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CHINA-ASEAN DIGITAL ECONOMY COOPERATION

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Abstract

The digital economy has become an important driver of regional economic development. Against the backdrop of deepening traditional economic and trade cooperation between China and ASEAN, the digital economy has gradually emerged as a new area of cooperation. This paper analyzes the development of China-ASEAN digital economy cooperation, focusing on cooperation in digital infrastructure, cross-border e-commerce, and digital technologies. It also examines the impact of relevant institutional arrangements on bilateral cooperation by analyzing the e-commerce rules under the Regional Comprehensive Economic Partnership (RCEP) and the ASEAN Digital Economy Framework Agreement (DEFA). The study finds that China-ASEAN digital economy cooperation has made certain progress, but still faces practical challenges, including uneven development of digital infrastructure, differences in data regulatory rules, and competition in digital technologies. Both sides need to strengthen coordination of digital rules, infrastructure development, and cooperation in emerging technologies in order to inject new impetus into regional digital economy cooperation.

Keywords: *Digital economy, regional cooperation, ASEAN, RCEP, DEFA, technology, infrastructure, cross-border e-commerce, rules*

Introduction

In recent years, the digital economy has become an important driver of global economic growth and has gradually transformed traditional patterns of trade and investment. In the current global economic landscape, the integration of digital technologies with the real economy has created new opportunities for regional economic cooperation. China and ASEAN are major trading partners and important investment partners of each other. As of 2026, China has remained ASEAN's largest trading partner for 17 consecutive years, while ASEAN has been China's largest trading partner for six consecutive years (Xu, N. N., 2026). With the continuous development of digital technologies, the digital economy has also become an important emerging area of cooperation between China and ASEAN.

Driven by initiatives and frameworks such as the Belt and Road Initiative and the Regional Comprehensive Economic

Partnership (RCEP), economic and trade cooperation between China and ASEAN has entered a new stage of high-quality development. The integration of industrial chains, supply chains, and financial cooperation has further accelerated. At the same time, cooperation in emerging areas, including cross-border e-commerce, emerging industries, the digital economy, and artificial intelligence, has developed rapidly, providing new impetus for regional economic growth (Lei, X. H., Yu, D., & Liang, Q. Y., 2026, 90). However, China-ASEAN digital economy cooperation still faces several challenges, including differences in the levels of digital development among ASEAN countries, the lack of unified regulatory rules for cross-border data flows, and the impact of international technological competition on digital cooperation.

Against this background, this paper analyzes the current development of China-ASEAN digital economy cooperation. It reviews bilateral cooperation in areas such as digital infrastructure, cross-border e-commerce, and digital technologies, and further examines the challenges facing cooperation and its future development directions. By examining these issues, this study aims to provide a better understanding of the role of the digital economy in China-ASEAN economic and trade cooperation and to provide a reference for further deepening cooperation in the digital sector.

Literature Review

As the importance of the digital economy in the global economic landscape has become increasingly prominent, academic research on China-ASEAN digital economy cooperation has gradually increased, resulting in several representative analytical perspectives.

From the perspective of differences in the development levels of ASEAN countries, Du Yushan used the stochastic frontier analysis method to measure the efficiency and potential of digital economy cooperation between China and ASEAN countries from 2003 to 2020. The study found that factors such as economic scale, market openness, and digital infrastructure have an impact on bilateral cooperation. In terms of the content of cooperation, cooperation between China and countries with relatively developed digital economies, such as Singapore, Malaysia, and Thailand, has mainly focused on digital platform development and technology applications. In contrast, cooperation with neighboring countries such as Vietnam and Laos has focused more on digital infrastructure development (Du, Y. S., 2022).

In “Progress, Opportunities and Challenges of China-ASEAN Digital Infrastructure Cooperation”, Liu Xinwen and Yang Xue examined the development of China-ASEAN digital infrastructure cooperation from three dimensions: cooperation policies, areas of cooperation, and participating countries. They pointed out that cooperation has expanded from network infrastructure such as 5G to areas including data centers and smart cities, while the intensity of cooperation varies across countries. Cooperation with Thailand, Malaysia, Singapore, Indonesia, and Laos is relatively close, whereas cooperation with the Philippines, Myanmar, Cambodia, and Vietnam is comparatively less developed. The authors also identified opportunities arising from the large market potential and overlapping policy initiatives, while noting challenges such as the digital divide, data security, and increasing market competition. They proposed measures including strengthening policy coordination and narrowing the digital divide (Liu, X. W., & Yang, X., 2024).

From the perspective of institutional complementarity, Zhao Runan argues that the Digital Economy Partnership Agreement (DEPA) provides certain rules and dispute settlement mechanisms for digital economy cooperation in ASEAN. China has advantages in digital technologies and market size, while ASEAN countries have distinctive strengths in localized innovation, allowing the two sides to form complementary advantages. Such cooperation can help reduce trade costs, facilitate trade, and support post-pandemic economic recovery. At the same time, as global competition in the digital economy intensifies, China and ASEAN also face challenges such as trade protectionism in promoting regional cooperation. Therefore, the two sides need to strengthen consultations and further cooperate on digital trade rules (Zhao, R. N., 2022).

Lü Jihai and Hu Xiaohong, in“The Multiple Dimensions of the Regional Comprehensive Economic Partnership in Promoting

Cross-Border Investment Facilitation", point out that the RCEP, as the world's largest free trade agreement, can directly or indirectly promote cross-border investment facilitation through investment facilitation provisions, trade facilitation and unified rules of origin, provisions on the movement of natural persons, and the internationalization of the renminbi. They further argue that the agreement may encourage member states to reform their domestic institutions and supporting infrastructure to meet the requirements of investment facilitation (Lü, J. H., & Hu, X. H., 2021).

From a multidimensional perspective, Li Jia and Jiang Zhida point out that China-ASEAN digital economy cooperation has expanded into multiple areas, including e-commerce, digital finance, basic digital networks, smart manufacturing, and digital agriculture. Although the scope and depth of cooperation have continued to expand, cooperation is still constrained by differences in policies and regulations, shortages of digital talent, security risks, and geopolitical competition. The authors suggest strengthening top-level planning and policy coordination, expanding the scale of digital trade, and developing a collaborative innovation ecosystem (Li, J., & Jiang, Z. D., 2025).

Overall, existing studies have examined China-ASEAN digital economy cooperation from different perspectives, with each study focusing on particular aspects. However, relatively few studies have systematically integrated these perspectives and examined their interactions. This is also the main research focus of this paper.

Research Methods

This paper mainly adopts the literature review method, case study method, and institutional analysis method. By examining economic and trade data, policy documents, and cooperation agreements issued by relevant official institutions in China and ASEAN countries, the study reviews the development of China-ASEAN digital economy cooperation. It analyzes the main areas of current cooperation from three perspectives: digital infrastructure, cross-border e-commerce, and digital technologies.

At the institutional level, this paper takes the e-commerce chapter of the Regional Comprehensive Economic Partnership (RCEP) and the ASEAN Digital Economy Framework Agreement (DEFA) as the main objects of analysis. It examines provisions related to cross-border data flows, electronic payments, and consumer protection, with the aim of exploring the impact of these rules on China-ASEAN digital economy cooperation and the possible linkages between the two mechanisms.

In addition, the study analyzes practical issues in the cooperation process through specific cases, including cross-border e-commerce projects and digital infrastructure development. Particular attention is paid to differences among countries in the development of digital infrastructure, data regulatory rules, and digital technologies. Based on this analysis, the paper identifies the main challenges facing China-ASEAN digital economy cooperation and provides a basis for the subsequent analysis and recommendations.

China-ASEAN Digital Economy Cooperation

Digital technologies have systematically empowered the development of digital trade between China and ASEAN through data-driven processes, process restructuring, and paradigm innovation. Their core enabling mechanisms can be mainly summarized in three aspects. First, the emergence of digital infrastructure such as 5G and cloud computing provides a stable and efficient physical channel for China-ASEAN digital trade, facilitating the interconnection of trade-related information between China and ASEAN. Second, the establishment of digital trade platforms enables greater connectivity in transactions between China and ASEAN. Third, the application of artificial intelligence facilitates the intelligent integration of China-ASEAN trade (Zou, C. M., & Feng, X. M., 2026). These three mechanisms are not isolated from one another, but instead demonstrate a progressive relationship from "channels" to "transactions" and then to "intelligence." Among them, infrastructure connectivity constitutes the prerequisite for the realization of the latter two dimensions.

Digital infrastructure constitutes the material foundation of the digital economy and is also one of the earliest areas in which

China-ASEAN digital economic cooperation has achieved substantive progress. In 2020, China and ASEAN jointly issued the Initiative on China-ASEAN Digital Economy Partnership, which explicitly emphasized the strengthening of cooperation in digital infrastructure. The initiative called for "strengthening cooperation in communications, the Internet, satellite navigation and other fields; jointly promoting the popularization of 4G networks, facilitating the application of 5G networks, and exploring ways to expand access to and connectivity of high-speed Internet at affordable prices, including supporting ASEAN digital hubs under the framework of the ASEAN Connectivity Master Plan 2025, developing the digital economy, and bridging the digital divide" (Department of International Cooperation. 2020). The introduction of this initiative marked a gradual shift in China-ASEAN digital infrastructure cooperation from previously dispersed project-based engagement toward more institutionalized advancement with clearly defined objectives.

Under the guidance of this policy framework, Chinese digital enterprises have accelerated their expansion in ASEAN countries. Companies such as Huawei and Tencent have established a presence in ASEAN countries and have achieved notable progress in promoting digital connectivity. The China-ASEAN Information Harbor project in Nanning, Guangxi, has established terrestrial optical-fiber connections reaching all 11 ASEAN member states, while submarine optical-fiber cables linking China and ASEAN countries are also under development. A number of Chinese digital enterprises have also established data centers in locations such as Johor, Malaysia, and Bangkok, Thailand (Supporting ASEAN's leapfrog development through the construction of the "Digital Silk Road." (2026).

While progress in connectivity at the hardware level continues, significant differences remain in the development of network infrastructure among ASEAN member states. This has created a practical context in which China-ASEAN digital infrastructure cooperation needs to adopt differentiated approaches and proceed at different levels according to local conditions.

ASEAN countries have developed their network infrastructure to varying degrees. Singapore has demonstrated the highest level of development and has sought to build a world-class Internet network. It has a highly developed fiber-optic network with near nationwide coverage, while 5G network coverage has exceeded 80%, providing seamless connectivity in business centers and core urban areas. Its well-developed infrastructure has laid a solid foundation for the development of services such as the Internet of Things, cloud computing, and big data, while strongly facilitating cross-border data transmission (Liu, A. Q., 2025, 25).

As the digital infrastructure of Singapore and other ASEAN countries has gradually improved, the application of digital technologies has expanded beyond communications and infrastructure into everyday economic activities such as trade, payments, and consumption. Cross-border e-commerce has therefore become one of the more active areas of China-ASEAN digital economic cooperation. In recent years, China has continued to promote the development of the "Digital Silk Road," providing important support for this transformation.

In November 2020, at the opening ceremony of the 17th China-ASEAN Expo Business and Investment Summit, President Xi Jinping proposed enhancing technological innovation and deepening cooperation in the digital economy. He called for the development of new areas of cooperation in smart cities, 5G, artificial intelligence, e-commerce, big data, blockchain, telemedicine, and other fields, promoting digital connectivity and building a "Digital Silk Road" (Xinhua News Agency. (2020).

Under the framework of the "Digital Silk Road," digital cooperation between China and ASEAN countries has gradually expanded from the aforementioned infrastructure development to specific application areas. In addition to the participation of Chinese enterprises in the construction of communications networks, data centers, and other digital infrastructure in ASEAN countries, which provides technological and network support for regional digital economic development, cooperation between the two sides in cross-border payments, e-commerce, and digital trade has also continued to increase.

Digital finance and mobile payments are among the key areas of China-ASEAN digital

economic cooperation. China's advanced technologies and business models in areas such as mobile payments have been introduced and applied in ASEAN countries. Ant Group's Alipay+ has established deep integration with local electronic payment providers in ASEAN, not only facilitating overseas travel for Chinese tourists but also helping local consumers move toward cashless payments (Wang, J., 2026).

As trade between China and ASEAN has become increasingly close, the two sides have begun to use RMB settlement to make trade settlements more convenient. The interconnection of cross-border QR-code payment systems introduced by multiple banks has also provided consumers who frequently travel within the region with faster and more convenient cross-border payment services. At present, the cross-border RMB clearing and settlement network continues to improve, with approximately one hundred banks in ASEAN countries directly or indirectly participating in the Cross-Border Interbank Payment System (CIPS) for RMB settlement, effectively supporting the use of the RMB in ASEAN countries (China and ASEAN promote cross-border payment connectivity. (2025)).

In addition to digital cooperation in the payment sector, China-ASEAN digital cooperation has begun to extend further into trade circulation and industrial-chain processes. As technologies such as artificial intelligence and big data are increasingly applied to cross-border trade, the role of digital technologies is no longer limited to addressing payment and settlement issues but has begun to cover multiple stages, including production, customs clearance, logistics, and marketing. This indicates that China-ASEAN digital cooperation is gradually extending from the facilitation of individual payment processes toward the digitalization of the entire trade process, creating more favorable conditions for enterprises on both sides to conduct cross-border trade.

For example, the Puzhai-Xin Thanh Smart Border Gate between China and Vietnam has been put into operation, using autonomous driving and AI-powered intelligent scheduling to significantly improve the efficiency of cross-border customs clearance. Digital platforms for the China-Indonesia durian industry and the China (Guangxi)-ASEAN fruit foundation model have also been launched. By applying AI technology across the entire chain of cultivation, traceability, logistics, marketing, and regulation, these initiatives have enabled high-quality ASEAN agricultural products to enter the Chinese market more efficiently, achieving mutual benefits through cost reduction and efficiency improvement for enterprises while also facilitating people's livelihoods (Liu, X., 2026, 1).

Key Mechanisms for Promoting China-ASEAN Cooperation

Institutional arrangements constitute an important foundation for promoting the transformation of China-ASEAN digital economic cooperation from market-driven development toward more stable and regulated cooperation. At present, the e-commerce chapter of the Regional Comprehensive Economic Partnership (RCEP) and the ASEAN Digital Economy Framework Agreement (DEFA) are two important mechanisms in this regard.

The Regional Comprehensive Economic Partnership (RCEP), which entered into force on January 1, 2022, covers 15 major economies in the Asia-Pacific region and is one of the most influential regional free trade mechanisms in the region (Wang, D. M., 2026, 80). According to statistics from the General Administration of Customs of China, during the first five months of 2026, the total value of trade between China and ASEAN reached RMB 3.52 trillion, representing a year-on-year increase of 16.6% and accounting for 17% of China's total foreign trade. Among this total, China's exports to ASEAN amounted to RMB 1.98 trillion, an increase of 16.2% year-on-year, with the trade structure continuing to improve (Li, K., 2026, 1).

Since its entry into force in 2022, RCEP has provided a basic set of rules for cross-border e-commerce between China and ASEAN countries through provisions on paperless trading, electronic authentication and electronic signatures, personal information protection, and consumer protection. These provisions have also reduced, to a certain extent, the transaction costs arising from differences in national regulatory systems. In particular, with regard to cross-border

data flows, RCEP does not require member states to implement completely unrestricted data flows, while allowing countries to adopt certain data localization measures when necessary for public policy purposes. This relatively flexible arrangement enables China to cooperate within the same framework with ASEAN countries such as Singapore, Vietnam, and Malaysia, despite differences in their digital governance models.

However, the e-commerce chapter of RCEP remains relatively limited in terms of its binding force, with many provisions being primarily principles-based and subject to relatively weak enforcement. Therefore, RCEP currently serves mainly as a basic framework of rules and a foundation for China-ASEAN digital economic cooperation. Against this background, in order to better adapt to the development of regional economic and trade rules under RCEP and changes in the digital market, it is necessary to further improve relevant economic and trade adaptation mechanisms. Establishing a comprehensive economic and trade adaptation system covering policy coordination, risk assessment, data support, and supply-demand matching is an important means of reducing deviations in economic decision-making in cross-border e-commerce (Wang, F. J., 2026, 26–27).

RCEP provides fundamental institutional support for regional digital cooperation through rules on e-commerce and related areas. However, its arrangements concerning the digital economy remain generally principles-based and framework-oriented, leaving room for further dialogu on more complex issues such as digital products, source code, and cross-border data flows. By comparison, DEFA seeks to promote more detailed regulatory coordination within ASEAN in areas including data flows, payment interoperability, digital identity authentication, data protection, and cybersecurity. It may therefore further shape the regional regulatory environment faced by China-ASEAN digital economic cooperation on the basis of the framework established by RCEP (Chen, M., 2026, 12).

The Senior Economic Officials Meeting (SEOM) of ASEAN successfully resolved all outstanding issues in the negotiations of the ASEAN Digital Economy Framework Agreement (DEFA) during its Second Meeting of the 57th ASEAN SEOM, held in Manila, Philippines on 27–29 May 2026. This marks the successful conclusion of the negotiations on ASEAN's first region-wide digital economy agreement and a major milestone in advancing the ASEAN Leader's vision of a digitally integrated, secure, interoperable, competitive, and inclusive regional economy (Association of Southeast Asian Nations. (2026)).

It should be noted that DEFA is primarily an agreement among ASEAN member states, with the eleven ASEAN countries as its direct parties. However, its development will also have implications for China-ASEAN digital economic cooperation. As the rules under DEFA are gradually implemented, digital rules within ASEAN are expected to become more harmonized. This will facilitate the operations of Chinese enterprises in areas such as cross-border e-commerce, digital payments, and technological cooperation in ASEAN countries, while also helping to reduce, to some extent, the compliance costs arising from differences in national regulations. At the same time, DEFA's rules on cross-border data flows and digital payments can provide useful references for further digital economic cooperation between China and ASEAN in the future.

From the perspective of their relationship, RCEP and DEFA are not substitutes for each other. RCEP provides a regional institutional foundation for digital economic cooperation between China and ASEAN, while DEFA further strengthens regulatory coordination within ASEAN. The two mechanisms can therefore play complementary roles.

However, the two mechanisms still differ in areas such as cross-border data flows and platform regulation. RCEP places greater emphasis on flexibility, preserving a certain degree of policy space for its members and allowing countries to adopt data localization measures when necessary for public policy purposes. DEFA, by contrast, places greater emphasis on the liberalization of digital trade and seeks to further promote the convergence of digital rules within ASEAN. At the same time, the digital regulatory systems of ASEAN member states themselves have not yet been fully harmonized. Countries such as Singapore, Indonesia, Vietnam, and Thailand continue to have different requirements regarding

personal data protection, cross-border data transfers, and platform regulation. Therefore, the implementation of DEFA cannot eliminate institutional differences among ASEAN member states in the short term.

In addition to regulatory coordination at the institutional level, China and ASEAN are also actively promoting the alignment of specific tools and mechanisms in digital economic cooperation to address practical challenges arising from the institutional differences described above. On May 20, 2025, the Special Meeting of China-ASEAN Economic and Trade Ministers was held online, during which the economic and trade ministers of both sides jointly announced the substantial completion of negotiations on Version 3.0 of the China-ASEAN Free Trade Area (Economic and Commercial Office of the Embassy of the People's Republic ...). In terms of digital economic tool coordination, Version 3.0 of the Free Trade Area incorporates paperless trade, electronic invoicing, electronic payments, electronic authentication, and electronic bills of lading into key areas of cooperation. In terms of upgrading trade facilitation mechanisms, Version 3.0 establishes a more comprehensive institutional framework. The two sides have established service standards for advance rulings and clarified the criteria for authorized economic operators as well as corresponding facilitation measures. These arrangements can help enterprises effectively avoid penalties and delays arising from disputes over tariff classification or customs valuation, thereby significantly improving the stability and predictability of regional trade (Liao, D. S., Chen, D. D., & Cao, Y. J., 2026, 47). The advancement of these instrumental and operational arrangements can, to some extent, bridge the differences between RCEP and DEFA in principle-based areas such as cross-border data flows and platform regulation, providing a more practical transitional pathway for bilateral digital economic cooperation.

For China, this means that a uniform approach cannot simply be adopted when conducting digital economic cooperation. Instead, corresponding compliance strategies should be developed according to the specific regulations of different countries, with particular attention to requirements concerning data localization, cross-border data transfers, and platform regulation. At the same time, China needs to further improve its own data security framework and strengthen coordination between domestic regulations, such as the Data Security Law and the Personal Information Protection Law, and relevant ASEAN rules. This would allow China to facilitate cross-border data flows while safeguarding data security. Such coordination would not only help Chinese enterprises better adapt to ASEAN markets but also contribute to China's participation in the formulation of global digital governance rules. If coordination remains insufficient, Chinese enterprises may still face additional compliance costs arising from differences among ASEAN member states, even after adapting to harmonized rules at the ASEAN level.

Conclusion

This study has examined China-ASEAN digital economic cooperation from the perspectives of digital infrastructure, cross-border e-commerce, and cross-border electronic payments. In recent years, the mechanisms supporting digital economic cooperation between the two sides have continued to expand. Projects such as the China-ASEAN Information Harbor and cross-border optical-fiber cables have provided an important foundation for digital connectivity. The e-commerce chapter of the Regional Comprehensive Economic Partnership (RCEP) and the ASEAN Digital Economy Framework Agreement (DEFA) serve as important institutional foundations for promoting cooperation. At the same time, cross-border e-commerce has become an important area where digital technologies and trade intersect, while cross-border electronic payments have made trade settlement between China and ASEAN more convenient. Emerging technologies such as artificial intelligence have further expanded the scope of cooperation.

However, several challenges remain alongside the development of cooperation. ASEAN member states differ significantly in their levels of digital development, resulting in disparities in infrastructure and technological capabilities. In addition, rules governing cross-border data flows and digital standards have not yet been fully harmonized. Therefore, future cooperation needs to take into account the specific conditions of individual countries while further strengthening

regulatory coordination, thereby facilitating smoother cooperation between China and ASEAN.

As mechanisms such as RCEP, DEFA, and Version 3.0 of the China-ASEAN Free Trade Area continue to advance, the institutional foundation for bilateral digital economic cooperation is expected to become further strengthened. At the same time, areas such as artificial intelligence and green digital infrastructure are likely to create new opportunities for cooperation. Overall, in the current digital era, the digital economy is becoming an increasingly important direction for China-ASEAN economic and trade cooperation.

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