Institutional Power and Competitive Geoeconomics: Asean's Strategic Adaptation in The Wake of India's Absence and Fta Rivalry

Do Thi Anh[1], Phan Thi Hai Yen[2], Nguyen Thi Thu Hien[3] and Nguyen Tran Thuy An[4]*
[1]Institute for Asian-Pacific Studies,
Vietnam Academy of Social Sciences, Vietnam
[2]Van Hien University, Vietnam
[3]The University of Da Nang, University of Science and Education, Vietnam
[4]Dong A University, Vietnam
Corresponding Author: Nguyen Tran Thuy An, anntt@donga.edu.vn

Abstract

Amid the rapidly shifting geopolitical and geoeconomic landscape of the Indo-Pacific, ASEAN's institutional centrality—particularly through the Regional Comprehensive Economic Partnership (RCEP)—is facing unprecedented challenges. India's withdrawal from RCEP disrupted the anticipated strategic balance, increasing institutional dependence on China and weakening ASEAN's soft balancing capacity. At the same time, the rise of high-standard free trade agreements (FTAs) such as the CPTPP and IPEF has created competitive structures, undermining RCEP's normative power and ASEAN's regional influence. This study employs a dual theoretical framework combining institutional power and geoeconomics to analyze ASEAN's strategic adjustments under mounting external pressures. It examines the institutional impact of India's absence and China's growing role within RCEP, while comparing the structural and normative influence of CPTPP and IPEF. Findings reveal that ASEAN has pursued multi-level strategic adaptations: strengthening intra-regional institutional capacity, diversifying partnerships, and leveraging multi-layered institutional structures to preserve strategic flexibility. The paper argues that ASEAN's ability to maintain centrality depends on enhancing institutional cohesion, deepening intra-regional coordination, and proactively shaping emerging regional orders. Without appropriate reforms, ASEAN risks marginalization amid intensifying institutional competition and growing polarization.

Keywords: *ASEAN, RCEP, CPTPP, IPEF, institutional power, geoeconomics, soft balancing.*

INTRODUCTION

As the regional geopolitical–economic architecture undergoes restructuring, ASEAN's central role in regional institutions—especially within the framework of the Regional Comprehensive Economic Partnership (RCEP)—is encountering increasingly pronounced strategic challenges. Initiated and led by ASEAN, RCEP was once expected to reinforce ASEAN's "institutional centrality" in shaping the regional order. However, India's withdrawal from RCEP in 2019 disrupted expectations of a geostrategic balance within the agreement's structure and weakened ASEAN's efforts to diversify economic power centers.

India's absence represents not only a strategic gap but also an opportunity for China to expand its influence, thereby diminishing ASEAN's effectiveness in sustaining "soft institutional balancing." Meanwhile, intensifying competition from other FTAs, particularly the CPTPP and IPEF, has heightened pressure on ASEAN's coordinating capacity. This institutional rivalry places ASEAN in a state of imbalance, as the bloc must simultaneously adapt to new economic power structures while maintaining its intermediary role among major economies.

Consequently, ASEAN's "soft centrality" is increasingly challenged, as its flexibility in coordination and rule-making no longer retains relative independence. In the long run, ASEAN risks being torn between conflicting strategic orientations, weakening its ability to shape an open, balanced, and inclusive regional order. Failure to sustain its position as a "neutral architect" of regional institutions would erode ASEAN's strategic capacity as a "third-party balancer" in an increasingly polarized regional power model.

This study is therefore situated within the context of ASEAN confronting opposing forces: the need to reaffirm institutional power through RCEP while simultaneously responding to challenges posed by India's absence and intensifying FTA competition led by extra-regional powers. Reassessing ASEAN's institutional adjustment strategies is imperative to preserve its strategic position in a volatile geoeconomic environment.

ASEAN's Institutional Character and New FTA Competition

The world stands at a historical crossroads, where successive shocks—geopolitical crises, the global pandemic, and economic instability—have shaken the foundations of the global economic system. As a result, polarization among major powers has intensified, leading to supply chain restructuring and the rise of trade protectionism. Trade barriers have tripled since 2019, accompanied by expanded financial sanctions. The geopolitical risk index spiked in 2022 following Russia's invasion of Ukraine. Direct trade between Russia and the West collapsed after the invasion and subsequent sanctions against Russia (Gopinath, 2024). In a world increasingly fragmented into two poles centered on the United States and China, with some non-aligned states in between, the International Monetary Fund estimates that such fragmentation could cause long-term losses equivalent to 2% of global GDP (IMF, 2023).

The rise of nationalism and the erosion of the global order have prompted states to reduce dependence on unstable partners, diversify supply chains, and establish distinct development strategies. Against this backdrop, the Regional Comprehensive Economic Partnership (RCEP) was launched in November 2020 and came into force in 2022, marking a major step forward in regional economic cooperation. With 15 Asia-Pacific countries participating—including all 10 ASEAN members—RCEP accounts for nearly 30% of global GDP and over 2.2 billion people, making it one of the largest free trade agreements in existence.

For more than half a century, the Asia-Pacific region has developed a multi-layered cooperation structure to flexibly adapt to economic and political shifts. A defining feature of this model is institutional stratification, with ASEAN playing the central coordinating role. Since 2000, ASEAN has actively promoted a network of bilateral FTAs under the ASEAN+1 framework, such as the ASEAN–China Free Trade Area (ACFTA), the ASEAN–Japan Comprehensive Economic Partnership (AJCEP), the ASEAN–Korea FTA (AKFTA), the ASEAN–India FTA (AIFTA), and the ASEAN–Australia–New Zealand FTA (AANZFTA). However, a comprehensive FTA framework for the entire East Asian region has remained elusive for decades, particularly the trilateral agreement among China, Japan, and South Korea, which has yet to achieve significant breakthroughs.

Meanwhile, global economic shocks—from the 2008 financial crisis, the Covid-19 pandemic, to the U.S.–China trade war—have accelerated supply chain restructuring and investment flows across the region. These changes pose new challenges to ASEAN's institutional centrality, as the bloc must navigate competing economic development models and a reshaping geopolitical order.

RCEP's initiation and leadership by ASEAN, from design to negotiation, is a clear testament to the bloc's institutional coordination capacity. The agreement not only consolidates ASEAN's pivotal role in the Asia-Pacific trade architecture but also enables the bloc to act as a strategic intermediary among major economies such as China, Japan, South Korea, Australia, and New Zealand (Shen & Guo, 2021). Thus, RCEP is not merely a trade agreement but also a tool that demonstrates ASEAN's centrality in shaping regional trade architecture and adapting to the emerging economic order.

The Strategic Gap Left by India

Within the emerging power structure of the Indo-Pacific, India's presence in RCEP was once expected to be a crucial factor in establishing "multipolarity" and reinforcing ASEAN's centrality through institutional balancing. With a population nearly equal to China's—over 1.4 billion, of which 68.9% will be of working age by 2030 (India, 2023)—and the fastest economic growth rate in the world (UN, 2024), India represented a potential partner both geoeconomically and geopolitically in the regional architecture (Xu, Liu & Wang, 2021; Zhang & Dong, 2021).

However, India's withdrawal from RCEP in 2019 created a significant strategic vacuum, undermining ASEAN's ability to maintain inclusiveness and institutional counterbalance. One prominent consequence was the loss of a potential partner in building supply chains to substitute for China—a central goal in ASEAN's diversification strategy after the COVID-19 pandemic. Through the "Made in India" initiative and the "Atmanirbhar Bharat" strategy, India has become an attractive destination for international investment and emerged as a new industrial hub within "China + 1" strategies (Chen, 2023; Zhao, 2020). India's record in attracting foreign investment is impressive, with FDI reaching $83.57 billion in the 2021–2022 fiscal year. The country now hosts more than 110 unicorns and around 130,000 startups, while ranking as the world's third-largest producer of renewable energy. Its rapidly expanding digital economy, coupled with innovation in green technologies and electronics—expected to reach a market size of $92 billion by 2032—has positioned India as a strategic partner in building sustainable development models.

India has also gained prominence in global initiatives such as the Indo-Pacific Economic Framework (IPEF), Quad, and the India–Middle East–Europe Economic Corridor (IMEC), while playing an active role in renewable energy, green hydrogen production, and climate finance. In renewable energy alone, India achieved remarkable progress: in 2021, newly built renewable capacity doubled that of coal; the country added 14 GW of solar power—equivalent to the UK's total capacity—bringing solar capacity close to 70 GW and wind power to 40 GW. India is currently implementing the world's largest renewable expansion program, targeting 500 GW by 2030. It is also pioneering international negotiations on green hydrogen production and distribution, while leading efforts to push developed countries toward stronger climate finance commitments. At COP28, Indian negotiators demanded that developed nations achieve net-negative emissions by 2050—a strategy aimed at safeguarding the interests of developing countries in the global energy transition.

Moreover, as the U.S. and Western nations seek to reduce dependence on China, India has emerged as a viable alternative partner, maintaining ties with China through mechanisms such as BRICS Plus and the Shanghai Cooperation Organization (SCO), while simultaneously strengthening strategic relations with the West. In this way, India can act as a "balancing intermediary" amid the current fragmentation of the global geoeconomic order. India's role as a new connectivity hub helps mitigate the negative effects of U.S.–China economic decoupling, thereby enhancing the flexibility and resilience of the global trading system. These achievements have positioned India as a potential balancing force between global power poles, particularly as the world enters an era of rising protectionism, supply chain competition, and geoeconomic restructuring.

India's absence from RCEP not only affects the regional power structure but also weakens ASEAN's representativeness and institutional coordination capacity, especially in maintaining its intermediary role among competing major powers.

Structurally, RCEP was envisioned as establishing an institutional balance among three major economies—China, Japan, and India—each representing a distinct axis of power (continental, maritime, and democratic). India was expected to serve as the primary counterweight to China, helping sustain the multipolar and inclusive nature of the regional architecture (Jain, 2021). Its withdrawal not only left a power vacuum but also tilted RCEP toward China's influence, which remains the largest trading partner for most ASEAN countries (Zhang & Dong, 2021). China currently dominates intra-RCEP trade, accounting for 30% of exports. Bilateral trade between China and ASEAN reached approximately $962.98 billion in 2024, up 9% from the previous year (Huaxia, 2025). China has maintained its position as ASEAN's largest trading partner for 15 consecutive years, representing 15.8% of ASEAN's total international trade in the first seven months of 2024 (Tuyen, 2024).

Smaller and developing ASEAN members such as Laos, Myanmar, and Cambodia depend on China for more than 80% of their total imports. For example, in the first seven months of 2023, Cambodia imported goods worth over $6.2 billion from China, accounting for 44.4% of its total imports (Pisei, 2023). China is also Laos's largest trading partner, with bilateral trade reaching $8.23 billion in 2024, a 15.91% increase from the previous year (Reporters, 2025). Larger ASEAN economies such as Thailand, Malaysia, and Indonesia have also recorded significant trade deficits after joining RCEP and bilateral FTAs with China.

China has leveraged its position in supply chains and advantages in high technology and e-commerce to consolidate economic influence within RCEP. By expanding direct investment—particularly in manufacturing, textiles, and electronics—China has gradually shaped intra-RCEP production and consumption structures, making businesses increasingly dependent on China-led value chains. Chinese exports to ASEAN have surged, especially in strategic goods such as lithium batteries, auto parts, and flat-panel modules, with growth exceeding 20% in Q1 2025 (Times, 2025). Meanwhile, imports from ASEAN to China also rose to $291 billion in 2024, benefiting from tariff reductions under RCEP. According to Vice Minister of Commerce Wang Shouwen, this not only reduced production costs for Chinese firms but also created jobs and enhanced domestic competitiveness.

As a result, China has become the dominant economic pillar in RCEP, with virtually no counterbalance. Selective import controls—such as border closures or technical barriers—are sometimes used as political tools, further reinforcing economic dependence and eroding ASEAN's autonomy.

The entry into force of RCEP in 2022 enabled China to strengthen its economic relations with regional partners while advancing its "economic repositioning" strategy to counter U.S. decoupling pressures. The upgrade of the ASEAN–China Free Trade Area to version 3.0 in October 2024—covering the digital economy, green economy, and supply chains—further expanded China's economic influence. The alignment between RCEP's objectives and the Belt and Road Initiative (BRI) facilitated China's rollout of numerous infrastructure projects in Southeast Asia, such as the Phnom Penh–Sihanoukville Expressway (Cambodia), the Cat Linh–Ha Dong railway (Vietnam), the China–Laos railway, the Jakarta–Bandung high-speed rail (Indonesia), and Malaysia's ECRL (Huaxia, 2025; Tuan, 2022).

China has signed 197 BRI cooperation projects with 137 countries and 30 international organizations, many of which are also RCEP members. Japan and South Korea likewise participate in China's BRI initiatives. These developments underscore Beijing's ambition to become a shaping force in regional investment and trade structures. As China assumes a leading role, its proposed institutions and norms increasingly dominate regional policymaking, overshadowing ASEAN's coordinating and guiding role.

This dynamic has generated "institutional adaptation pressure," compelling ASEAN states to adjust domestic policies to align with initiatives, standards, and institutional models led or influenced by China. As a result, policymaking now involves not only governments and supranational actors but is also increasingly steered by China's institutional influence. This poses major challenges for ASEAN in maintaining policy autonomy and safeguarding intra-regional interests. The incompatibility between developing countries' institutional models and China's dominant institutional power exacerbates asymmetry and deepens the imbalance of institutional power in the region.

Over time, the absence of India has limited ASEAN's ability to diversify power and increased the risk of being "gravitated" into China's economic–institutional orbit. Growing dependence on China in supply chains, infrastructure, investment, and technology erodes ASEAN's strategic autonomy and inclusiveness. The more ASEAN imports from China, the greater the risk of falling into China's trade trap. In 2019, Laos, Myanmar, and Cambodia already relied on China for more than one-third of their total imports. UNCTAD research shows Cambodia at 85%, Myanmar at 84%, and Laos at 94% import dependence.

Large ASEAN economies such as Thailand, Malaysia, and Indonesia face rising trade deficits with

China, especially after the ASEAN–China FTA in 2010. ASEAN's trade deficit with China surged tenfold between 2012 and 2021. Tariff reductions under RCEP are expected to further increase imports, particularly from China. In the first three quarters of 2024, China imported 184.83 billion RMB (~$26 billion) worth of agricultural products from ASEAN, making ASEAN China's second-largest source of agricultural imports. Products such as Malaysian durians, Bruneian seafood, and Vietnamese coconuts were newly approved for import, enriching Chinese consumer choices. Conversely, ASEAN is China's largest export market for agricultural goods, with Chinese fruits (oranges, pears) and vegetables (garlic, onions) widely available. In the same period, China's exports of fresh and dried fruits and vegetables to ASEAN rose 18.4% and 15.5% respectively (Ngan, 2024).

RCEP may thus increase ASEAN members' trade deficits and dependence on China, especially as most domestic firms lack the resources to diversify export markets. It is worth noting that China has a history of using trade as a political weapon, as seen in its recent tensions with Australia when it restricted iron ore imports.

In the context of intensifying economic–institutional competition, India's absence deprives ASEAN of a partner sharing its vision of an open, transparent, rules-based trading order, while limiting ASEAN's ability to strategically coordinate among major powers within RCEP. One of ASEAN's key attractions to global partners has been its diversity of development models and institutions. India, representing a democratic model, was expected to balance forces within RCEP and provide an alternative to China's monopolistic economic orientation (Xu, 2021). Without such opposing models, ASEAN struggles to maintain institutional diversity and to convince external partners of its inclusive and balancing role (Sun, 2023; Wang, 2022).

India's absence reduces ASEAN's developmental diversity and makes the bloc more easily perceived as "dependent on China." Moreover, without a strategic counterweight like India, ASEAN's role in shaping rules is diminished, pushing it into a state of "centrality through dependence"—a passive form of centrality derived from reliance on a dominant actor rather than internal capacity (Chen, 2023; Wang, 2022). China's growing prominence in RCEP not only dominates trade routes but also exerts deep influence over ASEAN's institutional mechanisms, complicating efforts to maintain balance and strength in strategic matters (Jin & Kang, 2021).

ASEAN risks becoming dependent on China-led initiatives and policies, reducing its independence and ability to manage relations with global partners. This undermines ASEAN's legitimacy in the eyes of external actors, as it can no longer claim diversity in development paths and institutional values. Consequently, ASEAN's capacity to coordinate among major powers and safeguard intra-regional strategic interests (Ma, 2023; Paul, 2005) is weakened, despite its tradition of designing open institutional structures to prevent domination by any single power.

ASEAN has long been recognized for its ability to connect and include diverse economies in the region, regardless of institutional or developmental differences. The participation of China, Japan, and South Korea has fostered economic, trade, and technological cooperation, opened vast new markets, and raised hopes for a trilateral China–Japan–Korea FTA. Japan pledged to remove tariffs on 56% of agricultural imports from China (Zhang, 2021). In return, China agreed to eliminate tariffs on 40% of imported Japanese sake after RCEP's entry into force, as well as on about 87% of auto parts, steel products, and household appliances from Japan (Tung, 2020).

According to estimates by the Peterson Institute for International Economics, China's exports are projected to increase by $248 billion thanks to RCEP, while Japan's exports will rise by $128 billion and South Korea's by about $63 billion. Trade among the three countries will grow significantly (Iwamoto, 2021). China, Japan, and South Korea are thus expected to be the biggest beneficiaries of RCEP's implementation.

The total trade volume among the three countries in 2024 is estimated at around 711 billion USD, reflecting close economic ties and mutual dependence within East Asia, in which China remains the largest trading partner of both South Korea and Japan. India's withdrawal has tilted RCEP's focus toward Northeast Asia, thereby increasing the influence of major economies and diminishing ASEAN's coordinating role in the multi-layered trade system. China can exploit its institutional advantages in RCEP to shape regional economic norms in ways favorable to Beijing, which poses challenges for ASEAN in maintaining a transparent trade mechanism and balancing member interests (Jin & Kang, 2021; Shen & Guo, 2021). This reduces ASEAN's representativeness in global issues, particularly in multilateral dialogues and global governance (Zhao, 2020).

Furthermore, India's decision to withdraw from RCEP disrupted efforts to expand economic–institutional connectivity between East Asia and South Asia, thereby limiting RCEP's spatial influence within the Indo-Pacific structure. One of ASEAN's initial strategic expectations when launching RCEP was to make it a bridge linking two potential growth poles—East Asia and South Asia—to expand regional supply chains, foster cross-regional integration, and diversify partnership networks. However, India's absence has severely undermined this strategic connectivity, leaving RCEP "locked" within Northeast and Southeast Asia instead of becoming a comprehensive intercontinental structure.

In the long term, RCEP's lack of India reduces the inclusiveness of the regional economic architecture, making it difficult for ASEAN to justify its role as an "open centrality." The absence of a large democratic economy like India diminishes RCEP's openness and risks portraying it as a mechanism skewed toward China, thereby affecting global partners' trust and ASEAN's ability to attract investment from outside the region (Xu, 2021; Zhou et al., 2021). Beyond weakening connectivity with South Asia, it also undermines India's "Act East" policy, a crucial strategy aimed at increasing New Delhi's presence in Southeast and East Asia through economic and institutional integration.

After India's withdrawal from RCEP in 2019, total trade with ASEAN declined slightly in 2020–21, likely due to the impact of the COVID-19 pandemic. However, bilateral trade rebounded strongly after 2021. Despite this recovery, India's trade balance with ASEAN remains negative and has worsened, reaching a deficit of 43.57 billion USD in 2022–2023. This shows that India and ASEAN continue to maintain close trade relations, but the growing deficit is a challenge for India, especially as it seeks to boost exports and reduce dependence on imports from the region.

India's withdrawal not only affected its foreign policy but also had adverse consequences for ASEAN, which lost a proactive partner in fostering regional integration from the South Asian direction (Jin & Kang, 2021). This disconnection prevents ASEAN from leveraging its intermediary role to guide integration between East and South Asia, thereby reducing RCEP's strategic value as an "intercontinental institutional bridge."

From both geopolitical and market perspectives, India provided not only a strategic counterweight to China but also expanded the connectivity axis between East Asia and South Asia—a core element in ASEAN's regional connectivity strategy (Xu, Liu & Wang, 2021). India's withdrawal, driven by concerns over trade deficits, agricultural protectionism, and insufficient safeguards for SMEs, created a power vacuum within RCEP. While some ASEAN members understood India's concerns, its absence has led to internal imbalance in the institutional order and weakened ASEAN's constitutive power in the region (Pan et al., 2023).

Ultimately, India's absence weakens ASEAN's ability to maintain centrality in the region and to enhance adaptability in an increasingly complex geopolitical environment. ASEAN, long considered a key organization in shaping regional and global order, risks losing influence and leadership without strategic counterweights, particularly against China. This may reduce ASEAN's capacity to shape trade agreements and security strategies within RCEP, turning it into a passive partner in regional and global integration processes (Shen & Guo, 2021).

Initiatives such as the ASEAN–India FTA (AIFTA), cooperation with the IPEF, and bilateral agreements may serve as "institutional counterweights" to partially offset the vacuum left by RCEP. However, these mechanisms require ASEAN to invest more in institutional coordination, connectivity, and strategic trust-building with key partners—especially India—to achieve long-term goals of stability, development, and strategic autonomy.

In sum, India's absence diminishes ASEAN's inclusiveness, balance, and institutional capacity within RCEP, making the bloc more easily identified with a China-led order and weakening its independent centrality, institutional coordination, and ability to construct an open, multilateral, and balanced regional architecture.

CPTPP and IPEF: Differences in Standards and Implications for ASEAN

The Regional Comprehensive Economic Partnership (RCEP) was once expected to serve as an inclusive, accessible trade framework suitable for the uneven levels of development across the region. ASEAN regarded it as an important tool to enhance intra-regional integration, as the agreement emphasizes flexibility in commitments and reduces trade barriers, particularly favoring developing ASEAN members (He & Liu, 2024; Xu et al., 2021). However, India's withdrawal and the absence of U.S. participation in traditional FTAs created space for China to expand its influence within RCEP, while opening the door for competing initiatives such as CPTPP and IPEF. In this context, ASEAN increasingly faces pressure from the high standards and alternative institutional structures these two agreements impose.

RCEP and CPTPP—during the period without U.S. participation—created pressure that forced Washington to reconsider its return to the Indo-Pacific. On that basis, 2022 witnessed the launch of the Indo-Pacific Economic Framework (IPEF), characterized by flexibility and the absence of binding legal commitments, entirely different from traditional FTAs (Service, 2020; CRS, 2018; Lan, 2022). Currently, IPEF members account for about 41% of global GDP and 28% of global trade—significantly higher than RCEP and CPTPP (Das, 2023). The essence of IPEF lies in building common standards on labor quality, environmental protection, and digital trade (Pham, 2022). Its goal is not tariff reduction but rather improving workers' quality of life, protecting the environment, and promoting digital commerce among nations, while minimizing the negative consequences of mere trade liberalization (WTO, 2022). Although it does not directly cut tariffs, IPEF creates opportunities for cooperation by prioritizing standards for the digital economy, strengthening supply chain resilience, fostering technological innovation, and transitioning to sustainable energy, ensuring equitable and inclusive economic growth (WTO, 2022). Participation in IPEF also demonstrates that the U.S. is not entirely absent from Asia-Pacific economic mechanisms, attracting interest from some ASEAN countries such as Vietnam and Malaysia—particularly in initiatives on digitalization and renewable energy (Ma, 2023; Liu & Kang, 2021).

ASEAN is now "sandwiched" between two major powers: RCEP leaning toward China's influence, while IPEF bears the imprint of the United States. ASEAN's neutral and flexible policy makes it difficult to fully align with either side without facing significant political–economic risks. The bloc is not strong enough to deeply engage in these competing FTAs without harming its independence and overall strategy, nor capable of leading the U.S.–China strategic confrontation (Zhou, 2023). The lack of consensus and clear internal strategy has led to ASEAN no longer being the center for designing "rules of the game" in regional trade agreements. Instead, major powers such as the U.S. and China increasingly take the lead in setting global trade norms and regulations (Zhou, 2023; Chen & He, 2024). As a result, ASEAN gradually loses its voice in deciding key issues related to regional economic and political security, risking becoming merely a platform for major powers to coordinate economic relations rather than a leader (Chen & He, 2024).

CPTPP—the Comprehensive and Progressive Agreement for Trans-Pacific Partnership—is one of the region's flagship FTAs, built on high standards and transparent procedures. Beyond tariff reduction, CPTPP requires members to comply with strict rules on labor and environmental protection, while promoting high standards in corporate governance and intellectual property rights. CPTPP is not just a conventional FTA but clearly demonstrates the rule-setting power of leading nations. With binding and transparent requirements, CPTPP creates strong reform pressure on member and potential states, including several ASEAN countries such as Vietnam, Singapore, and Malaysia. These standards enhance competitiveness and international integration but also generate internal divisions within ASEAN between states with strong and weak institutional capacity (Sun, 2023).

From the differences in approach and standards between CPTPP and IPEF, ASEAN faces a strategic dilemma: how to maintain intra-regional cohesion while adapting to external institutional pressures. These FTAs not only create trade competition but also force member states to confront growing divergence in FTA choices. Agreements such as CPTPP and IPEF have distinct characteristics, competing not only in trade benefits but also in shaping regional institutional structures.

Consequently, ASEAN struggles to maintain a stable common trade policy (Cai, 2024; Chen, 2023).
The development of CPTPP and IPEF has created fragmentation within ASEAN. First, the two agreements differ in operation and requirements: CPTPP emphasizes transparency and high governance standards, while IPEF aims to create new cooperative space with more flexible rules, focusing on digital transformation and sustainable development. This difference may lead to member states diverging in their choices: advanced economies tend to favor CPTPP to meet high standards (Zhao, 2020), while others may prioritize IPEF or RCEP. This reduces regional policy coherence and threatens ASEAN's collective coordination capacity (Yang, 2024; Liu, 2021).
The clear consequence of these contradictions is that ASEAN gradually loses its role as an institutional "bridge" once held in regional trade mechanisms. Instead of being a leader, ASEAN increasingly resembles a "playing field" for other FTAs to assert their positions, where member states must make difficult choices about joining high-standard agreements (Ma, 2023). That role is gradually shifting to major powers such as the U.S. and China, making ASEAN more passive in regional trade processes. This situation not only affects ASEAN's ability to manage trade relations in the region but also reduces its flexibility in shaping global trade rules. ASEAN therefore needs to quickly develop flexible response mechanisms to maintain leadership and ensure member states benefit from integration, while preserving the bloc's unity (Sun, 2023).
In summary, CPTPP and IPEF, with their competitive standards and institutional models, are challenging ASEAN's coordinating role and shaping capacity. In this context, it is imperative that ASEAN build a unified coordination mechanism, upgrade intra-regional institutions, and proactively position itself strategically within emerging FTA structures to maintain centrality in the regional economic architecture.

ASEAN's Strategic Adjustments to Structural Changes in RCEP and FTA Competition

In the context of intensifying institutional competition in the Indo-Pacific, ASEAN's effort to maintain and strengthen its centrality is not only a strategic goal but also an urgent requirement to ensure regional stability and political–economic sovereignty. Although India's non-participation in RCEP did not create an immediate shock to ASEAN's centrality, it has left long-term structural consequences, marking a significant structural turning point in the evolving Indo-Pacific economic architecture. Alongside rising competition from free trade agreements (FTAs) such as CPTPP, IPEF has emerged as an alternative institutional structure, directly challenging ASEAN's institutional leadership. In this situation, ASEAN is compelled to implement strategic adjustments to maintain its central role in the regional institutional framework. These adjustments are reflected at four main levels: (1) strengthening intra-regional institutional power; (2) diversifying partnerships and bilateralizing strategies; (3) leveraging multi-layered institutional structures to expand flexible coordination space; and (4) enhancing centrality through reform by consolidating cohesion and institutional capacity.

Strengthening Intra-Regional Institutional Power

Promoting internal initiatives and deepening regional economic integration is the core foundation for ASEAN to maintain centrality amid the growing complexity of the multilateral trading system. Mechanisms such as the ASEAN Economic Community (AEC), established at the end of 2015, serve as a crucial pillar to build a stable, prosperous, and highly competitive regional economy, with the goal of creating a single market and unified production base. Instead of navigating through 10 separate economies, ASEAN is shaping a single market, offering investors access to a population of over 640 million.
AEC focuses on trade liberalization, services, investment, rules of origin, and capital flows, while also developing infrastructure and ICT connectivity among member states. Parallel efforts include strengthening regional production networks through infrastructure connectivity in energy, transport, ICT, and telecommunications. These measures have been concretely implemented through important agreements such as the ASEAN Free Trade Area (AFTA), ASEAN Trade in Goods Agreement (ATIGA), ASEAN Framework Agreement on Services (AFAS), ASEAN Investment Area (AIA),

ASEAN Comprehensive Investment Agreement (ACIA), and the ASEAN Framework Agreement on Mutual Recognition Arrangements (MRA).

AEC 2025 provides a more comprehensive and practical action plan. First, it envisions "a highly integrated and cohesive regional economy, fostering sustainable economic growth through trade, investment, and enhanced employment opportunities." Second, it consolidates and expands commitments from the 2015 plan, including building a competitive economic region, promoting equitable economic development, and integrating with the global economy. For example, under the goal of "a competitive, innovative, and dynamic ASEAN," AEC 2025 introduces new commitments on governance and effective, responsive regulations aligned with higher international standards. Third, AEC 2025 sets new objectives to promote connectivity and sectoral cooperation in nine key areas: transport, ICT, e-commerce, energy, agriculture–forestry–fisheries, tourism, health, minerals, and science–technology. Finally, AEC 2025 includes a stricter monitoring and evaluation (M&E) framework, absent in the 2015 plan.

These initiatives are being restructured to enhance implementation capacity and policy harmonization among member states. Trade-related initiatives have significantly contributed to intra-regional trade growth. With total trade exceeding USD 3 trillion in 2021, ASEAN has become the world's fourth-largest trading bloc, after the EU, China, and the U.S. More than 90% of ASEAN tariff lines are at zero preferential rates—equal to or lower than MFN rates. Over 70% of intra-ASEAN trade is conducted at MFN zero tariffs.

Initiatives such as the Master Plan on ASEAN Connectivity (MPAC) and ATIGA need to shift from formality to substantive effectiveness, particularly in customs, technical standards, and digital trade. ASEAN must demonstrate constitutive agency rather than merely reacting passively to external pressures. Progress in key areas such as infrastructure development, sustainable agriculture, innovation in science and technology, and integration of MSMEs into global markets has deepened regional cooperation and strengthened collective resilience. These programs aim to narrow development gaps, enhance connectivity in infrastructure, institutions, and people, and foster an integrated ASEAN community (Wang, 2022; Kong, 2024).

By consolidating internal institutional power, ASEAN ensures its foundational vision remains intact despite India's absence from RCEP and the growing complexity of the regional trading system. ASEAN's emphasis on centrality is evident in initiatives such as the Initiative for ASEAN Integration (IAI) and MPAC. This strategy can be interpreted through the lens of soft balancing, whereby ASEAN strengthens collective economic and institutional capacity rather than directly confronting rival FTAs. IAI and MPAC serve as soft institutional tools to reinforce ASEAN's influence from within, thereby maintaining symbolic and functional centrality in the region's multilateral economic structure (Liu, 2021; Yang, 2007).

Moreover, ASEAN cannot rely solely on its traditional role but must proactively adjust strategy: enhancing RCEP's institutional capacity through technical working groups, strengthening commitment implementation, and expanding digital cooperation—as some member states are already doing in parallel FTAs. This strategy not only helps ASEAN maintain centrality but also repositions RCEP as an institution capable of adapting to today's complex institutional competition.

Bilateralization and Diversification of Partnerships

In the context of new FTAs that exclude ASEAN or impose high institutional pressures such as CPTPP and IPEF, bilateralizing trade relations and diversifying partnerships will help ASEAN safeguard its interests and avoid marginalization in global value chains. Instead of relying solely on collective mechanisms, ASEAN states should actively sign and upgrade bilateral FTAs with strategic partners such as India, the EU, Australia, Central Asia, or African countries—regions with significant untapped potential. This not only reduces dependence on a single trade axis, particularly China, but also enhances ASEAN's bargaining power and strengthens its strategic position in regional and global negotiations (Sun, 2023; Yuan, Pan & Wang, 2023).

This strategy reflects a pragmatic approach under competitive institutionalism, whereby ASEAN operates within overlapping institutions, positioning itself strategically across multiple arenas to increase flexibility and adaptability. ASEAN's participation in dialogues related to IPEF and CPTPP, even without binding legal commitments, demonstrates its willingness to be a stakeholder in the emerging normative order (Zhao, 2020; Chen, 2023). This balancing act reflects ASEAN's nuanced diplomacy: deepening intra-regional integration while cautiously expanding external partnerships to cope with FTA competition.

Leveraging Multi-Layered Structures for Flexibility and Coordination

In practice, regional structures operate under a multi-layered model, where a country can participate in multiple institutions simultaneously, with varying levels of commitment and policy scope. ASEAN needs to take advantage of this structure to coordinate its role across institutions, from RCEP to ARF, EAS, or ADMM+. Maintaining centrality in forums such as the East Asia Summit or the ASEAN Regional Forum allows ASEAN not only to serve as a dialogue bridge but also as an institutional architect. When ASEAN demonstrates a proactive role in linking institutional layers, it can increase strategic value and minimize the risk of major powers restructuring the institutional space in an exclusionary manner.

Beyond RCEP, ASEAN continues to assert leadership through other regional mechanisms such as ASEAN+3, the East Asia Summit (EAS), and APEC. Moreover, ASEAN should actively shape new trade standards by engaging with high-standard FTAs like CPTPP and IPEF through dialogue, observation, or gradual integration under its own conditions. This helps reduce the risk of being "left out" of the new wave of institutionalization and maintains influence in evolving cooperation structures (Baldwin, 2012). These platforms enable ASEAN to influence the shaping of broader regional norms and frameworks without being confined to a single agreement (Rao, 2013; Cai, 2024). This form of layered institutionalism enhances ASEAN's ability to exert influence through flexible institutional arrangements, ensuring ASEAN remains a hub of convergence rather than a focal point of division.

Participation in multiple mechanisms also reflects ASEAN's capacity to act as a "strategic institutional balancer," adjusting its role according to context without being marginalized. ASEAN's institutional flexibility—the ability to exercise selective leadership while maintaining an open region—helps it successfully navigate an increasingly crowded and competitive FTA landscape.

Centrality Through Reform: Strengthening Cohesion and Institutional Capacity

For ASEAN's centrality to be sustainable, internal reforms must be prioritized, particularly in policy cohesion and institutional capacity. Institutionalizing the principle of consensus needs to be made more flexible through the "ASEAN minus X" mechanism to avoid deadlock when one or several members do not agree. In addition, the technical and administrative capacity of the ASEAN Secretariat should be strengthened, with an independent monitoring and evaluation system established to ensure effective implementation of regional initiatives. Institutional reform not only increases operational efficiency but also demonstrates ASEAN's internal determination to upgrade its regional role—a key factor in enhancing credibility with external partners.

Examples include reducing developmental asymmetries through targeted integration initiatives (such as IAI and CLMV programs); strengthening implementation capacity through regulatory harmonization, dispute settlement mechanisms, and digital connectivity (He & Liu, 2024; Xu, Liu & Wang, 2021). These measures reflect a shift from normative centrality to instrumental centrality—from convening to effective execution in regional governance (Shen & Guo, 2021). ASEAN's reform agenda shows efforts to adjust institutional form to match functional realities, adapting to emerging economic conditions and normative pressures.

Furthermore, promoting intra-regional connectivity and supply chains will help ASEAN reduce dependence on major economies while enhancing strategic autonomy (Shen & Guo, 2021). This connectivity is not only economic but also reflects institutional cohesion within the region—a core foundation for maintaining centrality in an increasingly competitive geoeconomic environment. ASEAN should strengthen initiatives on transparency, digital trade, and sustainable development, thereby building the image of a dynamic, modern, and reliable cooperative region in the eyes of global partners. These elements will help ASEAN not only adapt but also reposition its leadership role in the post-RCEP era.

Instead of passively pursuing inclusiveness and neutrality, ASEAN can become a soft hub—a place that synthesizes, transforms, and disseminates regional norms on digital governance, green trade, infrastructure connectivity, and non-traditional security. To achieve this, ASEAN needs to expand strategic alliances with like-minded countries and invest in policy research and regional knowledge networks to maintain its role as an ideational architect.

Ultimately, ASEAN's response to the post-RCEP environment reflects a shift from a convergent foundation role to a norm-shaping role in regional governance. Rather than passively adapting to external institutions, ASEAN is seeking to build normative influence by setting standards for connectivity, sustainability, and inclusive development (Xu, 2023; Jin & Kang, 2021). Though soft in nature, this normative leadership allows ASEAN to demonstrate agency in the competitive institutional space, reducing the risk of marginalization.

Thus, ASEAN's strategic adjustments are not merely reactive but represent conscious efforts to reshape its central role amid shifting power and institutional models. Through internal initiatives, expanded bilateral and multilateral relations, and asserting presence across multiple institutional layers, ASEAN continues to maintain centrality in shaping the Indo-Pacific regional order. ASEAN now faces the urgent requirement of restructuring its central role, which demands enhanced institutional capacity, improved consensus mechanisms, and tighter coordination of member interests. At the same time, ASEAN must proactively engage in higher-standard cooperation networks while ensuring inclusiveness and cohesion are not undermined (Sun, 2023; Yuan et al., 2023).

In summary, ASEAN's adjustment strategy reflects proactive efforts to consolidate internal strength, adapt to institutional competition, and optimize its position in the multidimensional geoeconomic structure. In an increasingly polarized and competitive environment, ASEAN must continue investing in institutional capacity, intra-regional coordination, and soft leadership to ensure its centrality is not eroded.

CONCLUSION

From an economic perspective, RCEP is the first FTA to include countries that do not play a dominant role in the Asia-Pacific region, aiming to establish a modern, comprehensive, high-quality free trade area beneficial to all parties, based on maintaining ASEAN's centrality as a hub connecting major global economies. This is why ASEAN has always actively and proactively engaged in commitments within the RCEP process, seeking to leverage its balancing position to maximize the bloc's benefits. Attracting foreign capital and securing export markets remain crucial factors influencing ASEAN's intra-regional economic cooperation. Therefore, ASEAN needs to establish a broader framework that encompasses East Asian cooperation and other FTAs to maximize foreign investment inflows into ASEAN as well as its export markets.

From a political perspective, RCEP and ASEAN's centrality are mutually reinforcing. Without ASEAN's central role, RCEP would hardly be feasible, since ASEAN's centrality is a prerequisite for multilateral agreements in the region to gain support from both ASEAN and non-ASEAN countries. Conversely, ASEAN needs RCEP because the agreement helps sustain the multilateral cooperation model in which ASEAN holds the central role. However, India's absence from RCEP, together with the rise of parallel trade agreements such as CPTPP and IPEF, has posed profound strategic challenges to ASEAN's centrality in the regional institutional structure. Instead of firmly maintaining its position as a neutral coordinator, ASEAN now faces the risk of being "gravitated" toward opposing power poles, particularly China, without sufficient strategic counterweights to preserve RCEP's inclusiveness and balance.

China's growing dominance in both trade and institutions undermines ASEAN's autonomy and its ability to shape the rules of the game. Meanwhile, India's absence not only reduces ASEAN's institutional balancing capacity but also affects RCEP's credibility as a comprehensive and open framework. This situation exposes ASEAN to the risk of being identified with a China-led order, thereby eroding its coordinating capacity and weakening its strategic position in the region.

At the same time, competing FTAs such as CPTPP and IPEF are creating new norms and institutional spaces, forcing ASEAN to adjust in order not to be sidelined in the regional economic integration process. In this context, strengthening intra-regional institutional capacity, enhancing cohesion, and diversifying partnerships are necessary steps for ASEAN to maintain centrality—not only in name but also in strategic substance.

In the long term, ASEAN must continue investing in policy coordination capacity, promoting intra-regional cooperation, and playing an active role in shaping emerging institutional structures. Only by becoming a proactive agent—rather than passively reacting to major powers—can ASEAN safeguard its strategic interests and continue to hold centrality in the ever-changing geopolitical and economic order.

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