



日本貿易振興機構(ジェトロ)

## フィリピン 2026 年 ASEAN 議長国： 優先経済成果と戦略的意義

Philippines 2026 ASEAN Chairmanship:  
Priority Economic Deliverables and Strategic Implications

### 【要約】

2026 年はフィリピンが ASEAN 議長国を務める。「共に未来を切り拓く」をテーマに、5 分野 17 項目の優先経済成果（PEDs）を掲げる。第 1 の柱は貿易連携の強化であり、半導体や重要鉱物の戦略構築、ASEAN 電力網の運用化、デジタル人材向けのモビリティビザ導入、ASEAN・カナダ自由貿易協定の交渉完了などを目指す。第 2 はデジタル変革の加速で、世界初の地域デジタル経済協定（DEFA）の署名や、域内決済接続の推進が含まれる。第 3 は中小企業開発で、支援センターを設立し能力向上や市場アクセスの円滑化を図る。第 4 は創造経済とイノベーションで、保健分野の AI 活用、知的財産評価の標準化、創造産業センター設置、宇宙科学協力の宣言を行う。第 5 は持続可能で包摂的な経済で、再生型農業、グリーン投資、金融包摂、レジリエントな観光に取り組む。

これらの施策は前年の成果を継承し、「ASEAN 共同体ビジョン 2045」の実現を目指すものだ。フィリピン議長国年では、米中対立によるサプライチェーン再編やデジタル化といった課題に対応し、ASEAN を世界第 4 位の経済圏へと引き上げるための足場を作る。

### 【免責条項】

本レポートで提供している情報は、ご利用される方のご判断・責任においてご使用下さい。ジェトロでは、できるだけ正確な情報の提供を心掛けておりますが、本レポートで提供した内容に関連して、ご利用される方が不利益等を被る事態が生じたとしても、ジェトロおよび執筆者は一切の責任を負いかねますので、ご了承下さい。

**Title:** Philippines 2026 ASEAN Chairmanship: Priority Economic Deliverables and Strategic Implications

**Country/Region:** ASEAN, Indonesia

**Written Date:** November 2025

---

### Overview

The Philippines assumes the ASEAN Chairmanship in 2026 under the theme "Navigating our Future, Together," with 17 Priority Economic Deliverables (PEDs) organized across five thematic areas: **Strengthening Trade Linkages** (7 deliverables), **Accelerating Digital Transformation** (2 deliverables), **Integrating ASEAN's MSME Development Agenda** (1 deliverable), **Leveraging the Creative Economy and Innovation** (4 deliverables), and **Advancing Sustainable and Inclusive Economies** (4 deliverables).

The 2026 PEDs build on Malaysia's 2025 chairmanship achievements, including the substantial conclusion of DEFA negotiations, adoption of AFISS, the ASEAN Minerals Development Vision 2045, and the enhanced ASEAN Power Grid MoU. The Philippines introduces priorities around AI integration, creative economy development, and connectivity enhancement.

### Operational Impact & Key Opportunities

Here are key relevant initiatives which the PED will accelerate. These initiatives will create specific high-value opportunities for Japanese companies.

Key PED Pillar	Key Deliverables	Operational Impact for Japanese Firms	Opportunity to Shape Regulation
Strengthening Trade Linkages	<b>Semiconductors Strategic Framework &amp; Critical Minerals Strategy</b>	Secure long-term supply chain position in high-demand materials (Nickel, Tin, Rare Earths) and high-value manufacturing.	Influence standards for <b>technology transfer</b> , <b>material processing</b> , and <b>ESG compliance</b> in nascent regional frameworks.
	<b>ASEAN Power Grid Operationalization</b>	Engage in multi-billion dollar energy infrastructure projects (renewable energy, power equipment) often financed by multilateral banks.	Shape technical standards, grid connectivity protocols, and <b>regional equipment specifications</b> .
	<b>Digital Talent Mobility Visa</b>	Expedite regional talent deployment, mitigating workforce shortages for technology-intensive operations.	Influence visa duration and professional criteria for the proposed <b>ASEAN Digital Nomad Visa</b> .

<b>Accelerating Digital Transformation</b>	<b>DEFA (Digital Economy Framework Agreement)</b>	Drastically reduce regulatory friction for cross-border digital trade, e-commerce, and data flows.	Engage early to influence implementation protocols for data localization and <b>digital service governance</b> . DEFA is a flagship 2026 agreement.
<b>Leveraging the Creative Economy</b>	<b>AI Regional Program (Health S&amp;T) &amp; Creative Industries Center</b>	Access collaborative R&D in high-tech fields (diagnostics, drug discovery) and expand the market for digital content/services.	Shape regional frameworks for <b>AI ethics, data sharing, and intellectual property (IP) valuation</b> in emerging sectors.
<b>Advancing Sustainable Economies</b>	<b>Investment Promotion Action Plan</b>	Benefit from harmonized, green investment incentives aligned with global ESG commitments.	Influence standards for <b>sustainable investment criteria and green incentive frameworks</b> .

**Immediate Priority Actions**

Japanese companies must pivot from monitoring to **active engagement** starting now. The non-binding nature of ASEAN agreements means **practical implementation is shaped bilaterally** (Government-to-Government and Company-to-Government) rather than through uniform regional mandates.

1. **Prioritize**. Map corporate strategy against high-alignment PEDs (Semiconductors, Critical Minerals, Energy, Digital Transformation).
2. **Engage Early**. Utilize bilateral channels to participate in sectoral dialogues. **Early engagement is critical** to position Japanese technology and quality standards (ESG, governance) as the foundation for new regional regulations and action plans.
3. **Position as Trusted Partner**. Articulate a commitment to technology transfer and ecosystem building, addressing ASEAN's capability gaps rather than focusing solely on market extraction.

The 2026 Chairmanship is a strategic window to **lock in a competitive advantage** by directly influencing the economic landscape for the next decade.