日本貿易振興機構（ジェトロ）

ASEAN-インド物品貿易協定（AITIGA）の見直しおよび高度化に関する最新動向

Update on the Review and Upgrade of the ASEAN-India Trade in Goods Agreement (AITIGA)

【要約】

ASEAN-インド物品貿易協定（AITIGA）は、2010 年の発効後初の包括的改正が進められ、2026 年の妥結を目指して最終段階にある。原産地規則の見直し、市場アクセスの是正、非関税障壁の削減、貿易手続きのデジタル化、中小企業支援などを柱に、協定の簡素化と現代化を目指す。

特に原産地規則や関税自由化を巡り意見対立が続くが、サプライチェーン強化やインド・ASEAN 間の経済統合深化に向けた重要な交渉と位置付けられる。

Title: Update on the Review and Upgrade of the ASEAN-India Trade in Goods Agreement (AITIGA)

Country/Region: ASEAN, Indonesia

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Lead Paragraph

The ASEAN-India Trade in Goods Agreement (AITIGA), originally signed in 2009 and in force since January 2010, is undergoing its first comprehensive overhaul since entry into force. The AITIGA Joint Committee (JC), which oversees the review, formally launched negotiations in February 2024 after completing its Terms of Reference and Negotiating Structure in earlier sessions. As of early 2026, 10 formal Joint Committee rounds have been completed, and both sides have officially shifted their conclusion target from end-2025 to 2026. The 26th ASEAN-India Joint Cooperation Committee (February 13, 2026) reaffirmed both blocs' commitment to the "prompt conclusion of the AITIGA upgrade negotiations." ASEAN accounts for approximately 11% of India's global trade, with bilateral trade reaching USD 123 billion in 2024–25, though India's trade deficit with ASEAN exceeded USD 44 billion in FY2024–25.

Vision and Strategic Objectives

Overall Vision:

"A modernized, balanced, and mutually beneficial ASEAN-India Trade in Goods Agreement — more trade-facilitative, simpler, and reflective of current global trade practices — that corrects long-standing trade asymmetries, modernizes regulatory frameworks, and supports deeper supply chain integration between India and ASEAN."

Objectives as confirmed across ASEAN and Indian ministerial statements, the AITIGA Joint Committee, and ERIA research submitted to the Joint Committee:

- **Modernize Rules of Origin —** Replace the current uniform 35% local value addition requirement with product-specific rules; introduce self-certification options for trusted traders while tightening enforcement to address third-country transshipment concerns

- **Rebalance Market Access —** Address structural asymmetries in tariff liberalization commitments, with India seeking overall liberalization of 80% of tariff lines and a minimum of 70% at every individual ASEAN member state level

- **Reduce Non-Tariff Barriers —** Harmonize Sanitary and Phytosanitary (SPS) measures and Technical Barriers to Trade (TBT) to unlock mutual market access for agricultural products, pharmaceuticals, and engineering goods

- **Digitize Trade Facilitation —** Move toward paperless customs clearance, recognition of electronic trade documents, and mutual recognition of qualifications to reduce border delays and logistics costs

- **Support SME Participation —** Improve FTA utilization rates (currently identified by ERIA as low) through simpler certification processes, reduced documentation requirements, and more accessible compliance frameworks for MSMEs

- **Strengthen Supply Chain Connectivity —** Institutionalize supply chain resilience in critical sectors, with particular focus on integrating the semiconductor value chain connecting India's software and design capabilities with ASEAN's assembly, testing, and packaging nodes

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Key Focus Areas of the Upgrade

The AITIGA upgrade is not a renegotiation of the entire agreement from scratch but a targeted modernization focused on the following confirmed pillars. The final legal text is currently being finalized by the Joint Committee.

1. **Modernization of Rules of Origin (RoO)**
    - Overhaul of the existing uniform 35% local value addition threshold toward product-specific rules tailored to individual sector realities
    - Tightened anti-circumvention provisions to prevent third-country goods from being routed through ASEAN into India with minimal local processing
    - Introduction of self-certification mechanisms for trusted traders and risk-based audit approaches to reduce compliance burden on legitimate exporters, particularly MSMEs
    - India has pressed for stricter RoO enforcement as a core condition; several ASEAN member states have resisted, seeking predictability and flexibility for their export industries
    - ERIA's research submitted to the Joint Committee identified Rules of Origin complexity as a key driver of low AITIGA utilization rates among businesses on both sides

2. **Non-Tariff Barriers (NTBs)**
    - Harmonization of SPS measures to reduce divergence in food safety, plant, and animal health standards that currently restrict agricultural and food product trade
    - Alignment of technical standards and conformity assessment procedures under STRACAP to reduce duplication of testing and certification requirements
    - Targeted at unlocking trade in agricultural products, pharmaceuticals, and engineering goods where NTBs have been the primary obstacle rather than tariffs

3. **Digital and Paperless Trade Facilitation**
    - Commitments to modernize border operations through paperless customs clearance systems
    - Recognition of electronic trade documents across ASEAN and India
    - Advancement of single-window platform connectivity between India and ASEAN customs systems
    - Mutual recognition of digital qualifications and trade credentials

4. **Sector-Specific Supply Chain Connectivity**
    - Explicit focus on semiconductor value chain integration to connect India's software, design, and R&D strengths with ASEAN's established assembly, testing, and packaging infrastructure
    - Broader supply chain resilience provisions responding to global "China Plus One" manufacturing restructuring trends, positioning the ASEAN-India corridor as an alternative production and export base

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State of Negotiations: Sub-Committee Structure and Key Issues

The review is conducted through a Joint Committee supported by eight Sub-Committees (SCs), each responsible for a specific policy area. As of the 10th Joint Committee meeting (August 2025), all eight SCs have been active:

1. **SC on National Treatment and Market Access (SC-NTMA) —** Core discussions on tariff liberalization levels and schedules; India seeking 80% overall liberalization with 70% minimum per member state; tariff negotiations formally initiated but not yet concluded
2. **SC on Rules of Origin (SC-ROO) —** The most contentious area; India pressing for product-specific rules and tighter enforcement to prevent circumvention of Chinese goods through ASEAN transshipment; ASEAN exporters seeking predictability and self-certification mechanisms for trusted traders
3. **SC on Customs Procedures and Trade Facilitation (SC-CPTF) —** Digitalization of customs, advance rulings, and single-window platform connectivity
4. **SC on Standards, Technical Regulations and Conformity Assessment Procedures (SC-STRACAP) —** Mutual recognition and harmonization of standards
5. **SC on Sanitary and Phytosanitary Measures (SC-SPS) —** SPS provisions affecting agricultural trade
6. **SC on Legal and Institutional Issues (SC-LII) —** Legal architecture of the upgraded agreement
7. **SC on Trade Remedies (SC-TR) —** Safeguard and anti-dumping provisions
8. **SC on Economic and Technical Cooperation (SC-ETC) —** Capacity-building and cooperation provisions

Key Outstanding Issues:

The most substantive unresolved issues as of early 2026 are: tariff schedules and market access commitments; Rules of Origin, particularly product-specific rules and anti-circumvention provisions; and the overall balance of concessions between India and individual ASEAN member states. Indian officials have expressed concern over the pace of negotiations, citing differences in priorities among negotiating parties. ASEAN has maintained that the review should remain constructive and technical in spirit.

Alignment with Broader Frameworks

The AITIGA review is embedded within the broader ASEAN-India Comprehensive Strategic Partnership (CSP), elevated in 2023:

- Directly supported by the 26th ASEAN-India Joint Cooperation Committee (February 2026) and the 22nd ASEAN-India Summit (October 2025), both of which urged expedited conclusion
- Complements the ASEAN-India Trade in Services Agreement (2014) and the ASEAN-India Investment Agreement, which together form the ASEAN-India Free Trade Area (AIFTA)
- Aligns with India's Act East Policy and its Atmanirbhar Bharat (Self-Reliant India) industrial policy, which together shape India's insistence on tighter Rules of Origin and rebalanced market access
- Responds to ERIA's research findings on low FTA utilization rates, submitted formally to the AITIGA Joint Committee as a basis for the modernization agenda
- Connects to ASEAN's broader supply chain resilience agenda and the "China Plus One" investment trend reshaping manufacturing geography across Southeast Asia

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Final Assessment

The AITIGA upgrade has entered its decisive final stage. The February 2026 reaffirmation at the 26th ASEAN-India Joint Cooperation Committee represents the clearest signal yet that both sides are treating conclusion as imminent. The shift from a 2025 to a 2026 deadline reflects the genuine difficulty of the remaining issues, but not a collapse in political will.

The central challenge remains Rules of Origin. India's insistence on product-specific rules and tighter anti-circumvention enforcement is technically and commercially justified given the documented pattern of third-country goods entering India via ASEAN. However, several ASEAN member states (particularly those most integrated into Chinese manufacturing supply chains) have strong commercial incentives to resist overly restrictive rules. Finding RoO language that satisfies India's anti-circumvention concerns without disrupting ASEAN exporters' legitimate production networks is the make-or-break issue of the final stage. Self-certification for trusted traders, combined with risk-based audits, has emerged as a potential bridge, but consensus across ASEAN member states on specific product rules remains the hardest negotiating task.

For Japanese companies, the AITIGA upgrade carries direct and immediate relevance across three areas:

1. **Rules of Origin Compliance Across ASEAN Manufacturing (immediate: 2026) —** Japanese multinationals operating factories in Vietnam, Thailand, Malaysia, and Indonesia that use Chinese-sourced components and export to India must assess their exposure to new product-specific RoO before final rules are locked in. The semiconductor, electronics, automotive, and chemicals sectors face the highest risk of compliance disruption
2. **India Market Access via ASEAN Production (near-term: 2026–2027) —** A rebalanced agreement with higher tariff liberalization and cleaner RoO could make ASEAN-based production by Japanese companies a more viable and cost-effective route into India's large consumer and industrial market
3. **Semiconductor and Supply Chain Positioning (ongoing: 2026–2030) —** The explicit focus on ASEAN-India semiconductor value chain integration creates structural opportunity for Japanese firms — already deeply embedded in ASEAN's semiconductor ecosystem — to position themselves as connector investors bridging ASEAN packaging and assembly nodes with India's growing design and software capabilities

The window to engage trade ministries on Rules of Origin proposals before they are finalized is narrow. Companies with material India-ASEAN supply chain exposure should be actively monitoring the final negotiating stage and engaging through industry associations in both markets.