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Report

# The Evolution of Tech Governance in Southeast Asia-6

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# About this Study

The Evolution of Tech Governance in Southeast Asia-6 is the second edition in Tech for Good Institute's series to shape the tech ecosystem of Southeast Asia. While the 2023 edition focused on identifying "who" the key regulators are in the digital economy, this edition builds on that foundation by exploring "who" the key players are, "how" governments are approaching tech governance and "what" policy areas gained prominence in 2024, offering insights into the region's evolving regulatory landscape.

A key contribution of this report is its expanded scope, reflected in its title. While regulations pertain to specific policies and legislation, governance encompasses the structures, processes and administrative considerations involved in the exercise of government authority. By moving beyond understanding who latest regulators and what their regulations are to a more holistic understanding of governance, we hope to offer insights into the broader direction of the region's approach to the digital ecosystem.









This report spotlights the six major digital economies of the region—Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam (collectively referred to as the SEA-6). As the region undergoes rapid digital transformation, governments are adopting diverse policies and frameworks to effectively address the opportunities and challenges presented by emerging technologies.

With contributing partners from each country, this report provides in-depth insights into the dynamic landscape of tech governance across SEA-6. Acknowledging the rapid pace of technological advancement and the unique trajectories of each country, we recognise that the regulatory landscape of the digital economy will remain dynamic and continue to evolve. As a summary of 2024 developments, however, we hope that this report will serve as a useful resource for policymakers, researchers and industry practitioners seeking to understand the region's evolving regulatory frameworks.

The goal of this paper is to serve as a starting point for meaningful conversations. Southeast Asia presents valuable opportunities for learning from each other's experience in technology governance. By offering a shared resource that highlights key governance advancements across the region, this paper seeks to foster dialogue and collaboration in shaping effective and forward-looking regulatory frameworks. With the anticipated conclusion of the Digital Economy Framework Agreement (DEFA) negotiations later this year, this report also aims to identify common areas of convergence where tangible cooperation on regional interoperability can be advanced.

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## About the Tech for Good Institute

The Tech for Good Institute is a non-profit organisation working to advance the promise of technology and the digital economy for inclusive, equitable and sustainable growth in Southeast Asia.

With a population twice the size of the US and strong demographics, Southeast Asia's digital economy is evolving rapidly. At the same time, the region's trajectory is unique, shaped by its diverse cultural, social, political and economic contexts. The Tech for Good Institute serves as a platform for research, conversations and collaborations focused on Southeast Asia, while staying connected to the rest of the world. Our work is centred on issues at the intersection of technology, society and the economy, and is intrinsically linked to the region's development. We seek to understand and inform policy with rigour, balance and perspective by using research, effective outreach and evidence-based recommendations.

The Institute was founded by Grab to advance the vision of a thriving and innovative Southeast Asia for all. We welcome opportunities for partnership and support, financial or in-kind, from organisations and individuals committed to fostering responsible innovation and digital progress for sustainable growth in the region.

More information about the Institute can be accessed at [www.techforgoodinstitute.org](http://www.techforgoodinstitute.org).



# Executive Summary

**As Southeast Asia's digital economy continues to drive economic progress, policy and governance trends are shifting from rapid expansion to responsible development.** In 2024, governments in the region focused on sustainable growth and trust in the digital ecosystem amid the rapid innovation and adoption of artificial intelligence (AI) models, algorithms and products.

**In the early stages of Southeast Asia's digital economy journey, the prevailing "move fast and break things" mindset prioritised speed and innovation.** The pandemic further accelerated rapid scale and adoption. However, as digital technologies become more embedded in society, the risks have become more apparent. Governments are now adopting a more measured approach to mitigate unintended consequences, including misinformation, cyber threats and workforce disruptions. Moreover, regulatory clarity and interoperability are vital to attracting investment and reducing operational costs as companies mature.

**Digital ecosystem governance is therefore expected to remain a central policy priority for governments in the region.** In Southeast Asia, this unfolds in two key ways: balancing the **promotion** of the digital economy to enable emerging technologies, while simultaneously **advancing and safeguarding** digital society. Governments of Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam (collectively called the SEA-6) are implementing a range of governance mechanisms to achieve these dual objectives. Promoting the digital economy and fostering innovation maximises economic benefits of digital technologies as a horizontal force across all industry sectors. Meanwhile, protecting the digital society emphasises inclusion, trust and sustainability, ensuring that digital progress aligns with national priorities while mitigating risks and unintended harms.

**The promotion of the digital economy and the protection of the digital society can reinforce one another.** Building trust in the digital ecosystem, implementing robust data governance and developing digital public goods, for example, create a strong foundation for innovation and long-term digital progress in Southeast Asia.

**Across the region, this balancing act can be observed in shared policy areas (what) of AI governance, cybersecurity and data protection, and promotion of safety and trust.** Governments across the region have introduced new policies or updated their existing regulations to address opportunities and potential disruptions posed by AI, the evolving cyber threat landscape, and the deepening integration of e-commerce, fintech and digital platforms. Cyber resilience strategies were updated to protect critical infrastructure, and combating online harms and scams remains a key focus.

**Beyond policy priorities, this balancing act is also evident at the structural level (who) and its approach (how).** At the structural level, 2024 saw the emergence of new agencies tasked with governing the digital ecosystem holistically, from fostering digital economy growth to safeguarding citizens in the digital space and advancing digital public infrastructure. Specialised bodies in areas such as AI, e-commerce and cybercrime were established to build deep knowledge and implementation. As noted in TFGI's 2023 report *Evolution of Tech Regulation in the Digital Economy*,<sup>1</sup> tech policy coordination is more important than ever, with whole-of-government approaches advancing cross-sectoral efforts for policy coherence. This is needed in the national and sub-national levels of government agencies, across various industry verticals, and between key stakeholders to promote skills and capability development within society. Additionally, for digital economy companies, greater clarity from improved policy coordination will ease regulatory transitions, particularly as new and specialised agencies continue to be established.

**Governments are expanding their tech governance toolbox beyond traditional regulation as they recognise the need to foster innovation and maintain relevance.** In addition to hard laws, policy innovations such as soft guidelines, frameworks and sandboxes were implemented in the region, especially for emerging technologies. This approach allows governments to understand technologies and business models and understand the increased attention on mitigating unintended consequences before new products and services reach the market. By leveraging policy innovation initiatives, regulators were able to monitor technological advancements in real time while fostering public-private collaboration to safeguard the public interest.

**A regional view on tech governance developments across SEA-6 reveals that while countries share common policy priorities, they often diverge in structure and approach.** Shaped by their legal traditions, governance frameworks and cultural norms, regulatory strategies vary significantly across markets. In AI governance, for instance, some countries like Indonesia favour legally binding regulations, while others lean toward more flexible, principle-based guidelines to encourage innovation while managing risks. Despite these differences, the broad alignment on key priorities such as AI governance, cybersecurity and data protection, and online safety and trust presents valuable opportunities for regional cooperation.

**At a regional level, the ASEAN Digital Economy Framework Agreement (DEFA) is set for conclusion in 2025.** DEFA aims to harmonise digital trade rules, facilitate cross-border data flows and establish governance frameworks for emerging technologies. However, for regional alignment to be more achievable, domestic governance mechanisms must first be clearly defined. Regulatory clarity at the national level ensures that governments can engage in meaningful discussions on interoperability with pathways for implementation.

**Given the region's diverse levels of development, legal traditions and national priorities, sharing outcomes and focusing on priorities is the starting point for bridging differences in governance approaches and policy implementation.** This enables governments to learn from one another while fostering cross-border regulatory coherence. While the ASEAN DEFA provides a broad framework for cooperation, the shared priorities identified in this report, such as AI governance, cybersecurity and data protection, and promoting safety and trust, offer tangible areas for immediate collaboration. Prioritising these common interests enables incremental progress, building trust and practical alignment before tackling more complex areas of integration. Ultimately, a collective commitment to an open, interconnected and interoperable regional digital economy is essential for sustaining Southeast Asia's digital growth and resilience.

