

## **ASEAN-EU 自由貿易協定： 積み上げ型戦略と地域間協定交渉への展望**

### **ASEAN-EU Free Trade Agreement: The Building-Block Strategy and the Path Toward Region-to-Region Negotiations**

#### **【要約】**

ASEAN と EU は、地域間 FTA を長期的な目標としつつ、まず各 ASEAN 加盟国との二国間協定を積み上げる「積み上げ型（ビルディングブロック）戦略」を進めている。2009 年に中断した地域間交渉の教訓から、現在はシンガポール、ベトナム、インドネシアなどとの個別協定を拡大しており、2027 年頃に十分な加盟国をカバーした段階で、地域間交渉の再開が検討される見込みである。デジタル、グリーン、サプライチェーンが主要分野であり、包括的戦略的パートナーシップへの格上げが節目となる。

#### **【免責条項】**

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# Title: ASEAN-EU Free Trade Agreement: The Building-Block Strategy and the Path Toward Region-to-Region Negotiations

Country/Region: ASEAN, Indonesia

Written Date: March 2026

## Lead Paragraph

An ASEAN-EU region-to-region Free Trade Agreement (FTA) has been [reaffirmed](#) as a "common long-term objective" by both sides and is [expected](#) to come into scope for formal review and possible negotiation launch after 2027, contingent on the EU completing its current wave of bilateral FTAs with individual ASEAN member states. EU Commissioner for Trade and Economic Security Maroš Šefčovič [stated](#) explicitly at the 21st ASEAN Economic Ministers-EU Trade Commissioner (AEM-EU) Consultation on September 25, 2025, in Kuala Lumpur, that the EU's long-term goal remains a region-to-region trade agreement with ASEAN, and that the bilateral agreements currently under negotiation are designed explicitly as building blocks toward that objective. EU Ambassador to ASEAN Sujiro Seam [confirmed](#) on January 26, 2026, that the EU will review the possibility of region-to-region negotiations after 2027, when the bilateral building block program is expected to reach sufficient coverage. The 2027 milestone carries particular political significance as it marks the [50th anniversary](#) of the ASEAN-EU Dialogue Partnership, which both sides have identified as the target date for a commemorative upgrade of the current ASEAN-EU Strategic Partnership to a Comprehensive Strategic Partnership.

## Background: The Long and Interrupted History of ASEAN-EU FTA Negotiations

The ASEAN-EU FTA has a prolonged and interrupted history that directly shapes the structure of the current approach:

- [July 2007](#): Region-to-region FTA negotiations formally launched – the first attempt at a bloc-to-bloc trade agreement of this scale
- [March 2009](#): Negotiations suspended after seven rounds, with both sides unable to bridge gaps on market access, palm oil, investment protection, and the heterogeneous development levels of ASEAN member states
- [2017-2019](#): The EU pivoted to a bilateral strategy, pursuing individual agreements with ASEAN members as a more tractable path; negotiations launched with Singapore (2014, concluded 2018, in force November 2019) and Vietnam (2012, concluded 2019, in force August 2020)
- [September 2022](#): The AEM-EU Consultation re-oriented the Joint EU-ASEAN Working Group on Trade and Investment (JWG-TI) away from direct regional negotiations and toward developing a Framework setting out the parameters of a future ASEAN-EU FTA. A stocktaking exercise on the prospects of resuming region-to-region negotiations had concluded that conditions were not yet in place for an immediate re-launch
- [2022 ASEAN-EU Summit](#): Both sides reaffirmed a future ASEAN-EU FTA as a common long-term objective in the Joint Leaders' Statement, establishing the current policy baseline

As of March 2026, the bilateral building-block program has reached the following status across ASEAN member states:

| AMS | Status |
|-----|--------|
|-----|--------|

|                                        |                                                                                                                                                                  |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Singapore                              | <a href="#">EUSFTA</a> in force November 2019; <a href="#">EU-Singapore Investment Protection Agreement</a> pending ratification                                 |
| Viet Nam                               | <a href="#">EVFTA</a> in force August 2020; <a href="#">EU-Vietnam Investment Protection Agreement</a> pending ratification                                      |
| Indonesia                              | <a href="#">IEU-CEPA</a> concluded September 23, 2025; <a href="#">IPA</a> concluded simultaneously; awaiting ratification; target entry into force January 2027 |
| Thailand                               | <a href="#">Relaunched</a> September 2023; 7 rounds completed; active negotiations                                                                               |
| Philippines                            | <a href="#">Resumed</a> October 2024; 4+ rounds completed; active negotiations                                                                                   |
| Malaysia                               | <a href="#">Resumed</a> January 2025; active negotiations                                                                                                        |
| Myanmar                                | Investment protection agreement negotiations <a href="#">on hold</a>                                                                                             |
| Brunei, Cambodia, Lao PDR, Timor-Leste | No active negotiations                                                                                                                                           |

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## The 2027 Horizon: Political Framing and Stated Objectives

The 2027 target is explicitly political in character, not a negotiating deadline for the region-to-region FTA itself. Commissioner Šefčovič [stated](#) at the ASEAN-EU Business Summit 2025 (September 25, 2025, Kuala Lumpur): "In 2027, we will mark 50 years of dialogue between the EU and ASEAN. As partners committed to a rules-based international trading system, we hope to celebrate this milestone by sealing the comprehensive strategic partnership, because our long-term goal remains a region-to-region trade agreement." The 2027 deliverable explicitly targeted is therefore the upgrade of the ASEAN-EU Strategic Partnership to a Comprehensive Strategic Partnership – the formal relationship elevation – not the FTA launch itself.

The EU's stated condition for region-to-region FTA review is the completion of a sufficient set of bilateral building blocks. EU Ambassador Seam [confirmed](#) in January 2026 that if negotiations with Malaysia, Thailand, and the Philippines are concluded by 2027, the EU would have "a pretty good coverage of ASEAN member states." At that point, the structural conditions for reviewing a regional negotiation would be met. The review of whether to formally launch region-to-region negotiations is therefore projected for 2027 or shortly thereafter, not the commencement of negotiations themselves.

Three priority areas for eventual ASEAN-EU cooperation were formally identified by leaders at the 2022 ASEAN-EU Summit and [reaffirmed](#) at the 21st AEM-EU Consultation in September 2025: the digital economy, the green transition, and resilient value chains.

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## Pre-Negotiation Architecture: The TIWP and JWG-TI

Ahead of any formal region-to-region negotiation, ASEAN and the EU have maintained a structured pre-negotiation engagement framework:

1. [ASEAN-EU Trade and Investment Work Programme \(TIWP\)](#)  
A biannual work programme governing priority cooperation areas. The 21st AEM-EU Consultation on September 25, 2025 endorsed the TIWP 2026-2027, the final work programme before the 2027 anniversary milestone, framed as building toward the strategic economic partnership for mutual prosperity. The TIWP 2026-2027 focuses on digital trade, green technologies and green services, and supply chain resilience.
  2. [Joint Working Group on Trade and Investment \(JWG-TI\)](#)  
The technical body tasked by the September 2022 AEM-EU Consultation with developing the Framework and parameters for a future ASEAN-EU FTA. At the 21st AEM-EU Consultation, the JWG-TI was specifically tasked with considering the results of the joint study on digital trade and exploring possible ways to advance ASEAN-EU cooperation in this field.
  3. [Joint Study on Digital Trade](#)  
Welcomed at the 21st AEM-EU Consultation (September 25, 2025), the study demonstrated the potential for future ASEAN-EU digital trade cooperation and will inform both the TIWP 2026-2027 and the eventual FTA parameters.
  4. **EU Support Programs**  
The [SCOPE Trade program](#) provides targeted capacity building and regulatory support; the TAF-GTEI (Technical Assistance Facility on Green Trade and Economic Integration) mobilizes EU expertise on green and circular economy to help catalyze ASEAN economic activity and accelerate decarbonisation efforts – [both identified](#) in the 21st AEM-EU Consultation as The ASEAN-EU Plan of Action 2023-2027, implementing the Strategic Partnership, governs the non-trade dimensions of the relationship in parallel. Commissioner Šefčovič's [stated](#) ambition at the ASEAN-EU Business Summit 2025 was to upgrade this to a Comprehensive Strategic Partnership at the 2027 commemorative summit.
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## What the Bilateral Building Blocks Reveal About the Future Regional Template

Because the region-to-region ASEAN-EU FTA has no public negotiating text or confirmed chapter structure, the content of the bilateral building blocks – particularly the most recent and most ambitious ones – provides the best available indication of the template the EU will bring to a regional negotiation. The [Indonesia-EU CEPA](#) (concluded September 23, 2025) and the [EU-Philippines FTA](#) (in active negotiation, four rounds completed) are the most instructive references.

1. **IEU-CEPA chapter structure** (concluded September 23, 2025)  
The IEU-CEPA is described by the European Commission as covering 21 areas of cooperation. Its confirmed chapters and provisions include:
  - **Trade in Goods:** Tariff elimination on 98.5% of tariff lines and close to 100% in value; 80% liberalized at entry into force; remaining over five years. Indonesia's 50% car import tariff phased out mostly over five years. EU sectors benefiting: agri-food, chemicals, machinery, automotive. Indonesian sectors benefiting: palm oil, textiles, footwear, seafood
  - **Rules of Origin:** Self-certification system to streamline eligibility; approximately 40% regional value content for most industrial goods; provisions for ASEAN cumulation (materials from other ASEAN countries counting toward product origin)

- **Services:** Expanded market access in telecoms, energy, manufacturing, and maritime sectors; streamlined licensing
- **Investment:** Investment Protection Agreement (IPA) concluded as a separate instrument. No ISDS provisions; voluntary mediation mechanism and state-to-state dispute settlement. Investor-state dispute settlement to be negotiated in a separate phase within three years of entry into force
- **Customs and Trade Facilitation:** Modern self-certification for rules of origin; streamlined procedures; cooperation between customs authorities
- **Digital Trade:** Full package – prohibition of customs duties on electronic transmissions; electronic authentication and signatures; consumer protection online; protection of computer source code; legal certainty for cross-border digital transactions
- **Intellectual Property:** 221 EU Geographical Indications protected; 72 Indonesian GIs protected
- **Trade and Sustainable Growth and Development (TSGD):** Binding and enforceable via dispute settlement, which is a significant departure from earlier EU FTA TSD chapters that relied on consultations only. ILO core labor principles (freedom of association, collective bargaining, elimination of forced and child labor, non-discrimination); Paris Agreement commitment; environmental protection. Trade remedies as last resort for ongoing breach of ILO conventions or Paris Agreement
- **Natural Resources and Raw Materials:** Dedicated provisions on critical raw materials (nickel, cobalt); commitment to remove export restrictions inconsistent with WTO obligations; Protocol on Palm Oil creating a platform for dialogue on regulatory developments and sustainability standards
- **Green Economy:** Zero tariffs on green goods from entry into force; liberalization of renewable energy services and investment; energy-efficient products covered
- **Gender:** Provisions on women's economic empowerment and gender equality consistent with relevant UN and ILO conventions
- **SMEs, Good Regulatory Practice, Transparency, Dispute Settlement:** Standard modern FTA chapters

## 2. EU-Philippines FTA active chapter structure (19 negotiating areas)

The EU-Philippines FTA, resumed October 2024, is negotiating across: Trade in Goods, Services, Digital Trade, Government Procurement, Intellectual Property Rights, Geographical Indications, Rules of Origin, Customs and Trade Facilitation, Sanitary and Phytosanitary Measures, Trade Remedies, Competition and Subsidies, State Enterprises, SMEs, Good Regulatory Practices, Transparent Policies, Sustainable Food Systems, Trade and Sustainable Development, Anti-Fraud Clause, Dispute Settlement and Exceptions. New areas explicitly compared to ASEAN's older EU FTAs: Government Procurement, Digital Trade, Energy and Raw Materials, and Trade and Sustainable Development.

Both the IEU-CEPA and EU-Philippines FTA share a consistent structural template that, based on the EU's stated building-block strategy, is the template the EU will seek to replicate at the regional level.

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### Alignment with Broader Frameworks

The prospective ASEAN-EU FTA sits within a broader framework of ASEAN-EU strategic engagement.:

- [ASEAN-EU Strategic Partnership \(2023-2027\)](#) — the political framework within which all pre-negotiation work is embedded; its upgrade to Comprehensive Strategic Partnership is the targeted 2027 milestone
- [ASEAN Community Vision 2045 / ASEAN 2045: Our Shared Future](#) — the overarching ASEAN planning horizon that frames ASEAN's interest in a high-standard, forward-looking external trade architecture
- [ASEAN Digital Economy Framework Agreement \(DEFA\)](#) — explicitly identified by EU Ambassador Seam as a prerequisite for deeper digital economy engagement at the regional level; the EU is waiting for DEFA's conclusion before advancing the digital trade pillar of the region-to-region FTA parameters
- [ASEAN-EU TIWP 2026-2027](#) — the active work programme advancing the three agreed priority areas (digital economy, green transition, resilient value chains) in the immediate pre-negotiation period
- [EU Global Gateway](#) — the EU's infrastructure and connectivity initiative active in ASEAN, providing investment context for green and digital transition cooperation that complements the FTA ambitions
- [Paris Agreement](#) — binding commitment under the TSGD chapter of the bilateral template, confirmed as enforceable through dispute settlement in the IEU-CEPA; this is the standard the EU will seek to replicate regionally

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## Final Assessment

The ASEAN-EU FTA is not imminent, but it is no longer merely aspirational. The EU's bilateral building-block strategy has advanced with remarkable speed since 2022: Indonesia concluded in September 2025 after nine years of negotiations; Thailand, Philippines, and Malaysia are all in active rounds with a target of completion by 2027. If even three of these four reach conclusion by the 50th anniversary, the EU will have active or concluded FTAs with six of ASEAN's ten member states, covering the vast majority of trade value between the two blocs. At that point, the structural impediment that caused the 2009 suspension — ASEAN's heterogeneous development levels making a single regional offer impossible to construct — will have been substantially pre-solved at the bilateral level.

The 2027 commemorative summit is the next significant milestone. The explicit goal stated by Commissioner Šefčovič is a Comprehensive Strategic Partnership elevation, not yet a formal FTA launch. But the precedent set by other EU external partnerships suggests that a CSP elevation typically accelerates the formal trade relationship. A formal scoping exercise or joint feasibility study for the region-to-region FTA could plausibly be launched at or shortly after the 2027 summit, with actual negotiations following in 2028 or later.

The content template is now visible. Based on the IEU-CEPA and EU-Philippines FTA models, a future ASEAN-EU FTA can be expected to contain: near-complete tariff elimination (98%+ of lines); a full digital trade chapter including prohibition of duties on electronic transmissions; a binding and enforceable Trade and Sustainable Development chapter with Paris Agreement and ILO core labor commitments; critical raw materials and natural resources disciplines; investment protection (likely as a separate IPA); and government procurement access. The TSGD chapter's enforceability (the most contested and precedent-setting feature of the IEU-CEPA) will be the most contentious element in a regional negotiation, given that ASEAN member states with differing regulatory capacities and implementation timelines will face more significant adjustment costs than Singapore, Vietnam, or Indonesia.

The structural challenge that will define the region-to-region negotiation is not replicated in any bilateral: the need for a single offer that reflects the diverse development levels and economic structures among ASEAN member states. The bilateral building blocks resolve this partially, as the EU can point to existing frameworks with advanced members as the Green/Tier 1 standard, while offering longer phase-ins and development cooperation support for CLMV members. Whether the EU will accept formalized differentiation within a single agreement – rather than insisting on uniform high standards – is the central unknown.

For Japanese companies and financial institutions, the ASEAN-EU FTA trajectory creates four areas of active strategic relevance:

1. **Standards convergence and regulatory alignment (ongoing 2026-2030):** The bilateral building blocks are already harmonizing ASEAN regulatory environments with EU standards on sustainability disclosure, labor rights, digital trade governance, and green goods classification. Japanese companies operating across ASEAN supply chains need to assess whether their own compliance postures (calibrated to ASEAN-level or Japan-domestic standards) will remain adequate as EU-standard bilateral FTAs enter force. The IEU-CEPA's entry-into-force target of January 2027 for Indonesia is the first compliance trigger.
2. **Critical raw materials and green supply chains (2026-2028):** The IEU-CEPA's critical raw materials chapter establishes EU-Indonesia preferential treatment for the minerals most critical to battery manufacturing. Japanese automotive and battery manufacturers sourcing Indonesian nickel and cobalt will need to assess how IEU-CEPA rules of origin and export restriction disciplines affect their supply chain structures relative to European competitors with preferential access. The ASEAN cumulation provision in the IEU-CEPA rules of origin is particularly relevant for Japanese manufacturers with multi-country ASEAN production networks.
3. **Digital trade and data governance (2027 onwards):** The EU's insistence on a full digital trade chapter in every bilateral, including prohibition of duties on electronic transmissions and computer source code protection, combined with DEFA's development, means that by 2027 ASEAN will have committed to digital trade frameworks with both ASEAN-internal and EU dimensions. Japanese platform companies and digital service providers may consider engaging in the DEFA process specifically to ensure the ASEAN digital trade architecture that the EU will eventually build upon is shaped with Japanese business interests in mind, not only EU priorities.
4. **Trade and Sustainable Development enforceability (systemic, 2026 onwards):** The IEU-CEPA is the first ASEAN-EU agreement with genuinely binding TSD enforcement via dispute settlement, including Paris Agreement compliance. As this model extends to Thailand, Malaysia, and the Philippines – and eventually to a regional agreement – it will establish the sustainability compliance baseline for operating in ASEAN markets that are EU-aligned. Japanese trading houses and manufacturers with ASEAN operations should treat IEU-CEPA's TSGD chapter as the leading indicator of the regulatory floor their supply chains will be held to as the bilateral network becomes regional.