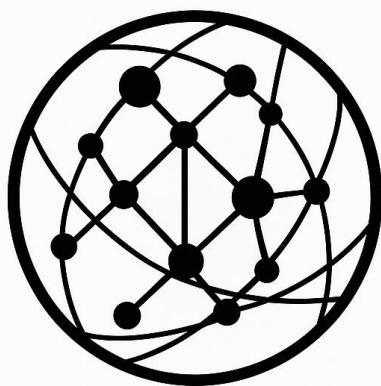


Policy Brief

Series Information:
EPINOVA Policy Brief
Series on Strategic
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Emerging Security

Recommended
Citation:
Wu, S. (2026). *ASEAN in the Emerging AI Power Order: Distributed National Nodes, Overlapping Technological Systems, and Strategic Autonomy* (Policy Brief No. EPINOVA-2026-PB-73). Global AI Governance and Policy Research Center, EPINOVA LLC.
<https://doi.org/10.67037/epinova.pb.2026.073>

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ASEAN in the Emerging AI Power Order:
Distributed National Nodes, Overlapping Technological Systems, and Strategic Autonomy

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Date: October 11, 2026

Key Judgments

- **ASEAN is a consequential coordination environment, not a unified AI power.** Its eleven members possess differentiated national capabilities, while regional institutions support alignment without creating a common regulator, compute authority, or enforceable AI-admission regime.
- **Member-state functions matter more than a single readiness ranking.** Singapore coordinates and connects; Malaysia, Thailand, and Viet Nam convert infrastructure and industrial capacity; Indonesia and the Philippines contribute major market and application functions; and smaller members follow distinct institutional and public-digital pathways.
- **Technological overlap is not equivalent to geopolitical alignment.** U.S., Chinese, domestic, Japanese, Korean, European, Indian, and Gulf-linked resources coexist in different combinations across compute, models, cloud, manufacturing, rules, and security interfaces.
- **Interoperability may increase strategic options without pooling sovereignty.** Shared frameworks can lower coordination costs, but member-state Boundary Autonomy improves only when substitutes actually preserve a specified function under credible operational and legal conditions.
- **Selected advanced-compute interfaces already show consequential local boundary control.** Malaysia’s conditional strategic-trade controls and documented customs seizure, alongside Singapore’s separate investigation and prosecution of alleged server end-user misrepresentations, demonstrate distinct national legal interfaces—not joint ASEAN enforcement or proven evasion of U.S. export restrictions.
- **The 2030 policy test is conversion, not institutional symbolism.** ASEAN's relevance will depend on whether coordination produces operational interoperability, transferable skills, credible fallback routes, and local value capture rather than parallel investment announcements.

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Executive Summary

Southeast Asia is often portrayed as a contested space between U.S. and Chinese artificial-intelligence ecosystems. That characterization identifies important external influences but obscures the region's internal structure. ASEAN now comprises eleven members, following Timor-Leste's admission in October 2025. They differ markedly in cloud hosting, semiconductor and electronics production, platform demand, public-sector integration, regulatory authority, institutional maturity, and security relationships. These differences shape how external AI technologies are used and which actors can set conditions at important interfaces.

This brief argues that ASEAN is best understood as a distributed regional coordination and overlap environment. AI National Power (ANP) remains attributable to member-state systems and their usable, mobilizable functions. AI Boundary Power (ABP) is relational: it arises where a specified controller can alter another actor's access to an AI-relevant resource or function. Boundary Autonomy describes a target's credible ability to switch, substitute, bypass, or internalize at that interface. Systemic Influence requires a separate showing of persistent, sufficiently broad, credibly attributable effects. Treating all four as one regional stock would exaggerate ASEAN's institutional unity and understate the agency of its members.

The ASEAN Guide on AI Governance and Ethics, Responsible AI Roadmap 2025–2030, and Digital Masterplan 2030 provide a recurring coordination architecture. They can facilitate alignment and shared learning without replacing national law or creating a supranational enforcement body. Four mechanisms warrant attention: aggregation of complementary nodes, interoperability among systems, expansion of credible national options, and mediation across external technology and governance agendas. Their implementation is uneven: coordination and selected cross-border activities are observable, whereas regional switching capacity and durable system-shaping effects remain to be demonstrated.

The immediate policy opportunity is therefore neither technological autarky nor forced bloc choice. It is interoperable pluralism: preserving multiple workable connections, securing nationally controlled interfaces, and converting investments into capabilities that can operate across organizational and technological boundaries. The result is conditional rather than predetermined; poorly coordinated infrastructure growth could instead deepen lock-in and fragmented dependence.

Why This Matters

Southeast Asia is increasingly important to the placement, operation, regulation, and use of AI infrastructure, yet two familiar descriptions risk obscuring the practical choices facing its governments. Treating ASEAN only as an arena of U.S.–China rivalry overlooks the distinct capacities and authorities of its members. Describing ASEAN as a unified emerging AI power, by contrast, attributes collective control to institutions that largely coordinate rather than command. Neither account adequately identifies who can preserve a public service, admit a supplier, authorize a data flow, or sustain access when an external interface changes.

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The difference matters for critical-service continuity, industrial policy, procurement, and regional diplomacy. A locally hosted data centre may still depend on foreign-controlled accelerators and software; contracts with several providers may conceal a common technical chokepoint; and compatible regional guidance may remain voluntary even when it changes implementation costs. Conversely, limited supranational authority does not make regional cooperation immaterial. If shared procedures permit national systems to interoperate and maintain credible alternatives, ASEAN coordination can expand practical choices without requiring common ownership or exclusive external alignment. The policy question is therefore what coordination enables actors to do rather than merely what declarations they adopt.

Analytical Scope

The geographic scope covers ASEAN's eleven member states, including Timor-Leste following its admission in October 2025. The analysis examines nationally usable AI-related functions, recurring regional coordination arrangements, and selected relationships with external technological systems where access, interoperability, or dependence is at issue. It does not inventory all AI firms and investments, construct a composite readiness ranking, or treat ASEAN as a unified sovereign AI system.

Analytical attribution follows the unit appropriate to each claim. AI National Power (ANP) is assessed at the level of individual national systems and specified functions; AI Boundary Power (ABP) at the controller–target–interface level; and Boundary Autonomy from the target's capacity to preserve a function through alternative arrangements. Regional coordination is examined through interactions among these national and relational conditions, rather than as an independent stock of AI power. Systemic Influence requires separate evidence of persistent, sufficiently broad, and credibly attributable changes in participation conditions, network structures, or rules.

The evidence cutoff is 30 September 2026. Functional roles are overlapping and time-indexed, while the labels Supported, Bounded/Function-Specific, Formation-Stage, and Evidence-Constrained qualify specific claims rather than rank countries. Public policy documents, institutional records, and reported operational cases provide the basis for descriptive comparison and bounded mechanism illustrations. Announced investments, proposed measures, and strategic objectives are distinguished from implemented services and exercised control. The brief does not conduct a new causal test.

1. The Analytical Problem: Distributed Capacity and Regional Coordination

AI strategy in Southeast Asia cannot be reduced to which country hosts the most graphics processors, attracts the largest announced investment, or purchases a leading foundation model. Physical location does not establish ownership; ownership does not ensure nationally usable access; and model availability does not by itself establish continuity under disruption. National capability must be traced from resources through organizational and institutional conversion to actual functions. This distinction is particularly important where data centres, accelerators, cloud controls, and intellectual property are distributed across borders (Wu, 2026).

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ASEAN introduces a second analytical complication: regionally coordinated rules and practices operate through nationally and privately administered interfaces. Its AI-governance documents establish voluntary alignment and implementation roadmaps rather than a unitary regulator (ASEAN Secretariat, 2024, 2025, 2026a). The relevant empirical question is therefore who operates a given resource, holds the applicable control rights, and can change access for a specified user and function. A foreign supplier’s presence in a member state establishes neither that state’s complete control over the service nor the supplier’s home government’s automatic command of it.

The practical implication is that regional coordination cannot be assessed by aggregating national resources or institutional commitments. Analysis must first establish which functions member states can mobilize and which actors control consequential interfaces before examining whether their interactions produce wider regional effects. This distinction guides the functional comparison of ASEAN's eleven members in the following section.

2. Eleven Members, Differentiated Functional Roles

ASEAN's eleven members occupy overlapping AI functions rather than positions on a single development ladder. **Table 1** identifies their principal observable roles as of 30 September 2026, with evidence states qualifying specific claims rather than ranking countries.

Singapore combines domestic AI deployment, cloud connectivity, and regional governance coordination, although its proposed Digital Infrastructure Bill had not become an operational regulatory gate. Malaysia links cloud hosting and hardware supply chains to an emerging national AI implementation architecture, while Thailand connects foreign cloud investment with industrial development without establishing indigenous frontier-stack control (Infocomm Media Development Authority, 2026; Ministry of Digital Development and Information, 2026; Ministry of Digital, 2026a, 2026b; Google Cloud, 2026; Royal Thai Government, 2026).

Indonesia combines established market and platform functions with a formation-stage sovereign-AI agenda. Viet Nam demonstrates operational industrial–compute conversion through FPT's AI Factory, without established upstream autonomy or severe-disruption resilience. The Philippines combines digital-market and data-governance functions with prospective AI-industrial development (Ministry of Communication and Digital Affairs, 2026b; FPT AI Factory, 2026; Government of Viet Nam, 2026; Board of Investments, 2026).

Other members follow distinct institutional pathways. Brunei is developing sovereign AI infrastructure and governance; Cambodia emphasizes institutional formation and multiple partnerships; and Lao PDR demonstrates selected public-sector AI applications. Myanmar remains evidence-constrained, while Timor-Leste focuses on regional integration and digital transformation. These differences neither establish broad technological autonomy nor justify equating limited public evidence with incapacity (Ministry of Transport and Infocommunications, 2026; Ministry of Post and Telecommunications, 2026; Lao News Agency, 2026; Ministry of Information, 2026; Government of Timor-Leste, 2026).

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Table 1 ASEAN Member-State Functional Node Configurations and Evidence States

Member State	Functional Node / Evidence State	Key Evidence Limit
Singapore	Regional gateway and domestic AI conversion: Supported; ASEAN AI-governance coordination: Bounded/Function-Specific	Domestic deployment and Singapore-led regional AI-governance coordination are documented; no ASEAN-wide regulatory authority (IMDA, 2025, 2026; MDDI, 2026).
Malaysia	Cloud-hosting gateway: Supported; national AI implementation architecture: Formation-Stage	Operational foreign-owned cloud infrastructure is established; national implementation institutions are developing. Hosting does not establish indigenous stack control or comprehensive national mobilizability (Amazon Web Services, 2024; Ministry of Digital, 2026a, 2026b).
Indonesia	Scale-market and platform functions: Supported; sovereign-AI formation: Formation-Stage	Substantial digital-market and platform activity is documented; planned national compute development does not establish realized upstream technological autonomy (Google Indonesia, 2025; Ministry of Communication and Digital Affairs, 2026a, 2026b).
Viet Nam	Industrial–compute conversion: Supported; digital-market governance: Bounded/Function-Specific	Operational firm-level AI services and a legal framework for digital-market governance are documented; national compute mobilizability and severe-disruption continuity remain unverified (FPT AI Factory, 2026; Viet Nam Government News, 2026).
Philippines	Digital-market scale and formal government-data governance: Supported; strategic-industrial interface formation: Formation-Stage	Market activity and a government-data classification and residency framework are established; regulatory implementation is phased, while the proposed AI-industrial hub remains prospective (Philippine Statistics Authority, 2026; Office of the President of the Philippines, 2026; Board of Investments, 2026).
Thailand	Cloud/hosting conversion: Supported	Operational foreign cloud infrastructure is established; indigenous control of frontier models and accelerators is not demonstrated (Google Cloud, 2026).
Brunei Darussalam	Governance and sovereign-infrastructure formation: Formation-Stage	Sovereign cloud and AI infrastructure remain planned; frontier-scale operational AI depth is not established (Ministry of Transport and Infocommunications, 2026).
Cambodia	Institutional/application formation and multi-partner engagement: Formation-Stage	Policy and institutional direction are documented; operational supplier substitution and Boundary Autonomy remain unverified (Ministry of Post and Telecommunications, 2026).
Lao PDR	Selected government-facing AI: Bounded/Function-Specific	Selected public-sector applications are documented; no inference of broad-stack autonomy is warranted (Lao News Agency, 2026).
Myanmar	Selected applications and institutional formation: Evidence-Constrained	Publicly verifiable evidence supports only limited functional claims; broader AI capacity and Boundary Autonomy cannot be adjudicated (Ministry of Information, 2026).
Timor-Leste	Regional integration and digital transformation: Formation-Stage	Institutional integration and digital-transformation planning do not establish mature AI deployment or control over major technological interfaces (Government of Timor-Leste, 2026).

Note. Evidence cutoff: 30 September 2026. Roles are non-exclusive and function-specific. Supported indicates documented operational activity or established institutional arrangements; Bounded/Function-Specific limits findings to defined functions; Formation-Stage identifies emerging but not fully realized capabilities; and Evidence-Constrained indicates insufficient evidence for broader claims. These classifications neither rank countries nor establish region-wide Systemic Influence.

Sources. Author's synthesis of institutional, governmental, market, and operational evidence cited in the third column; full references are listed below. IMDA = Infocomm Media Development Authority; MDDI = Ministry of Digital Development and Information.

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3. Four Mechanisms of Regional Consequence

Aggregation joins complementary markets, manufacturing sites, cloud and data-centre locations, talent, public institutions, and service gateways in one regional economy. This creates demand and investment opportunities, but regional size becomes causally meaningful only when specific cross-border arrangements connect the functions of separate national nodes. Aggregation is an observed regional condition, not proof of joint mobilization.

Interoperability reduces the costs of connecting different national rules and technological systems. ASEAN's governance guide, AI roadmap, and digital masterplan support convergence in vocabulary, assurance practices, capacity building, and implementation priorities. Whether that convergence changes actual authorization, data transfer, procurement, or compatibility conditions must be assessed separately. Interoperability can improve the coupling of systems while enforcement remains national (ASEAN Secretariat, 2024, 2025, 2026a).

Option-set expansion is the potential strategic advantage of multiple cloud providers, hosting sites, model ecosystems, suppliers, and legal pathways. Its standard is more demanding than availability on paper. An alternative must maintain the function with acceptable performance, cost, legal status, integration time, and continuity. Without a demonstrated substitution pathway, diversification remains an option rather than verified Boundary Autonomy. There is therefore no analytically defensible ASEAN-wide autonomy score.

Mediation refers to ASEAN's potential role as a recurring institutional interface among external technological and governance agendas. ASEAN and the United States convened an AI Ministerial in May 2026; the ASEAN Secretary-General also presented the regional governance perspective at an AI-governance meeting in Shanghai in July. These events document participation across different external forums, not equidistance between powers or enforceable regional control (ASEAN Secretariat, 2026b, 2026c).

These mechanisms have different evidentiary status. Aggregation describes regional complementarity, not joint mobilization; interoperability combines formal commitments with selected operational connections; option-set expansion remains conditional on functional substitution; and mediation is observed mainly as recurring institutional engagement rather than demonstrated bargaining leverage. None alone passes the evidentiary threshold for region-wide Systemic Influence.

4. Overlap across U.S., Chinese, and Other AI Systems

A binary technological-bloc map would be misleading. U.S.-linked systems are prominent in hyperscale cloud, advanced accelerators, enterprise software, semiconductor partnerships, and selected security and strategic-technology relationships. China-linked systems contribute platforms, models, compute demand, infrastructure and equipment relationships, industrial value chains, and commercial integration. Japanese and Korean manufacturing and investment, European governance and certification models, Indian public-digital architectures, Gulf finance, and domestic firms add further layers. The mix changes by country and function; supplier nationality alone cannot establish an actor's effective control over each interface.

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The Philippines' industrial partnership proposals and Cambodia's multi-partner policy orientation illustrate differing approaches to external connection. Indonesia has explicitly described a middle course in global technology competition (Board of Investments, 2026; Ministry of Post and Telecommunications, 2026; Ministry of Communication and Digital Affairs, 2026a). Such strategies cannot be collapsed into a single pro-U.S./pro-China axis. Nor does multi-source procurement guarantee freedom of action when all suppliers depend on the same upstream accelerator, cloud-control layer, or legal authorization chain.

The policy question is whether multiple connections are functionally independent enough to preserve options. If two apparently competing services depend on the same critical authorization or software interface, supplier diversity may conceal concentrated control. Conversely, compatible services across several member states may improve switching capacity even without common ownership. ASEAN's importance lies partly in creating conditions under which national alternatives become usable rather than in eliminating the boundaries attached to them.

5. A Diagnostic Case: Malaysia–Singapore Advanced-Compute Overlap

The clearest current example is narrower than ASEAN as a whole. In July 2025, Malaysia announced a strategic-trade permit requirement for export, transshipment, and transit of high-performance AI chips of U.S. origin. The ministry expressly invoked Section 12 of the Strategic Trade Act 2010, a catch-all provision whose advance-notification obligations for unlisted items depend on knowledge or reasonable grounds to suspect a restricted use. This condition must be distinguished from a blanket prohibition. On 5 June 2026, Malaysian customs seized 72 server units containing advanced AI chips at Kuala Lumpur International Airport; officials subsequently described suspected unlicensed re-export and an ongoing investigation. The episode documents national implementation at a transit interface but does not independently establish the shipment's ultimate destination or a completed illicit diversion (Ministry of Investment, Trade and Industry, 2025; Reuters, 2026b).

Singapore presents a separate end-user-integrity interface. In February 2025 its authorities arrested three individuals who were subsequently charged with suspected fraud by false representation in server-related transactions. The March 2025 ministerial account described an independent domestic investigation and did not establish the ultimate destination of the equipment or a proven circumvention of U.S. export controls. Investigative action and criminal charges should not be coded as a final finding of guilt or export-control evasion, nor as evidence of a joint Malaysia–Singapore controller (Ministry of Home Affairs, 2025). Separately, Reuters reported in March 2026 that ByteDance was seeking access to high-end NVIDIA chips through a Malaysia-hosted arrangement for services outside China. The report indicates an important foreign-hosted technological pathway; it does not establish its enduring reliability or the full legality and operation of every downstream use (Reuters, 2026a).

The case illustrates a bounded configuration: U.S.-origin accelerator technology and access conditions intersect with separately administered Malaysian and Singaporean legal interfaces and reported China-linked demand for third-country hosting. These observations concern distinct transactions and jurisdictions; no common supply chain or coordinated enforcement action is established. Overlap can increase the relevance of locally held boundary rights, but the supported inference remains a selected Southeast Asian advanced-compute overlap rather than a unitary ASEAN-wide compute network or a completed redistribution of AI power.

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6. Political Implications

First, political authority remains distributed even when ASEAN coordinates common practices. Procurement agencies, licensing bodies, data regulators, and infrastructure operators retain distinct implementation responsibilities. External partners therefore encounter a regional forum for consultation but different national participation conditions in practice. Repeated adoption of compatible procedures could eventually give ASEAN coordination wider effects, although no regional AI regulator or common enforcement authority is established here (ASEAN Secretariat, 2024, 2025, 2026a).

Second, the conventional choice between U.S.- and China-centered technological blocs understates the layered character of member-state relationships. Advanced accelerators, model services, cloud management, industrial production, commercial platforms, capital, and security cooperation do not necessarily follow the same external alignment. A government may engage different partners for different functions while retaining dependence on shared upstream systems. Multi-partner diplomacy is therefore not equivalent to technical independence, geopolitical equidistance, or freedom to switch a critical service under disruption (Ministry of Communication and Digital Affairs, 2026a).

Third, local jurisdiction becomes politically consequential precisely because technology and control rights are distributed. Malaysia's conditional strategic-trade requirements and documented customs seizure, together with Singapore's separate investigation and prosecution of alleged server end-user misrepresentations, illustrate the salience of national legal authority within globally connected advanced-compute supply chains. They do not establish a joint ASEAN enforcement regime, a shared transaction chain, or the final destination of the equipment. They show instead why international technology providers and external governments must account for distinct local authorization and implementation conditions (Ministry of Investment, Trade and Industry, 2025; Ministry of Home Affairs, 2025; Reuters, 2026b).

Fourth, uneven member-state capacity may shape who benefits from regional integration. Established gateways can capture more hosting, capital, technical services, and compliance activity, while newer and less infrastructure-dense systems may depend on externally managed services or on stronger regional partners. Common practices could lower entry costs and widen access, but they could also consolidate dependence if participation requires capabilities that some members cannot yet supply. Inclusion should therefore be evaluated by operational access, capacity transfer, and participation in rule implementation—not formal attendance alone.

Taken together, these implications point to a regional politics of selective coordination rather than inevitable bloc formation. External partners can compete and cooperate at different interfaces; member states can exercise bounded local authority without controlling the full technological stack; and ASEAN institutions can improve the compatibility of national choices without pooling them into a single power stock. Whether these changes produce durable region-wide effects remains an empirical question, not a conclusion of the present case evidence.

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7. Policy Priorities through 2030

Priority 1 — Turn regional AI guidance into verifiable interoperability. ASEAN bodies and member-state regulators should develop voluntary, modular reference practices for cross-border assurance, documentation, incident reporting, procurement evaluation, and data-governance coordination. They should measure whether participating institutions actually exchange compatible evidence and reduce duplicate compliance processes. The policy objective is usable interoperability, not an artificial uniform regulator.

Priority 2 — Measure nationally usable capacity rather than announced infrastructure. Governments should separate installed and operational compute, accessible compute hours, foreign-managed cloud services, nationally allocable capacity, and severe-disruption continuity. Joint regional reporting could use compatible definitions without requiring common ownership. Public procurement should disclose which entity controls service eligibility, scheduling, pricing, technical administration, and termination.

Priority 3 — Test substitution at critical interfaces. For public AI, healthcare, education, emergency services, and other consequential uses, participating institutions should periodically test migration among providers or deployment modes. Metrics should include time to switch, service quality after migration, legal compatibility, data portability, security revalidation, and achievable capacity during disruption. Merely contracting with multiple vendors is insufficient.

Priority 4 — Convert hosting and industrial investment into domestic learning. Compute and cloud investment agreements should be evaluated against operational employment and skills formation, local supplier participation, research and developer access, service-continuity obligations, and measurable domestic applications. Investment value, megawatts, or announced GPU purchases alone should not be presented as national AI capability.

Priority 5 — Preserve multiple external partnerships while distinguishing control rights. ASEAN convening should retain channels to U.S., Chinese, European, Indian, Japanese, Korean, and Gulf partners, but every critical partnership needs an interface map: who owns the asset, operates the service, administers the rules, authorizes users, can suspend access, and bears the cost of disruption. This clarifies which forms of diversification genuinely improve member-state options and which merely redistribute exposure.

A common implementation principle runs through all five priorities: coordination should **reduce avoidable incompatibility while preserving member-state responsibility and function-specific choices**. Smaller and newer members require access to technical assistance and shared templates so that interoperability does not become a new barrier to participation.

8. Three Conditional Pathways and Five Tests for 2030

Three trajectories are plausible rather than forecast outcomes. Under interoperable pluralism, regional guidance supports recurring cross-border functions, suppliers remain meaningfully substitutable, and member states retain differentiated partnerships. Under parallel expansion, cloud, data-centre, and AI-policy investments proliferate but systems remain administratively or technically disconnected; capacity grows without comparable gains in resilience or regional coordination. Under fragmented dependence, critical interfaces become concentrated or incompatible, and external restrictions or provider decisions force abrupt, costly adaptation.

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The difference can be assessed through five observable tests by 2030: (1) the number and functional significance of cross-border arrangements that are actually operating; (2) demonstrated portability or recovery of priority AI services after provider interruption; (3) transparent evidence of domestic value capture from hosted infrastructure; (4) interoperability of governance and compliance procedures without suppression of national experimentation; and (5) inclusion of lower-capacity members in operational, not merely ceremonial, regional programs. Positive results would strengthen the evidence for regionally consequential coordination. A claim of Systemic Influence would still require additional proof of persistent, sufficiently broad changes attributable to specified regional mechanisms.

9. Limitations

The assessment is constrained by uneven public visibility. Governments, firms, and providers disclose different levels of detail about operational compute, contractual control, data handling, security interfaces, and service continuity. Observed institutional activity is consequently easier to document in some member states than in others. An Evidence-Constrained classification records insufficient verification for the specified function; it does not establish that relevant capacity is absent.

The causal evidence is also bounded. Regional documents demonstrate coordination agendas, not necessarily cross-border changes in actual admission, interoperability, or service continuity. Hosting, announced investment, and supplier diversity cannot by themselves demonstrate nationally mobilizable capacity or Boundary Autonomy. The Malaysia–Singapore case juxtaposes distinct national regulatory and investigative processes; it does not estimate regional market effects, establish the complete downstream path of the equipment, equate allegations with proven violations, or attribute the actions to a unified ASEAN controller.

No composite AI-power score, region-wide substitution test, severe-disruption resilience assessment, or causal estimate of systemic transformation is offered. The three pathways to 2030 are conditional scenarios rather than forecasts. Because classification stops on 30 September 2026, later regulation, infrastructure activation, supplier changes, or new evidence could alter individual role assessments. Claims of Systemic Influence require independent evidence of persistence, breadth, and credible attribution. These limits constrain the conclusions without erasing the narrower national and regional mechanisms already observed.

Conclusion

ASEAN's strategic importance in the emerging AI order is not that it can be treated as an eleven-member superstate or an exclusive technological bloc. It lies in the interaction of differentiated national systems, local boundary authorities, overlapping external technologies, and regional mechanisms that may connect them. Its present contribution is strongest as a distributed coordination and overlap environment, rather than an already demonstrated source of region-wide Systemic Influence. Its future contribution will depend on whether member states can convert that position into interoperable functions, credible alternatives, and durable institutional learning. The relevant measure of progress is not how many AI partnerships are announced, but which options remain usable when rules, suppliers, or operating conditions change.

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