

ASEAN-韓国 FTA（AKFTA）の改定：正式交渉開始

ASEAN-Korea Free Trade Agreement (AKFTA) Upgrade: Launch of Formal Negotiations

【要約】

ASEAN-韓国自由貿易協定（AKFTA）の高度化は、2025 年の首脳会議で正式に交渉開始が合意され、2026 年から本格交渉に入る予定である。既存の AKFTA は、2007 年以降に物品貿易、サービス、投資などの分野で段階的に整備され、2010 年に完全発効した。今回の高度化は、ASEAN・韓国間の貿易額拡大や韓国から ASEAN への投資増加を背景に、協定内容を現代的な経済環境に即したものに更新することを目的としている。

高度化交渉では、新たな重点分野として、デジタル貿易、サプライチェーン強靱化、グリーン経済、貿易円滑化などが盛り込まれる予定である。特に、デジタル分野の規定は初めて導入される。既存のパートナーシップ枠組みや地域協定とも連携し、ASEAN と韓国の経済関係を一層強化する狙いとしている。

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Title: ASEAN-Korea Free Trade Agreement (AKFTA) Upgrade: Launch of Formal Negotiations

Country/Region: ASEAN, Indonesia

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Lead Paragraph

At the 26th ASEAN-Republic of Korea (ROK) Summit [held](#) on October 27, 2025, in Kuala Lumpur, Malaysia — chaired by Prime Minister Dato' Seri Anwar Ibrahim and attended by Korean President Lee Jae Myung — ASEAN and the ROK announced agreement to commence AKFTA Upgrade Negotiations in early 2026, pending completion of respective domestic procedures. The announcement [followed](#) the endorsement of a Joint Scoping Paper (JSP) by the 22nd ASEAN Economic Ministers-Republic of Korea (AEM-ROK) Consultation on October 23, 2025. The AKFTA, which entered into force as a complete framework on January 1, 2010, is the second FTA ASEAN has concluded with any dialogue partner and the economic foundation of what became the ASEAN-ROK Comprehensive Strategic Partnership (CSP) established in October 2024.

Background: The Existing AKFTA

Korea became ASEAN's second dialogue partner to conclude a free trade agreement with the bloc. The legal architecture of the AKFTA was built in stages:

- [Framework Agreement on Comprehensive Economic Cooperation](#): signed May 13, 2005, Kuala Lumpur — the foundational document
- [ASEAN-Korea Trade in Goods Agreement \(AKTIG\)](#): signed August 24, 2006; entered into force June 2007
- [ASEAN-Korea Trade in Services Agreement](#): entered into force May 2009
- [ASEAN-Korea Investment Agreement](#): entered into force June 2009
- [AKFTA](#) in full effect: January 1, 2010

Implementing mechanisms include the AKFTA Implementing Committee and the Working Group on Economic Cooperation (AK-WGEC, established 2006), supported by the ASEAN-Korea Economic Cooperation Fund (AKEC Fund, established 2008). The AKEC Fund has financed capacity building, trade facilitation, MSME development, and the joint studies that laid the groundwork for the current upgrade.

As of 2024, two-way merchandise trade between ASEAN and the ROK [reached](#) USD 208.29 billion, a 5.8% increase from 2023. ROK FDI into ASEAN [reached](#) USD 7.6 billion in 2024, a 103.5% year-on-year increase. The ROK is ASEAN's [fifth-largest](#) trading partner; ASEAN is South Korea's [second-largest](#) investment destination.

Pre-Negotiation Process: Key Meetings and Documents

The path to the formal upgrade launch followed a structured multi-year preparatory process:

1. [AKFTA Implementation Committee Virtual Meeting](#) — June 10, 2025, Virtual
Held online with participation of all AMS and the ASEAN Secretariat. The meeting reviewed implementation status, discussed the upgrade, and updated progress on both joint studies. The studies assessed global trends, current policies, challenges, opportunities, and digital gaps

between ASEAN and Korea, and made concrete recommendations for the substantive review of the AKFTA.

2. [ASEAN-ROK CSP Plan of Action 2026-2030](#) – Adopted July 2025

The successor POA explicitly incorporates the AKFTA upgrade as a priority action (Paragraph 2.1.2), identifying it as a mechanism to intensify trade and investment facilitation alongside RCEP. It also calls for possible establishment of an ASEAN-Korea Standardization Joint Research Center (AKSRC) and ASEAN-Korea Standard Cooperation Network (AKSCN), in conjunction with the upgrade.

3. [22nd AEM-ROK Consultation](#) – September 24, 2025, Kuala Lumpur

Co-chaired by Malaysian Minister of Investment, Trade and Industry Tengku Datuk Seri Utama Zafrul Aziz and Korean Minister for Trade Han-Koo Yeo; Timor-Leste's Minister Filipus Nino Pereira attended as observer. The meeting confirmed that the joint studies on digital trade and new trade agendas complemented the Joint Review Study, offering concrete recommendations for the substantive review of the AKFTA. Malaysia's Minister Tengku Zafrul stated publicly after the meeting that scope had been agreed and would be announced to ASEAN leaders at the October Summit.

4. [AEM-ROK Consultation](#) – October 23, 2025, Kuala Lumpur

Endorsed the Joint Scoping Paper (JSP) for the AKFTA Upgrade, defining the agreed scope of negotiations immediately before the Leaders' Summit.

5. [26th ASEAN-ROK Summit](#) – October 27, 2025, Kuala Lumpur

Leaders formally announced an agreement to commence AKFTA Upgrade Negotiations in early 2026. The Summit also adopted the new CSP Plan of Action 2026-2030 and commended the ROK's ongoing support for the ASEAN-ROK electronic Certificate of Origin (e-CO) exchange platform, which supports seamless AKFTA implementation by enhancing trade efficiency and competitiveness.

Upgrade Objectives and Confirmed Scope

The 26th ASEAN-ROK Summit Chairman's Statement confirms the upgrade aims to ensure the AKFTA "continues to be commercially meaningful and relevant to businesses, trade facilitative, modern, forward-looking, and responsive to regional and global developments."

Based on confirmed source documents, the upgrade scope includes the following areas:

1. [Digital Trade](#)

A new chapter, as the existing AKFTA contains no provisions on digital trade. The joint studies commissioned at the 21st AEM-ROK Consultation assessed global trends, policies, challenges, opportunities, and digital gaps between ASEAN and Korea, and produced recommendations specifically for this chapter. Korea proposed the digital trade study in the context that the current AKFTA does not include content on digital trade as well as emerging trade sectors.

2. [New Trade Agendas](#)

Emerging sectors and cooperation frameworks referenced in the joint studies, including supply chain resilience and semiconductors – areas specifically discussed at the 22nd AEM-ROK Consultation – and green economy dimensions referenced across the CSP POA 2026-2030.

3. Trade Facilitation

The e-CO platform commended at the Summit signals continued emphasis on digital customs modernization. The CSP POA 2026-2030 also references possible standardization cooperation through the AKSRC and AKSCN.

The upgrade is explicitly embedded in the broader ASEAN-ROK Digital Economy Framework Agreement (DEFA) context and the ASEAN-ROK Digital Innovation Flagship Project (KADIF), which covers a joint data ecosystem, high-performance computing infrastructure, AI startup competition, ASEAN Digital Academy, and AI solutions development – programs that provide the digital infrastructure context for the upgrade's new chapter commitments.

Alignment with Broader Frameworks

The AKFTA Upgrade sits within a broader framework of ASEAN-ROK strategic engagement:

- [ASEAN-ROK Comprehensive Strategic Partnership \(CSP\)](#) – established October 2024; the AKFTA upgrade is a core economic deliverable [embedded](#) in the CSP POA 2026-2030
- [ASEAN Community Vision 2045 / ASEAN 2045: Our Shared Future](#) – acknowledged in the 26th Summit Chairman's Statement as the overarching anchor for ASEAN-ROK cooperation
- [RCEP Agreement](#) – referenced alongside the AKFTA upgrade in the POA 2026-2030 as a complementary, not competing, mechanism for trade facilitation
- [ASEAN Digital Economy Framework Agreement \(DEFA\)](#) – the digital trade chapter of the AKFTA upgrade is being developed in parallel with DEFA; both sides confirmed digital trade cooperation under the ASEAN-ROK DEFA arrangement
- [AKFTA Economic Cooperation Fund \(AKEC Fund\)](#) – institutional vehicle through which joint studies supporting the upgrade have been funded; continues to fund the upgrade process
- [Korea-ASEAN Digital Innovation Flagship \(KADIF\)](#) – five-pillar digital cooperation platform providing implementation infrastructure for the upgrade's digital commitments

Final Assessment

The AKFTA Upgrade is in active negotiations as of 2026, making it one of the most consequential trade processes currently open in ASEAN. Unlike AITIGA or ACAFTA, it comes to the table from a USD 208 billion existing trade base and a 35-year relationship with functioning institutions and a dedicated cooperation fund, which are conditions that typically enable faster negotiating progress. The political context also favors speed: the CSP elevation in October 2024 and the POA 2026-2030 adoption in July 2025 have created clear political momentum from the highest level, and the joint studies commissioned specifically to prepare for the upgrade are already complete.

The confirmed scope – digital trade, new trade agendas including supply chains and green economy, and trade facilitation – signals a modernizing upgrade rather than a renegotiation. The most structurally significant addition is the digital trade chapter, which will for the first time create binding AKFTA-level commitments on cross-border data flows, e-commerce, and digital trade facilitation, areas directly relevant to Korean technology companies and ASEAN digital economy operators.

On the probable content and ambition of the upgrade, the [Korea-Singapore FTA \(KSFTA\) upgrade](#) launched simultaneously on March 2, 2026 is instructive. The KSFTA upgrade was scoped across four areas: supply chains, green economy, trade facilitation, and aviation MRO. This is consistent with and more specific than the AKFTA scope statements, suggesting that Korea's upgrade template across its FTA portfolio currently prioritizes these same domains. The MOUs signed alongside the KSFTA upgrade – covering AI cooperation, civil nuclear energy, quantum technology, SMRs, and environmental satellites – further illuminate the strategic sectors Korea is actively embedding in its bilateral trade relationships in 2026. While MOUs of that bilateral specificity fall outside the multilateral AKFTA context, they indicate that when Korea upgrades trade frameworks, green energy infrastructure, AI, and supply chain security are the sectors driving the negotiating agenda.

For Japanese companies and financial institutions, the AKFTA Upgrade creates three areas of active concern:

1. **Supply chain competitive dynamics (2026-2027)** – Korea's deep integration in ASEAN's electronics, semiconductor, and automotive supply chains means the upgrade's supply chain commitments (and any accompanying tariff or rules-of-origin adjustments) could affect cost competitiveness among manufacturers operating in the same value chains, including Japanese companies. Japanese trading houses and electronics manufacturers with ASEAN operations should begin mapping how enhanced AKFTA preferential treatment affects their position relative to Korean counterparts. The semiconductor sector was specifically mentioned in the 22nd AEM-ROK Consultation discussions.
2. **Digital economy access (2026-2028)** – The new digital trade chapter will grant Korean ICT and platform companies structured preferential access in ASEAN's digital economy, operating in parallel with both DEFA and the KADIF programs. Japanese IT services and platform companies operating in ASEAN should monitor the chapter's provisions on cross-border data flows and market access, particularly given that ASEAN is simultaneously negotiating DEFA and the provisions will interact.
3. **Green economy and energy transition (ongoing 2026-2030)** – The upgrade's green economy scope aligns with areas where Korean industrial players – batteries, hydrogen, solar – directly compete with Japanese companies for ASEAN infrastructure and energy contracts. The Korea Development Bank-Seviora Holdings investment MOU announced alongside the KSFTA upgrade signals that Korean state-backed capital is now explicitly mobilized toward ASEAN growth industries. Japanese policy financial institutions should assess whether equivalent institutional vehicles provide competitive parity in green infrastructure finance across the region