



Creative Technology in ASEAN and the Philippines

A Foresight Lab Policy Snapshot

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The CoSTAR Foresight Lab

Driven by the UK's leading Creative Industries experts, the [CoSTAR Foresight Lab](#) is researching the adoption, use and impact of new, emergent and convergent technologies in gaming, TV, film, performance and digital entertainment.

Our findings will inform research, development and innovation across the Creative Industries, including the R&D taking place through the convergent screen technologies and performance in real time (CoSTAR) programme, the UK R&D network for creative technology.

[CoSTAR](#) is a £75.6 million national R&D network of laboratories that are developing new technology to maintain the UK's world-leading position in gaming, TV, film, performance, and digital entertainment. Delivered by the UKRI Arts and Humanities Research Council, the programme is supporting new innovations and experiences that will enrich the UK's creative industries, economy, and culture. The network comprises the National Lab, the Realtime Lab, the Live Lab, the Screen Lab and the Foresight Lab. CoSTAR is funded through UK Research and Innovation's Infrastructure Fund, which supports the facilities, equipment and resources that are essential for researchers, businesses, and innovators to do groundbreaking work. You can find out more by visiting www.costarnetwork.co.uk.

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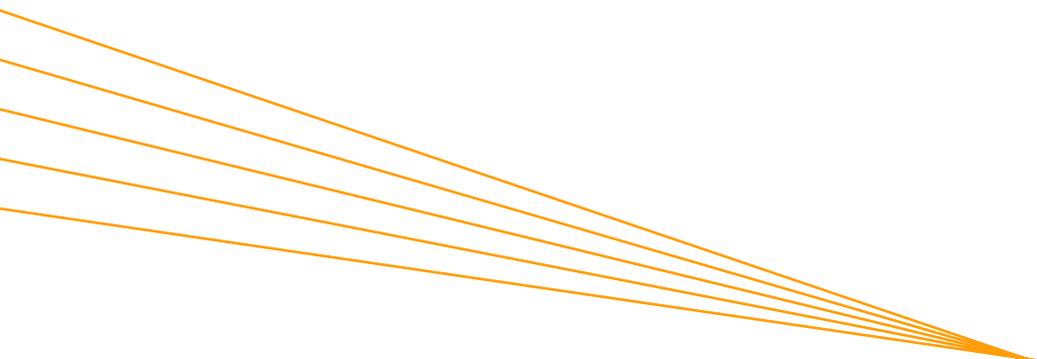
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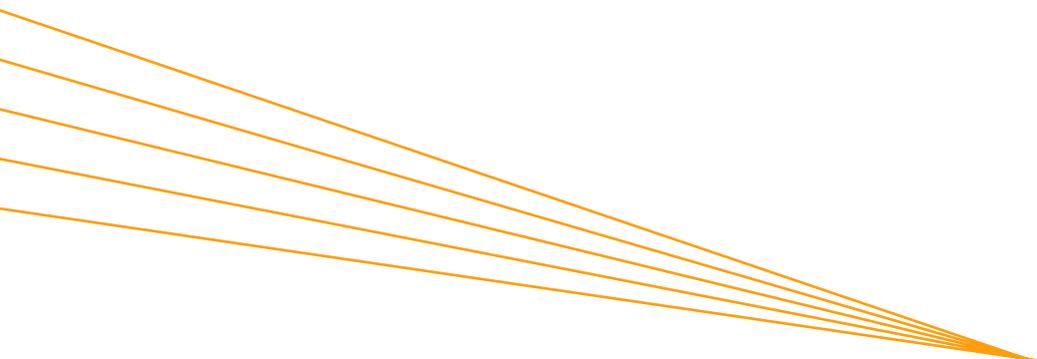
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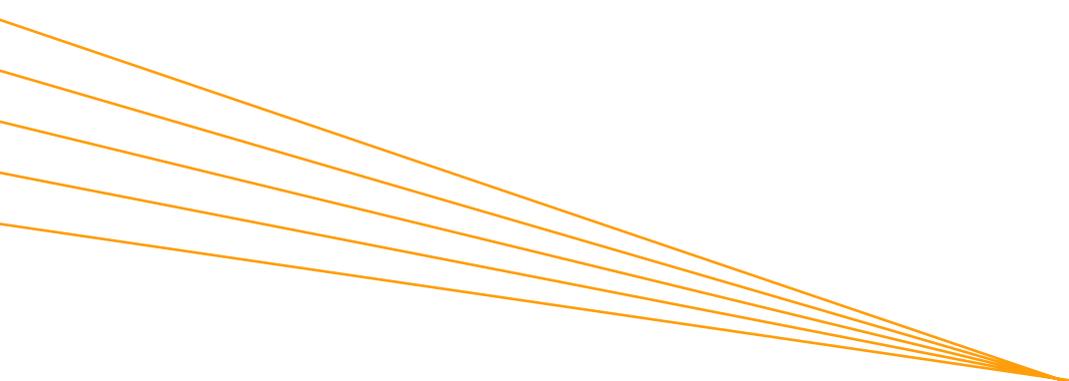
Introduction

This Policy Snapshot is one of several short studies being undertaken by the CoSTAR Foresight Lab, aiming to provide information and insights on policies being developed to support the adoption of technologies in the Creative Industries around the world. These provide a high-level overview of select key policy developments and initiatives related to film, television, games, performance and digital entertainment as they relate to convergent technology R&D and innovation – helping to build understanding of both international developments and opportunities for UK trade and collaboration.

The Policy Snapshots, conducted between June 2025 and September 2026, include India, Japan, Australia (published) and South Korea (forthcoming). They are complemented by regular *International Scans* undertaken in partnership with Olsberg·SPI, which aim to track industrial developments and emerging policy signals, and should be read in parallel.

This Policy Snapshot presents a high-level summary of policies and strategies related to the Creative Industries and convergent technology innovation for the Association of Southeast Asian Nations (ASEAN) and the Philippines. This snapshot study will present:

- Creative Industries policies and technology regulation in the ASEAN region;
- Creative Industries policies and technology regulation in the Philippines.



Glossary of key terms and definitions

This snapshot uses the terms ‘Creative Economy’, ‘Creative Industries’, ‘Cultural and Creative Industries’, in line with how they are defined and applied within ASEAN and individual ASEAN Member States (AMS), reflecting national policy frameworks and local contexts.¹ These terms, and the way they are used in this document, are outlined below.

<p>Creative Economy</p>	<p>This term is used throughout the document per the definition adopted by the ASEAN as follows:</p> <p><i>The ASEAN Creative Economy (ACE) is added value emanating from human creativity based on heritage, culture, the arts, design, science, technology, and innovation, that promotes sustainable, resilient, equitable and inclusive development by way of jobs, wealth and value creation. The ACE encompasses activities related to production, consumption, distribution and trade of intangible assets such as intellectual property rights and tangible assets such as goods and services.</i>²</p> <p>The Creative Economy is understood as an ecosystem comprising of Creative Industries or Cultural and Creative Industries, which are structured in diverse ways across the AMS.³</p>
<p>Creative Industries / Cultural and Creative Industries</p>	<p>The Philippines government defines Creative Industries as follows:</p> <p><i>trades involving persons, whether natural or juridical, that produce cultural, artistic, and innovative goods and services originating in human creativity, skill, and talent and having a potential to create wealth and livelihood through the generation and utilization of intellectual property (IP).</i>⁴</p> <p>Some policy documents use Creative Industries and Cultural and Creative Industries interchangeably.</p>

1 For reference, the [Annex](#) also provides an overview of terminology commonly used by the UK and international organisations. The Annex includes terms that CoSTAR Foresight Lab uses in all of publications, and that are based on the UK DCMS definition.

2 ASEAN (2025) ASEAN Creative Economy Sustainability Framework. Available at: <https://asean.org/asean-creative-economy-sustainability-framework/> P.3.

3 Sioson, E.P. and Tan Ghee Tiong, J. (2021) ASEAN at a creative turn. The ASEAN – Creative Economy: culture, identity and the business creativity. Available at: <https://asean.org/serial/the-asean-magazine/>

4 Republic Act No. 11904. (2022) An Act Providing for the Promotion and Development of the Philippine Creative Industries and Providing Funds Therefor. Cited from: DTI (2025) The Philippine Creative Industries Development Plan 2025-2034. Available at: <https://docs.google.com/forms/d/e/1FAIpQLSehFwTc5jau44osoi3BdN1fBe7XoDmKKqXiG02iZ8FRu0TdhGg/viewform> P.22.

ASEAN's Creative Industries and Creative Technology

Across ASEAN, the Creative Industries have emerged as an important driver of economic growth.⁵ In Thailand, for example, Creative Industries contributed USD 41.4 billion in 2023, accounting for 8% of GDP, highlighting their strong macroeconomic significance.⁶ Indonesia shows a similarly substantial contribution, with the 'Creative Economy' generating over USD 100 billion, or around 7.3% of GDP, while employing 26.5 million people in 2024 or approximately 18.3% of the national labour force, underscoring its role in large-scale employment creation.⁷ Malaysia's 'Cultural and Creative Industries' recorded USD 28.4 billion, contributed 6.8% of GDP in 2024, and employed about 4.7% of the workforce.⁸ The Philippines aligns closely with these high-contribution economies, with its 'Creative Economy' accounting for USD 33.9 billion, or 7.3% of GDP in 2024, and employing 15.4% of the national workforce, reinforcing the sector's importance for both economic output and jobs across ASEAN.⁹

Creative technology is driving significant change and opportunity across ASEAN, enabling innovative artistic practices and reimagining the region's rich cultural heritage.¹⁰ Supported by a range of government investments and rapid digital advancement, artists are increasingly using technologies such as AI, AR, and VR to create new narratives and immersive experiences.¹¹ Nevertheless, a number of challenges – including uneven digital access, resource constraints, and inconsistencies in regulatory frameworks – continue to affect opportunities for collaboration and sustainable growth, particularly in underserved communities.¹²

5 The availability of comparable creative economy statistics varies significantly across ASEAN countries. While Indonesia, Malaysia, and the Philippines have recent official figures on GDP share and employment, other AMS either do not regularly publish creative industry data, or it is not widely accessible in standard international datasets.

6 Creative Information Centre (2025) Available at: <https://data.cea.or.th/>

7 Kementerian Ekonomi Kreatif/Badan Ekonomi Kreatif Republik Indonesia. Available at: <https://ekraf.go.id/>

8 Department of Statistics Malaysia (2025) Cultural and Creative Satellite Accounts 2024. Available at: https://www.dosm.gov.my/portal-main/release-document-log?release_document_id=17944

9 Philippine Statistics Authority (2025) Philippine Creative Economy Satellite Account. Available at: https://psa.gov.ph/statistics/creative-economy?utm_source=chatgpt.com&_cf_chl.tk=Keb.2qWnx8vqFEaZuRq03MEyXW_BAv3a9bjzdfv2rY-1769181643-1.0.1.1-sxAnNSm4al5avZBHjAVZFXyUG3Rd0Illm8Y35i0Rdqq

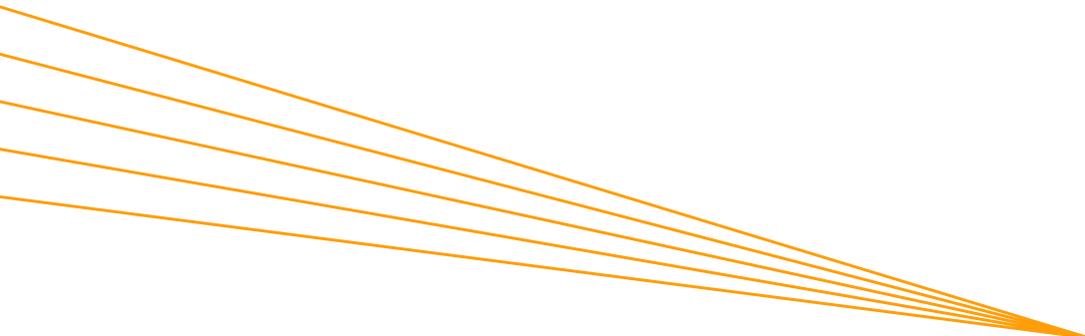
10 British Council (2024) Arts and Technologies in ASEAN: Interconnected parts. Available at: https://www.britishcouncil.org/sites/default/files/full_report_-_arts_and_technologies_in_asean_web.pdf

11 A number of AMS provide public funding instruments, including grants and subsidies, to stimulate the growth of creative technology activities. In Singapore, for instance, the Infocomm Media Development Authority (IMDA) supports the sector through initiatives such as the Media Development Grant (IMDA, 2023). Alongside public support, private capital plays a strong role in the region, with venture capital firms actively financing startups and emerging technology ventures. Key investors include Golden Gate Ventures and Gobi Partners, both of which have made substantial contributions to ASEAN's technology ecosystem (Golden Gate Ventures, 2023; Gobi Partners, 2023). In addition, multilateral institutions such as the World Bank and the Asian Development Bank (ADB) finance technology and innovation initiatives, including projects linked to the Creative Industries (World Bank, 2023; ADB, 2023).

12 British Council (2024) Arts and Technologies in ASEAN: Interconnected parts. Available at: https://www.britishcouncil.org/sites/default/files/full_report_-_arts_and_technologies_in_asean_web.pdf

Interdisciplinary approaches that merge art, science, and community engagement are increasingly common across ASEAN, while artists are also responding to social, political, and environmental challenges through their work.¹³ Although generative AI is expanding creative possibilities, limited access to advanced tools and concerns over artistic autonomy limit the adoption of technology-driven creative practice. The varying levels of intellectual property (IP) development across AMS present both a challenge and an opportunity for regional Creative Industries growth. As IP protection, monetisation, and management remain more advanced in some Member States than others, these disparities can limit the sector's collective potential. Strengthening cross-border recognition and enforcement of IP rights would therefore be a critical step toward creating a more cohesive and competitive industry ecosystem across the region.

13 British Council (2024) Arts and Technologies in ASEAN: Interconnected parts. Available at: https://www.britishcouncil.org/sites/default/files/full_report_-_arts_and_technologies_in_asean_web.pdf



ASEAN's Creative Industries Policies

Definition of the Creative Economy

ASEAN approaches the 'Creative Economy' as a development driver that integrates culture, technology, innovation, and inclusive growth. At the core of this approach is a broad, overarching definition to frame and guide the understanding of the 'Creative Economy' as follows:

The ASEAN Creative Economy (ACE) is added value emanating from human creativity based on heritage, culture, the arts, design, science, technology, and innovation, that promotes sustainable, resilient, equitable and inclusive development by way of jobs, wealth and value creation. The ACE encompasses activities related to production, consumption, distribution and trade of intangible assets such as intellectual property rights and tangible assets such as goods and services.¹⁴

This definition positions creativity not merely as cultural expression, but as an economic system encompassing the production, distribution, consumption, and trade of goods and services. It embeds sustainability, resilience, equity, and inclusivity as central outcomes, linking creative activity directly to jobs, wealth generation, and long-term development. The shared definition has the potential to enable AMS to align how creative activities are identified, measured, and understood. The definition would offer a common framework for countries to identify and collect data on relevant industries, enabling aggregation at the regional level.

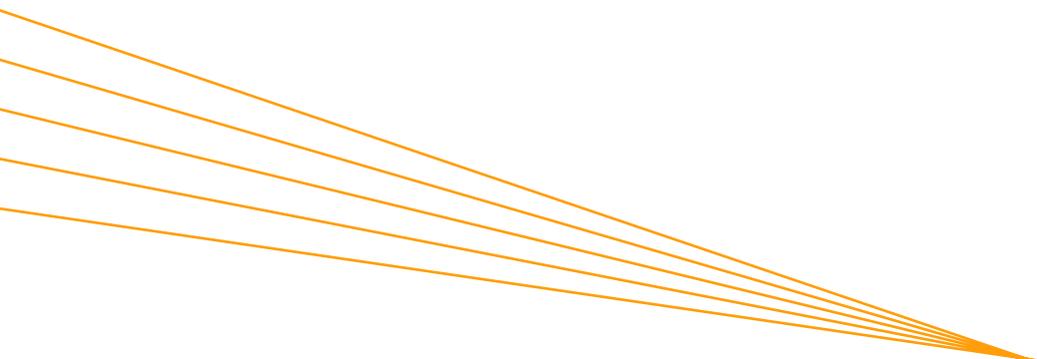
Across AMS, the 'Creative Economy' is understood and structured in diverse ways, reflecting different cultural, economic, and policy contexts rather than a single, uniform model.¹⁵ While AMS adopt their own classifications, such as Indonesia's 17 creative subsectors and Thailand's 15 creative subsectors, with expansion into areas like traditional medicine and wellness, ASEAN also draws on

14 ASEAN (2025) ASEAN Creative Economy Sustainability Framework. Available at: <https://asean.org/asean-creative-economy-sustainability-framework/> P.3.

15 According to the British Council study, conducting a regional perception poll on the ASEAN Creative Economy, it consists of the following industries:

- Fashion design and clothing technology
- Film, video and photography
- Visual arts and crafts Design (product, furniture, graphic, etc.)
- Performing arts (music, dance, theatre)
- Built environment (architecture, building design, landscape design, urban design and planning, interior design)
- Animation and video games
- Advertising and marketing
- Television and radio (broadcast and podcast)
- IT, software and computer services
- Gastronomy/culinary
- Literature and publishing

British Council.(2025). Regional Perception Poll on ASEAN Creative Economy. <https://doi.org/10.57884/S1NY-T022>



definitions developed by international organisations, including UNESCO. For instance, Creative Economy: culture, identity and the business creativity magazine, issued by the ASEAN Socio-Cultural Community Department of the ASEAN Secretariat, references UNESCO's classification, which frames the 'Creative Economy' as comprising 'Cultural and Creative Industries'.¹⁶ In this understanding, the 'Creative Economy' across different AMS generally includes core industries within the culture, arts, and media industries, such as arts and handicrafts, fashion, publishing, design, music, and film, alongside newer, innovation-driven activities such as gaming, streaming services, and knowledge-based industries. However, the absence of a shared classification framework across the ASEAN region has contributed to fragmented discourse. While Member States agree on the core essence of the creative economy, they vary significantly in their delineated scope. For example, in the Philippines, this ecosystem is commonly and somewhat broadly described as the 'Creative Economy', while the term 'Creative Industries' has a more specific meaning, referring to the nine domains identified under the *Philippine Creative Industries Development Act (RA 11904)*. Sub-components within these domains are typically described as 'Creative Sectors', which together encompass more than 70 distinct areas, illustrating both the richness and complexity of the national creative landscape.

Creative Economy as an engine of recovery and adaptation

ASEAN's framing of the 'Creative Economy' is closely linked to COVID-19 pandemic recovery and long-term adaptability. Adopted in 2022, *Siem Reap Declaration on Promoting a Creative and Adaptive ASEAN Community to Support the Cultural and Creative Economy*¹⁷ (referred to going forward as *the Declaration*) articulates creativity as an economic and social asset, emphasising the need for creative sectors to adapt through digital transformation, innovation, and entrepreneurship. *The Declaration* seeks to deepen regional cooperation by elevating the role of 'Cultural and Creative Industries' within ASEAN's development agenda. It advances a structured approach to developing the ASEAN 'Creative Economy' through regular policy dialogues, evidence-based research, and knowledge exchange on best practices. Capacity building and talent development are prioritised to strengthen the creative workforce, while outreach initiatives aim to raise public awareness of the social and economic value of 'Cultural and Creative Industries'.

16 Sioson, E.P. and Tan Ghee Tiong, J. (2021) ASEAN at a creative turn. The ASEAN – Creative Economy: culture, identity and the business creativity. Available at: <https://asean.org/serial/the-asean-magazine/>

17 ASEAN (2022) Siem Reap Declaration on Promoting a Creative and Adaptive ASEAN Community to Support the Cultural and Creative Economy. Available at: https://asean.org/wp-content/uploads/2022/07/Siem-Reap-Declaration_AMCAadopted_7July2022.pdf

Sustainability, inclusion, and cultural infrastructure

Adopted in May 2025, the *ASEAN Creative Economy Sustainability Framework*¹⁸ (referred to going forward as *the Framework*) provides a shared roadmap for policymakers and stakeholders to advance the 'Cultural and Creative Industries' through regional cooperation. It sets a common vision and strategic direction, promotes a culture-centric, inclusive and sustainable ASEAN-wide approach, identifies key opportunities and challenges for cross-sector collaboration, and offers recommendations to guide coordinated policy and programme implementation across the region.

The Framework is guided by ten principles that promote a multi-stakeholder, inclusive, and bottom-up approach to 'Creative Economy' development. These principles emphasise that the 'Creative Economy' extends beyond cultural policy or economic growth alone, addressing broader social, cultural, and environmental objectives. Key themes include the equal importance of cultural and physical infrastructure, the need for shared data and metrics, and the recognition of ASEAN's diversity as a strategic strength. *The Framework* stresses whole-of-government involvement, local-level implementation, community participation, environmental sustainability, and the value of cultural heritage in shaping the future. At its core, it also highlights the critical role of a robust IP system in empowering creators, fostering innovation, and supporting sustainable and inclusive regional growth.

Technology and regional competitiveness

Across ASEAN's long-term development agenda, the 'Creative Economy' is intertwined with digital and emerging technologies. The adoption of *ASEAN 2045: Our Shared Future* at the 46th ASEAN Summit in May 2025 positions the 'Creative Economy', enabled by digital and emerging technologies, as a new source of regional competitiveness, social cohesion, and inclusive growth.¹⁹ Within the ASEAN Economic Community Strategic Plan 2026–2030, the 'Creative Economy' is framed as an economic sector that acts as a catalyst for sectoral cooperation to advance regional integration. Among six Strategic Goals, the AEC Strategic Plan 2026-2030 envisions ASEAN as an enterprising, innovation-driven region capable of leveraging advances in science, technology, and digitalisation to deepen economic integration and strengthen its position in global value chains. The ASEAN 'Creative Economy' is linked to objectives such as accelerating digital transformation, strengthening innovation ecosystems, and advancing an inclusive and competitive business environment, particularly for micro, small, and medium-sized enterprises. The Strategic Plan also recognises the role of IP systems in unlocking creative value. The advancement of a fair, effective, and regionally coherent IP ecosystem is positioned as essential for protecting creative outputs, incentivising innovation, and enabling creative enterprises to participate meaningfully in regional and global markets.

18 ASEAN (2025) ASEAN Creative Economy Sustainability Framework. Available at: <https://asean.org/asean-creative-economy-sustainability-framework/>

19 ASEAN (2025) ASEAN 2045: Our Shared Future. Available at: <https://asean.org/wp-content/uploads/2025/05/ASEAN-2045-Our-Shared-Future.pdf>

Talent development and value creation

The ASEAN 'Creative Economy' is recognised as a key driver of value creation, particularly in 'strengthening of ASEAN's identity and shared civilisational values, and implement capacity-building initiatives and talent development programs to enhance the skills of cultural and creative workers.'²⁰ Policy priorities under the *ASEAN Socio-Cultural Community Strategic Plan 2026–2030*²¹ focus on capacity-building and talent development to enhance the skills, mobility, and international competitiveness of cultural and creative workers. This includes targeted initiatives to strengthen education and training institutions, promote the internationalisation of higher education in creative fields, and foster regional and global collaboration in sectors such as visual arts, performing arts, film, music, animation, and digital media. Technology plays a critical enabling role, particularly in expanding access to digital production tools, platforms, and global audiences. The plan also foregrounds IP rights as a socio-economic instrument. By promoting awareness and cooperation on IP frameworks, especially for cultural assets, traditional knowledge, and cultural expressions, ASEAN aims to ensure equitable benefit-sharing, protect cultural heritage, and link creative production to inclusive development. Youth engagement is another cornerstone of this pillar. The policy explicitly promotes the participation of ASEAN youth in 'Creative Industries', digital entrepreneurship, and leadership programmes through exchanges, scholarships, internships, and fellowships.

Social cohesion and regional integration

The ASEAN 'Creative Economy' is reframed as a tool for social cohesion, inclusive development, and equitable growth.²² By strengthening physical, institutional, and people-to-people linkages across the region, the *ASEAN Connectivity Strategic Plan 2026–2030*²³ positions the ASEAN 'Creative Economy' as a link between communities, markets, and identities. The ASEAN 'Creative Economy' is closely aligned with the plan's six strategic areas, such as sustainable infrastructure, smart and sustainable urban development, digital innovation, seamless logistics and supply chains, regulatory excellence and cooperation, and people-to-people connectivity, where creative technologies, digital content, and cultural production can enhance urban liveability, drive digital adoption, and expand cross-border collaboration.

20 ASEAN (2025) ASEAN 2045: Our Shared Future. Available at: <https://asean.org/wp-content/uploads/2025/05/ASEAN-2045-Our-Shared-Future.pdf> P. 116.

21 ASEAN (2025) ASEAN 2045: Our Shared Future. Available at: <https://asean.org/wp-content/uploads/2025/05/ASEAN-2045-Our-Shared-Future.pdf>

22 Under the ASEAN Connectivity Strategic Plan 2026–2030, please see: ASEAN (2025) ASEAN 2045: Our Shared Future. Available at: <https://asean.org/wp-content/uploads/2025/05/ASEAN-2045-Our-Shared-Future.pdf>

23 ASEAN (2025) ASEAN 2045: Our Shared Future. Available at: <https://asean.org/wp-content/uploads/2025/05/ASEAN-2045-Our-Shared-Future.pdf>

Advancing Science, Technology, and Innovation in ASEAN

Regional governance and coordination of science, technology and innovation

Since its early formation, ASEAN has placed science, technology, and innovation (STI) at the core of its regional agenda. This long-standing commitment was formalized with the establishment of the ASEAN Committee on Science, Technology and Innovation (COSTI) in 1970, which was created to deepen collaboration among AMS and accelerate collective progress in scientific and technological development. The committee's early work laid the institutional foundation for ASEAN's coordinated approach to STI.

A major point was the introduction of the first *ASEAN Plan of Action on Science and Technology* (APASTI) in 1985, which provided a structured framework for regional collaboration in research and innovation. This framework has since evolved through successive action plans, reflecting shifting priorities and global developments. Later iterations increasingly aligned STI cooperation with ASEAN's broader long-term vision, ensuring that scientific and technological advancement contributed directly to regional integration and sustainable growth.

Strengthening regional innovation capacity

The *APASTI 2016-2025*²⁴ marked a particularly important phase in ASEAN's STI development, expanding collaboration among AMS and international partners while aligning priorities with global trends such as clean energy, advanced digital technologies, food innovation, and skilled talent mobility. *APASTI 2016-2025* strengthened public-private partnerships, flagship programmes, and regional knowledge-sharing. Despite this progress, challenges remain, including uneven STI capacity, reliance on foreign technologies, infrastructure gaps, and the underrepresentation of women alongside limited attention to gender equality, disability, and social inclusion.

Building on these foundations, the *APASTI 2026-2035*²⁵ sets out a more ambitious vision to position ASEAN as an innovation-driven hub of scientific and technological excellence. It emphasises cross-border collaboration, stronger innovation performance, and strategic STI investments to support sustainable economic growth, competitiveness, and regional integration.

24 ASEAN (2016) ASEAN Plan of Action on Science, Technology and Innovation (APASTI) 2016-2025. Available at: <https://asean.org/book/asean-plan-of-action-on-science-technology-and-innovation-apasti-2016-2025/>

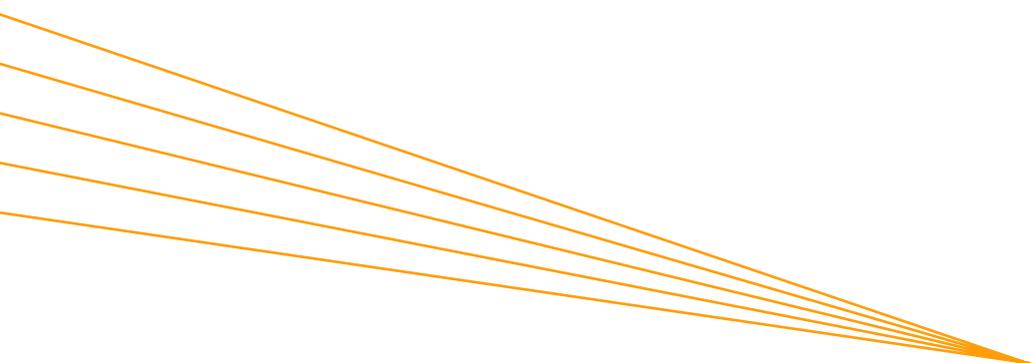
25 ASEAN (2025) ASEAN Plan of Action on Science, Technology and Innovation (APASTI) 2026-2045. Available at: <https://asean.org/book/asean-plan-of-action-on-science-technology-and-innovation-apasti-2026-2035/>

Advancing emerging technologies

A key priority of the *APASTI 2026-2035* is strengthening regional capacity in emerging technologies. ASEAN aims to expand its role in frontier fields such as AI, high-performance and quantum computing, biotechnology, and advanced analytics by increasing R&D investment and developing specialised talent through scholarships, training, and cross-border knowledge exchange. Collaboration among government, industry, and academia is encouraged to support adaptive technology governance. At the same time, ASEAN seeks to accelerate the adoption of advanced technologies across the region. Efforts focus on coordinated approaches to AI governance, innovation in ICT, and entrepreneurship linked to smart cities, big data, and analytics, while promoting the wider uptake of technologies such as the Internet of Things, cloud computing, VR/AR, additive manufacturing, and biotechnology in line with the principle of technology neutrality.

Strengthening collaborations

Another key priority of the *APASTI 2026-2035* is strengthening partnerships to future-proof the regional STI ecosystem. It emphasises policy coherence, cross-sector collaboration, and stronger links between the private sector and knowledge communities to support start-ups, accelerate commercialisation, and generate regionally relevant innovations. Central to this effort is deeper cooperation among universities, research institutions, and centres of excellence to advance skills development, technology transfer, and innovation. Key measures include improving regional innovation infrastructure, promoting joint research and innovation challenges, increasing access to funding opportunities, and creating digital platforms that connect start-ups with researchers and investors, while expanding opportunities for women and youth in technical and entrepreneurial fields.



Digital cooperation

The *ASEAN Digital Masterplan 2030 (ADM 2030)*²⁶ outlines a shared strategic framework to guide regional digital cooperation between 2026 and 2030, building on earlier initiatives such as the *ASEAN ICT Masterplan 2016-2020*²⁷ and the *ASEAN Digital Masterplan 2021-2025*²⁸. Responding to rapid technological change and growing demands for inclusive and sustainable development, *ADM 2030* aims to foster a secure, integrated, and trusted regional digital ecosystem that enables seamless cross-border interaction. It serves as a flexible, non-binding reference that supports AMS in advancing national digital priorities while encouraging voluntary collaboration, interoperability, and capability uplift across differing levels of digital readiness. Through eight interlinked desired outcomes spanning infrastructure, governance, innovation, industry transformation, sustainability, and digital skills, *ADM 2030* reinforces ASEAN's central coordinating role and positions digital transformation, including the responsible use of emerging technologies such as AI, as a key enabler of economic resilience, social inclusion, and long-term regional competitiveness. On the Creative Industries, the *ADM 2030* specifically outlines an Enabling Action towards promoting ASEAN 'Creative Economy' through digital platforms, cross-border content innovation, and support for creative startups and SMES in area such a gaming, media, culture and design.

AI governance: Key principles

ASEAN's approach to AI governance is characterised by pragmatism, regional alignment, and flexibility principles that promote soft, non-binding, and consensus driven regulation approach. The *2024 ASEAN Guide on AI Governance and Ethics*²⁹ (referred to going forward as *the Guide*) represents a collective effort by all AMS to establish a shared reference point for responsible AI development and deployment across the region. Rather than imposing legal obligations, *the Guide* functions as a voluntary framework intended to support interoperability among national AI policies while respecting differing domestic regulatory environments.

The Guide articulates a set of ethical principles, covering transparency, fairness, safety, robustness, human-centred design, data governance, and accountability, that all aim to build trust in AI systems and ensure their societal acceptability. These principles underscore ASEAN's recognition that responsible AI must extend beyond technical efficiency to address social values, individual rights, and responsibility structures. Operational guidance across the AI lifecycle translates these norms into practice, emphasising internal governance mechanisms, proportional human oversight based on risk, data quality management, and stakeholder engagement to mitigate harm and sustain public confidence.

26 ASEAN (2026) ASEAN Digital Masterplan 2030. Available at: <https://asean.org/wp-content/uploads/2026/01/ASEAN-Digital-Master-Plan-2030-final-2026.pdf>

27 ASEAN (2016) ASEAN ICT Masterplan 2016-2020. Available at: <https://asean.org/wp-content/uploads/2024/11/ASEAN-ICT-Masterplan-2020.pdf>

28 ASEAN (2021) ASEAN Digital Masterplan 2021-2025. Available at: <https://asean.org/wp-content/uploads/2021/09/ASEAN-Digital-Masterplan-EDITED.pdf>

29 ASEAN (2024) ASEAN Guide on AI Governance and Ethics. Available at: <https://asean.org/book/asean-guide-on-ai-governance-and-ethics/>

AI governance: Execution

Building on this foundation, the *ASEAN Responsible AI Roadmap (2025–2030)*³⁰ (referred to going forward as *the Roadmap*) represents a shift toward implementation and execution. Rather than restating ethical commitments, *the Roadmap* focuses on translating ASEAN's responsible AI principles into concrete, step-by-step actions that AMS can adopt according to their varying capacities and stages of digital development.

The Roadmap prioritises enabling conditions for responsible AI, such as public-sector capacity building, digital and data infrastructure, start-up ecosystems, and trusted data-sharing platforms, while emphasising multi-stakeholder participation and public trust. *The Roadmap* integrates responsible AI into ASEAN's broader digital and economic priorities, aligning with initiatives such as the *ASEAN Digital Masterplan 2025*³¹, the *ASEAN Digital Economy Framework Agreement*³² and the *ASEAN Digital Masterplan 2030*³³. Noting the rising urgency for humanity to shape the trajectory of AI, the ASEAN Leaders adopted *the Declaration on the Establishment of the ASEAN AI Safety Network* at the 47th ASEAN Summit in October 2025 in Kuala Lumpur, Malaysia, which is a crucial step towards institutionalisation of AI safety, ethics and governance principles.

Looking ahead, under the Philippines' Chairship, ASEAN is expected to adopt an *ASEAN Leaders' Declaration on AI-Powered MSME Growth*. This *Declaration* aims to establish a coordinated regional framework to systematically address the key barriers preventing MSMEs from adopting AI technologies, including constraints related to awareness, affordability, skills, and access to data and digital infrastructure, towards fully taking advantage of the enormous economic opportunity in ASEAN.

30 ASEAN (2025) *ASEAN Responsible AI Roadmap (2025-2030)*. Available at: <https://asean.org/book/asean-responsible-ai-roadmap-2025-2030>

31 ASEAN (2021) *ASEAN Digital Masterplan 2025*. Available at: <https://asean.org/book/asean-digital-masterplan-2025>

32 ASEAN (2023) *Framework for Negotiating ASEAN Digital Economy Framework Agreement*. Available at: https://asean.org/wp-content/uploads/2023/09/Framework-for-Negotiating-DEFA_ENDORSED_23rd-AECC-for-uploading.pdf

33 The Working Group consists of delegates from all AMS, collaborating to implement the Guide's recommendations and to support countries seeking to adopt its elements. Where relevant, the Group engages industry stakeholders to gather expertise, perspectives, and practical feedback.

Collaboration between ASEAN and the UK

Collaboration between ASEAN and the UK has the potential to unlock significant strategic value, bringing together complementary strengths in creativity, policy expertise, cultural exchange, and innovation to support inclusive and sustainable growth. As ASEAN's 'Creative Economy' continues to expand alongside rapid digital and technological change, partnerships with the UK offer opportunities to share best practices, build institutional capacity, and strengthen connections across research, innovation, exports and trade.

Initiatives such as the *ASEAN-UK Advancing Creative Economy* programme illustrate the potential of collaboration to support professional development, knowledge exchange, and research, while reinforcing regional priorities and strengthening ties between creative practitioners and policymakers.³⁴ The *ASEAN-UK Advancing Creative Economy* programme is an initiative of the UK Mission to ASEAN, co-funded by the UK's Foreign and Commonwealth Development Office and implemented by the British Council, in close coordination with the Senior Officials Meeting on Culture and Arts (SOMCA) and the ASEAN Secretariat. The programme aligns with the plan of action to implement the ASEAN-UK Dialogue Partnership and supports the ASEAN Socio-Cultural Community Blueprint 2025 and the ASEAN Strategic Plan for Culture and Arts 2016-2025.³⁵

34 [Gov.uk](https://www.gov.uk/government/news/asean-uk-advancing-creative-economy-launched-to-foster-collaboration-and-development) (2024) ASEAN-UK Advancing Creative Economy launched to foster collaboration and development. Available at: <https://www.gov.uk/government/news/asean-uk-advancing-creative-economy-launched-to-foster-collaboration-and-development>

35 Through Phase 1, the programme delivered two rounds of the Hybrid Creative Economy Policy Training, reaching nearly 1,000 participants. The Programme also commissioned three regional research studies and facilitated regional dialogue through key events, including the 1st ASEAN-UK Creative Economy Symposium in Kuala Lumpur. Discussions at the symposium informed the development of the ASEAN Creative Economy Sustainability Framework, which was subsequently adopted at the 46th ASEAN Summit in May 2025. During Phase 2, cooperation will be focused on policy influence and advocacy, while placing greater emphasis on supporting creative entrepreneurs and creative businesses in ASEAN.

The Philippines

The Philippines is one of ASEAN's fastest-growing economies, with average annual growth of about 6.4% from 2010 to 2019, driven by strong domestic demand, a resilient labour market, alongside rapid urbanisation, a growing middle class, and a young population.³⁶ The main engines of the country's economic expansion include the IT and business process management sector, along with retail, manufacturing, and financial services.³⁷

Despite this strong economic performance, structural weaknesses continue to constrain further growth and development, including in the Creative Industries and creative technology adoption. Gaps in digital infrastructure, fragmented policymaking, slow administrative systems, limited investment in R&D, and outdated regulatory frameworks hinder the Philippines' ability to fully capitalise on technological advances.³⁸ These constraints are compounded by uneven public-private coordination, weakening the ability of creative enterprises to scale, innovate, and compete globally. These limitations are reinforced by unequal access to affordable and reliable broadband, which restricts skills development, technological upskilling, and participation in creative digital production, particularly for independent creators and smaller firms outside major urban centres.³⁹

36 Gov UK (2024) UK Science & Innovation Network Summary: Philippines. Available at: <https://www.gov.uk/government/publications/philippines-uk-science-innovation-network-summary/uk-science-innovation-network-summary-philippines>

37 UNESCO (2025) Philippines: artificial intelligence readiness assessment report. Available at: <https://unesdoc.unesco.org/ark:/48223/pf0000393860?posInSet=1&queryId=cb72b22d-9dd3-44cd-9090-c4c89328a09c>

38 UNESCO (2025) Philippines: artificial intelligence readiness assessment report. Available at: <https://unesdoc.unesco.org/ark:/48223/pf0000393860?posInSet=1&queryId=cb72b22d-9dd3-44cd-9090-c4c89328a09c>

39 *Ibid.*

Overview of Creative Economy and Creative Technology

In 2024, the Philippines' 'Creative Economy'⁴⁰ reached USD 33.9 billion, reflecting an 8.7 % increase from the previous year and contributing 7.3% to the national GDP.⁴¹ The 'Creative Economy' spans a wide range of industries, including digital⁴² and audiovisual media, advertising and research services, publishing, music and performing arts, visual arts, traditional cultural activities⁴³, and cultural venues such as museums and galleries. Among these, symbols- and image-based activities⁴⁴ generated the largest economic share at one-third of total output (33%), followed by advertising and related services (21.4%), and digital interactive goods and services (20.6%).

Employment in the Philippines' 'Creative Industries' also rose steadily, reaching 7.5 million workers in 2024, or 15.4% of total national employment.⁴⁵ Traditional cultural expression accounted for the largest share of creative jobs (36.6%), followed by symbols-and image-related activities (29.5%) and advertising-related services (17.9%). These figures underscore the sector's role as a significant economic contributor and a major source of livelihoods.

Beyond its economic scale, the Philippines has emerged as a dynamic player in ASEAN's creative technology landscape, particularly in animation and new media.⁴⁶ Supported by a maturing talent ecosystem and international partnerships, the country has positioned itself as a competitive

40 The Philippines draws on the internationally adopted definition of the creative economy, such as the one suggested by the UNCTAD: the creative economy refers to knowledge-driven economic activities grounded in creativity, cultural expression, heritage, and innovation, encompassing fields such as design, film, fashion, music, animation, and digital media. According to the Philippine Statistics Authority, the creative economy consists of the following industries: Audio and audiovisual media activities; Digital interactive goods and service activities; Advertising, research and development, and other artistic service activities; Symbols and images and other related activities; Media publishing and printing activities; Music, arts and entertainment activities; Visual arts activities; Traditional cultural expression activities; and Art galleries, museums, ballrooms, conventions and trade shows, and related activities. See at: Philippine Statistics Authority (2025) Philippine Creative Economy Satellite Account. Available at: <https://psa.gov.ph/statistics/creative-economy?utm>

41 Philippine Statistics Authority (2025) Philippine Creative Economy Satellite Account. Available at: <https://psa.gov.ph/statistics/creative-economy?utm>

42 Digital interactive goods and service activities include manufacturing, renting, trading of computers, software, programs, mobile applications, and electronic games.

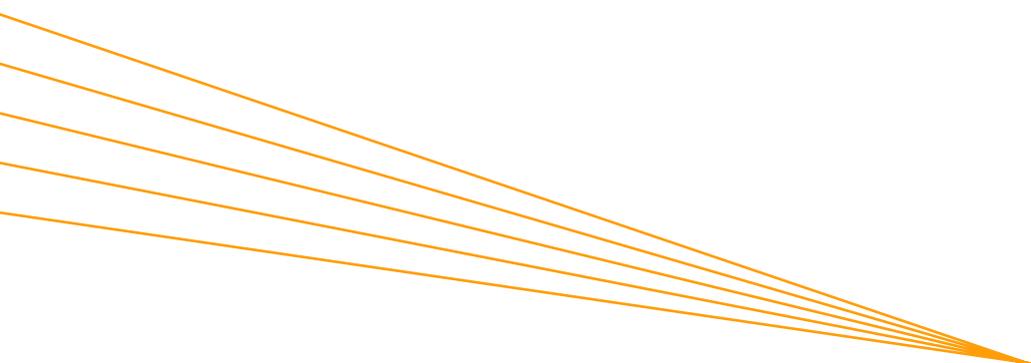
43 Traditional cultural expression activities are related to customs, practices, traditions, culture, heritage including arts and crafts, gastronomy, culinary practices, cultural festivals, and celebrations.

44 Symbols and images and other related activities include manufacturing, renting, trading of symbols and images in textiles, garments, footwear, furniture, jewellery, fashion and accessory, toys, etc.

45 *Ibid.*

46 British Council (2024) Arts and Technologies in ASEAN: Interconnected parts. Available at: https://www.britishcouncil.org/sites/default/files/full_report_-_arts_and_technologies_in_asean_web.pdf

hub for high-quality digital content production. These strengths are reinforced by policy and institutional frameworks that actively support industry development and global engagement. Government initiatives, including its international film production incentive, the *Film Location Incentive Program* and various international film trade co-production agreements, encourage international collaboration and content export, while a robust IP regime, led by the Intellectual Property Office of the Philippines, provides critical protection for creators and investors.



Creative Industries Policies

The definition of the Creative Industries

The Philippine government defines 'Creative Industries' as follows:

trades involving persons, whether natural or juridical, that produce cultural, artistic, and innovative goods and services originating in human creativity, skill, and talent and having a potential to create wealth and livelihood through the generation and utilization of intellectual property (IP).⁴⁷

This definition positions 'Creative Industries' not only as forms of cultural expression, but also as drivers of sustainable livelihoods and economic growth. Reflecting this broad conception, the Philippine government recognises nine 'Creative Industries' domains, ranging from digital and audiovisual media to traditional cultural expressions and cultural sites.⁴⁸ These domains capture

47 Republic Act No. 11904. (2022) An Act Providing for the Promotion and Development of the Philippine Creative Industries and Providing Funds Therefor. Cited from: DTI (2025) The Philippine Creative Industries Development Plan 2025-2034. Available at: <https://docs.google.com/forms/d/e/1FAIpQLSehFwTc5jau4osoi3BdN1fBe7XoDmKKqXiG02iZ8FRu0TdhGg/viewform> P.22.

48 According to the Philippine Creative Industries Development Act, Creative Industries include nine domains, each consisting of various creative sectors:

1. Audiovisual Media: Film; Broadcasting Content and Production; Animated Film Productions; Vlogs; Recorded Music; Music Score; Motion Graphics; 2D and 3D; Design Technology; Animatronics; Composition for recording; Podcasts; Entertaining Audio or Audiovisual Material; Content developed for educational purposes or Edutainment Content.
2. Digital Interactive Media: Software and Mobile Applications; Video Games; Computer Games; Digital Content Streaming Platforms; Mobile Games; Virtual, Augmented, or Mixed Reality Games; Digitized Creative Content; Web Design and User Experience/ User Interface.
3. Creative Services: Advertising and Marketing; Creative Research and Development; Cultural and recreational services; Live creative experience; Communication and Graphic Design.
4. Design: Architecture; Urban Landscaping; Environmental Planning; Interior and Spatial Planning; Product Design; Fashion and Accessory making; Textile Development; Furniture making; Jewellery making; Toy making.
5. Publishing and Printed Media: Books and Textbooks; Blogs; Comics; Graphic Novels; Physical Print; Editorial and Commentaries; Magazines; Newspapers; Other Published Media.
6. Performing Arts: Live Music; Theatre; Musical Theatre; Dance; Live Events; Opera; Circus; Spoken Word; Puppetry; Cinema and Movie Theatre.
7. Visual Arts: Paintings; Drawings; Sculptures; Photography; Antiques; Performance Arts; Art Toys; Collages; Other decorative materials.
8. Traditional Cultural Expressions: Arts and Crafts; Food and Gastronomy; Culinary Practices; Cultural Festivals; Celebrations; Cultural Education.
9. Cultural Sites: Galleries and Museums; Libraries; Creative Cities; Performing Arts Venues; Cultural Exhibitions; Heritage Sites.

Cited from: DTI (2025) The Philippine Creative Industries Development Plan 2025-2034. Available at: <https://docs.google.com/forms/d/e/1FAIpQLSehFwTc5jau4osoi3BdN1fBe7XoDmKKqXiG02iZ8FRu0TdhGg/viewform> P. 50.

both heritage-based and technology-enabled 'Creative Industries', with each comprising multiple creative sectors. This classification draws largely on United Nations Conference on Trade and Development (UNCTAD)'s *Creative Economy Report*⁴⁹ and has been subsequently adapted to reflect local contexts and evolving practices.

Establishing the Creative Industries governance framework

The enactment of the *Philippine Creative Industries Development Act (PCIDA)* in 2022 marked a structural turning point in Creative Industries governance.⁵⁰ Prior to the Act, policy support for the sector was fragmented across agencies, limiting coordination and long-term impact. *PCIDA* addressed this gap by establishing a unified institutional framework centred on the Philippine Creative Industries Development Council (PCIDC), led by the Department of Trade and Industry (DTI). The Council is mandated to design and implement a long-term development plan, aligning Creative Industries growth with national economic priorities and international development objectives.

PCIDA introduces a comprehensive support system that combines regulatory recognition with targeted enabling mechanisms. Central to this framework is the Creative Industries Development Fund, which finances research and development, trade promotion, human capital development, and welfare support for creative workers and enterprises. This reflects a shift from ad hoc assistance toward systematic ecosystem-building, recognising that Creative Industries growth depends on skills development, access to finance, innovation capacity, and market connectivity.

Asia's premier creative hub by 2030

Building on the foundations established by *PCIDA*, *The Philippine Creative Industries Development Plan 2025-2034 (the Plan 2025-2034)*⁵¹ outlines strategies to support Creative Industries through capacity building, technological integration, IP protection, and fostering creative clusters. The PCIDC has been tasked with leading the execution of *the Plan 2025-2034* and reviewing it every three years.

The Plan 2025-2034 articulates a long-term vision of positioning the Philippines as Asia's premier creative hub by 2030, with Creative Industries contributing significantly to GDP growth, job creation, and social inclusion by 2034. The policy roadmap adopts a phased approach: strengthening institutional capacity and digital transformation by 2028; achieving global recognition and leadership in culture-led innovation by 2030; and delivering broader socioeconomic transformation over the longer term. This sequencing underscores an emphasis on foundational capacity before scale and global competitiveness.

49 United Nations Conference on Trade and Development (2008) *Creative Economy Report 2008: The Challenge of Assessing the Creative Economy toward Informed Policy-Making*. Available at: <https://unctad.org/publication/creative-economy-report-2008-challenge-assessing-creative-economy-towards-informed>

50 DTI (2025) *The Philippine Creative Industries Development Plan 2025-2034*. Available at: <https://docs.google.com/forms/d/e/1FAIpQLSehFwTc5jau4osoi3BdN1fBe7XoDmKKqXiG02iZ8FRu0TdhGg/viewform>

51 DTI (2025) *The Philippine Creative Industries Development Plan 2025-2034*. Available at: <https://docs.google.com/forms/d/e/1FAIpQLSehFwTc5jau4osoi3BdN1fBe7XoDmKKqXiG02iZ8FRu0TdhGg/viewform>

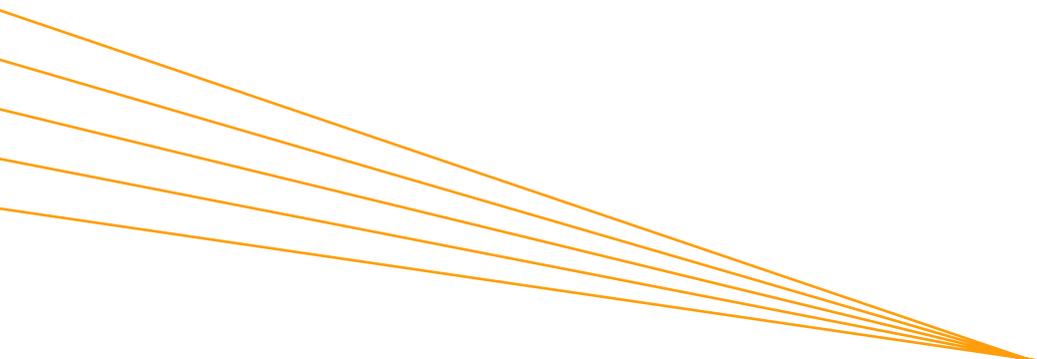
The Philippines' industrial strategy is structured around five priorities: creative clustering, innovation-driven entrepreneurship, place-based regeneration, international collaboration, and talent development. These priorities are supported through *the Plan 2025-2034*'s five corresponding pillars (also referred to as the B.E.A.M.S. Strategy) focused on:

- building creative ecosystems,
- empowering creative workforce,
- accelerating inclusive innovation,
- mobilising financial support, and
- seizing market opportunities.

Rather than pursuing short-term gains, *the Plan 2025-2034* adopts a long-term view and an innovation-led approach to building resilient, interconnected ecosystems that integrates Creative Industries, technology, and inclusive development.

The Film Development Council of the Philippines (FDCP), the national agency responsible for promoting and developing the country's film industry, published its own 10-year roadmap for the Philippine film sector, *The Big Picture: Roadmap for the Future of the Film Industry of the Philippines*.⁵² The roadmap provided a detailed SWOT assessment of the film sector and a series of recommendations and actions to improve production infrastructure, workforce capacity, incentives and public funding, audience and exhibition development, and more 'film-friendly' policies.

52 Film Development Council of the Philippines & Olsberg SPI (2025) *The Big Picture: Roadmap for the Future of the Film Industry of the Philippines*. Available at: <https://fdcp.ph/publications>



Technology and Innovation Policies

Science and innovation progress

Progress in science and innovation in the Philippines remains uneven, reflecting persistent gaps in investment and capacity. In the 2025 Global Innovation Index⁵³, the country ranked 50th out of 139 economies and placed third among lower-middle-income countries, behind India and Vietnam.⁵⁴ This standing highlights moderate innovation performance but also underscores structural limitations, particularly in research intensity. Gross domestic expenditure on R&D stood at just 0.32% in 2018, far below the global average of 2.04% and the commonly cited 1% benchmark for sustained innovation-driven growth.⁵⁵

Public funding trends further illustrate these constraints. Government budget allocations for R&D declined sharply from USD 978 million in 2018 to USD 68.5 million in 2024, signalling reduced state capacity to drive long-term research agendas.⁵⁶ Targeted investments in emerging technologies remain modest: for example, government support for AI amounted to USD 5.96 million, indicating limited engagement with strategic frontier technologies.⁵⁷ Overall, R&D financing is largely borne by the private sector, which accounts for 61% of total R&D expenditure, compared with 39% from government sources.⁵⁸

At the same time, the Philippines' digital economy is playing an increasingly important role in national output, accounting for 8.4% of GDP, or USD 34.8 billion, in 2023.⁵⁹ Digital-enabling infrastructure investments reached USD 28.9 billion, with economic value concentrated in telecommunications, professional and business services, and electronics manufacturing.⁶⁰ As a significant exporter of computers, scientific instruments, and electrical machinery, the country demonstrates strength in digital production and services. However, the contrast between a rapidly expanding digital economy and comparatively weak public R&D investment suggests a structural imbalance in which short-term, market-driven growth outpaces the development of a robust, publicly supported innovation ecosystem.

53 The Global Innovation Index, published by the World Intellectual Property Organization, ranks 139 economies based on their innovation capacity and performance. Widely used as both a benchmark and a policy tool, the GII assesses innovation through indicators covering institutions, human capital, research, infrastructure, investment, knowledge creation and diffusion, and creative outputs. Its framework is structured around two sub-indices—innovation inputs and outputs—organized into seven pillars.

54 World Intellectual Property Organization (2025) Philippines ranking in the Global Innovation Index 2025. Available at: <https://www.wipo.int/gii-ranking/en/philippines>

55 *Ibid.*

56 UNESCO (2025) Philippines: artificial intelligence readiness assessment report. Available at: <https://unesdoc.unesco.org/ark:/48223/pf0000393860?posInSet=1&queryId=cb72b22d-9dd3-44cd-9090-c4c89328a09c> (p.28)

57 *Ibid.*

58 *Ibid.*: p.33

59 *Ibid.*: p.33

60 *Ibid.*: p.33

Pillars of long-term development

The Philippines' technology and innovation policy framework, as articulated in *the Philippine Development Plan 2023–2028 (PDP 2023–2028)*⁶¹, positions R&D, technology adoption, and innovation as central drivers of long-term economic growth, competitiveness, and social progress. Anchored in the context of rapid digital transformation, the policy agenda emphasises the generation of high-value knowledge and technologies that can move efficiently from research to market application. *The PDP* outlines four desired outcomes:

- strengthening basic R&D and knowledge creation;
- advancing market-driven R&D;
- scaling-up technology adoption, utilisation, and commercialisation;
- accelerating innovation and entrepreneurship.

At the core of this framework is an integrated view of R&D and innovation as a continuous pipeline, spanning basic research, applied development, and commercialisation. The government seeks to strengthen both ends of this continuum: expanding foundational knowledge creation while ensuring that research outputs are responsive to market needs and capable of scaling into viable products and services. This focus reflects a shift toward an ecosystem-based approach that links universities, public research institutions, industry, and entrepreneurs.

Commercialisation and entrepreneurial growth

The PDP 2023–2028 places strong emphasis on market-driven and customer-centred R&D. Mechanisms such as shared market intelligence platforms, stronger academia–industry collaboration, and the integration of creative arts and social sciences into science and technology initiatives are designed to ensure that innovation responds to real consumer and social needs. International collaboration and private-sector participation are actively encouraged to attract global expertise, investment, and best practices while adapting them to local contexts.

In *Pagtanaw 2050: The Philippine Science, Technology and Innovation Foresight*⁶², R&D, innovation, and technology commercialisation are framed as interconnected elements of a long-term STI ecosystem that is responsive to evolving industry needs, including those of the creative and digital sectors. The foresight study underscores the role of digital technologies and Information and Communications Technology as foundational enablers for achieving proficiency in STI, linking advances in areas such as blockchain, cognitive systems, robotics, quantum computing and emerging digital platforms to productivity, new business models, and value creation across industries. Higher education institutions are positioned as critical nodes within this ecosystem, tasked with knowledge generation and talent development, applied research, and industry-relevant innovation. Through an emphasis on experiential STEM education, interdisciplinary collaboration, and the translation of research into practical applications, *Pagtanaw 2050* envisions universities, research institutions, and industry working in closer alignment to support commercialisation pathways.

61 Department of Economy, Planning, and Development (2022) *The Philippine Development Plan 2023–2028*. Available at: https://pdp.depdev.gov.ph/wp-content/uploads/2022/12/12152022_PDP-2023-2028-Abridged-Version.pdf

62 National Academy of Science and Technology Philippines (2021) *Pagtanaw 2050: The Philippine Science, Technology and Innovation Foresight*. Available at: <https://transactions.nast.ph/?p=1792>

AI governance approach

The Philippines' approach to AI governance is anchored in its evolving *National AI Strategy Roadmap (NAISR)*, with the launch of *NAISR 2.0* in 2024 marking a significant step toward more structured, forward-looking AI policymaking.⁶³ Led by the Department of Trade and Industry (DTI), *NAISR 2.0* positions AI as an economic catalyst and a governance challenge, embedding technological ambition within the country's broader development agenda. Central to the *NAISR 2.0* strategy is the aspiration to establish the Philippines as a Centre of Excellence in AI R&D, while ensuring that AI adoption is guided by ethical, transparent, and socially responsible principles.

NAISR 2.0's governance framework is built around seven strategic imperatives that are focused on improving internet connectivity, data access, workforce development and R&D. Improved digital connectivity and data accessibility are treated as foundations, recognising that uneven internet access and limited data-sharing mechanisms directly constrain AI development. At the same time, education reform, workforce upskilling, and advanced research capacity are prioritised to address skills shortages and support long-term AI capability-building. These measures are complemented by policies to stimulate AI-driven innovation through targeted R&D investments, startup support, and engagement with multinational firms.

Responsible AI

A defining feature of *NAISR 2.0* is its focus on responsible AI. *NAISR 2.0* calls for the development of an adaptive AI governance framework that integrates ethics, fairness, inclusivity, and accountability into public and private AI use. This involves coordinated action across regulatory bodies such as the National Privacy Commission, the Intellectual Property Office, and the Philippine Competition Commission, as well as engagement with academia and civil society. Proposed measures include updating existing laws, developing AI-specific and sector-based guidelines, strengthening organisational compliance mechanisms, and establishing certification systems for AI auditors and systems. Public awareness and AI literacy are also positioned as governance tools, reinforcing the role of societal understanding in shaping responsible adoption.

63 Philippine Department of Trade and Industry (2024) National AI Strategy Roadmap 2.0 (NAISR 2.0). Available at: https://erikalegara.com/uploads/NAISR2.0_July2024.pdf

AI governance stakeholders

AI governance is embedded within the country's innovation architecture. The National Innovation Council acts as the key policy advisory body for the formulation, implementation and evaluation of the country's innovation goals and priorities, while DTI plays a coordinating role in aligning AI governance with innovation, entrepreneurship, and industrial policy. The establishment of the *Center for AI Research (CAIR)*⁶⁴ in 2024 represents a move toward implementation, providing a platform to operationalise *NAISR 2.0's* priorities through research, pilot projects, and international collaboration. Partnerships with regional and global actors signal an effort to align Philippine AI governance with international best practices while addressing local linguistic, cultural, and developmental contexts.

The *DTI AI and Startup Center* is a collaborative initiative between the DTI and the broadband and technology firm Converge ICT, set to launch in Makati in the first quarter of 2026. Designed to support micro, small, and medium-sized enterprises (MSME) and startups, the Centre will function as a focal point for AI adoption by providing access to digital solutions, skills development, and industry networks, with the goal of strengthening MSME competitiveness in the digital economy.

Centre of Excellence for Creative Industries

The Philippines, serving as ASEAN Chair in 2026, is advancing the establishment of an ASEAN Centre of Excellence for Creative Industries (ACE-CI) through the DTI's Competitiveness and Innovation Group.⁶⁵ ACE-CI is intended to strengthen skills development, stimulate innovation, and deepen cross-border collaboration across ASEAN. As a flagship initiative of the Philippines' 2026 ASEAN Chairship, ACE-CI will support creative enterprises by improving access to regional and global markets while fostering a more connected and competitive creative ecosystem. Preparatory work for ACE-CI will be advanced through key regional engagements, including the 2nd ASEAN-UK Creative Economy Symposium scheduled for March 2026 in Manila, which is expected to help shape its operational framework.⁶⁶ The initiative is being developed in partnership with organisations such as the British Council, reflecting a strong emphasis on international cooperation, capacity building, and market expansion. Aligned with both national priorities and the *ASEAN Creative Economy Sustainability Framework*, ACE-CI positions the Philippines to play a leading role in shaping the future of the 'Creative Economy' in the region.

64 The CAIR was transferred to the Department of Education and is now known as Education CAIR (eCAIR).

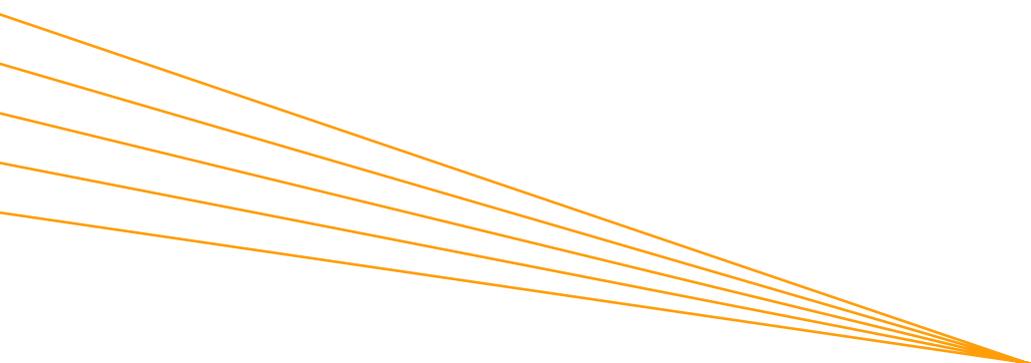
65 Logan Kal-EI M. Zapanta (2025) Philippines sets 5-point agenda as the next Asean chair. [Inquirer.net](https://business.inquirer.net/560006/ph-sets-5-point-agenda-as-the-next-asean-chair). Available at: <https://business.inquirer.net/560006/ph-sets-5-point-agenda-as-the-next-asean-chair>

66 DTI Competitiveness and Innovation Group (2026) Big wins ahead for Filipino creatives. Available at: <https://www.facebook.com/DTI.CIG/posts/big-wins-ahead-for-filipino-creatives-as-2026-asean-chair-the-philippines-is-ope/1314671924033238/>

Conclusion

Across ASEAN, creativity and the Creative Industries have moved beyond their traditional framing as instruments of 'soft power' to become increasingly recognised as tangible drivers of economic transformation, employment, and regional competitiveness. This shift is reflected in more structured policy attention, clearer sectoral mapping, and growing efforts to link creative activity with trade, innovation, and inclusive growth. At the same time, rapid technological change, particularly in digitalisation and emerging fields such as AI, is reshaping creative production, distribution, and markets. ASEAN policy frameworks increasingly seek to balance technological advancement with human-centred, trust-based, and inclusive approaches, though persistent disparities in digital readiness, institutional capacity, and access to finance continue to complicate implementation and outcomes across AMS.

Within this regional landscape, the Philippines stands out for its deep cultural heritage and long-standing creative traditions, alongside recent progress in digital infrastructure, skills development, and policy coordination. Initiatives linking creativity with innovation, entrepreneurship, and technology signal strong potential for the 'Creative Economy' to contribute more decisively to national development. However, sustaining leadership will depend on strengthening the broader innovation ecosystem, deepening public investment in R&D, and ensuring that creative and digital sectors are fully integrated into market-driven, inclusive, and future-oriented growth strategies.

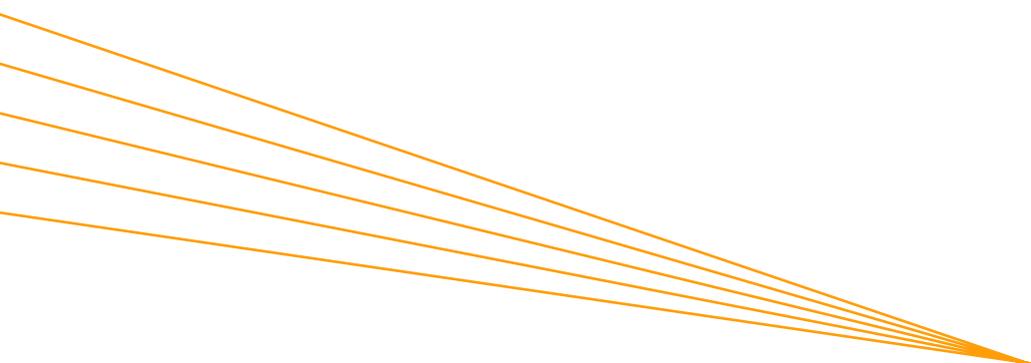


Afterword

This Policy Snapshot on ASEAN and the Philippines has been prepared by the CoSTAR Foresight Lab in response to emerging opportunities to contribute evidence and insight to discussions on creative technologies and their policy environments.

The publication reflects a collaborative effort. The CoSTAR Foresight Lab is grateful to the Department of Trade and Industry of the Philippines for its initiative in inviting our input and expertise, and to the British Council for enabling this engagement. The report is shared with ASEAN partners in a spirit of collaboration and constructive dialogue.

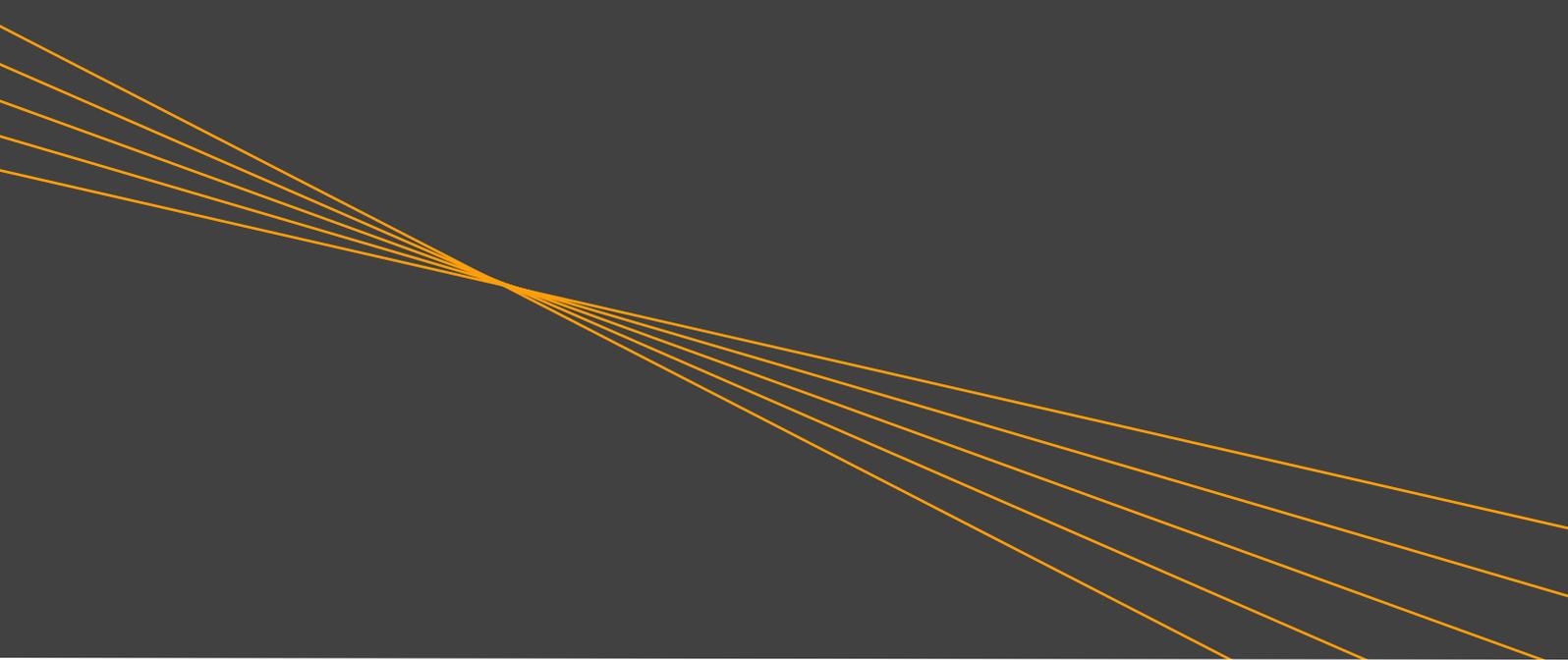
This work forms part of a broader programme supporting the development of the ASEAN Centre of Excellence for Creative Industries. It is published in advance of the 2nd ASEAN–UK Creative Economy Symposium, to be held in Manila in March 2026, where these themes will be explored further through regional dialogue and collaboration.





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