



RCEP Implementation, ASEAN Economic Consolidation, and Regional Geoeconomic Dynamics, 2022–2025

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Abstract. The implementation of the Regional Comprehensive Economic Partnership since 2022 has created a new institutional setting for economic integration in the Asia-Pacific and raised questions about its implications for the Association of Southeast Asian Nations. This study examines how implementation during 2022–2025 contributes to regional economic consolidation and shapes geoeconomic power relations. It uses qualitative document-based research drawing on scholarly publications, official agreements and policy documents, research reports, and institutional trade data. The research asks how common trade rules, market connectivity, and regional production networks affect economic consolidation, and how these changes influence regional power dynamics. The findings show that rule-of-origin harmonization, wider trade connectivity, and stronger regional value chains support a more coordinated economic structure, although gains remain uneven across member states. At the same time, deeper interdependence increases China’s economic centrality while preserving the Association of Southeast Asian Nations’ institutional role as the organizing hub of the agreement. The study concludes that the partnership operates simultaneously as an integration mechanism and a geoeconomic framework that redistributes influence through rules, markets, and production networks.

Keywords: ASEAN; Economic Consolidation; Geoeconomics; Regional Comprehensive Economic Partnership; Regional Value Chains.

1. BACKGROUND

Before the Regional Comprehensive Economic Partnership entered into force, economic integration in East and Southeast Asia had developed through a dense network of bilateral and plurilateral trade arrangements. the Association of Southeast Asian Nations (ASEAN) had concluded separate ASEAN+1 free trade agreements with China, the Republic of Korea, Japan, Australia, and New Zealand, while the ASEAN Economic Community sought to deepen integration among the ten Southeast Asian member states. These arrangements expanded market access, but they also produced overlapping tariff schedules, product-specific rules, certification procedures, and investment provisions. The resulting regulatory fragmentation is often described as a “spaghetti bowl” problem because firms operating across several agreements must determine which rules apply to each transaction. Shimizu (2021) and Armstrong and Drysdale (2022) argue that the significance of the Regional Comprehensive Economic Partnership lies partly in its capacity to connect these previously fragmented arrangements within a broader regional framework. The agreement therefore emerged not simply as another trade agreement, but as an attempt to make an already interdependent production region more institutionally coherent. The need for greater coherence became more visible during the disruption caused by the coronavirus pandemic. Supply-chain interruptions, transport bottlenecks, weaker global demand, and renewed protectionist tendencies exposed

the vulnerability of production networks that depend on predictable cross-border flows. The Regional Comprehensive Economic Partnership was signed on 15 November 2020 by the ten ASEAN members together with China, Japan, the Republic of Korea, Australia, and New Zealand, and it entered into force on 1 January 2022 for the first group of ratifying parties (Regional Comprehensive Economic Partnership Agreement 2020). The agreement covers tariff commitments, rules of origin, customs procedures, services, investment, electronic commerce, and other areas of economic cooperation. Its implementation therefore coincides with the post-pandemic effort to restore trade connectivity while also taking place in a strategic environment marked by intensifying United States–China competition. This combination makes the agreement relevant to international political economy because the same rules that reduce transaction costs can also reshape patterns of dependence and bargaining power.

Existing research has examined several dimensions of this problem, but usually in separate analytical conversations. Studies of regional integration emphasize the agreement's trade-creation potential, common rules of origin, and the possibility of stronger regional supply chains (Park et al. 2021; Kimura, Thangavelu, and Narjoko 2022). More specific work on rules of origin shows that differences among overlapping agreements raise compliance costs and can limit the utilization of preferential tariffs, while convergence can support firms that organize production across several economies (Crivelli, Inama, and Marand 2024). Other research stresses the political and institutional role of ASEAN. Le Thu (2022) interprets the negotiation process as evidence of ASEAN agency, while Magno and Vivo (2023) show how the organization's convening role can allow smaller and middle powers to shape a mega-regional arrangement. At the same time, geoeconomic studies draw attention to the strategic consequences of trade and production networks, especially when economic interdependence develops alongside great-power competition (Ji 2021; Aslam and Yee 2025). These strands of scholarship are complementary, but they often treat economic consolidation and regional power dynamics as distinct outcomes.

That separation creates an analytical gap. If the Regional Comprehensive Economic Partnership succeeds in harmonizing rules and deepening cross-border production, it does more than improve economic efficiency. It can alter which markets become more central, which states gain structural leverage, and which institutions are able to set or coordinate regional rules. Conversely, the distribution of economic power can affect whether ASEAN's institutional centrality remains meaningful as the agreement matures. This study therefore links two questions that should be analyzed together: how has implementation of the Regional Comprehensive Economic Partnership contributed to ASEAN economic consolidation during

2022–2025, and what are the geoeconomic implications of that implementation for regional power dynamics? The study defines economic consolidation as the strengthening of coordinated trade relations, common regulatory practices, and regional production linkages rather than as the creation of a customs union or a fully integrated single market.

The purpose of the research is to explain the relationship between implementation mechanisms and these two outcomes. The analysis focuses on three observable dimensions of economic consolidation: the reduction of trade fragmentation through rule harmonization, the expansion and stabilization of regional trade connectivity, and the strengthening of regional value chains. It then evaluates three geoeconomic consequences: changes in economic centrality and dependence, the distribution of rule-setting influence, and the persistence of ASEAN Centrality within a more integrated regional economy. The article uses qualitative document-based research and secondary data covering the implementation period from 2022 through 2025. Its contribution lies in treating trade integration and geoeconomic power as mutually connected processes. This approach is also relevant for the study and teaching of international relations because it demonstrates how apparently technical trade rules can generate strategic effects beyond tariffs and market access.

2. THEORETICAL REVIEW

The first analytical foundation is Béla Balassa's theory of economic integration. Balassa (1961) conceptualizes integration as a process in which barriers among participating economies are progressively reduced and economic relations become more coordinated. His classic sequence distinguishes a free trade area, customs union, common market, economic union, and more complete forms of integration. The Regional Comprehensive Economic Partnership remains a free trade agreement rather than a customs union, so this study does not treat its implementation as movement through all of Balassa's formal stages. Instead, the framework is used more narrowly to identify whether the agreement deepens integration within its existing institutional form. The relevant indicators are the reduction of trade barriers and administrative fragmentation, greater compatibility of trade rules, and the strengthening of cross-border production linkages. These indicators are consistent with the broader ASEAN Economic Community objective of creating a highly integrated and cohesive regional economy (ASEAN Secretariat 2015).

This distinction is important because "ASEAN economic consolidation" in this article does not mean that ASEAN becomes a single economy or that the Regional Comprehensive Economic Partnership replaces the ASEAN Economic Community. Consolidation refers to the

strengthening of practical economic linkages that make regional exchange more coordinated and less fragmented. Common rules of origin can reduce the cost of using preferences across several trade relationships. More predictable customs and tariff arrangements can improve market connectivity. Stronger regional value chains can distribute stages of production among several member economies. When these processes occur simultaneously, integration becomes embedded not only in legal commitments but also in the everyday organization of production and trade. The approach therefore connects formal institutions with observable economic structure.

The second analytical foundation is geoeconomics. Blackwill and Harris (2016) define geoeconomics as the use of economic instruments to pursue geopolitical objectives and the strategic use of economic relationships as sources of influence. Ji (2021) applies a related perspective to mega-regional arrangements, emphasizing that large trade institutions can become arenas of competition over rules, markets, and structural dependence. In this study, geoeconomics is not used to claim that the Regional Comprehensive Economic Partnership is controlled by a single state or designed primarily as a geopolitical weapon. The agreement was ASEAN-led and includes major economies with different strategic orientations. The geoeconomic question is instead whether its implementation changes the distribution of economic opportunities and dependencies in ways that affect bargaining positions and regional influence.

Three geoeconomic indicators guide the analysis. The first is economic centrality: whether expanded trade and production networks make particular economies increasingly indispensable to regional exchange. The second is rule-setting influence: whether participation in a common institutional framework gives actors greater capacity to shape standards and expectations that other economies must follow. The third is institutional centrality: whether ASEAN continues to function as the organizing hub that convenes larger powers and anchors regional economic architecture. Combining Balassa's integration perspective with geoeconomics allows the article to examine a single mechanism from two directions. A common rule of origin may reduce transaction costs and deepen integration, but it may also redirect supply chains toward the largest production centers. A larger regional market may strengthen ASEAN's collective relevance, but it can also expose differences in the ability of individual member states to capture the benefits. The analytical framework therefore treats economic consolidation and power redistribution as simultaneous rather than contradictory outcomes.

3. RESEARCH METHODS

This research uses a qualitative document-based design. The unit of analysis is the implementation of the Regional Comprehensive Economic Partnership as a regional institutional process during 2022–2025, with particular attention to its consequences for ASEAN economic consolidation and regional geoeconomic relations. A qualitative approach is appropriate because the research question requires interpretation of policy rules, institutional arrangements, trade patterns, and strategic implications rather than statistical testing of a single causal model. Following Creswell and Creswell (2023), the study combines documentary evidence from different source types to develop an explanatory interpretation of a complex regional process.

The evidence base consists of secondary materials in four broad groups. The first group is peer-reviewed scholarship on the Regional Comprehensive Economic Partnership, ASEAN economic integration, regional value chains, rules of origin, regionalism, and geoeconomics. The second group is official material, especially the Regional Comprehensive Economic Partnership Agreement and the ASEAN Economic Community Blueprint 2025. The third group comprises research reports and working papers from institutions such as the Economic Research Institute for ASEAN and East Asia and the Asian Development Bank. The fourth group consists of institutional and reputable online trade data used to describe post-implementation developments. Recent journal literature from approximately the last five years was prioritized for the empirical discussion, while older foundational works were retained only when they provide the primary theoretical basis of the analysis. Literature and documents were identified through searches completed in August 2026 using Google Scholar, Scopus, ScienceDirect, institutional repositories, and the official websites of ASEAN, the Asian Development Bank, and the Economic Research Institute for ASEAN and East Asia. Search terms were used individually and in combination, including “Regional Comprehensive Economic Partnership,” “RCEP implementation,” “ASEAN economic integration,” “rules of origin,” “regional value chains,” “ASEAN Centrality,” “geoeconomics,” and “United States China economic competition.” Materials were included when they directly addressed the agreement or one of the analytical dimensions, provided identifiable methods or institutional provenance, and contained evidence relevant to the 2022–2025 implementation period. Materials that discussed Asian integration without a clear connection to the agreement, duplicated the same empirical claim, or did not provide a traceable basis for the claim were not used as core evidence.

Analysis proceeded in three stages. First, documentary evidence was extracted and organized according to the implementation mechanism it described, particularly tariff and rule-of-origin arrangements, trade connectivity, and production-network integration. Second, evidence was coded against the analytical indicators derived from the theoretical framework. For economic consolidation, the indicators were reduced regulatory fragmentation, stronger market connectivity, and deeper regional production linkages. For geoeconomic analysis, the indicators were the concentration or dispersion of economic centrality, the strategic significance of trade and supply-chain dependence, and the capacity of ASEAN to maintain a coordinating and agenda-setting role. Third, claims were compared across academic studies, official documents, research reports, and trade data. Where the evidence was descriptive rather than causal, the article treats the observed pattern as consistent with an integration mechanism rather than attributing the entire change to the agreement.

This procedure is intended to make the research replicable at the level appropriate for qualitative document analysis. Another researcher can apply the same time boundary, search terms, source categories, and analytical indicators, then compare whether the same evidence supports the same interpretation. The design also has limitations. It does not use firm-level utilization data across all fifteen members, and it cannot isolate the effect of the agreement from exchange-rate changes, post-pandemic recovery, commodity cycles, or other trade policies. The study therefore emphasizes triangulation and theoretical interpretation rather than claiming a precise causal effect for every change in regional trade.

4. RESULTS AND DISCUSSION

The evidence indicates that implementation has strengthened the institutional basis for a more consolidated regional economy, although the effect should be understood as incremental rather than transformational. The agreement covers fifteen economies and approximately three tenths of global population, output, and trade, giving its common rules substantial economic reach. Table 1 summarizes the scale reported for the agreement around the beginning of implementation. The significance of this scale is not merely quantitative. A common framework matters because firms can organize sourcing, production, and sales across a market that includes ASEAN and five major partners under a more coherent set of trade provisions. In Balassa's terms, the agreement deepens the practical operation of a free trade area by reducing some of the fragmentation that previously separated ASEAN+1 arrangements (Armstrong and Drysdale 2022; Kimura, Thangavelu, and Narjoko 2022).

Table 1. RCEP economic scale in 2022.

Indicator	Value
Number of members	15 countries
Population	Approximately 2.3 billion people
Share of world population	Approximately 30%
Share of global GDP	Approximately 30%
Share of global trade	Approximately 28–29%

Source: Kimura, Thangavelu, and Narjoko (2022).

The most direct example is the harmonization of rules of origin. Before implementation, exporters often had to comply with different product-specific requirements to qualify for preferential tariffs under different ASEAN+1 agreements. This fragmentation raised administrative costs and could discourage firms from using available preferences. The Regional Comprehensive Economic Partnership introduces a common regional origin framework and allows cumulation across participating economies, enabling qualifying inputs from one member to be used in production in another without automatically losing preferential treatment. Crivelli, Inama, and Marand (2024) show why this matters: restrictive or divergent origin rules can reduce preference utilization and complicate regional production, while greater convergence can lower compliance burdens. The institutional effect is therefore larger than tariff reduction alone. It creates a more uniform regulatory environment for firms whose production networks already cross national borders.

Table 2 places ASEAN within the wider economic structure at the beginning of implementation. ASEAN's aggregate output is substantially smaller than that of the broader ASEAN+3 grouping and the full partnership, yet the organization occupies a strategically important position because all five external partners are connected through an agreement initiated and coordinated through an ASEAN-centered process. This creates an unusual form of regional consolidation. ASEAN does not consolidate by becoming economically dominant; it consolidates by embedding its member states in a common network while retaining an institutional role in how that network is organized. Le Thu (2022) and Magno and Vivo (2023) interpret this capacity as a form of agency by smaller and middle powers. The agreement therefore reinforces the distinction between material size and institutional influence.

Table 2. ASEAN position in the RCEP economic structure in 2022.

Region	GDP (US\$ trillion)	Trade (US\$ trillion)
ASEAN	2.85	1.60
ASEAN+3	22.36	5.59
RCEP	23.90	5.95

Source: Kimura et al. (2022).

Trade developments after entry into force are broadly consistent with deeper connectivity, although they cannot be attributed exclusively to the agreement. As shown in Figure 1, intra-partnership trade increased from about US\$5.32 trillion in 2021 to US\$6.03 trillion in 2022. It then declined to approximately US\$5.51 trillion in 2023 before recovering to around US\$5.80 trillion in 2024 and US\$6.04 trillion in 2025 (Asia Global Institute 2026). The first-year increase of roughly 13.3 percent coincided with the start of implementation, while the 2023 contraction demonstrates that regional integration does not remove exposure to global demand, inflation, exchange-rate movements, or other macroeconomic shocks. The recovery in 2024 and 2025 is nevertheless important because it suggests that the agreement continued to operate as a stable institutional framework during a volatile external environment. The appropriate interpretation is therefore not that implementation single-handedly caused the observed trade path, but that common rules and lower administrative frictions provided infrastructure through which regional trade could adjust and recover.

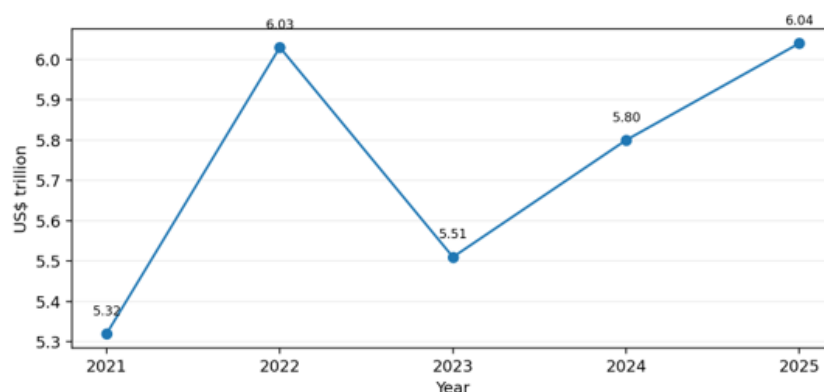


Figure 1. Development of intra-RCEP trade, 2021–2025.

Source: Asia Global Institute (2026).

For ASEAN, this wider connectivity can reinforce the ASEAN Economic Community by expanding the commercial environment in which ASEAN firms operate. Shimizu (2021) argues that the relationship between the ASEAN Economic Community and the Regional Comprehensive Economic Partnership is complementary: ASEAN's internal integration provides the organizational base, while the broader agreement connects that base to major East Asian and Pacific economies. The result is a form of outward-facing consolidation. ASEAN members gain access to a larger rules-based market while maintaining their own regional integration project. This also helps explain why the agreement should not be interpreted as replacing ASEAN integration. Its main institutional contribution is to connect ASEAN-centered arrangements more coherently with external partners. Regional value chains provide a second mechanism of consolidation. Contemporary production in East Asia is characterized by the movement of intermediate inputs across borders before final goods reach consumers. A

trade agreement can therefore generate significant effects even when it does not immediately produce dramatic changes in final-goods trade. The simulation evidence summarized in Table 3 indicates an estimated increase of approximately US\$42 billion in trade among participating economies, while intermediate goods account for a large share of existing regional trade. The same research identifies electronics, automotive products, textiles, and medium-technology manufacturing among sectors in which production-network integration is especially relevant. These patterns support the argument that the agreement strengthens the infrastructure of regional production rather than merely increasing the number of tariff preferences.

Table 3. Indicators of strengthening regional value chains within RCEP.

Indicator	Value
Estimated increase in trade among RCEP members	US\$42 billion
Intermediate goods share of total RCEP trade	55%
Intermediate goods trade occurring among RCEP members	60%
Main sectors associated with stronger regional value chains	Electronics, automotive, textiles, and medium-technology manufacturing

Source: Sun et al. (2023).

From the perspective of economic integration theory, stronger regional value chains matter because they increase the cost of economic fragmentation. Once firms distribute sourcing and production among several participating economies, predictable rules become a shared interest. This can produce a self-reinforcing form of integration: common rules make cross-border production easier, and denser production networks create stronger demand for stable common rules. Park et al. (2021) similarly find that the agreement can reinforce manufacturing supply chains and generate regional income gains. The consolidation effect is therefore structural. It is visible not only in aggregate trade volumes but also in the organization of production, investment decisions, and the use of intermediate inputs across national boundaries.

The benefits, however, are not evenly distributed. ASEAN members differ significantly in manufacturing capacity, logistics infrastructure, digital readiness, human capital, and the ability of firms to use preferential trade arrangements. Economies already embedded in advanced manufacturing and logistics networks are generally better positioned to exploit common rules quickly, while less industrialized members face higher adjustment costs and capacity constraints. Aslam and Yee (2025) emphasize that the agreement contains both economic opportunities and power asymmetries, and research on sectoral integration similarly shows that gains depend on domestic productive capacity. This unevenness limits any claim that implementation automatically produces equal consolidation. A more integrated regional

framework can coexist with persistent development gaps. Indeed, deeper integration may make those gaps more visible because economies participate in the same market from different starting positions.

This asymmetry has a direct geoeconomic dimension. The largest production and consumer markets can gain additional centrality as regional trade becomes more interconnected. China is the clearest case. Its manufacturing scale, domestic market, investment capacity, and existing trade relationships with ASEAN mean that implementation occurs on top of already dense economic ties. Figure 2 shows the increase in the value of China–ASEAN trade from approximately 5.67 trillion yuan in 2021 to 6.52 trillion yuan in 2022, followed by 6.41 trillion yuan in 2023 and 6.99 trillion yuan in 2024. Reporting on the first year of implementation also recorded approximately 15 percent growth in bilateral trade in 2022 (Global Times 2023), while later reporting continued to describe China–ASEAN economic cooperation as a major component of regional trade (China Report ASEAN 2025). These data illustrate increasing economic centrality, but they do not by themselves demonstrate political dominance.

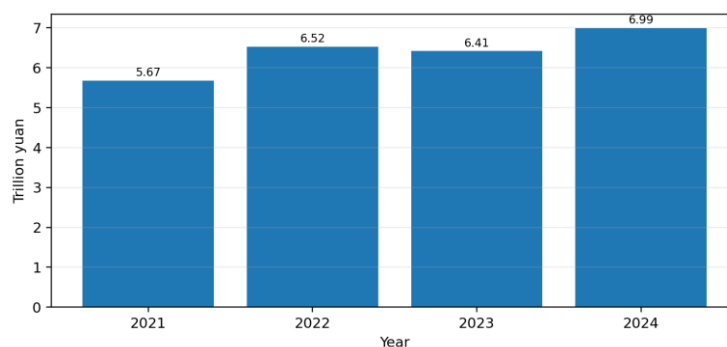


Figure 2. China–ASEAN trade value, 2021–2024.

Source: China Report ASEAN (2025) and Global Times (2023).

The distinction between centrality and dominance is essential. Geoeconomic power is partly relational: an economy gains structural influence when many partners depend on access to its market, inputs, capital, or production networks. Deeper regional value chains can therefore increase China’s centrality even without coercive policy. Yet the institutional design of the partnership constrains a simple China-centered interpretation. Japan, the Republic of Korea, Australia, and New Zealand are also members, and the agreement was negotiated through an ASEAN-centered process. This creates multiple economic poles within a single framework. Aslam and Yee (2025) describe the partnership as a site of both economic rationality and power politics, while Koesrianti (2024) argues that ASEAN-centered architecture remains important for the governance of regional investment. The geoeconomic

outcome is consequently a layered interdependence in which China's material weight grows within, rather than outside, an institution that ASEAN helped construct.

ASEAN Centrality is therefore the second major geoeconomic implication. Centrality in this context should not be confused with material primacy. ASEAN does not possess the largest market or the greatest financial resources in the agreement. Its influence derives from convening capacity, institutional legitimacy, and the ability to place major powers inside an ASEAN-led framework. Le Thu (2022) argues that the negotiation and conclusion of the agreement demonstrate agency by Southeast Asian states at a time when global trade governance was under pressure. Magno and Vivo (2023) similarly show that ASEAN's role in the negotiations reflects middle-power diplomacy and coalition management. Implementation preserves this institutional achievement because participating powers continue to operate within a framework whose political origin and regional architecture are closely associated with ASEAN. This institutional centrality also provides ASEAN with strategic space amid United States–China rivalry. The United States is not a party to the agreement, which gives the partnership clear significance in debates about the future of Asia-Pacific economic order. Yet the absence of the United States does not turn the arrangement into an exclusive Chinese bloc. The participation of several United States allies and partners, combined with ASEAN's coordinating role, produces a more plural structure. Ji (2021) shows that mega-regional trade arrangements can become arenas of geoeconomic competition because they shape standards, market access, and production networks over long periods. In this sense, the partnership matters strategically even when its legal provisions are not explicitly geopolitical. It helps determine which rules become normal, which supply chains become more economically efficient, and which regional institutions remain indispensable to economic cooperation.

The combined theoretical framework clarifies why economic consolidation and geoeconomic change occur through the same mechanisms. Harmonized rules of origin reduce fragmentation, which supports consolidation; at the same time, they can encourage firms to concentrate sourcing within the most competitive regional production centers, which affects economic centrality. Expanded market connectivity supports trade recovery and ASEAN's outward-facing integration; at the same time, it increases mutual exposure to the economic conditions of large partners. Stronger regional value chains deepen interdependence; at the same time, they create potential leverage for actors that control critical markets, technologies, investment, or intermediate inputs. Geoeconomics therefore does not begin after economic integration has occurred. It is embedded in the structure of integration itself.

The evidence from 2022–2025 also suggests that ASEAN’s geoeconomic position is simultaneously strengthened and constrained. It is strengthened because the agreement confirms ASEAN as an institutional hub capable of convening major economies and linking different production systems. It is constrained because institutional centrality does not eliminate differences in material power. ASEAN members remain economically dependent to varying degrees on external markets and investment, and their ability to convert regional rules into domestic gains differs considerably. This produces a strategic balancing problem. ASEAN benefits from deeper economic engagement with China while also having an interest in maintaining diversified relations with Japan, the Republic of Korea, Australia, New Zealand, the United States, and other partners. The Regional Comprehensive Economic Partnership supports this diversification inside the agreement itself, but it cannot substitute for broader external economic diplomacy.

These findings extend previous research in two ways. First, they support studies that identify common rules and production networks as major economic mechanisms of the agreement, but they qualify claims of straightforward trade success by emphasizing macroeconomic volatility and uneven national capacity. The 2023 decline in intra-partnership trade is a reminder that institutional integration does not produce a continuously rising trade trajectory. Second, the findings connect ASEAN agency to material economic change. ASEAN Centrality is not only a diplomatic principle; its durability depends partly on whether ASEAN remains useful as the institutional platform through which major economies organize trade and production relations. The agreement thus links institutional legitimacy with economic function.

For international relations scholarship, the main implication is that the implementation of a trade agreement should not be analyzed solely through tariff outcomes. The Regional Comprehensive Economic Partnership is simultaneously a legal framework, a market-making institution, and a structure of strategic interdependence. Its early implementation shows how rules that appear technical—such as origin certification and cumulation—can influence the geography of production and, over time, the distribution of regional bargaining power. The agreement therefore offers a useful case for teaching international political economy, regionalism, and geoeconomics together rather than as isolated subjects. The empirical record remains early, but the 2022–2025 period already demonstrates that economic integration and strategic order are being shaped through the same institutional processes.

5. CONCLUSIONS AND RECOMMENDATIONS

The study answers the first research question by showing that implementation of the Regional Comprehensive Economic Partnership during 2022–2025 has contributed to ASEAN economic consolidation through a more coherent regional trade framework, particularly the harmonization of rules of origin, wider market connectivity, and the strengthening of regional production networks. These mechanisms reduce some of the fragmentation created by overlapping ASEAN+1 arrangements and support the outward-facing dimension of the ASEAN Economic Community. The evidence does not justify attributing every post-2022 trade change to the agreement, and the benefits remain uneven because member states differ in industrial capacity, infrastructure, and readiness to use the new rules. Nevertheless, the institutional direction is clear: ASEAN economies are operating within a broader and more coordinated production and trade framework than before implementation.

The second research question is answered by the finding that the same integration mechanisms also reshape regional power relations. Deeper trade and supply-chain interdependence increases China's economic centrality, but this occurs within a plural regional structure in which Japan, the Republic of Korea, Australia, New Zealand, and ASEAN itself remain significant actors. ASEAN Centrality is therefore preserved primarily as institutional and convening power rather than material dominance. Future research should test these conclusions with firm-level preference-utilization data, member-state comparisons, sector-specific supply-chain evidence, and causal designs that separate agreement effects from post-pandemic recovery and other macroeconomic changes. Comparative work on how different ASEAN members convert common regional rules into domestic industrial upgrading would be particularly valuable for assessing whether economic consolidation becomes more balanced over time.

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