practitioners alike, as we collectively navigate media, culture, and arts in ASEAN.

The ASEAN Creative Economy, Digitalisation, and Sustainability

ASEAN Socio-Cultural Community Trend Report No. 24 (2026)

ASCC Research and Development Platform on Media, Culture, and Arts

Dr. Teh Lip Li

Executive Summary

The ASEAN Creative Economy, which comprises diverse industries, is undergoing rapid growth, driven by geopolitical transformation, digitalisation, and sustainability. This report explores these factors and their impact across the ASEAN Member States (AMS).

Digitalisation and technology have revolutionised access and distribution in the creative sector, impacting sectors as diverse as design, fashion, and the performing arts to an extent unimaginable even a decade ago. The increasing emphasis on sustainability is also shaping the development of the creative economy. For example, it is increased demand, for environmentally friendly materials or for ethical production practices. Digitalisation has also enhanced sustainability by streamlining processes and the use of resources.

This report explores the convergence of these factors and the new opportunities to develop the creative economy, focusing ASEAN's role in fostering innovation and reshaping industries.

The Introduction explains the research methodology and scope of the report and delves into the complexities involved in defining and measuring the creative economy. Section 2 examines the potential of creative economy. Section 3 explores relevant trends, such as how the creative economy can support recovery from the COVID-19 pandemic, digitalisation, and sustainability. Section 4 offers recommendations for fostering a robust and inclusive ecosystem for the creative economy, while Section 5 provides relevant case studies. Ultimately, the report seeks to contribute to the development of a vibrant and resilient creative ASEAN ecosystem, where innovation and sustainability can coexist and thrive.

Section 1: Introduction

Driven by globalisation, digitalisation, and sustainability, the knowledge-based economies of AMS have been in transformation, with their creative sectors emerging as a powerful growth driver.

Valued at over \$1.5 trillion in 2022 (UNCTAD, 2024), the global creative economy fuels innovation and economic prosperity and has immense potential to boost sustainable development and well-being through innovation, employment, and income generation. It includes diverse industries, such as advertising, architecture, arts and crafts, computer games, cultural expression, design, fashion, film, music, the performing arts, photography, publishing (both electronic and print), television, and video.

New opportunities have emerged in the creative economy, driven by technology, rapid digitalisation, and emerging sustainability concerns. This has reshaped creative fields and encouraged their integration with traditional economic sectors and fostered the creation of new economic modes, such as digital marketplaces. These developments have coincided with the emergence of sustainable materials and ethical production practices, further transforming the creative landscape.

This report aims to stimulate thinking, enrich discussions, and inform future actions and initiatives by policymakers in ASEAN and AMS, as well as stakeholders, including researchers, non-government entities, partners, and specialist organisations.

1. Objectives

The objectives of the report are to:

- review the trends shaping the ASEAN creative economy in the context of digitalisation and sustainability;
- provide analysis to inform the actions of ASEAN governments and their stakeholders;
- explore how the creative economy can drive sustainable development, well-being, innovation, employment, and generate income; and
- examine the challenges and opportunities presented by new technologies, rapid digitalisation, and sustainability for the creative industries.

2 Methodology, Scope, and Limitations

A qualitative approach was used for this report. It applied content analysis to examine policy documents and reports and descriptive analysis to develop detailed accounts of specific initiatives and policies. It then applied comparative analysis to contrast approaches in AMS with international examples; and a gap analysis, to identify opportunities for policies or practices to improve.

The report provides an overview of the trends that affect ASEAN's policies to develop the creative economy. It recognises that ASEAN favours a pro-market approach to cultural policy. Such an approach focuses on nurturing economic growth in creative industries, rather than welfare model that treats culture and the arts as public goods supported by state subsidies or private sector grants.

The report emphasises regional and intergovernmental activities that fall under the ASEAN Socio-Cultural Community (ASSC). Accordingly, the report does not examine geopolitical considerations, statistical analysis

and data collection methodologies, tourism development, and intellectual property protection and copyright infringement.

3. Measurement and Definition Problems

While governments have increasingly recognised the economic significance of the creative economy, definitions of the creative economy have remained fluid, depending on different cultural, economic, and measurement approaches (UNCTAD, 2024). Scholars have generally investigated the creative economy by examining its social and cultural impact, including traditions and heritage, or by adopting an economic perspective.

Historically, creativity has been viewed as a way to create social meaning through forms of expression such as music, art, and storytelling. Creators typically receive rewards for their work, although such acknowledgement is more symbolic than financial. The economic dimension of creativity emerged as a major concept only recently, after 2000 (UNCTAD, 2024).

Measurement of the creative economy has become increasingly important for governments, particularly due to its value in international trade (UNCTAD, 2024). However, inconsistent definitions, data collection, analysis, and classification schemes have hindered measurement. Data collection and measurement standards must be revised to support ASEAN's realisation of the Sustainable Development Goals (SDGs) (UNCTAD, 2024).

Governments and organisations have continued to face challenges in gathering data on creative industries in recent years. Their complexity, rapid evolution, and often informal nature have made the process more difficult. Addressing these challenges is crucial if ASEAN intends to help AMS harness the potential of their creative economies and accurately assess their impact on social and economic development.¹

1. For more information, see UNCTAD (2024), Advancing the measurement of the creative economy: A revised framework for creative industries and trade, https://unctad.org/system/files/official-document/ditctsce2024d1_en.pdf

Section 2: Potential of the ASEAN Creative Economy

1. Economic Growth

The creative economy, encompassing cultural and creative industries (CCI), has emerged as a significant driver of economic growth and development, particularly for emerging nations seeking to integrate into high-value sectors of the global economy. In ASEAN, CCIs have demonstrated considerable potential. It has shown 7% annual growth between 2002 and 2015, outpacing other sectors, and gaining traction across major emerging markets (UNCTAD, 2018).

Globally, CCIs are a growing economic sector. The market value for creative goods worldwide topped USD 509 billion in 2015 (UNCTAD, 2018), while some estimates state that the CCI sector could account for 10% of global GDP by 2030 (EY, 2015). In ASEAN, the artisanal economy subset of the CCIs provides informal employment for over 300 million individuals (Artisan Alliance, 2020). Before the pandemic, the global artisanal economy was valued USD 985 billion (World Bank, 2018).

Recognising the transformative potential of the creative economy, the United Nations General Assembly (UNGA) declared 2021 the International Year of Creative Economy for Sustainable Development (UN, 2019). The UNCTAD subsequently developed a comprehensive report on the creative economy's role in advancing the SDGs. Recent data from UNCTAD indicates that creative services comprised approximately 21% of total service exports in 2020, increasing substantially from the previous decade (UNCTAD, 2022).

In ASEAN, CCIs have been making substantial contributions to the ASEAN economies (UNCTAD, 2022). CCIs offer substantial potential for job creation, income generation, and export earnings (UNCTAD, 2022). However, UNCTAD and the Asian Development Bank (ADB) have emphasised the need to address issues such as intellectual property protection, access to finance for creative entrepreneurs, and skills development tailored to the digital age (ADB, 2023).

2. Connecting Economic Development, Social Development, and Sustainability

The ASEAN creative economy provides the opportunity to integrate social and economic development, cultural heritage preservation, and international relations. The impact of the sector extends beyond economic metrics. The sectors influence social cohesion, cultural identity, and regional integration.

Socially, CCIs provide a powerful vehicle to foster intercultural dialogue and understanding (UNESCO, 2022). The transnational appeal of films, music, and other creative outputs can transcend national boundaries, cultivate empathy, and foster appreciation for ASEAN's diverse cultures. Collaborative initiatives, such as co-productions and regional festivals, have created platforms for creative exchange, challenged stereotypes, and nurtured a shared regional identity (Comunian & England, 2020).

To ensure sustainability and inclusivity, policies to support local artists, provide incentives for regional

collaborations, and prioritise cultural richness must be prioritised. Developing critical media and cultural literacy is essential to create audiences that can engage discerningly with cultural products and appreciate their diversity.

Economically, the creative sector presents a promise for sustainable development. ADB has estimated that creative industries would grow and make larger contributions to regional GDP. Digital technologies have expanded the market reach of creators, enhanced exports, and boosted foreign exchange earnings (UNCTAD, 2022) for CCI products. However, ensuring equitable access to resources and opportunities across AMS remains challenging.

ASEAN should develop robust policy frameworks to harness the social and economic potential of the creative economy while safeguarding cultural heritage. Policies should foster innovation, protect intellectual property rights, and facilitate access to financing for creative entrepreneurs (UNESCO Bangkok, 2021). Additionally, strategies to promote social inclusion through cultural industries should be devised to empower vulnerable communities and provide alternative avenues for their economic participation. By strategically leveraging its creative economy, ASEAN can work toward inclusive and sustainable development that balances economic growth, cultural preservation, and social cohesion.

Section 3: Navigating Transitions in the Creative Economy

ASEAN has had to manage several transitions due to geopolitical realignments, the escalating climate crisis, rapid digitalisation, demographic shifts, widening socio-economic disparities, and the post-COVID-19 pandemic recovery.

1. Pandemic Recovery and Resilience

The pandemic profoundly impacted the ASEAN's CCI, with revenues declining by 20% to 40% between 2020 and 2023 (BOP Consulting, 2021). The downturn particularly affected micro, small, and medium-sized enterprises (MSMEs) and informal workers (ADB, 2023). However, the pandemic also highlighted the resilience of the sector, and its role in fostering social cohesion and promoting mental health during periods of isolation (Pratt, 2020).

The pandemic further precipitated shifts in consumer behaviour, with growing demand for authentic and locally rooted cultural experiences and sustainable creative products (UNCTAD, 2022). This aligned with a global shift toward valuing cultural sustainability in the creative sector (Throsby, 2020).

Despite economic challenges, new creative hubs have emerged across ASEAN, often driven by grassroots initiatives and public-private partnerships (PPPs). These ecosystems have facilitated innovation and collaboration, playing a pivotal role in the sector's recovery and reinvention (Flew, 2021).

CCIs have played an important role in realising ASEAN's broader sustainability goals, as manifested in eco-friendly design practices and creative projects addressing environmental challenges (UNDP, 2023). Cross-sectoral collaborations have grown, with creative professionals engaging with technology, healthcare, and education. They have motivated innovation and opened new avenues for creative skills (World Economic Forum, 2022). CCIs have demonstrated resilience, influenced community well-being, and driven an inclusive and sustainable recovery from the pandemic. However, the recovery must be guided by policies that prioritise cultural heritage, equitable access to digital technologies, and the protection of traditional knowledge systems, as well as economic growth (Yúdice, 2019).

2. Digital Acceleration

Although accelerated by the pandemic, digitalisation has long been reshaping ASEAN's creative landscape (UNCTAD, 2022), as evinced by virtual exhibitions, online performances, and digital marketplaces for creative goods. However, digitalisation has also exacerbated existing inequalities in access to technology across the region even while helping creators connect with global audiences. Digitalisation has reshaped the modes of cultural production and consumption, as well as the nature of creative work (Kong, 2022).

In ASEAN, CCIs have embraced new technologies and digitalisation. E-commerce platforms and online marketplaces have provided artists and artisans with unprecedented access to global audiences, bypassing geographical limits (World Economic Forum, 2022). Social media has fostered community building for CCIs, allowing creators to connect directly with consumers, build brand loyalty, and cultivate unique online presences (British Council, 2022). Digital tools have also democratised access to tools previously confined to professional studios, with new software to facilitate design, animation, and music production, (Deloitte, 2022).

However, digitalisation has also presented obstacles. The abundance of online content necessitates constant innovation and adaptation for creative practitioners to remain relevant. Understanding and leveraging digital marketing strategies has become crucial for reaching new audiences. Moreover, the rapid shift to online technologies risks marginalising cultural traditions and expressions that are less adaptable to the digital landscape. Traditional knowledge systems and artistic practices that are embedded in physical spaces and embodied experiences may be overlooked (Nguyen, 2020).

Traditional forms of knowledge transmission and communication are being eroded across the region. Storytelling, oral histories, and artistic expressions that rely on human interaction are fundamental to the region's cultural heritage (UNESCO, 2016). While digitalisation can document and archive these traditions, it cannot replace the human connection integral to their transmission and interpretation.

The liberalisation and privatisation of media platforms, exemplified by the regional expansion of online streaming services, has profound implications for cultural heritage. While these platforms offer unprecedented access to global media, they also present challenges to local content creators and traditional cultural expressions. The influx of international content can potentially erode local traditions and languages (Jin, 2020). Conversely, these platforms could also serve as vehicles for promoting and preserving Southeast Asian cultural heritage by providing a global stage for local productions. However, algorithmic curation may inadvertently create echo chambers, that may limit exposure to diverse cultural perspectives (Napoli, 2019).

Further, the gaps in digital access within and between the AMS, specifically the areas of internet access and technological literacy, threatens to exclude many local creators and consumers from the digital creative economy (Deloitte, 2020). This could reinforce existing inequalities and risks homogenising cultural expression, as dominant online platforms prioritise certain aesthetics and content formats.

As the AMS manage their digital transitions, policymakers must strike a balance between embracing technological progress and safeguarding cultural identity. The challenge lies in harnessing the potential of digital acceleration while mitigating its negative effects on cultural variety and inclusion.

3. Intellectual Property Rights

While intellectual property rights (IPR) in the digital landscape is expected to help creators monetise their work, substantial challenges exist, where copyright enforcement mechanisms are still developing. The work of creators, especially those based on traditional knowledge or intangible cultural heritage, can be easily replicated without attribution or compensation (Nguyen, 2020).

ASEAN policymakers recognise the need for intellectual property (IP) protection frameworks to promote digitalisation. They adopted the Action Plan on Intellectual Property Rights 2016-2025 (ASEAN Secretariat, 2016) which contains strategic goals and initiatives on leveraging information technologies to improve regional IP service quality and service delivery.

However, ASEAN must balance digital innovation with safeguarding our shared cultural heritage. This may require unique perspectives towards IP that recognises the characteristics of AMS creative industries, including

the communal ownership of traditional art forms and the need for balanced and flexible protection mechanisms to accommodate both digital innovation and cultural preservation.

4. Sustainability

Sustainability has become a core concern for ASEAN and the creative economy sector. Consumers are increasingly seeking products and experiences that align with environmentally conscious practices. This has prompted designers to explore eco-friendly materials and production methods. Fashion brands are adopting circular economy principles, promoting clothing rental models, and supporting upcycling initiative. The film and performing arts industries are also embracing sustainability through greener production practices, such as reducing energy consumption and using sustainable sets. Additionally, storytelling plays a crucial role in raising awareness about environmental issues and motivating audiences to adopt eco-conscious behaviours.

4.1. Balancing Growth and Heritage Protection of Heritage

Safeguarding and promoting ASEAN's diverse cultural heritage is critical. While cultural industries typically celebrate diversity, dominant narratives and aesthetics can distort cultural heritage, given that commercial interests typically prioritise profit over accurate representation.

To ensure inclusivity, AMS must nurture diverse cultural expressions by devising policies to support local artists, offer incentives for regional collaboration, and prioritise local narratives. Fostering critical media literacy might also empower audiences to engage with cultural products in a discerning manner (Hesmond & Rancie, 2008).

ASEAN can harness the role of the creative sector to enhance social inclusion and regional cohesion, drive social development, foster intercultural dialogue, empower young people. It can create an enabling environment for creativity to flourish (British Council, 2023). The proliferation of independent cinema across Southeast Asia exemplifies this trend, providing platforms for local narratives and a sense of shared identity.

4.2. Climate Change

ASEAN's creative industries must balance economic growth with environmental stewardship by integrating climate considerations into policy frameworks and fostering cross-sectoral collaborations to develop sustainable practices that address local and global climate challenges (IPCC, 2022). The CCIs, as a contributor to global carbon emissions, particularly through digital technologies and large-scale events, must mitigate their environmental impact. Further, climate-resilient strategies are essential to preserve cultural heritage sites threatened by rising sea levels and extreme weather events (UNESCO, 2022). Moreover, the creative economy has a unique opportunity to drive climate action through innovative storytelling and design solutions that can influence public perception and behaviour.

5. Changing Models of Cultural Production, Dissemination, and Governance

The development of the creative economy in AMS has been influenced by diverse stakeholders, including ASEAN Dialogue Partners, international organisations, private sector entities, foundations, and non-state actors.

The private sector has been influential, especially in urban centres where creative hubs and innovation districts have proliferated (Kong, 2020). Further, technology companies have been reshaping the creative economy

landscape, with platforms and large social media corporations creating and dominating new channels for cultural expression that have influenced content creation and consumption patterns (Jin, 2021). Corporate-sponsored cultural initiatives and art spaces are another trend, raising questions about the autonomy of cultural production and the ethics of corporate interests shaping cultural narratives (Chong, 2018).

Meanwhile, international philanthropic bodies, like the Ford Foundation, have supported large-scale cultural initiatives, while local foundations, such as the Ayala Foundation in the Philippines, have supported local artists and cultural education (Phaosawasdi, 2022; Ee, 2020). ASEAN's Dialogue Partners and international organisations, such as the European Union and UNESCO, are increasingly involved in shaping cultural and creative initiatives in AMS (Katsikis et al., 2021; UNESCO, 2019).

Traditionally, the ASEAN governments have been the primary actors in cultural policymaking and implementation. However, the increasing involvement of non-state actors has led to a shift in the state's role to more of a facilitator or regulator (Lim, 2018). While this shift has allowed for more diverse and innovative approaches to cultural development, it has also raised concerns about the erosion of state sovereignty over culture and the potential for cultural neo-colonialism.

These changing dynamics also raise questions about equitable access to cultural resources and the preservation of less commercially viable forms of cultural heritage. While the private sector typically prioritises economically successful cultural products, governments have traditionally played the main role in supporting and preserving a wider range of cultural expressions (Yúdice, 2018).

Many member states have adapted, focusing on creating enabling environments for creative industries, mediating between stakeholders, and safeguarding national cultural interests. Thailand's Creative Economy Agency, for example, is a government effort to coordinate and stimulate creative industry development while maintaining a degree of state influence (Bunnell & Goh, 2018).

ASEAN and its member states must devise CCI policies that strike a balance between innovation and cultural authenticity. The evolving role of the state, in conjunction with non-state actors, will continue to shape ASEAN's creative economy and cultural heritage. Moving forward, finding effective models for collaboration between state and non-state actors will be key to ensuring culturally sensitive, equitable, and sustainable development of the creative economy in the region.

Section 4: Challenges and Risks

1. Challenges

The emphasis on economic outcomes can overshadow the intrinsic social and cultural value of creative practices, particularly those not easily quantifiable in market terms. The potential commodification of culture by CCI initiatives raises ethical questions about the value and meaning of cultural production. The contradiction between cultural and economic value is acute in contexts where traditional creative practices have been integrated into the formal creative economy (Throsby, 2021).

As the creative economy grows, its environmental footprint will grow along with it, as the energy consumption for digital infrastructure and the waste from physical production will increase. Balancing economic growth with ecological responsibility requires a rethinking of production methods, distribution channels, and consumption patterns across the creative industries (Maxwell & Miller, 2022).

Further, the pandemic highlighted the vulnerability of the creative sector. Although digital platforms provided lifelines for many creators during the pandemic, the crisis also exposed the precarity of creative labour and the fragility of cultural institutions. The uneven recovery evident across different subsectors and geographical areas in ASEAN underscores the risk of creating new inequalities and exclusions within the creative economy (Banks & O'Connor, 2021)

Further, differing resource distribution and infrastructure development in AMS also threaten equitable development of the creative economy. Unless appropriate consideration is made, AMS with more advanced digital infrastructure and established creative industries will disproportionately benefit from regional initiatives, exacerbating existing economic disparities. These gaps will affect market access and influence the type of creative content that can be produced and disseminated.

Finally, while robust IPR protection can foster innovation and ensure fair compensation for creators, overly restrictive regimes may stifle creativity and limit access to cultural resources. Balancing the needs of creators with the broader public interest in cultural participation and knowledge sharing is challenging in ASEAN, where AMS have different legal systems and varying levels of IPR enforcement (Tan, 2022). Further, traditional knowledge and cultural expressions often fall outside conventional IPR frameworks, raising questions about how to protect and promote these forms of creativity without commodifying or exploiting them for economic gain.

2. Risks

The development of creative clusters and urban-centric creative economy policies can exacerbate rural-urban divides and contribute to gentrification. While creative city strategies can also drive urban regeneration, there is a risk of displacing existing communities and traditional creative practices, raising questions about who benefits and who is excluded from the creative economy (Grodach & Silver, 2020).

As the member states integrate their local creative economies into global markets, the risk of commodification, homogenisation, and the loss of local identity, cultural expressions, and traditional knowledge increases. Commodification can lead to the erosion of cultural heritage and creative practices that may not align with mainstream market demands. The pressure to produce globally marketable content may prioritise Westernised or homogenised cultural products over locally significant but less commercially viable creative expressions (Pratt, 2020).

Further, political tensions and geopolitical rivalries inside and outside ASEAN pose another risk to developing a cohesive regional creative economy. Differing national priorities, censorship regimes, and approaches to cultural policy can hinder collaboration and the free flow of creative content across borders. Moreover, the creative economy's potential as a soft power tool could exacerbate existing regional tensions if not managed carefully (Yúdice, 2019).

The rapid pace of technological change in the creative industries is another concern. While digital platforms offer unprecedented opportunities for creators to reach global audiences, they also create new forms of dependency and vulnerability. The dominance of global technology giants in content distribution platforms may lead to a loss of autonomy for ASEAN creators and policymakers in shaping the regional creative landscape. Additionally, algorithmic curation of content by these platforms can reinforce existing biases and power structures, potentially marginalising diverse voices and alternative creative expressions (Flew, 2023).

Section 5:

Recommendations and Priority Issues

1. Sustainable Financing Mechanisms for the ASEAN Creative Economy

Developing sustainable financing mechanisms is crucial for the long-term viability and cultural integrity of the ASEAN creative economy. Efforts must balance commercial imperatives with cultural preservation, and address the challenges faced by AMS creative industries (Comunian & England, 2020).

ASEAN should explore various financing approaches, including blended models that combine public and private capital to reduce the investment risk for culturally significant projects. This might include government loan guarantees to cultural enterprises and public-private venture capital funds for innovative cultural startups. Consideration may be given to refining the ASEAN Cultural Fund to enable public-private partnerships and funding from non-state actors to support cross-border collaborations and preserve shared cultural heritage.

ASEAN should also promote development of microfinance initiatives with tailored small-scale lending programs to support individual artists and creative micro-enterprises that lack financing. These programs should combine financial support with business development services to help professionalise grassroots creative enterprises.

AMS should consider offering fiscal incentives such as tax benefits and subsidies to stimulate investment in their local creative industries, particularly in underserved sectors or regions. This might include tax credits for film and television production or reduced import duties on materials used in traditional crafts.

ASEAN could also leverage technology to create new revenue streams, including regional crowdfunding platforms for cultural projects, blockchain-based solutions for royalty distribution, and digital marketplaces for ASEAN creative products.

Finally, ASEAN should consider how to promote the integration of financial literacy and business management training into creative education curricula, equipping artists and cultural professionals with needed skills to manage finances, develop sustainable business models, and understand the creative economy's complexities.

2. Public-Private partnerships (PPPs) Prioritising Cultural Sustainability

Collaboration is key for nurturing a thriving ASEAN Creative Economy. Public-Private Partnerships (PPPs) could allow governments and the private sector to combine their resources and expertise, drive innovation, boost investment, and preserve cultural values.

To ensure cultural sustainability, ASEAN should consider developing appropriate cultural impact assessment

tools for PPP projects in the creative economy. These tools should be designed to evaluate how proposed projects might affect local cultural ecosystems, traditional practices, and community identities. By integrating these assessments into PPP planning and implementation, ASEAN would help ensure that economic benefits do not compromise cultural integrity.

AMS should consider establishing long-term funding mechanisms for cultural initiatives that are not solely dependent on market success, such as dedicated cultural funds, tax incentives for cultural investments, and grant programs for non-commercial cultural projects. By providing stable support for diverse cultural expressions, including those that may not have immediate market appeal, AMS could better safeguard cultural heritage and foster innovation in their creative sectors.

Similarly, ASEAN should consider creating incentives for private sector investment in culturally sustainable creative projects, such as tax breaks for companies supporting local cultural initiatives or employing traditional artisans, preferential awarding of government contracts for firms that demonstrate commitment to cultural sustainability, and launching public recognition programs for culturally responsible businesses. By aligning private sector interests with its cultural preservation goals, ASEAN can mobilise significant resources for the development of a sustainable creative economy.

3. Cultural Dialogues, Diversity, and Inclusive Governance

Cultural dialogues are a foundation for building a shared cultural identity. This aligns with the ASEAN Socio-Cultural Community Blueprint 2025, which emphasises the need for a people-oriented, people-centred community (ASEAN Secretariat, 2016). Promoting cultural heritage can contribute to regional economic growth and innovation, foster creativity, and enhance the creative economy as a driver of sustainable development. Embracing cultural diversity could also lead to unique cultural products and services that could enhance cultural tourism and local creative industries (Isar, 2017). Additionally, cultural dialogue and diversity can contribute to addressing common regional challenges, such as environmental sustainability and social inequalities, by facilitating the exchange of traditional knowledge and practices across countries (Chong, 2020).

ASEAN should consider establishing multi-stakeholder platforms that include government and business representatives, community leaders, groups, and cultural organisations in decision making, while also improving the quality of engagement on existing platforms. These platforms will help ensure that diverse perspectives are considered by policymakers when shaping the creative economy, leading to more inclusive and representative policies.

Further, AMS should consider implementing participatory cultural mapping initiatives to identify and document their diverse cultural assets. Initiatives should be designed to ensure that marginalised voices are represented to obtain a comprehensive understanding of the region's cultural landscape to inform policy decisions.

ASEAN should also consider developing cultural exchange programs that include traditional arts as well as contemporary and emerging cultural expressions. Programs should foster a dynamic and evolving sense of shared identity, promote cross-cultural understanding, and enhance collaboration among AMS. By including a wide range of cultural expressions, exchange programs could help bridge generational gaps and ensure the continuity and evolution of ASEAN's cultural heritage.

4. Empower Creators with Digital Technologies and Cultural Sensitivity

The empowerment of ASEAN's creators through digital technologies can contribute to cultural and economic development. Digitalisation offers opportunities for artists, content producers, and cultural entrepreneurs to

expand their reach and influence beyond traditional boundaries.

ASEAN should consider developing region-specific digital platforms that cater to local languages, cultural norms, and artistic practices, rather than rely on global platforms. Platforms should be designed to showcase and distribute ASEAN creative content to give creators greater control while expanding their reach to regional and global audiences. These platforms could help preserve and promote ASEAN's cultural heritage in the digital realm.

The AMS should consider implementing comprehensive digital literacy programs to teach technical skills and foster critical thinking about cultural representation in digital spaces. Programs should basic digital skills as well as advanced concepts, such as data privacy, online marketing, and digital rights management. Programs could help artists in ASEAN adjust to the digital economy while maintaining their cultural integrity.

Finally, establishing a regional digital rights framework would protect the intellectual property of creators as well as allowing traditional practices of cultural sharing and adaptation (Lim, 2018). A framework could address the challenges of digital content creation and distribution in the ASEAN context, balancing the need for copyright protection with rich local traditions of cultural exchange and communal ownership. It could also provide mechanisms for fair remuneration of digital creators, ensuring that the benefits of digital distribution are equitably shared.

5. Integrating Traditional Knowledge and Artistic Expression

The preservation and integration of cultural heritage in ASEAN's creative economies safeguards the past and is also an important catalyst for economic viability and cultural identity (UNESCO, 2022). By incorporating traditional knowledge systems and artistic expressions into contemporary creative ventures, AMS could cultivate cultural continuity while generating substantial economic opportunities.

ASEAN should develop ethical guidelines for the commercial use of traditional knowledge and artistic expressions in the creative economy. Guidelines should ensure fair compensation and acknowledgment of source communities, promote sustainable economic development, and address intellectual property rights, benefit-sharing mechanisms, and cultural appropriation.

AMS should establish collaborative research programs between academic institutions and holders of traditional knowledge to document, analyse, and innovate based these knowledge and practices, while bridging the gap between traditional wisdom and contemporary innovation. Collaborations could lead to new insights and applications of traditional knowledge in fields such as sustainable agriculture, traditional medicine, and eco-friendly production techniques.

Finally, ASEAN should consider creating incubation programs matching traditional artisans with contemporary designers. These programs should ensure a balanced exchange of knowledge and skills rather than a one-way extraction of traditional techniques. By fostering dialogue and collaboration between traditional and contemporary practitioners, incubation programs could lead to innovative products and services that blend cultural heritage with modern design, and appeal to local and global markets.

6. Prioritise Local Narratives through Critical Media and Heritage Education

It is crucial to amplify local narratives to maintain cultural heritage and foster a sense of shared regional identity. However, this process should acknowledge the complexities within these narratives, recognising that

heritage is a cultural, living process, beyond material things.

ASEAN can develop critical media literacy and heritage education programs in schools and communities. These programs should encourage reflection on the construction and use of heritage narratives, while fostering an understanding of how cultural identities are formed, contested, and evolve over time. By promoting critical engagement with media representations of culture and heritage, these programs can empower ASEAN citizens to actively participate in shaping their cultural narratives.

ASEAN can support research and artistic projects that explore contested aspects of local heritage. These projects should aim to foster dialogue and understanding across communities, acknowledging different perspectives on shared histories and cultural practices. By providing platforms for diverse voices and encouraging nuanced discussions of complex cultural issues, ASEAN can promote a more inclusive and dynamic understanding of its cultural heritage.

Further, ASEAN can create platforms for intergenerational dialogue on cultural heritage. These platforms could include community forums, digital storytelling projects, and intergenerational mentorship programs in traditional arts and crafts. By ensuring that young people are actively involved in shaping the future of their cultural legacies, ASEAN can bridge generational gaps and ensure the continuity and evolution of its cultural traditions.

These efforts can contribute to a creative economy that drives economic growth, strengthens cultural resilience, fosters social cohesion, and promotes sensitivity and understanding of ASEAN's rich and diverse heritage.

Section 6: Case Studies

This section presents case studies of strategies and initiatives in the creative economy sector that address the challenges and opportunities previously identified. These examples offer insights into successful practices for fostering a vibrant, sustainable, and inclusive creative economy across ASEAN.

1. Addressing Uneven Resource Distribution

The British Council's Creative Hubs for Good program (2018-2022) supported programs in Indonesia, Malaysia, the Philippines, Thailand, and Viet Nam, providing targeted support to creative communities, facilitating knowledge sharing, and building local capacity. The program created a network of mutual support and learning, ensuring that less-developed areas could participate in the creative economy and demonstrated how regional cooperation, and targeted investment could foster a more equitable creative economy in AMS (British Council, 2022).

2. Navigating IPR Complexities

South Korea's Copyright Protection Centre, established in 2005, addresses intellectual property rights in the creative sector. It employs an online monitoring system to detect copyright infringements, provides mediation services for disputes, and offers educational programs on copyright. The centre's proactive approach helps protect creators' digital rights and builds a culture of respect for intellectual property. This model offers lessons for ASEAN on managing IPR in the creative economy (Korea Copyright Protection Agency, 2023).

3. Cultural and Economic Values

New Zealand's Māori Design Strategy integrates cultural values into the contemporary creative economy while preserving cultural heritage by supporting Māori artists in creating contemporary works rooted in traditional culture and promoting Māori design in international markets. The strategy incorporates Māori design principles into national branding and tourism campaigns, creating a unique identity and ensuring economic benefits for Māori culture. This approach demonstrates how culturally grounded values can be respected, preserved, and economically valued by the creative economy (Creative New Zealand, 2023).

4. Environmental Sustainability

Amsterdam's Denim Deal, launched in 2020, aims to make the city's denim industry more sustainable. It set targets for recycled content in denim production, promoted water-saving technologies, encouraged circular economy principles, supported designing for recyclability, promoted efficient recycling technologies, and advocated for new business models based on reuse. This public-private partnership showed how targeted initiatives could drive sustainability in the creative sectors, offering AMS a model for balancing economic growth with ecological responsibility (Amsterdam Economic Board, 2022).

5. Post-Pandemic Recovery and Labour Precarity

Germany's Neustart Kultur program, launched in 2020, addressed the post-pandemic recovery and labour precarity in the creative sector, allocating EUR 2 billion for cultural institutions and projects, digital infrastructure development, and protections for freelance and self-employed cultural workers. The program provided

grants for individuals and supported organisations that employed creative professionals. The intervention demonstrates how governments or other organizations could help the creative sector recover from disruptions while addressing labour instability, offering lessons for AMS facing similar challenges (German Federal Government, 2023).

6. Mitigating Cultural Homogenisation

The Jogja Fashion Week in Yogyakarta, Indonesia promotes local creative industries while combating cultural homogenisation. Established in 2006, this annual event showcases traditional Javanese textiles and designs alongside contemporary fashion. It provides a platform for local designers to blend traditional craftsmanship with modern aesthetics, preserves cultural heritage, and engages with global fashion trends. The event boosted Yogyakarta's creative economy, supported local artisans, and attracted international attention (Indonesia Ministry of Tourism and Creative Economy, 2022).

Similarly, India's Handloom Mark Scheme, launched in 2006, certifies authentic handloom products, distinguishing them from power loom and mill-made textiles. It helps to preserve traditional weaving techniques, supports millions of artisans, and promotes India's diverse textile heritage. By creating a recognisable brand for handloom products, it enhances their market value and consumer appeal. The Handloom Mark has boosted exports and domestic sales, demonstrating how policy interventions can preserve cultural crafts, support local artisans, and resist homogenisation in the global textile market (Ministry of Textiles, Government of India, 2022).

7. Bridging the Urban-Rural Divide

China's Taobao Villages initiative aims to close the urban-rural divide by developing e-commerce in rural areas. It provides digital infrastructure, training for rural entrepreneurs, and the creation of online marketplaces for rural products, including handicrafts. The program, which facilitates logistics networks connecting rural producers with urban markets, demonstrates how targeted digital strategies can create opportunities for rural artisans and creative entrepreneurs (World Bank, 2022).

8. Managing Technological Dependencies

Adopted in 2022, the European Union's Digital Services Act (DSA) addresses technological dependencies and protects digital rights in the creative economy. It implemented rules for online platforms to ensure fair competition, protect user rights and freedom of expression, and promote transparent content moderation and algorithms. The DSA demonstrates how regulatory frameworks could address technological dependency risks while fostering a more equitable digital creative ecosystem, offering insights for AMS in developing digital governance strategies (European Commission, 2023).

9. Cultural Outputs Enhancing International Markets

South Korea's K-pop industry demonstrates how cultural content can increase national access international markets and serve as a cultural diplomacy tool. Strategic support from the government, including infrastructure investment and promotional activities, helped create a globally appealing cultural product. K-pop's success has generated revenue, boosted related industries, and enhanced the nation's soft power. This case offers insights for AMS on developing and promoting cultural content for global markets, while highlighting the importance of strategic planning, talent development, and leveraging digital platforms (Noland, 2020).

10. Cultural Tourism

Thailand's Creative Tourism program has leveraged cultural assets to drive the nation's creative economy. Creative Tourism offers immersive experiences, such as traditional craft workshops and culinary tours, for

tourists to engage with local traditions. The approach has generated revenue, supported local artisans, and preserved cultural practices. By promoting experiences across Thailand, the program has helped to distribute tourism benefits widely. Creative Tourism's success has demonstrated how AMS can create unique, high-value tourism experiences to drive the creative economy while supporting cultural preservation (Tourism Authority of Thailand, 2023).

11. Digital Platforms and Cultural Dissemination

Indonesia's music sector, particularly for dangdut music, is an example of how digital platforms can drive cultural dissemination and economic growth. Artists have used online distribution channels and live streaming platforms to reach wider audiences, democratising the industry and allowing independent artists to gain popularity. Digitalisation has also stimulated related economic activities, creating new job opportunities. Indonesia's experience demonstrates how embracing digital platforms can help traditional cultural expressions reach new audiences and create economic opportunities, offering insights for other AMS (UNCTAD, 2020).

12. Fostering Creative Clusters

Singapore's Mediapolis initiative demonstrates how creative clusters can drive innovation in the creative economy. Mediapolis offers space to production facilities, post-production services, offices, and educational institutions, creating a self-contained ecosystem for media and digital content creation. It fosters collaboration, supports smaller companies and startups, and emphasises talent development. Mediapolis has positioned Singapore as a regional hub for media production and attracted international companies. The model offers insights for other AMS seeking to develop creative hubs or foster innovation in their CCIs (Singapore Economic Development Board, 2024).

Section 7: Conclusion

The development of an ASEAN Creative Economy is a complex effort that encompasses economic development, social cohesion, cultural protection and regional integration. This report highlighted both its potential and future challenges. A key consideration is the inherent tension between economic growth and inclusive and sustainable development to foster the creative economy. In recognising and addressing this tension AMS should adopt collaborative, ethical, and inclusive strategies to:

- foster regional cooperation in creative projects,
- promote digital equity in AMS to address uneven resource distribution,
- empower local communities and underrepresented voices,
- strengthen IP protection,
- develop critical media and cultural heritage literacy,
- implement evidence-based policymaking, and
- develop sustainable financing mechanisms.

These strategies will enable ASEAN to harness the potential of the creative economy for sustainable and equitable growth. They acknowledge the value of the creative economy beyond economic growth and embraces its capacity to foster social cohesion, preserve cultural heritage, and project soft power.

Despite diverse local contexts, the case studies offer insights that could be adapted to local contexts. As ASEAN develops its creative economy, it should draw inspiration from these experiences while crafting solutions tailored to specific regional and cultural contexts.

As AMS creative economies evolve, ASEAN must develop policies that are agile and ensure that the creative sector continues to drive inclusive development. ASEAN's challenge is to nurture a shared regional identity while balancing the conservation and preservation of cultural heritage and promoting economic growth to leverage creativity for social progress.

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