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LAOS AND ASEAN-LED DIGITAL ECONOMIC MULTILATERALISM

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Abstract: The article aims to reveal the nature and degree of Laos' influence on the implementation of multilateral projects and initiatives of the Association of Southeast Asian Nations (ASEAN) in the digital field. The paper analyzes the association's visionary documents that set the parameters of its approach to global digital processes, outlines the modernization paradigm of Laos as one of the least developed ASEAN countries, reveals the specifics of Laos' digital initiatives and projects, and assesses their outcomes. Stating that the current level of digital instruments at Laos' disposal does not allow its fully-fledged participation in ASEAN's multilateral cooperation, the author argues that the reason goes beyond Laos' capabilities. It has a broader dimension due to the specifics of the ASEAN integration model. Amidst the digital transformation, with quick decision-making and the binding cooperation among all its participants are pivotal preconditions for both ASEAN competitiveness and its status of an influential international actor, the "ASEAN Way" becomes not only a serious, but an insurmountable obstacle for ASEAN-led multilateral digital projects and initiatives. Simultaneously, the nature and dynamics of Laos' cooperation with China is a mini-perspective of the future parameters of ASEAN's dialogue with China. Since the conceptualization of ASEAN's digital regionalism is still in its infancy, an identification and analysis of factors that shape its evolution accounts for the novelty and practical significance of this study.

Keywords: *digital transformation, ASEAN, economic multilateralism, Laos, China, digital projects and initiatives, ASEAN Way*

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Научная статья. Политические науки

ЛАОС И МНОГОСТОРОННЕЕ ЭКОНОМИЧЕСКОЕ СОТРУДНИЧЕСТВО АСЕАН В ЦИФРОВОЙ СФЕРЕ

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Аннотация: В статье предпринята попытка определить характер и степень влияния Лаоса на реализацию многосторонних проектов и инициатив Ассоциации стран Юго-Восточной Азии (АСЕАН) в цифровой сфере. Проведен анализ содержания основных документов Ассоциации, задающих параметры ее подхода к глобальным цифровым процессам, дан обзор модернизационной парадигмы Лаоса как одного из наименее развитых государств АСЕАН, определен характер цифровых инициатив и проектов Лаоса, дана оценка их результатов. Констатируя, что современный уровень развития цифровых инструментов Лаоса не дает ему возможности полноценно подключиться к реализации многостороннего сотрудничества государств АСЕАН в цифровой сфере, автор указывает, что причина сложившейся ситуации не замыкается на собственно возможностях Лаоса, а носит комплексный характер, обусловленный спецификой интеграционной модели АСЕАН. В условиях цифровой трансформации, когда быстрота принимаемых решений и обязательный характер их выполнения всеми участниками сотрудничества становятся ключевыми условиями не только конкурентоспособности АСЕАН, но и сохранения ею статуса влиятельного международного актора, «Путь АСЕАН» становится не просто серьезным, а непреодолимым препятствием для осуществления Ассоциацией своих многосторонних цифровых проектов и инициатив. Одновременно с этим характер и динамика сотрудничества Лаоса с Китаем является мини-проекцией будущих параметров взаимодействия АСЕАН с КНР. Поскольку осмысление цифрового регионализма АСЕАН находится на начальной стадии, выявление и анализ факторов, влияющих на его эволюцию, обуславливают новизну и практическую значимость проведенного исследования.

Ключевые слова: цифровая трансформация, АСЕАН, многостороннее экономическое сотрудничество, Лаос, Китай, цифровые проекты и инициативы, «Путь АСЕАН»

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The year 2025 marks the establishment of the ASEAN Community, part of which is the ASEAN Economic Community (AEC). According to the AEC Blueprint 2025, the corporate sector of ASEAN member states is to play a prominent role in making Southeast Asia a unified economic and doing business area.

Amidst the on-going digital transformation, the association equips its on-going projects and initiatives with digital instruments, as well as has launched new multilateral formats aimed at achieving a profound digital transformation of Southeast Asia. However, seamless trans-boundary cooperation is a necessary prerequisite for translating these plans into reality.

Since the chain is as strong as its weakest link is, it is timely and relevant to look at countries that lag behind other ASEAN member states in their readiness to participate in ASEAN's digital projects and initiatives. A relevant example is presented by Laos that belongs to the cohort of Least Developed Country Category, but pays close attention to raising its international competitiveness.

ASEAN-Led Digital Initiatives: Vision and Major Obstacles

ASEAN tries to keep abreast with the current developments, part of which is the global digital transformation. Responding to them, the association has launched its own digital initiatives, as well as supports its on-going multilateral projects with digital instruments. This process started in 1997, when the association issued ASEAN Vision 2020, and continues at present. Remarkably, its evolution demonstrates a shift from a relatively narrow focus, mostly, on the ICT development, to a comprehensive embrace of digital tools in its policy. Among the most recent documents that set the parameters of ASEAN's digital policy, the ASEAN Digital Masterplan (ADM) 2025, the ASEAN Guide on AI Governance and Ethics (the Guide) and the ongoing negotiations on the Digital Economy Framework Agreement (DEFA) are worthy of note.

The ADM 2025 is a visionary document that both covers strategic directions and offers practical steps to translate ASEAN's plans into reality. Several points bear relevance.

First, the document presents the international context in which the association implements its digitalization-related plans. Specifically, the COVID-19 pandemic, the climate change and technology trends are discussed. Implications for ASEAN governments, market players and end-users are examined. Revealingly, Section 2.3. Global Technology Trends demonstrates both the present technology-related situation and its likely

future evolution with implications for ASEAN and its member states. This factor reveals a high degree of continuity between the ASEAN Digital Masterplan 2025 and the ASEAN Economic Community Blueprints 2015 and 2025 due to the pillar “Global ASEAN” in both documents.

Second, the Masterplan offers practically-oriented recommendations on translating ASEAN’s vision into action. For instance, Section 3 “Desired Outcomes & Enabling Actions” consists of eight policy directions ranging from recovering from the COVID-19 pandemic to building a digital society in ASEAN member states. In this context, Figure 3.1. “A Summary List of the Desired Outcomes (DOS) and Enabling Actions (EAS) is of special note, as the supportive measures and their degree of importance are presented. The material that follows adds special comments to the list. The proposed measures are pointed and tailored to the specifics of ASEAN and its member states.

Third, a practically oriented plan with metrics of success is offered. In this regard, the Proposed Timetable for ADM 2025 deserves mentioning. The outline of measures goes along with time deadlines and specific measures seen as outcomes. Figure 4.2. Metrics for Success of the DOS presents Desired Outcomes together with relevant indicators as success proofs. Remarkably, the degree to which digital services are used by consumers, businesses and governments are distinguished¹.

ASEAN Guide on AI Governance and Ethics specifically focuses on “encouraging alignment within ASEAN and fostering the interoperability of AI frameworks across jurisdictions”. The document offers ASEAN’s definition of terms like “Artificial Intelligence”, “AI system”, “Deep Learning”, “Machine Learning” and some others. The Guide outlines measures to be adopted in several areas (internal governance structure and measures, human involvement in AI-augmented decision-making, operation management, and stakeholder interaction and communication). Different stages of the AI System Lifecycle and their salient features are presented. Various cases from the public and the corporate sector, like, for instance, UCARE.AI, Gojek, Aboitiz Group, Smart Nation Singapore and Singapore’s Ministry of Education, are demonstrated as examples of excellence. Risk Impact Assessment covering internal governance structures and measures, the level of human involvement in AI-augmented decision-making, operation management etc. is undertaken. At both national and regional level, detailed recommendations are offered. Revealingly, a voluntary rather than an obligatory basis to apply the provisions of the document is recommended².

The ongoing negotiations on ASEAN Digital Framework Agreement (DEFA), scheduled for finalizing at the end of 2025, is ASEAN's another attempt to digitally support economic and business practices across South-east Asia. As expected, the agreement will contribute to increasing the value of ASEAN's digital economy to 2 trillion dollars by 2030. DEFA is synergized with ASEAN's efforts to establish the ASEAN Community. Nine directions are outlined: Digital Trade, Cross-border E-Commerce, Payments and E-Invoicing, Digital ID and Authentication, Online Safety and Cybersecurity, Cross-border Data Flows and Data Protection, Competition Policy, Cooperation on Emerging Topic, and Talent Mobility and Cooperation³. It evidences that the association has ambitious digitalization-related plans in synergy with its regional integration priorities. Remarkably, a study prepared by the Boston Consulting Group in November 2024 outlines improved access and inclusivity, employment and social mobility, improved resilience and positive climate impact as "massive additional benefits expected through digital economy – not all quantifiable, but highly valuable⁴". Although there are reasonable doubts that ASEAN will achieve substantial progress along those directions due to time-pressing conditions, the comprehensive and multi-directional nature of DEFA is evident.

ASEAN's digital policy is closely linked with its integration priorities, the pivotal of which is the ASEAN Economic Community (AEC) 2025. Concerning the latter, ample evidence suggests that the association encounters numerous digital and non-digital shortcomings. With regard to major non-digital obstacles, the key is lack of global value chains established by enterprises of ASEAN member states. In fact, ASEAN economic multilateralism after the Cold War, which is exemplified by AFTA, was premised on Japan's initiative BBC (Brand-to-Brand Complementation)⁵. As a result, ASEAN cannot equip its projects and initiatives with effective digital instruments, as grass-root cooperation, premised on trans-boundary supply-production chains, people-to-people interactions and technology transfers, is missing. As GVC across Southeast Asia grow in sophistication, ASEAN enterprises stuck at the lowest value added level, namely, manufacturing, while other levels – R&D, design, logistics, marketing and after-sale services – are monopolized by American, Japanese, South Korean and European companies. Presently, apart from producer GVC, exemplified by car-making, consumer electronics and other production networks, consumer GVC, presented mostly by Chinese retail chains, increase in number across Southeast Asia. Since the association lacks its own GVC and brands "Made in ASEAN", it lags behind rather than leads the digital transformation of industrial cooperation in Southeast Asia.

To aggravate the problem, logistics performance across Southeast Asia is inconsistent. According to the Logistics Performance Index 2023 (the latest figures available), gaps between ASEAN member states are significant. The scores of Singapore, Malaysia, Cambodia and Laos were 4.3; 3.6; 2.4; and 2.4 respectively (1st, 32nd, 115th and 115th places respectively)⁶. As Southeast Asia aims to become a burgeoning not only production, but also consumption area, with quick trans-boundary delivery of ordered goods, this factor undermines ASEAN's economic and business-related prospective plans.

Concerning digital obstacles, the following points deserve mentioning. There are wide gaps in internet penetration across Southeast Asia. In 2023, Brunei and Malaysia had 99.0 and 97.7 of internet subscribers per 100 persons, while the corresponding figures of Laos and Cambodia were 66.2 and 56.7 respectively⁷. Contrasts in approaches to data localization strongly matter: while Vietnam and Indonesia adhere to strict rules of trans-boundary data transfers, Singapore's position is much more liberal. Most significantly, the association cannot foster the development of the AI agenda within the framework of its multilateral economic projects and initiatives. As the AI instruments available to ASEAN and its member states are not strong enough, a scenario under which the association may slip into dependence on its external partners is quite probable.

The processes discussed above demonstrate that ASEAN is serious about the implications of the on-going digital transformation. At the same time, its policy aimed at providing its multilateral projects and initiatives with digital support is encountering difficulties. An overlap of non-digital and digital shortcomings plays a crucial role. The former have been brewing for decades, while the latter compound them, producing a negative multiplier effect. In this context, it is expedient to look at Laos as a country that lags behind its ASEAN partners.

Laos' Modernization Efforts: Assessing Interim Results

Among ASEAN member states, Laos is a unique country in many respects. It is landlocked, while its neighbors attach much importance to developing sea trade as a foundation of their export-oriented strategies. Understanding this factor, the LPDR Government aims to transform the country "from land-locked to land-linked", mostly, by participating in trans-boundary projects with other Indochina states. As a side effect, different parts of the country are better connected with neighboring states rather than with other provinces: Southern Laos strengthens ties with Vietnam and

Thailand, while Northern Laos is oriented to China. Laos participates in the Belt and Road Initiative, the Greater Mekong Subregion and the East-West Economic Corridor with an objective to improve its infrastructure facilities.

Due to the Mekong River potential, Laos aims to be a battery for neighboring countries. The electricity sector accounts for 10% of Laos' GDP and 30% of its export, while about 80% of the latter goes to Thailand and Vietnam. The country is rich in natural resources, mostly, in gold, copper, zinc and tin⁸.

China's presence is strongly felt in Laos. As the PRC aims to integrate China-ASEAN Free Trade Area, the Regional Comprehensive Economic Partnership and the Belt and Road Initiative, Laos has become a focus of China's increasing attention. The central part of the Kunming-Singapore Rail Line runs through Laos, linking the country to China's Yunnan province. More to the point, China owns almost half of Laos' external government debt. As of 2023 (the most recent figure available) China's share was 5.1 billion dollars, while the overall debt was 10.5 billion dollars⁹.

From an economic model perspective, Laos emulates Vietnam's experience of market reforms. Soon after the Doi Moi started in the SRV, Vientiane launched its own version, the New Economic Mechanism, that focuses on establishing market institutions in the country, FDI attraction etc. At present, the Ninth National Socio-Economic Development Plan (2021-2025) stipulates that Laos is to leave the cohort of the Least Developed Countries by 2026¹⁰, although the country will lose a number of trade privileges, an access to international development financing, the WTO decreased special and preferential treatment etc. Recent developments, for instance, the decline of the poverty line from 24.0% to 18.3% in 2016 and 2023 respectively¹¹, suggest that progress has been made.

With respect to Laos' socio-economic modernization paradigm, several factors bear relevance. The Party portrays itself as the ultimate supervisor of economic and social development and, by extension, the mentor of the corporate sector. The Party controls all the appointments in big companies. Remarkably, the government-business hierarchy is more rigid than it is, for instance, in China or in Vietnam, and the activity of decision-making venues are more formal than substantial. It is an important problem, as the country aims to attract foreign investors and incentivize them to integrate their prospective planning with Laos' development priorities.

Due to underdeveloped financial system, many intra-country transactions are carried out in foreign currencies. The latter include not only the US dollar and the Chinese renminbi, but also the Thai baht and the Viet-

namese dong. For companies, access to finance crucially depends upon good relations with government decision-makers.

Laos' economy remains heavily dependent on natural resources and hydropower. As diversification of development tools is necessary, the government pays increasing attention to tourism and light manufacturing. In the latter regard, the focus is on metal fabrication, construction materials production, gemstone processing, etc. It resonates with investors' expectations, as the country is seen as a low-cost production base with special economic zones (SEZ), integrated in trans-boundary projects like, for instance, the Greater Mekong Subregion. Notwithstanding this, diversification-related progress has been modest. Energy resources with export of hydro-energy power to neighboring countries as a top priority remain the cornerstone of the country's economic development.

A focus on state-owned enterprises (SOE) deserves special attention. As natural monopolies, they operate in transportation, telecommunications, electricity, banking and other state-controlled industries. SOE are characterized by lack of corporate strategies, appointments of former government officials, who lack relevant industry skills but have "right connections", as well as contradictory policies implemented by government agencies that supervise SOE. Each of these factors individually, not to say about them all collectively, undermines SOE efficiency.

As far as salient features of privatization are concerned, comparing SOE-related developments in Laos with Vietnam reveals a substantial difference. In Laos, leasing arrangements rather than sales of enterprises to foreign investors were the most popular form of privatization. Leasing arrangements had clear advantages. They were not so threatening to economic development as any form of privatization would have been. Legal issues like, for instance, the sale of state land, were relatively easy to handle. Most importantly, local investors with limited financial possibilities found leasing arrangements more attractive than privatization. Arguably, under a privatization scenario, state assets would have been taken by foreign companies, with negative aftereffects for social stability and the reputation of the Party.

Although SOE are important, micro-, small and medium-sized enterprises (MSME) dominate the country's economic landscape. According to Asia-Development Bank, MSME accounted for 99.8% of all enterprises in Laos in 2024¹². They operate in different economic sectors, including traditional and innovative ones, in large cities and rural areas. They may be promising technologically-advanced startups integrated in global value chains. Mostly, obstacles to their development resemble those in other

ASEAN member states. They include a complicated access to finance, as banks consider loans to MSME as risky, dependence on micro-finance institutions with exorbitantly high interest rates, inconsistent electricity supplies, limited or no assistance from business associations. Among the latter, the only exception is the Small and Medium-Sized Enterprise Promotion and Development Office (SMEPDO), but not all Lao MSME participate even there.

These factors set the parameters of government-business dialogue in Laos. Major government-business venues are presented by Lao National Chamber of Commerce and Industry (LNCCI), Lao Federation of Trade Unions (LFTU) and the Association of the Lao Garment Industry (ALGI). LNCCI that was established in 1989 and represents joint ventures, SOE and individual businesspersons is the apex dialogue platform. Its responsibilities include informing government officials about problems the business community encounters, establishing and strengthening ties with foreign companies operating in Lao market, organizing business networking and capacity-building events around the country. Remarkably, however, LNCCI, as well as other government-business dialogue venues, aims mostly at facilitating contacts between the corporate sector and government officials, while raising competitiveness of its participants is a secondary priority.

In sum, Laos has so far been unable to create favorable conditions for doing business in order to incentivize foreign companies to run and expand business there. Internally, the hydro-energy industry remains the backbone of its economic development. Externally, although Laos participates in trans-boundary development projects in Indochina, it is increasingly visibly slipping into dependence upon China.

Vientiane's Major Digital Initiatives and Their Constraints

As the current digital transformation around the world intensifies, Laos participates in those processes. The country has published several visionary documents, among which the most important are the National Digital Economic Development Vision for 2021-2040, the National Digital Economic Development Strategy for 2021-2030, and the National Digital Economic Development Plan for 2021-2025. From a practical perspective, the following projects are worthy of note.

Laos attaches much importance to providing its government services with digital support. It is exemplified by E-Civil Registration and Vital Statistics (e-CRVS) system for civil registration, i.e. monitoring births, deaths,

marriages and divorces in the country. Another example relates to E-Learning Management Information System (e-LMIS). As its name suggests, its prime objective is managing education-related data, educational resources and tools in order to make them available to all schoolchildren in the country. The system offers access to online materials and monitors pupils' performance. It is integrated with other government digital services, primarily, e-CRVS.

Apart from government agencies, the corporate sector tries to explore the digital niche and develops commercial projects. Take, for instance, LOCA, a platform for booking taxi services in the 24/7 format. Or LaoKYC that offers businesses and individual entrepreneurs digital verification services, which contributes to preventing fraud and other digital crimes. Or LaoFarm that connects farmers and their clients, as well as provides farmers with information on market access specifics, price dynamics, the status of orders and deliveries, etc.

The factors presented above demonstrate that Laos aims to keep abreast with global digital processes and substantiates these plans with practically-oriented actions. Notwithstanding this, serious obstacles are in place.

Most importantly, compared with other ASEAN member states, Laos has low internet penetration. According to the ASEAN Secretariat, although the number of internet subscribers/users per 100 persons increased from 35.4 to 66.2 between 2018 and 2023^{13,14}, it is still below other ASEAN countries. This is especially important, as the urbanization rate in Laos is lower than it is in the majority of ASEAN member states (38.2% in 2023¹⁵). Undoubtedly, to eliminate this shortcoming within a short time period is problematic.

To resolve the problem, the country turns to China. In 2017, the LPDR, together with Saudi Arabia, Serbia, Turkey, Thailand and the UAE, signed the BRI Digital Economy International Initiative¹⁶. Later on, as the Kunming-Vientiane Railway was officially launched, Huawei Smart Railway Solution, aimed at providing the railway with digital support, became operational¹⁷. Among other projects that Huawei carries out in Laos, the "In Laos for Laos"¹⁸ aimed at digital skill training, support in building the China-Laos Expressway from Vientiane to Vangvieng¹⁹, smart mining business (potash mines)²⁰ deserve mentioning. Additionally, Huawei's program "Seeds for the Future", which synergizes training in advanced ICT skills and traditional Chinese culture, is carried out in Laos²¹. Arguably, prospects for Laos' increasing dependence upon China in the digital field are clear.

In Laos, government services, including those offered to the corporate sector, are in their infancy. Government agencies have poor interoperability, and their functions often overlap. A central catalogue of government services, which would help entrepreneurs both instrumentally and substantially (with information on government entities, necessary forms to fill and corresponding fees), is absent. This factor seriously hampers effective digital support of government-business links.

Lastly, a significant share of the country's "informal economy", estimated at 22.9% as a percentage of GDP²², strongly matters. This is a legal "grey zone" that is neither supervised by the government nor taxed. Corruption practices of all sorts are in abundance there. Understandably, both government officials and companies do not want to lose illegal incomes. It further complicates the digital transformation of the country's economic and business practices.

As demonstrated by the afore-discussed developments, Laos pays increasing attention to its digital transformation. The results, however, lag far behind those achieved by other ASEAN member states. This factor hampers ASEAN integration in the digital field, as a holistic approach to digital ASEAN-wide cooperation is a crucial prerequisite for success. Simultaneously, the country's growing dependence on China is increasingly evident.

Conclusion

An analysis of the extent to which Laos shapes ASEAN-led digital multilateralism through the prism of ASEAN's response to the global digital transformation and the specifics of Laos' modernization paradigm leads to several broad assessments.

Responding to global challenges brought by the digitalization, as well as realizing that effective digital tools are an important prerequisite for competitiveness, the association equips its projects and initiatives with digital support in order to make Southeast Asia a unified doing business area. The latter, however, must be holistic, as a weak link in the chain may undermine ASEAN's collective efforts.

Among ASEAN member states, Laos is one of the afore-mentioned weakest links. The country is a clear example of much-discussed resource curse. It lags behind its ASEAN partners along multiple formal economic criteria, the degree of participation in ASEAN trans-boundary business projects and initiatives, and the quality of digital instruments. Although the country develops its own digital projects, much remains to be done in order to level the intra-ASEAN playing field. Arguably, Laos will remain behind other ASEAN member states for many years to come. Additionally, Laos is

an example of how China aims to develop relations with ASEAN, or, putting it differently, a mini-projection of the BRI implications for Southeast Asia.

This factor influences on ASEAN's prospective plans and policy steps hampering the achievement of impressive results. The "ASEAN Way" prioritizes moving at a step comfortable to all participants. As the digital transformation gains momentum, this premise of cooperation becomes ultimately outdated. Arguably, the digital transformation is a litmus test for ASEAN's integration model. The on-going digital processes within and beyond Southeast Asia clearly demonstrate urgent need for reforms.

ИНФОРМАЦИЯ ОБ АВТОРЕ

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