



Economic Research Institute for ASEAN and East Asia

**2013**  
Annual Report

Providing Analytical Support to  
Economic Integration and Development  
in **ASEAN** and **East Asia**





Economic Research Institute for ASEAN and East Asia



## ➤ ABOUT THE COVER

The colour blue implies trust and dependability that resembles the blue colour in the ERIA logo. The arrows going upwards suggest that ASEAN and East Asia countries are moving forward towards the future, supported by ERIA through its research and analysis. On the whole, the cover speaks of ERIA's role which has been supporting ASEAN and East Asia through its work in the past six years.

## ➤ TABLE OF CONTENTS

08	What is ERIA
10	Message from the Executive Director
14	ERIA's First Five Years: How it Began and What it Has Done
22	ERIA Event Highlights
30	Research and Research-related Activities
60	Dissemination Activities
64	Capacity Building
66	General Affairs

### ANNEXES

70	Annex A – Governing Board Members
72	Annex B – Academic Advisory Council Members
73	Annex C – Research Institutes Network
74	Annex D – ERIA Officials and Researchers
78	Annex E – Summit Statements (2013)
80	Annex F – List of Completed and Ongoing Research by Theme
83	Annex G – List of Outreach Activities of ERIA Researchers
89	Annex H – Seminars/Symposia
91	Annex I – Media Exposure
96	Annex J – Publications
101	Annex K – Capacity Building Seminar-Workshops



**16**  
MEMBER COUNTRIES



ERIA provides analytical research and policy recommendations.



ERIA works closely with the ASEAN Secretariat, researchers and research institutes from East Asia to provide intellectual and analytical research and policy recommendations.

The Economic Research Institute for ASEAN and East Asia (ERIA) is an international organisation established by a formal agreement among 16 Heads of Government at the 3rd East Asia Summit in Singapore on 21 November 2007. It works closely with the ASEAN Secretariat, researchers and research institutes from East Asia to provide intellectual and analytical research and policy recommendations.

These research and policy recommendations are expected to help in the deliberation of the leaders and ministers during their meetings (e.g., ASEAN Economic Ministers Meeting) and the East Asia and ASEAN Summits. The ERIA Headquarters is based in Jakarta, Indonesia.

The objectives of ERIA are:

- To facilitate ASEAN Economic Community building
- To contribute to the narrowing of development gaps in the region
- To support ASEAN's role as driver of the deepening of economic integration in East Asia

#### RESEARCH

ERIA conducts research under three pillars:

- Deepening Economic Integration
- Narrowing Development Gaps
- Achieving Sustainable Development

Studies cover a wide range of areas such as trade and investment, globalisation, SME development, human resource and infrastructure development, and energy issues.

#### DISSEMINATION

In order to disseminate its research findings and solicit inputs from various stakeholders, ERIA organises seminars and symposia which nurture a sense of community in the region. ERIA also publishes Reports, Discussion Papers and Policy Briefs that present the key recommendations of its studies. It likewise publishes the *ERIA Frames* newsletter which presents a bi-monthly picture of ERIA activities and research.

#### POLICY RECOMMENDATION

Based on the mandate given by the East Asia and ASEAN Summits, ERIA provides policy recommendations to the Leaders and Ministers during their meetings to stimulate economic growth, deepen regional integration and strengthen partnership in ASEAN and East Asia.

#### CAPACITY BUILDING PROGRAM

To strengthen policy research capacities and to secure an intellectual basis for the development of CLMV countries and other developing areas in East Asia, ERIA regularly conducts capacity building seminars and workshops in partnership with regional research institutes for policymakers, administrators, researchers and business managers in the above mentioned countries. ■



## MESSAGE FROM THE EXECUTIVE DIRECTOR



**Prof. Hidetoshi  
Nishimura**  
*Executive Director*

“Today, ERIA’s role in the region continues to expand especially as ASEAN and East Asia enter into critical phases in regional integration in the coming years.”

ERIA has made a number of important contributions to facilitate regional integration in both ASEAN and East Asia in the past five years through the conduct of research, provision of policy recommendations and organisation of symposia as mandated by both ASEAN and East Asia Leaders. The section on the First Five Years of ERIA included in this Report outlines the significance of these contributions and essays how such works have responded to key issues and concerns in the region.

Today, ERIA’s role in the region continues to expand especially as ASEAN and East Asia enter into critical phases in regional integration in the coming years. In this light, Fiscal Year 2013 proved to be a challenging as well as exciting year as ERIA helped ASEAN and East Asia push the envelope further to achieve the meaningful fulfillment of the ASEAN Economic Community (AEC) in 2015 and to set up a new and more enhanced regional architecture for deeper integration in the Asia Pacific region.

In the area of research, for example, ERIA’s contributions to ASEAN under the AEC included the completion and presentation of the results of the AEC beyond 2015 project which offered key recommendations for moving ASEAN and AEC forward beyond 2015; the continuation and subsequent completion of Phase 3 of the AEC Scorecard Project which dealt with the conduct of informed conversations, with the help and support of the members of ERIA’s Research Institutes Network (RIN), on regulatory reform and improved regulatory coherence in ASEAN (with special reference to logistics services sectors and trade facilitation) as well as with the estimation and analysis of border and behind-the-border restrictions in the logistics sector and trade facilitation to see their impact on the economic performance of the ASEAN Member States; and the further strengthening of the monitoring of the implementation of the AEC Blueprint through a more enhanced AEC Scorecard under Phase 4 which started around the end of 2013. All these have helped ASEAN in taking stock of the AEC progress.

In FY 2013, ERIA also conducted a number of RCEP-related studies which aimed to facilitate the completion of the RCEP negotiation by 2015. It also formulated Public-Private Partnership (PPP) institutional assessment studies in ASEAN countries (Phase 2) to help develop appropriate PPP frameworks in certain countries as well as developed the ASEAN SME Policy Index with a view to supporting competitive and innovative SMEs in ASEAN.

Recognising the crucial role of energy in supporting the economic growth in the ASEAN and East Asia region, ERIA has conducted numerous studies in the energy field since its establishment in 2008. This commitment to doing research in energy-related concerns was further fortified as the institute enhanced its energy unit through the addition of two more energy economists in FY 2013. This thereupon strengthened the unit's capacity to respond all the more to priority energy issues as it conducted and coordinated 13 energy-related projects tasked out by the EAS Energy Ministers Meeting.

ERIA's hard work and meaningful research did not go unnoticed. In the ASEAN and East Asian Summits, especially in the statement of the 8th East Asia Summit in October 2013 in Brunei Darussalam, the leaders called on ERIA to continue its extensive research activities to promote the economic integration of ASEAN and East Asia. In particular, the Chairman's Statement contained one chapter titled "ERIA" mentioned along with the concepts of Energy, Connectivity, Trade and Economics. While the recognition and appreciation certainly give honor to ERIA, they also represent greater responsibility for the institute as it is expected to continue to support the Summit activities as Sherpa organisation with the same vigor and commitment.

ERIA has also enjoyed a high ranking among think tanks all over the world through the years. For 2013, according to THE GLOBAL GO TO THINK TANK REPORT 2013, ERIA is ranked as Number 30 among the Top 50 International Economic Policy Think Tanks. The report had 6,826 think tanks from

182 countries participating in the process. Credit for this feat goes to the recognition of ERIA's extensive research works on economic integration in ASEAN and East Asia notwithstanding the fact that ERIA is still a relatively young institution in the region.

Fiscal year 2013 likewise saw the broadening of ERIA's reach to wider arenas as it deepened liaison with various international frameworks. Last October, ERIA jointly published a Special Report on "Southeast Asia Energy Outlook" with the International Energy Agency (IEA). Then in December, ERIA published a book titled "The Road to Bali: ERIA Perspectives on the WTO Ministerial and Asian Integration" and hosted a session on "East Asian Economic Integration and the WTO" in the Bali Trade and Development Symposium on the

margins of the 9th WTO Ministerial Conference. Furthermore, ERIA has been strengthening ties with the OECD as the latter set up the OECD Southeast Asia Regional Programme, including the development of a follow-up joint project to the ASEAN SME Policy Index which will be published in 2014. Considering the global interconnectivity and high transmissibility of economic changes and impacts, it is only appropriate for ERIA to extend its activity outwards.

Finally, the year 2013 also gave me much honor when I was reappointed as Executive Director for another five-years during the 6th ERIA Governing Board Meeting on May 4, 2013. To which I vow to commit to carry out ERIA's sacred mission as it charts new courses and explores new frontiers. ■



**Prof. Hidetoshi  
Nishimura**  
Executive Director

"According to THE GLOBAL GO TO THINK TANK REPORT 2013, ERIA is ranked as Number 30 among the Top 50 International Economic Policy Think Tanks."

## FIRST FIVE YEARS: HOW IT BEGAN AND WHAT IT HAS DONE



### THE BEGINNING

On 23 August 2006, during the 13th Consultation held between the ASEAN Economic Ministers and the Ministry of Economy, Trade and Industry of Japan (AEM-METI) in Kuala Lumpur, the name “Economic Research Institute for ASEAN and East Asia (ERIA)” appeared for the first time. In this meeting, Mr. Toshihiro Nikai, Japan’s Minister of Economy, Trade and Industry, proposed to establish a think tank called ERIA that would approximate an East Asia version of the Organisation for Economic Co-operation and Development (OECD) and committed to contribute more than 10 billion Japanese Yen in 10 years. A joint media statement of said consultation later stated that the ASEAN Ministers welcomed Japan’s proposal and requested Japan to discuss it further with the ASEAN Secretariat.

In response to this, then ASEAN Secretary General, Mr. Ong Keng Yong, initiated the creation of an ERIA Expert Group chaired by Dr. Hadi Soesastro, Senior Fellow at the Centre for Strategic and

International Studies (CSIS), Indonesia, and composed of experts from 16 East Asia Summit (EAS) countries and the ASEAN Secretariat. The Expert Group had intensive discussions on the overall idea of ERIA, in particular, its objectives, activities, structure, research themes, and capacity building program.

At the Second East Asia Summit held on 15 January 2007 in Cebu, Philippines, Mr. Shinzo Abe, Prime Minister of Japan, formally proposed to establish ERIA and the EAS Leaders welcomed said proposal. Thereupon, on 1 April 2007, the Expert Group agreed on the Points of Convergence on the Institutional Set-Up of ERIA, which defined the objectives, activities and policy interface of ERIA. In addition, two test-run research projects were started through a collaboration among 16 regional research institutes. One was titled “Developing a Roadmap toward East Asian Economic Integration”, which was reported to the ASEAN Economic Ministers Meeting in August 2007, and the other was the “Energy Security in East

Asia”, which was reported to the East Asia Energy Ministers’ Meeting also in August 2007. Based on the results of these projects and the thorough discussions of the Expert Group, the formal establishment of ERIA was agreed upon by all the leaders of the East Asia Summit at the Third East Asia Summit in Singapore on 21 November 2007.

Excerpts from the Chairman’s Statement of the Summit read as follows:

“13. We agreed to the establishment of the Economic Research Institute of [for] ASEAN and East Asia (ERIA) to be accommodated temporarily at the ASEAN Secretariat. We welcomed the report submitted to us by the Expert Group, which focuses on research topics of strategic interest to the EAS countries. We encouraged the Expert Group to continue its research work and we looked forward to practical policy recommendations to further regional integration and strengthen partnerships in East Asia.”

On 3 June 2008, ERIA was established as an organisation with its headquarters located at the ASEAN Secretariat and during its inaugural Governing Board Meeting, Dr. Dinh Van An was selected as Chairman, Prof. Hidetoshi Nishimura was appointed as Executive Director, and the statement on the Establishment of the Economic Research Institute for ASEAN and East Asia (see below) was thereupon adopted.

“We, the Members of the Governing Board of ERIA, hereby agree that:

FIRST, the Institute shall be known as the Economic Research Institute for ASEAN and East Asia, to be temporarily accommodated in the ASEAN Secretariat.

SECOND, the Institute shall function as an independent research institute but shall maintain and develop strong communication ties with [the] policy-making process. Especially, the Institute shall support ASEAN’s endeavor to build the ASEAN Economic Community (AEC) and support its role as the driver of the wider economic integration. The results of its research works shall produce concrete and tangible policy recommendations that shall meet the needs of Ministerial and National Leaders’ meetings.

THIRD, the Institute shall maintain its highest academic standards in its research activities, but shall never become an “Ivory Tower” secluded from the actual economic realities and people’s livings. It shall provide a tripartite-type forum for policy dialogue and interactions among researchers, policymakers, and civil society.

FOURTH, the Institute shall provide meaningful resources for narrowing development gaps and enhancing research capabilities in countries in need for improvement of public policy-making and research abilities, to build up confidence of these countries in the integration process.

FIFTH, the Institute shall function as a common asset to the ASEAN and East Asian countries in providing a common platform for rigorous economic studies, and its activities shall be open for cooperation with various prominent economic research institutions and organizations around the world, just as the East Asian economic integration shall be wide open, not closed to the rest of the world.”

While ERIA's headquarter is located at the ASEAN Secretariat, it had to have more space for the conduct of its research activities and organisational operations. Thus, it set up an Annex office at the Senayan area, about 2 kms away from the ASEAN Secretariat, which was officially opened on 17 September 2008, with Dr. Dinh Van An, Governing Board Chairman; Dr. Surin Pitsuwan, ASEAN Secretary General; Mr. Takamori Yoshikawa, Senior Vice Minister of Economy, Trade and Industry of Japan; and Mr. Primo Joeliyanto, Director General of Asia Pacific, Ministry of Foreign Affairs of Indonesia, in attendance.

In full recognition of the key role that it will play, ERIA was also given the status of an International Organisation through a formal agreement between the Indonesian Government and the ASEAN Secretariat on 30 December 2008. With all members of the ERIA Governing Board in agreement, ERIA then operated on the basis of this status, with Mr. Hidetoshi Nishimura appointed as its Executive Director.

#### ERIA'S STRUCTURE

Apart from the Governing Board which serves as the highest decision-making body of ERIA, ERIA is supported and advised by experts in its organisational set up. The Academic Advisory Council (AAC) is composed of a number of internationally renowned East Asia Summit countries' scholars and experts from universities, research institutions, the private sector, international organisations and non-governmental organisations. It provides advice and support to the Executive Director on the annual work program, review and evaluation of the research outcomes, and review and evaluation of the performance of the researchers. The first AAC meeting was held on 18 May 2009.

ERIA has another advisory body outside of its organisation, the Research Institutes Network (RIN), which consists of a network of research institutes in the East Asia region. Recognizing the fact that a network of research institutions is the key to ERIA's academic/research activities, members of the Expert Group, which also provided support to ERIA's test-run research projects, established the RIN in February 2009. The RIN has since supported ERIA's research activity by providing country information and research findings from individual countries, and giving advice to ERIA's research themes and policy recommendations, as well as encouraged the dissemination of ERIA's research outcomes to policymakers, opinion leaders and political leaders who implement policies. It has also supported ERIA's capacity building program since its establishment.

#### THE SETTING: RESPONDING TO THE REGION'S NEEDS

How has ERIA responded to the needs of the region in the past five years? Has it sufficiently addressed ASEAN's endeavour to build the AEC? Has it helped in narrowing development gaps in the region and in improving the capabilities of countries in need for better public policy making and research as they go through the regional integration process? And has it adequately helped in providing rigorous analysis and recommendations to resolve regional economic issues and crises?

At the height of the global economic and financial crisis of 2008-09, 16 EAS countries issued a statement in June 2009 titled "Joint Press Statement of the East Asia Summit on the Global Economic and Financial Crisis," which called for taking appropriate and coordinated measures against the impact of the financial crisis and the downturn of the world's economy as well as strengthening the region's growth potential and expanding demand. The 16 EAS Leaders expressed determination to address these concerns through the acceleration of basic infrastructure improvement, strengthening of policies and measures to expand domestic demand, expansion of assistance to the private sector, in particular SMEs, and promotion of human resources development. More importantly, they called for the need to advance regional cooperation efforts such as ASEAN integration, facilitation of trade and investment, promotion of

subregion-wide development, and promotion of people-to-people exchanges.

#### *Connectivity and narrowing the gap issues*

In this regard, they encouraged the ERIA, the Asian Development Bank (ADB) and the ASEAN Secretariat to work together to prepare as soon as possible a coherent master plan that would contribute to coordinating, expediting, upgrading and expanding subregional initiatives and promoting private sector participation. In addition, they called upon ERIA to provide policy recommendations to stimulate economic growth in the region, deepen regional integration and strengthen partnership in East Asia.

Responding to this mandate, ERIA completed the "Comprehensive Asia Development Plan (CADP)" whose conceptual framework utilizes the fragmentation theory and new economic geography. The CADP provides a grand spatial design of economic infrastructure and industrial placement in ASEAN and East Asia. It designates the intended regions of analysis in terms of three tiers. Tier 1 includes countries/regions that are already in production networks and where industrial agglomerations have started to form. Tier 2 corresponds to countries/regions that are not yet fully integrated into quick and high-frequency production networks. Tier 3, on the other hand, consists of countries/regions that are not likely to come into high frequency production networks in the short run but expect new industrial development through better

logistics infrastructure. The CADP emphasises the effectiveness of development strategies centered on economic corridors in promoting fragmentation of production activities. This is realised by connecting the different tiers along the corridors through reduction of service link costs and control of agglomeration/dispersion effects.

ERIA further supplemented its work on the CADP with its support on the drafting of two chapters in the Master Plan on ASEAN Connectivity (MPAC) wherein findings from the CADP study were utilised. The CADP was specifically mentioned with appreciation during the Fifth East Asia Summit held in Ha Noi on 30 October 2010 while the MPAC was endorsed during the 17th ASEAN Summit held on 28 October 2010. In this connection, ERIA's support to the MPAC was likewise appreciated by



the ASEAN Summit leaders. To this date, the two documents serve as the basis for implementing connectivity-related projects that spur subregional development and people-to-people exchanges. And since then, ERIA has worked closely with the ASEAN Connectivity Coordinating Committee (ACCC) and the ASEAN Secretariat in implementing the MPAC, especially on how to develop Private-Public Partnership (PPP) in the AMSs, and also organized Connectivity Symposia annually in collaboration with the ACCC and the ASEAN Secretariat.

ERIA has also completed CADP-2, further elaborating CADP and showing the huge potential in developing the Mekong-India Economic Corridor which starts in Ho Chi Minh at the east end and reaches India at the west end. Based on this study, the Heads of Government of Japan, Cambodia, Lao PDR, Myanmar, Thailand and Viet Nam, during the 3rd Mekong-Japan Summit held in Bali on 18 November 2011, and following the public announcement by ASEAN of Myanmar's ASEAN Chairmanship for 2014, acknowledged the need to formulate a comprehensive development study for Myanmar which will make "an important contribution to the enhancement of Intra Mekong and ASEAN connectivity". Thereupon, they agreed for ERIA to develop the Myanmar Comprehensive Development Vision (MCDV). The MCDV is expected to be utilised as the basis for Myanmar's long term national plan.

***The ERIA AEC Scorecard project and Mid-Term Review of the Implementation of the AEC Blueprint***

Signed by the ASEAN Leaders at the 13th ASEAN Summit on 20 November 2007 (just before the global financial crisis), the ASEAN Economic Community (AEC) Blueprint lays the foundation for the creation of an ASEAN economic community. In April 2009, the Leaders of ASEAN signed the Cham Hua Hin Declaration on the Roadmap for the ASEAN Community (2009-2015) and later agreed on the accelerated time table for the realisation of the ASEAN Community.

In 2009, the ASEAN Economic Ministers (AEM) requested ERIA to conduct a study that reviews the implementation of the AEC Blueprint as a complement to the official scorecard prepared and used by the ASEAN Secretariat on the implementation of the Blueprint. The ERIA study is basically a compliance scorecard and focuses on the status of the liberalisation and facilitation environment, and the eventual impact of the AEC Blueprint. Because the ASEAN Secretariat's AEC scorecard mainly monitored the progress of tariffs, the ERIA scorecard study decided to add indicators that would also measure the progress in areas such as investment and trade facilitation. Phase 1 of the ERIA Scorecard Project thus covered (1) investment liberalisation and facilitation; (2) trade facilitation; (3) transport; and (4) logistics services. To determine which of the measures listed in the Blueprint are the 'core' which needed improvement and had to be monitored and

measured, Phase 2 of the ERIA Scorecard Project did a survey of the ASEAN private business sector's priority needs and found that the sector wanted to put more emphasis first and foremost on the improvement of trade facilitation measures such as custom clearance procedures and the National Single Window, and then of investment and transport facilitation measures. In addition, Phase 2 also developed an alternative scoring system for these measures. Through the results of these alternative scores for the core measures, the AMSs had been able to see the true situation of how far they have gone towards achieving the objective of having an ASEAN economic community by 2015.

Based on these experiences, the AEM 2011 Chair, H.E. Mari Elka Pangestu, in her 15 April 2011 letter to ERIA, requested ERIA to assist ASEAN in undertaking the Comprehensive Mid-Term Review (MTR) of the AEC Blueprint and in providing policy analyses/recommendations to the AEM in order to (a) assess the effectiveness of the adopted measures of the AEC Blueprint as well as the contribution of the AEC Blueprint measures to economic growth, employment, competitiveness and social welfare within ASEAN, and to (b) provide recommendations to enhance the implementation of the AEC Blueprint. On 28 August 2012, ERIA presented the output and highlights of its mid-term review at the 8th AEC Council Meeting in Siem Reap. Said report and the prioritisation it presented were welcomed by ASEAN Leaders at the 21st ASEAN Summit in Phnom Penh on 18 November 2012.

The ERIA AEC Scorecard Phase 3 then focused on regulatory reform and improved regulatory coherence in the ASEAN countries to help bring about a more responsive and conducive environment for facilitation and liberalisation reforms. At the start of 2013, the Project entered its fourth phase which compares AEC commitments with actual implementation and policies in the AMSs and analyses the reasons as well as bottlenecks, if any, for the results.

#### **FTA mapping and RCEP studies**

The first five years of ERIA were also punctuated by its active involvement in the analysis and mapping of ASEAN free trade agreements (FTAs) with various dialogue partners and the utilization of said FTAs by ASEAN business sectors. At the same time, ERIA also provided intellectual support to the Regional Comprehensive Economic Partnership (RCEP) negotiation, delving into the importance of the notion of “ASEAN Centrality” both as a process facilitator and driver of the substance of the RCEP negotiation.

#### **ASEAN and AEC beyond 2015**

Meanwhile, responding to the call first made by the Indonesian President, H.E. Dr. Yudhoyono, during the opening of the 18th ASEAN Summit in May 2011 to “start the discussion on what ASEAN would be beyond 2015 and how to achieve such vision”, ERIA embarked on a major undertaking in 2012 which looked into various areas related to ASEAN and AEC beyond 2015. Tapping the huge reservoir of experts and specialists largely from

the ASEAN region, ERIA was able to put together several thought or issues papers under the project named ASEAN Rising: Moving ASEAN and AEC Forward Beyond 2015. With its completion in 2013, the report has been submitted to the High Level Task Force on Economic Integration (HLTF-EI) and presented in various roadshow presentations in the ASEAN region in late 2013.

#### **Towards realising Sustainable Development – studies on Energy**

Since its establishment, ERIA has allocated huge resources to studies related to sustainable development in this region, especially focusing on energy-related issues. In this light, ERIA has further strengthened and enriched its capacity to do research on energy concerns as it established an Energy Unit in April 2012 and designated a Special Advisor to the Executive Director on Energy Affairs.

#### **ERIA-ASEAN Chair-Harvard University Symposia**

In addition to the above-mentioned activities, ERIA, as the only Sherpa organisation in the region, has likewise supported the Chair of ASEAN in the latter’s Summit activities every year. A typical example is the annual big symposium organised by ERIA, together with the year’s ASEAN Chair country and Harvard University, on a topic that represents one of the deliverables of the Chair. In 2010, the first of this type of Symposium was held in Ha Noi on the theme “Evolving ASEAN Society and Establishing Sustainable Social Security Net”. In 2011, the Second Symposium was held in Jakarta, with the theme on “Moving ASEAN



Community Forward into 2015 and Beyond”. For this particular Jakarta symposium, ERIA Executive Director, Prof. Nishimura, together with ASEAN Secretary General, Dr. Surin Pitsuwan, handed over the Symposium’s set of policy recommendations dubbed as the “Jakarta Framework” to the ASEAN Chair, H.E. Susilo Bambang Yudhoyono. In 2012, the Third Symposium on “Realizing a More Integrated, Competitive, Equitable, and Resilient ASEAN Community” was held in Phnom Penh, and the outcomes and recommendations of this symposium were handed over to the ASEAN Chair, H.E. Samdech Akka Moha Sena Padei Techo Hun Sen, by Prof. Nishimura. And in 2013, the Fourth Symposium in Bandar Seri Begawan focused on “SME Development and Innovation Towards a People-Centered ASEAN Community”. The symposium report was circulated during the 8th East Asia Summit in Brunei in 2013.

#### **Capacity building program**

Finally, as the Statement on the establishment of ERIA mentions, ERIA is to help build the capacities of countries that are in need of improvements in their research and policymaking capabilities to prepare them for the process of deeper regional integration in the ASEAN region, especially in the CLMV (Cambodia, Lao PDR, Myanmar and Viet Nam) countries. In this connection, ERIA has, since its establishment, conducted a number of capacity building seminars on the topics related to regional integration in these countries. The memorable first seminar was held on 28 January 2009 in Phnom Penh. The theme was on the “Impact of Economic Integration to CLMV Countries”. Since then, seminars have been organised in each CLMV country every year. In mid-2013, ERIA also started the “Executive Capacity Building Program” which is designed for government officials of CLMV and Thailand at the level of Deputy Director General who will subsequently become the key players as senior officials in the field of transport, trade and commerce, and development planning. The capacity building programs have been conducted with the support of the Bangkok Research Center-JETRO Bangkok. ■



## 6th ERIA Governing Board Meeting

May 4th, 2013  
Indonesia

The 6th ERIA Governing Board Meeting was held at the ASEAN Secretariat in Jakarta. The meeting endorsed the ongoing and pipeline activities of ERIA which focused on economic integration and connectivity in ASEAN and East Asia. The meeting was chaired by Dato Paduka Lim Jock Hoi, Permanent Secretary of the Ministry of Foreign Affairs and Trade of Brunei Darussalam. During the meeting, the ERIA Governing Board also agreed to reappoint Prof. Hidetoshi Nishimura for another five-year term as ERIA Executive Director.



## 10th ASEAN Economic Community (AEC) Council Meeting

August 19th, 2013  
Brunei Darussalam

In his presentation titled "Towards Informed Regulatory Conversations and Improved Regulatory Coherence in ASEAN: Logistics Sector and Trade Facilitation" which is based on ERIA's study under the AEC Scorecard Project Phase 3, Prof. Nishimura urged ASEAN leaders to look into the regulatory burdens and regulatory improvement in a concerted manner and to make use of the improved regulatory environment as a competitiveness tool for the region. .



## EAS Economic Ministers Meeting

August 21st, 2013  
Brunei Darussalam

Prof. Hidetoshi Nishimura made a presentation to the Ministers on ERIA's activities and some ideas on a new development model for East Asia. He emphasised upon the need of having a proper economic policy regime in the region which includes enhancing the human capital and making industrial agglomerations efficient. Prof. Nishimura also encouraged the Ministers to discuss how the new development model can be realised in the region through active cooperation and coordination.



## 2nd ERIA Editors Roundtable on "Challenges Ahead: AEC 2015 and Beyond"

September 11th, 2013  
Brunei Darussalam

ERIA organised its 2nd Editors Roundtable after the first one held in November 2012 in Phnom Penh, Cambodia. The 2nd roundtable was special in terms of the number of media representatives, editors, policymakers and experts participating. The roundtable aimed to increase awareness and understanding among journalists from EAS member countries on key issues affecting the ASEAN Community. It also discussed matters related to the progress report of the Master Plan on ASEAN Connectivity (MPAC) and the prospect of the Regional Comprehensive Economic Partnership (RCEP).



## Symposium on "SME Development and Innovation towards a 'People-Centred' ASEAN Community"

September 14th, 2013  
Brunei Darussalam

Universiti Brunei Darussalam, with ERIA and Harvard University, organised the symposium on "SME Development and Innovation towards a 'People-Centred' ASEAN Community". The symposium discussed and articulated key elements in developing competitive ASEAN SMEs such as accelerating the ASEAN economic community building, ensuring an equitable, people-centred, stable and robust growth of ASEAN, and

enhancing innovation and technology capability. The symposium also came up with possible recommendations in supporting the role of SMEs towards the realisation of the AEC.



**7th East Asia Summit Energy Ministers Meeting**

*September 26th, 2013  
Indonesia*

The 7th East Asia Summit (EAS) Energy Ministers Meeting (EMM) was held in Bali and chaired by Energy and Mineral Resources Minister of Indonesia, H.E Jero Wacik, and co-chaired by Japan State Minister of Economy, Trade and Industry, H.E Kazuyoshi Akaba. During the meeting, Prof. Nishimura presented the key findings and policy implications of the research studies tasked out by the 6th EAS EMM to ERIA and also introduced the new research on energy being done by ERIA.



**Launch of Southeast Asia Energy Outlook**

*October 2nd, 2013  
Thailand*

ERIA's joint study and publication with the International Energy Agency (IEA) titled "Southeast Asia Energy Outlook" was formally launched in Bangkok, with H.E. Dr. Wichianchot Sukhotrat, Vice Minister of Energy of Thailand, presiding over the ceremony in the presence of H.E Maria van der Hoeven, Executive Director of IEA, and ERIA Executive Director, Prof. Hidetoshi Nishimura. In his remarks, Prof. Nishimura expressed ERIA's commitment to support energy activities and to continue its collaboration with the IEA and ASEAN countries on the study of energy issues.



**23rd ASEAN Summit and 8th East Asia Summit**

*October 9th – 10th, 2013  
Brunei Darussalam*

The Outcomes and Recommendations of the Universiti of Brunei – ERIA – Harvard Symposium that was held earlier on September 14 were distributed in this 8th East Asia Summit (EAS). In addition, ERIA's annual review of CADP (Comprehensive Asia Development Plan) was also distributed. The leaders attending the 8th EAS called on ERIA to continue its extensive research activities to promote economic integration in ASEAN and East Asia.



**ERIA Executive Capacity Building Program: Executive Leaders' Summit in 2013**

*October 21st – 25th, 2013  
Thailand*

Together with the Ministry of Commerce of Thailand, ERIA organised the Executive Capacity Building Program: Executive Leaders' Summit 2013 which was designed for government officials from the CLMV countries and Thailand at the level of Deputy Director General who would subsequently become major players in their respective countries as senior officials in the areas of trade and commerce, transportation and development planning. The capacity building activity

started with a seminar on "Building Robust, Efficient and Value Creating Connectivity for Regional Development" in Bangkok (10/21) and continued with a field trip and Executive Workshop in Chiang Mai (10/22 – 10/23) and finally, with a field trip to Chiang Rai (10/24 – 10/25).



**ASEAN RISING Workshops**

*16, 19, 23 & 26 November 2013,  
Indonesia, Malaysia, Myanmar & the Philippines*

The ASEAN Rising: Moving ASEAN and AEC Forward Beyond 2015 was presented in a series of workshops in four major cities in ASEAN: Jakarta, Kuala Lumpur, Yangon and Manila. Dr. Ponciano Intal, Jr., ERIA Senior Researcher and lead researcher of the study, said that while the title of the study bespeaks of optimism and ambition, the study nonetheless recognizes the substantial challenges ahead which require concerted efforts to address them. In the end, a concerted effort among all the member states and stakeholders is needed to sustain the momentum of moving towards and beyond AEC 2015.



**ERIA Capacity Building Seminars**

*November 2013  
CLMV Countries*

ERIA, in cooperation with concerned ministries and research institutions in Cambodia, Lao PDR, Viet Nam and Myanmar, conducted capacity building seminars on topics relating to the RCEP, SME, Competition Law, Consumer Protection and IPR in Phnom Penh, Vientiane, Hanoi and Nay Pyi Taw in the month of November 2013. The capacity building seminars aimed to strengthen the understanding of the participants on concepts and issues related to the regional economic integration process as their countries prepare for the realisation of the ASEAN Economic Community (AEC) in 2015 and beyond.



**9th WTO Ministerial Conference and Bali Trade and Development Symposium**

*December 3rd – 5th, 2013  
Indonesia*

ERIA hosted one session entitled East Asian Economic Integration and the WTO in the Bali Trade and Development Symposium organised by the International Center for Trade and Sustainable Development (ICTSD) and the Centre for Strategic and International Studies (CSIS). The discussions revolved around the book titled *The Road to Bali: ERIA Perspectives on the WTO Ministerial and Asian Integration* published by ERIA. ERIA Chief Economist Prof. Fukunari Kimura

moderated the session with speakers from ERIA and other institutions. The session aimed to provide a new perspective on regional and multilateral trading system based on the evolving production networks in the East Asia region.



**Japanese Vice Minister Visits ERIA**

*22 January 2014  
Indonesia*

H.E. Mr. Takamori Yoshikawa, Senior Vice-Minister of Agriculture, Forestry and Fisheries of Japan, visited the ERIA office on 22 January 2014. The Vice-Minister has previously served as Secretary-General of the Parliamentary League for ERIA and has been one of the strong supporters of ERIA since its establishment. In his visit, H.E Yoshikawa noted the development and growth of the organisation since it opened in 2008.



**Meeting with Secretary-General of OECD**

*January 31st, 2014  
France*

Meeting with the Secretary-General of the Organisation for Economic Co-operation and Development (OECD) in Paris, France, Prof. Nishimura extended his thanks and appreciation to OECD for its support to ERIA, especially on the development of the ASEAN SME Policy Index. During the meeting, ERIA and OECD agreed to work closely as partners and reinforce each other's efforts in the Southeast Asian region, especially in view of OECD's setting up of its Southeast Asia Regional Programme.



**ERIA Europe Roadshow**

*January 24th – February 2nd, 2014  
Europe*

With the objective of broadening ERIA's reach across the Asian continent and introducing ERIA's work and activities, Prof. Nishimura visited several development organisations and academics/think tanks in Europe to discuss about ERIA's various initiatives as well as global economic and trade issues. Amongst the organisations visited were the International Energy Agency in Paris (with the Executive Director, Ms. Maria van der Hoeven), World Trade Institute in Switzerland (with Dr. Thomas Cottier), Chatham House in London (with the Director, Dr. Robin Niblett), and the Centre for Trade and Economic Integration (CTEI) in Geneva (with the Director, Prof. Richard Baldwin).



**BNERI International Annual Conference**

March 25th, 2014  
Brunei Darussalam

Prof. Hidetoshi Nishimura, with the ERIA Energy Economists, attended the *Future Secure and Sustainable Energy Landscape for Brunei*. Prof. Nishimura delivered the keynote address wherein he presented an overview of the energy landscape in the EAS region and the studies being implemented by ERIA such as the Energy Outlook, Energy Saving Potential, Strategic Use of Coal, Energy Market Integration in ASEAN and East Asia, among others.



**Expert Seminar on the Introduction of the ASEAN SME Policy Index in Bali**

March 25th, 2014  
Indonesia

During the Expert Seminar session of the OECD Southeast Asia Regional forum held in Bali, the ASEAN SME Policy Index was introduced. The joint ERIA-OECD publication on the Index compares SME policy performance across the 10 ASEAN member countries and recommends reform priorities to support governments' efforts towards the realisation of the ASEAN Economic Community. The ASEAN SME Policy Index is an output of the project coordinated by ERIA

Economist Dr. Sothea Oum in close coordination with the ASEAN SME Agencies Working Group, the ASEAN Secretariat and governments of the AMSs. Senior Economist Antonio Fanelli and Policy Analyst Anita Richter from OECD served as external advisors of the project.



**OECD Southeast Asia Regional Forum**

March 26th, 2014  
Indonesia

Prof. Hidetoshi Nishimura moderated the high-level panel of the OECD Southeast Asia Regional Forum on Regional Competitiveness for Sustained Growth in Bali. The forum brought together high officials and experts from Southeast Asia and OECD countries. The forum was opened by Indonesian Finance Minister Muhammad Chatib Basri and H.E. Angel Gurría, Secretary-General of the OECD.

## RESEARCH & RESEARCH-RELATED ACTIVITIES



### RESEARCH AND RESEARCH-RELATED ACTIVITIES

In FY2013, ERIA completed 20 research projects and as of end of March 2014, there were 26 ongoing research projects under four major themes, namely, (a) deepening economic integration, (b) narrowing development gaps, (c) achieving sustainable economic development, and (d) energy-related issues.

Annex F enumerates the completed and ongoing research in FY 2013 by theme.

At the same time, in addition to the ERIA research projects that the ERIA researchers coordinated or were involved in, they were also active in sharing their expertise outside of ERIA as they were invited to serve as keynote speakers, paper presenters, panelists or discussants in various events organised by other institutions; resource persons or advisers on key policy issues to government officials or ministries; and contributors of articles in major journals, quarterlies, magazines and opinion columns in media dailies. These contributions not only helped in promoting the works and mandate of ERIA but also gave important perspectives and insights to public discussions of policy issues.

Annex G lists down some of these outreach activities of the ERIA researchers in FY 2013.

### Completed Research

For fiscal year 2013, the completed projects include the following:

#### 1. ASEAN Rising: ASEAN and AEC Beyond 2015

In response to H.E. Yudhoyono's clarion call during the 18th ASEAN Summit in May 2011, the Economic Research Institute for ASEAN and East Asia (ERIA) prepared the Jakarta Framework for Moving ASEAN and AEC Forward into 2015 and Beyond, the output of the Government of Indonesia-ERIA-Harvard University Symposium in October 2011. The Jakarta Framework was presented by ERIA, together with the ASEAN Secretary General, to H.E. Dr. Susilo Bambang Yudhoyono during the 19th ASEAN Summit in Bali in November 2011. As 2015 drew nearer and with the impetus for thinking through and preparing for the ASEAN Economic Community Blueprint post 2015 becoming stronger, ERIA decided in 2012 to tap a large number of specialists and experts from the ASEAN region (primarily) and outside to prepare more than 30 thought or issues papers on a wide range of areas related to moving ASEAN and the AEC forward beyond 2015. The papers explicate and deepen the ideas embodied in the Jakarta Framework and are put together in this study 'Moving ASEAN and AEC Forward Beyond 2015'.

This study highlights the progress of, and challenges facing, ASEAN and AEC, reframes the

1997 ASEAN Vision 2020, proposes targets for ASEAN indicative of a Rising ASEAN, presents and elaborates on a framework towards the achievement of an “ASEAN Miracle”, and provides key recommendations for moving ASEAN and AEC forward beyond 2015.

## 2. Globalisation and Performance of Small and Large Firms

In the past decades, growth performance of many East Asian economies has been far above the international standards. There is a growing consensus that one of the key factors behind this is because these economies were increasingly integrated with the global market, de facto and de jure.

However, in many East Asian economies, there is also a growing concern that the growth performance has been very uneven across firms. This is true not only in developed countries such as Japan and Korea but also in developing countries such as Indonesia and Viet Nam. In policy debate, this is often translated into the view that there is an increasing performance disparity between small and large firms. While it is an empirical issue as to whether or not this view has a sound factual basis, the perceived divergent performance between small and large firms has, in reality, become an important economic or socio-economic policy issue.

This study, which is the sixth in the ERIA Microdata project series since 2008, attempted to shed

light on this issue, with an objective to better understand whether and how globalisation has affected the performances of small and (or versus) large firms, as well as to identify policy issues which need to be addressed in order to achieve a stronger and resilient economic growth and development in East Asian economies. The study has 10 papers which cover the following countries: Japan (two papers), China, South Korea, Indonesia (two papers), Thailand, Malaysia, the Philippines, and Viet Nam.

## 3. AEC Scorecard Phase 3 - Towards Informed Regulatory Conversations and Improved Regulatory Regime: Logistics Sector and Trade Facilitation

Phase 3 involved the conduct of informed conversations with key stakeholders on regulatory reform as well as improved regulatory coherence in the ASEAN region with special reference to logistics services sectors and trade facilitation. The aim was for said reform to lead to the harmonisation of rules and regulations, standards, liberalisation, reduction in barriers, greater transparency and rationalisation of process, all of which are critical to the drive towards AEC 2015.

This Project Phase had two parts. Part 1 involved an overview of the regulatory regime in the logistics sector and trade facilitation, regulatory stock taking and gap analysis on actual regulations versus “best practice” regulations, and case studies of regulatory review and coherence which were done with the help of the members of ERIA’s

Research Institutes Network (RIN) in the region. Part 2, on the other hand, dealt with the estimation of the expanded restrictiveness index using both border and behind-the-border restrictions in the logistics sector and trade facilitation, and the analysis of the impact of the restrictions on the economic performance of AMSs.

## 4. Entrepreneurship and Local Technological Capacity in the East Asian Natural Resource-based Production Network

Previous researches of ERIA have emphasized the importance of participation in international production networks in order to benefit from technology transfer. But evidences show that beneficiaries in the manufacturing sector are mostly limited to multinational companies (MNCs) and a handful of local firms which are capable of meeting requirements from MNCs. On the other hand, natural resource-based (NRB) industries account for a significant portion of exports for most of the ASEAN member states. There are indigenous big enterprises in the member states which are already internationalised and have created international networks which are governed by themselves, through which technology could be transferred within the region. However, little attention has been paid to the NRB industries for establishing a clear relationship between technology and network.

The main objective of this research project is to get a deeper understanding of technological

upgrading and production networks in the NRB industries. To this end, two methodologies were adopted: case study and survey.

For the case study, one leading industry enjoying comparative advantages was selected from India, Indonesia, Lao PDR, Malaysia, the Philippines, Thailand, and Viet Nam. The selected industries for each country are the following: rubber processing (India and Thailand); seafood processing (Indonesia and Viet Nam); fruit processing (Lao PDR); palm oil (Malaysia); and furniture (Philippines).

In tandem with the case studies, the questionnaire surveys were conducted in five geographical areas that cover main industrial districts within four ASEAN countries: Jabodetabek in Indonesia, Calabarzon in the Philippines, Greater Bangkok Area in Thailand, and Hanoi and Ho Chi Minh Areas in Viet Nam. This year’s survey asks firms about product safety, in addition to the existing questions like respondent’s business profiles; innovation and upgrade activities; sources of technologies and information; and business tie-ups with customers and suppliers. In addition to these four countries, the survey was also organised in Lao PDR, focusing on firms supporting NRB industries.

## 5. Financing Infrastructure in ASEAN Member States: Fiscal Landscape and Resource Mobilisation

ASEAN Connectivity becomes a central issue to integrate and consolidate ASEAN member states



(AMSs) towards realising the ASEAN Economic Community 2015 and beyond. However, ASEAN still faces several obstacles in the realisation of all the three pillars of connectivity, i.e., physical, institutional, and people-to-people connectivity. In terms of physical connectivity, one of the main problems in implementing the prioritised projects listed in the Master Plan on ASEAN Connectivity (MPAC) is finance.

This study maps the current infrastructure development, fiscal condition and policy in all AMSs as well as the available financial sources at the regional level. It also looks at the fundamental challenges towards utilisation of funds and recommends a regional mechanism that would push forward the financing of infrastructure in the region. With a short supply of public financing to meet the demand for infrastructure, there has been an increasing need for private participation. One

important aspect in this study is to look at possible avenues to increase the role of Public-Private Partnership (PPP) in financing infrastructure and ASEAN Connectivity.

#### **6. Social Security System and Fiscal Policy in India, China, Japan and Indonesia**

This research project builds upon the previous ERIA research on Social Security Systems with three main objectives. The first is to review the modeling techniques used in the literature to project pension related old-age expenditure, and examine the quality and policy relevance of the projections, particularly for the four most populated Asian countries: China, India, Indonesia, and Japan.

The second objective is to assess the additional fiscal resources likely to be required by these four countries as they address challenges of rapid ageing. Conventional projection techniques with appropriate modifications are found to be suitable for Japan and China, but not for India and Indonesia for whom only rough projections on various components of social security system are found to be relevant.

The third objective is to explore avenues for each of the four countries in finding the fiscal space needed to finance age-related expenditure. The focus on understanding and evaluating modeling techniques for age-related pension expenditure, and then linking the projected needs to reforms in fiscal systems fills an important gap in the pension literature for these countries. Pension reforms

and fiscal reforms are usually analysed separately in the four countries. This study's premise is that an integrated approach to both is needed and an essential link between the two should be recognised. It is expected that such a linkage will assist policymakers in taking a broader view of pension system reforms.

#### **7. Public Private Partnership in ASEAN Countries Phase 2: Institutional Assessment to Develop Public Private Partnership System in Cambodia, Laos PDR and Myanmar**

Implementation of a PPP system requires an existing set of preconditions. The establishment of a PPP system itself requires several stages to be completed. CLM (Cambodia, Lao PDR and Myanmar) are, however, countries that will be mature in the not-so-distant future; international aid and investment will flow into the countries if institutional reform is successful. They therefore have opportunities to adopt PPP into their development strategies, given that international financial resources might be accessible for bankable schemes. Thus, the first task on hand is for CLM to develop a feasible and lucid PPP policy and framework. To do so, there is need for a background study and gap analysis on making appropriate PPP in the respective countries.

This study assesses the current development of private finance initiatives in CLM and the stage of PPP policy maturity. It provides analytical review of regulatory and institutional frameworks and

suggestions to move forward private participation in infrastructure development.

#### **8. ASEAN SME Policy Index 2014: Towards Competitive and Innovative ASEAN SMEs**

Because SMEs are critical for the robust growth of the AMSs and the whole ASEAN region itself, it is important for the policy regime in the region to be facilitative of the growth and development of the SME sector. Such policy regime is determined by both ASEAN initiatives and agreements as well as national policies and programs. Towards this end, it is necessary to have a consistent SME policy framework in the ASEAN at both the national and regional levels. There also needs to be a comprehensive and effective monitoring tool such as the ASEAN SME Policy Index to see whether the policies, programs and institutions are supportive of the development of SMEs in the region.

The ASEAN SME Policy Index is derived from the OECD SME Policy Index and adapted to ASEAN's specific context. Thus, the policy dimensions, sub-dimensions, indicators and levels of policy reform comprising the ASEAN SME index reflect more the specific circumstances of the ASEAN region.

The development and subsequent publication of the ASEAN SME Policy Index report is an outcome of the collaboration among the ERIA, OECD, members of the ASEAN SME Working Group and the ASEAN Secretariat.

### 9. Preparing for Natural Disasters: ASEAN Perspectives

Disaster, as a phenomenon impacting on economic activity, is quite different in many ways from other crises like a global financial crisis. It is characterised by sudden occurrence of the event, loss of lives, negative externalities, non-uniform distribution of damages over space, and a dynamic trend change from large negative shocks to a positive demand injection for recovery and reconstruction. As such, the impact estimate of disasters entails a delicate exercise methodologically. This ERIA study is a support towards serious endeavors of Asian nations to prepare for natural disaster. It focuses on the methodology of impact assessment, the cases for impact on poor households, and on disaster-linked financial instruments. The study also reviews current insurance systems of natural disaster and proposes improvement therein for ASEAN.

In the context of improving regional resilience, the study found that the region still lacks reliable data and insurance coverage. Therefore, it recommends to establish a regional center for disaster risk data, modelling and insurance that would be a critical first step for regional cooperation in natural disaster risk financing and transfer. The empirical results from the West Sumatra case also support the idea that ex-ante insurance scheme, even though the coverage is rather small, can have a positive effect on short-term recovery.

### 10. Economic Impact Evaluation of Investments on the Energy Savings and Low Carbon Emitting Technologies in East Asia – Phase 2

The first phase of this study projected energy supply and demand for 16 East Asia Summit (EAS) countries up to 2035 in two scenarios: Business-as-Usual Scenario (BAU) and Alternative Technology Scenario (ATS). The BAU considers the continued implementation of current policies and the use of current level of technology application while the ATS considers technological energy saving potential compared with the BAU and estimates the potential of those countries to reduce CO<sub>2</sub> emissions through low-carbon technologies. In the first phase, the study also evaluated the investment requirements for meeting the energy supply and demand, and conducted the analysis of the costs of introducing energy conservation and low-carbon technologies, and the direct benefits from reducing the fuel import spending.

Building on the findings from the first phase, the second phase of this study aimed to estimate the comprehensive impact from the introduction of energy conservation and low-carbon technologies on the economy of each country in the EAS. This is also based on the observation of a policy shift in recent years in the EAS countries to promote energy efficiency improvement as well as use low-carbon technologies.

Using the estimations of the investment requirements to introduce energy conservation and low-carbon technologies and their energy

saving effects by sector, the study analysed the direct impacts on each sector, and later the indirect influence on the economy by using a computable general equilibrium model, namely, the Global Trade Analysis Project or GTAP. Based on the results, the study classified the EAS member countries into several groups in trying to draw policy implications specific to each group. Considerations are given to facilitate cooperation among the EAS member countries towards achieving green growth and regional prosperity.

### 11. Analysis of Energy Saving Potential in the East Asia Region

This study is a support study for the EAS Energy Ministers Meeting (EMM) and the EAS Energy Cooperation Task Force (ECTF), and is the fifth in the series of studies on energy saving potential in East Asia. The results of the previous four studies have been reported in the past four EMMs and have been highly appreciated by the Ministers.

Based on social, economic and technological assumptions which are exogenous to the modeling, this research develops a Business as Usual (BAU) scenario for each EAS country outlining future sectoral and economy-wide energy consumption, assuming no significant changes to existing government policies. An Alternative Policy Scenario (APS) is also designed to examine the potential impacts of additional energy efficiency goals, action plans and policies that have been reported by the governments. The difference

between the BAU and APS represents potential energy savings.

The current study is extending and enhancing the analysis of energy saving potential undertaken in the past five years with new data and additional policy targets from the member countries. The study also examines other scenarios such as energy security scenario which estimates the necessary energy savings to maintain energy supply security at the 2000 level and clean coal technology scenario which estimates the impact of this technology on supply security and GHG emissions.

In 2012-2013, three additional and supportive research studies were conducted by the Working Group for the Analysis of Energy Saving Potential in East Asia and the Biofuel Sub Working Group. These three studies served as complements to the main research on energy saving potential in East Asia.

### 12. Benchmarking of Biodiesel Fuel Standardisation in East Asia

Asian countries are actively promoting the introduction of biofuels due to soaring oil prices and increasing energy consumption. The utilisation of biofuels is also important from the viewpoint of energy security and alternative fuels. However, the low-quality biodiesel fuel raises serious concerns regarding the effect on engine performance caused by fuel impurities and oxidation. Therefore, it was considered practical that biodiesel fuel

standards should be established in each country to promote more efficient distribution in the region.

The objective of this research was to define appropriate utilisation of biodiesel fuel by establishing the quality standard and quality control/management method that is required in the market. To achieve this objective, production of high-quality biodiesel fuel, its smooth distribution, and stabilisation of economic infrastructure are required.

The project collected information on test laboratories in each EAS country; compared test results and considered harmonisation of the test methods for the benchmark stand; and examined quality control measures at the pump in each EAS country.

The Working Group for this study updated the biodiesel fuel standard that was proposed in 2008, surveyed other biomass resources and investigated fuel/vehicle adaptation to reach emission targets.

### 13. Extending the ERIA Working Group Methodology for Sustainability Assessment of Biomass Utilisation in East Asian Countries – Phase 5

The ERIA Working Group (WG) on “Sustainability Assessment of Biomass Utilisation in East Asia” started its activity on sustainability assessment of biomass energy utilisation in the East Asian context in 2007 as part of a pre-ERIA test-run project. In that first phase, the WG extracted

issues of concern for sustainability assessment of biomass utilisation and summarised a WG report titled “Sustainable Biomass Utilisation Vision in East Asia”, which played an important role as scientific backup for the adoption of the “Asia Biomass Energy Principles” endorsed during the Second Meeting of the Energy Ministers of East Asia Summit in 2008. In the second phase, the WG developed a methodology to evaluate sustainability of biomass utilisation based on environmental, economic and social pillars. It also framed the “Guidelines to Assess Sustainability of Biomass Utilisation in East Asia”, incorporating the methodology developed and data required for sustainability assessment for biomass utilisation. Consequently, in the third phase, the WG conducted pilot studies in four selected East Asian countries to field-test the methodology developed and presented in the WG report “Sustainability Assessment of Biomass Energy Utilisation in Selected East Asian Countries”. The fourth phase upgraded the methodology based on the lessons learned from the pilot studies, as summarised in the WG report “Sustainability Assessment Methodology for Biomass Energy Utilisation for Small and Large Scale Initiatives: Lessons Learned from Pilot Studies in Selected East Asian Countries”.

The activities in this fifth phase aimed at (1) checking the indicators developed by the WG for assessing sustainable biomass utilisation with other international efforts such as the Global Bioenergy Partnership (GBEP) and the Roundtable



on Sustainable Biofuels (RSB), and (2) developing a basic framework of an ex-ante decision support tool for assessing sustainability of biomass utilisation systems.

For the first objective, the sustainability indicators of biomass utilisation identified in the international initiatives were considered and compared with those selected for the ERIA WG’s methodology. In this regard, the sustainability indicators in the ERIA WG methodology were found to be consistent with those in GBEP and RSB. Meanwhile, to meet the second objective, the framework of a decision support tool to make ex-ante sustainability assessments on biomass utilisation was developed and the relevance of the indicators developed by the ERIA WG was discussed. The need for such a tool had been identified earlier on to facilitate evaluation of planned biomass utilisation projects before they are actually implemented.

### 14. Effective Investment of Power Infrastructure in East Asia through Power Grid Interconnection

In the EAS countries, electricity demand is steadily rising due to population increase and economic growth. Moreover, as improving the electrification rate is an important policy task in many countries, electricity demand appears certain to increase more in the future in line with a rise in living standards. Meanwhile, as income is relatively low except for a small group of wealthy people, it is necessary to supply electricity at the minimal possible cost. Therefore, for the EAS countries, implementing large-scale power source development steadily in an economically efficient way is an urgent task.

Basically, for a country to implement power source development for self-sufficiency and energy security purposes is natural and a rational approach if the country’s demand growth for energy is moderate or if the country can implement economically efficient power source development on its own to meet the demand. However, when demand growth outstrips the capability to employ necessary domestic resources or when economically efficient power source development is difficult due to some constraints, importing electricity from neighboring countries should then be considered an option. In light of these, ways of developing power infrastructures (power sources and grids) on a pan-regional basis should be looked into. This will help optimise or improve the efficiency of power infrastructure investments.

In the ASEAN region, HAPUA (The Heads of ASEAN Power Utilities / Authorities) and the Asian Development Bank are implementing initiatives related to intra-region power grid interconnections, and bilateral power imports and exports are ongoing. However, individual countries still put priority on optimising investments at the domestic level. Besides, power imports and exports are not brisk enough to contribute to “power grid interconnection,” and moves towards pan-regional optimisation have been slow.

This study therefore quantified the possibility and benefits of the pan-regional optimisation of power infrastructure investments in the EAS region. As such, the study provided clues for facilitating policy decisions towards the development of optimal power infrastructures and investment decisions.

#### **15. Development of Energy Security Index and Assessment of Energy Security for East Asia Countries – Phase 2**

Enhancement of energy security is becoming one of the top priorities for each East Asian country since each needs to achieve sustainable economic growth and development. It is also essential to recognize that East Asian countries have a wide range of diversity in energy resource endowment, economic development stage, industrial structure, and stage of technology development and deployment. Given the above, it is imperative to analyse the energy security situation and the policy implications in East Asian countries, with such diversity taken into consideration. It is

also very important to promote energy security enhancement not only in each country but also in the East Asian region as a whole through regional cooperation.

The first objective of the research was to develop an Energy Security Index that would allow policy planners in the region to have an accurate understanding of the energy security situation in each country. The second objective was to assess energy security policy impacts in East Asian countries by using the Energy Security Index. The third objective was to draw policy recommendations for energy policy planners in the region based on the above analysis, with reference to what is the best approach/practice to enhance energy security for each country; what is the most effective way forward to enhance energy security for each country with different energy/economic conditions; and how the regional cooperation could be best promoted to enhance energy security.

#### **16. Asian Potential of Biofuel Markets – Phase 2**

Asia’s growing appetite for energy but relatively limited resource reserves makes it vulnerable to changes in international energy prices. For liquid fuel, the situation is even worse. Concerns on environment deterioration caused by the burning of fossil fuels have been growing. In facing the challenges, most Asian countries promote production and utilisation of biofuels as one of the possible solutions. However, it is an intensely debated option, with some of the following issues

being raised: biofuels versus food security, biofuels versus land use, deforestation, and others. Thus, promotion of biofuels’ production and utilisation should be planned and implemented with caution.

This study explored the Asian potential in the biofuel market. Indonesia, Malaysia, the Philippines, and Thailand were selected for study at the first stage since these countries are relatively advanced in the production and/or utilisation of biofuels in ASEAN.

In this second phase of the study, biofuel supply and demand outlook was projected and analysed for each selected country. Established results of other ERIA working groups were also utilised for the “Business as Usual (BAU)” case.

#### **17. Energy Market Integration in East Asia Summit Region: Renewable Energy and Its Deployment into the Power System**

The Energy Market Integration (EMI) study has been a continuous work since FY2009. This particular study focused on renewable energy (RE) and its deployment into the power system. It has nine research papers, six of which dealt with renewable energy. Among the topics addressed were on the impact of price distortion on the national economy, diversity in an integrated energy market, and cash transfer (subsidy removal) in India. On renewable energy issues, the studies addressed integration in ASEAN, trade and price support policy, case studies in

Cambodia, Indonesia, New Zealand, and the global perspective.

#### **18. Strategic Usage of Coal in the EAS Region – Phase 1**

With rapid economic development, electricity demand in the EAS region is also increasing. Coal- and gas-fired thermal power generation will generally continue to play a central role in order to satisfy this demand. As coal is cost competitive compared with gas, it is anticipated that coal-fired power generation will increase on a broad scale. For the sustainable usage of coal, the dissemination of Clean Coal Technology (CCT) for clean and efficient usage in the EAS region is of pressing importance.

While the necessity for the dissemination of CCT has been recognised, inefficient technology is still being widely used. It is therefore a concern that inefficient technology will lead to wastage of valuable coal resources and to less reduction of harmful environmental impacts. Based on the above, Phase 1 of this study developed a “practical” technological potential map for efficient CCT dissemination which could be used by policymakers in the region. It aimed to suggest a feasible efficiency level, environmental performance and maintenance criterion of each technology so that a country in the region would be able to select and introduce the best technologies based on its own situation.

**19. International Cooperation in Nuclear Safety Management in East Asian Countries – Phase 1**

Some of the ASEAN countries plan to introduce commercial nuclear reactors by the early 2020s due to the high growth of energy demand. In the 1st Working Group meeting of this study, the information on the current development plan with regard to safety regulation and nuclear security systems was shared among the member countries in order to identify problems in establishing an emergency action plan for accidents and in considering desirable cross-border cooperation. The 2nd Working Group meeting discussed proposals for regional cooperation such as emergency response, planning and management, technology and industrial development for nuclear safety and security.

This study's findings are:

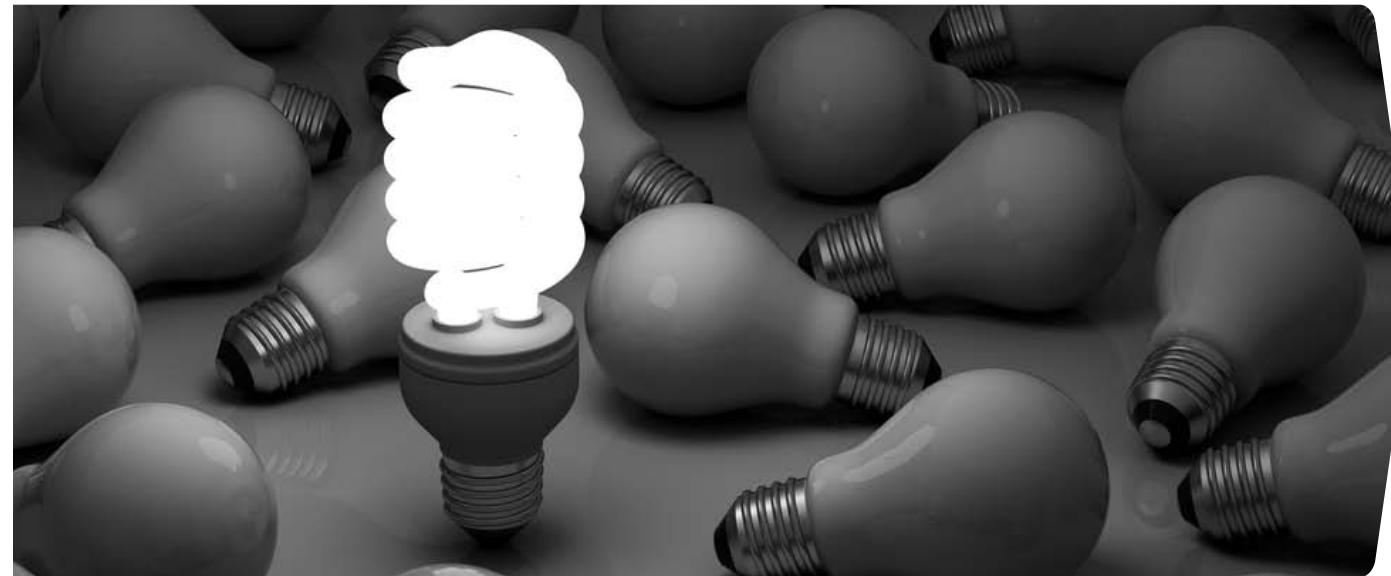
- All member countries have some kind of a national nuclear regulatory body and a common awareness that every country should play a role in regional cooperation on nuclear safety, irrespective of the development status of commercial nuclear power generation.
- The countries which already have nuclear energy technology, namely Korea, China and Japan, will be expected to provide information on the reactor and fuel technologies, safety regulatory schemes, security and safeguard issues, and most of all, human resources development plans.

- The nuclear accident at the Fukushima Dai-ichi on 11 March 2011 has had a serious impact among ASEAN countries even though the location of the accident is far from their location. Prompt and accurate information sharing at a regional scale would be the top priority in case of a serious nuclear accident.

**20. Energy Efficiency Improvement in the Transport Sector through Transport Improvement and Smart Community Development in the Urban Area – Phase 1**

The growth in transport sector oil demand has been led by motorization in some EAS countries whose income levels are growing rapidly. The expanding urban area of high income level and its soaring passenger vehicle ownership has been causing a number of socio-economic issues, including chronic traffic congestion. This in turn leads to energy waste, time losses in economic activities, and worsening air quality.

With respect to the transport sector, smart community aims to simultaneously achieve the efficiency improvement in the transport sector and the lowering of environmental burden through the optimisation of transport infrastructure such as road and rail, introduction of the next generation vehicles (hybrid, PHV, and EV), and transport demand management. In other words, smart community for the transport sector could cope with various transport issues in the urban areas of Asia.



A number of studies have been implemented to consider the energy saving potential in the transport sector of Asia through shifts towards fuel efficient vehicle units. This particular study utilised a simulation model which was able to analyse the impacts of infrastructure development on the traffic flow and subsequent impacts of the overall transport sector energy efficiency improvement within the rapidly developing Asian cities. The outcomes from the study provided new insights that would contribute to the sustainable development of cities in the EAS countries through urban transport improvement via smart community development.

### Ongoing Research

As of 31 March 2014, there were 26 ongoing research projects whose description and objectives are presented below.

#### 1. ASEAN Economic Community Scorecard - Phase 4 : Monitoring the Implementation of AEC Blueprint Measures

Effective monitoring is a central element in ASEAN's drive towards, and management of, deeper integration in the region. This is especially critical in the context of the ASEAN approach to regionalism and integration based on shared aspirations, interests and values; mutual trust and accepted procedures; frequent interaction and consensus building; and flexibility and pragmatism.

In support of the realisation of AEC 2015, ERIA has undertaken the monitoring and analysis of priority AEC measures in 2010 and 2011, in response to the task mandated by the ASEAN Economic Ministers. In preparation for AEC 2015, ERIA, through its AEC Scorecard Phase 4, proposes to once again undertake a major monitoring of the implementation of key priority AEC measures in early 2014. This new monitoring effort aims, among others, to:

- Determine the progress in the implementation of the key AEC measures as compared to the first monitoring effort done in 2010-2011. Given that the implementation of the AEC Blueprint is a continuing effort, it is expected that this new monitoring exercise will allow the measure and presentation of progress made. The measurement of progress using a common methodology will be useful for ASEAN officials in their communication with the public on both the successes and challenges of AEC 2015.
- Determine the gap between the rate of liberalisation in terms of commitments and actual policies. It may be possible that actual policies are more liberal than what were committed by AMSs in the AFAS or ACIA. It is therefore useful to determine this gap in the AMSs to help indicate areas for possible acceleration of implementation or for informing the pace and extent of liberalisation in the negotiations for the successor AEC Blueprint beyond 2015.

#### 2. Regional Comprehensive Economic Partnership Related Studies

The Regional Comprehensive Economic Partnership (RCEP) is critical to the deepening of economic integration of East Asia.

RCEP has taken the initiatives on regional economic integration to a higher level. First, in contrast to the ASEAN+1 Free Trade Agreements (FTAs) where individual ASEAN member states

(AMSs) had essentially bilateral commitments with the Dialogue Partners, AMSs would likely need to have common commitments vis-à-vis the partners (with perhaps a few exceptions) under RCEP. Second, the commitments of the dialogue partners need to be common commitments congruent with those of the AMSs. Third, the commitments under RCEP need to be substantially better than those under the ASEAN+1 FTAs; in short, RCEP should not merely be a consolidation of the ASEAN+1 FTA commitments but rather a high quality agreement in order for it to be credible and worthy of the resources and time expended for the negotiations and related activities. Moreover, given that RCEP effectively includes an implicit FTA agreement among China, Japan and South Korea which results in trade and investment diversion from ASEAN as compared to the ASEAN+1 FTAs, only deeper facilitation and liberalisation commitments would provide additional benefits to ASEAN Member States as compared to the current ASEAN+1 FTAs. With these objectives in mind, ERIA has undertaken a number of studies to support the RCEP negotiations towards a high quality trade and investment agreement, with greater emphasis on economic cooperation.

#### 3. ASEAN+1 Free Trade Agreements: The Use of FTAs in ASEAN

In collaboration with the ASEAN Business Advisory Council (ASEAN BAC) and national think tanks in ASEAN, ERIA conducted surveys on the usage of free trade agreements (FTAs) by the private sector. The surveys covered 630 exporting or importing

manufacturing firms and 182 services firms that use imported goods in their business operation across ASEAN countries. The surveys were complemented by interviews and focus group discussions with firms, business associations, chambers of commerce and government officials. In Brunei, in particular, because of its relatively small number of manufacturing and services firms, focus group discussions were organised instead of surveys. The surveys started in April 2013 and proceeded throughout August 2013.

#### 4. Meaning of Indian Economic Dynamism for the East Asia Economic Integration Process

India's recent economic performance is a success story. This economic dynamism needs to be harnessed by increasing its presence in the East and Southeast Asian region in a mutually beneficial manner. Given that East Asia is characterised by developmental asymmetries and a lack of any pan-Asian comprehensive economic integration agreement, the objective of this study is to demonstrate what Indian economic dynamism brings to the ASEAN+6 process, including its developmental implications. The study highlights the economic significance of India's integration within Asia and also how India's soft power has both cultural and ethical dimensions to this integration.

A detailed analysis is undertaken in the study to conceptually and empirically assess mutually beneficial potential in the realms of trade in goods, trade in services, FDI, demographic

complementarities and others. Based on the analysis, the study will make some broad recommendations towards creating a pan-Asian comprehensive economic integration framework.

#### 5. Trade in Value Added of Southeast Asia

The East Asia Pacific (EAP) economic growth has outperformed the world growth for the last two decades, except from 1997 to 1999 due to the Asian Financial Crisis. Most East Asian economies are well-positioned to weather any renewed volatility. As the drivers of global economic growth shift towards East Asia and Emerging East Asian economies, it is important for Southeast Asian economies to be well-positioned for them to benefit from the growing power of bigger Asian economies.

After a decade of China's accession to WTO, no one can afford not to trade with China. But as China's growth pattern changes as it moves up the income ladder and is likely to rely more on consumption and less on investment and exports (China's export performance was anemic in 2011 and has weakened further in early 2012) and more on services and less on industry, opportunities for Southeast Asian countries to expand their economies through trade and investment emerge. Much of East Asia's production is through production networks. Imports are largely used as inputs for exports. Many countries are engaged directly and indirectly in producing final products.

Given this scenario, this study aims to provide a framework on globalisation's second unbundling related to trade and industrialisation in Southeast Asia. The study will cover the following issues:

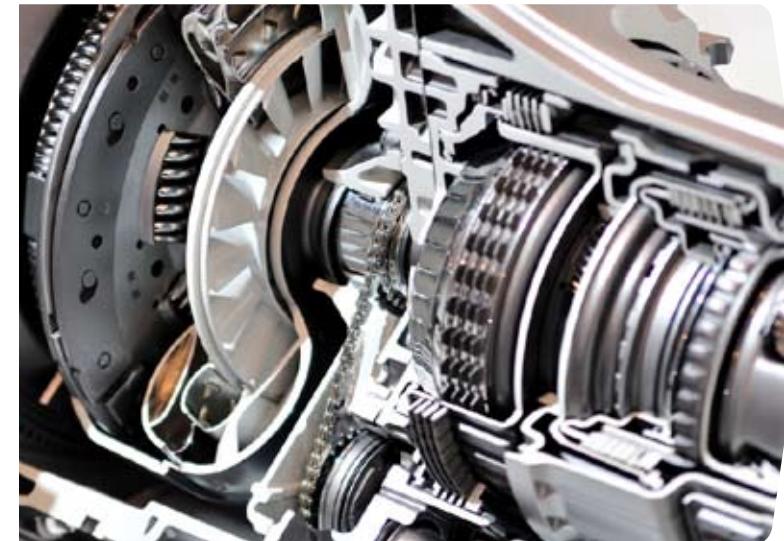
- How does the slowdown in trade in China affect Southeast Asian trade?
- How does Southeast Asia manage to level up its product value added and improve trade competitiveness?

#### 6. ASEAN Regional Integration and the Automobile and Auto Parts Industry

ASEAN has created a highly developed free trade system that is unique in Asia. In this, the automotive sector has been prioritised. The free trade system which began with the Brand to Brand Complementation (BBC) scheme in 1987 and finalised with the creation of the ASEAN Trade in Goods Agreement (ATIGA) promoted intra-regional trade and investment from automotive original equipment machineries (OEMs) and auto parts suppliers.

The automotive and auto parts industry is one of the key sectors for ASEAN to actualize AEC. This is proven by official trade statistics in which automotive parts account for more than 20 percent of the total intra-regional trade in ASEAN. The AEC Blueprint, which illustrates a roadmap towards realising an ASEAN single market and production base, schedules harmonisation of standards and technical regulations for the automotive sector. Such arrangements will also facilitate intra-regional automotive trade.

There still remain, however, some issues to be improved such as infrastructure (soft and hard) provision, mobility of skilled workers, and connectivity. The objective of this study is to observe the progress of the AEC establishment and its expected impact on industrial development, focusing on auto parts industry. Case studies have been conducted to investigate the current business conditions faced by automobile OEMs and parts suppliers. The study includes current states and issues of ASEAN's automobile and auto parts industries in ASEAN 5, AEC and Japan, ASEAN automotive parts logistics, workers mobility in ASEAN, automobile and auto parts industry in CLMV, India-ASEAN supply chain relations, and the automotive industry in Indonesia.



#### 7. Analysis of Competition Laws in East Asian Countries

As the East Asian region grows rapidly in economic activities, enactment and improvement of competition policies and laws will play a critical role in this growth by providing critical legal infrastructure to realise market-based economic environments and thus, further accelerate the economic growth. The introduction of a National Competition Policy in all the ASEAN member states by 2015 is one of the policy measures adopted in the AEC Blueprint to realise a competitive ASEAN. Moreover, the RCEP negotiations cover competition policy as one of the important chapters.

This ERIA study will therefore conduct a comprehensive comparative research on the competition policies and laws in East Asia (namely, Indonesia, Malaysia, Singapore, Thailand, Viet Nam, China, Japan and Korea). It is intended to shape common understanding on the elements required in an effective competition law system as well as to promote the harmonisation of said system with international standards. The framework of this study will be based on the features that are unique to East Asia.

The study is expected to be completed by the end of 2014.

### 8. FDI Policies and Performance in ASEAN Region

Foreign direct investment (FDI) is an important driver of industrialisation and growth in many developing countries, including those of the member states of ASEAN. The extent of FDI inflows to these countries has increased tremendously in the past two or three decades, coinciding with their economies' rapid growth. While the general positive impact is clear, the literature is still incomplete in documenting the policy issues surrounding the rapid investment flow. Moreover, previous studies have noted that there could be a great deal of variation in FDI inflow between countries and across industries within a country.

This study addresses this issue in selected ASEAN member states (AMSs). Its general objective is to examine the role of FDI policy in explaining the variation in the FDI inflows among the AMSs covered by the study. The implementation of this study will be completed in two fiscal years of research. The specific objective of the research for the first year (ERIA Fiscal Year 2013-14) is to make a rigorous documentation of FDI policy in all countries covered by the study i.e., Indonesia, Thailand, Malaysia, the Philippines, Viet Nam, and Cambodia.

In the documentation, discussions are made to align the FDI policy with other policies that are often linked to policies governing FDI. Examples are trade policy, labour policy, education policy,

infrastructure policy (hard and soft infrastructure), technology development, and regional economy within a country.

### 9. Study and Survey on Intra-ASEAN Non-Tariff Measures on Trade and Foreign Direct Investment

During the last decade, ASEAN countries have been active in mutually reducing tariff barriers to trade. This has been achieved mainly through various trade agreements concluded both bilaterally and at a regional level. Although this process has led to important reductions in barriers to trade, important non-tariff measures (NTMs) remain.

With the rising importance of global and regional production chains and international firms, NTMs constitute an increasingly important impediment both to trade and foreign direct investment (FDI). Trade and FDI that are freed from NTMs would potentially benefit all ASEAN countries. Unlike tariffs, regulation cannot just be removed. However, regulatory differences between countries and trade and investment costs that they create, can be reduced. To understand the extent of these impediments and the potential for their reduction in the ASEAN region, the first step is to measure these NTMs.

This survey study aims to identify and analyse existing NTMs and regulatory divergence at the sectoral level in the ASEAN countries. The survey and the report will focus on at-the-border

and behind-the-border costs that emerge from regulatory divergence. The results of this survey will provide insights into the extent of NTMs and regulatory divergence that exist within the ASEAN countries and how large or diverse effect they have on both trade and FDI.

The Centre for Strategic and International Studies (CSIS), Jakarta will provide a complete survey dataset together with a summary of existing surveys on the NTMs in the ASEAN region. The survey aims to observe the importance of NTMs between each trading country for each industry. The survey will cover representative exporting/importing firms considering geography, industry, size, ownership, state of being in an export zone and other firm characteristics.

### 10. Cross-border Soft Infrastructure Improvement in the Inland ASEAN

Transport facilitation is one of the essential measures for ASEAN to deepen the economic integration, strengthen ASEAN's competitiveness, and enhance people-to-people connectivity. The AEC Blueprint, Master Plan on ASEAN Connectivity (MPAC) and Brunei Action Plan clearly emphasised the importance of transport facilitation and specified the prioritised transport facilitation measures.

While AEC measures have not yet been fully implemented, production networks are expanding and becoming more sophisticated using new and existing trade and transport facilitation measures.

With ongoing transport facilitation between Laos, Cambodia, Viet Nam and Thailand, the Mekong region has been the forerunner of ASEAN in terms of transport facilitation.

Simulation analysis by IDE/ERIA-GSM revealed that development of the Mekong-India Economic Corridor (MIEC) had a larger impact on the Mekong region than the other GMS economic corridors. However, there are two missing links in MIEC: (1) Dawei deep seaport and link between Dawei and Kanchanaburi, and (2) Transit transport between Bangkok and Ho Chi Minh City. The IDE/ERIA-GSM suggests that firms would want to utilise these links as they will boost the economic activities in the Mekong region.

Given this background, this study raises the following issues: (a) the real bottlenecks in the missing link of the Bangkok-Ho Chi Minh City transit route among several soft and hard infrastructure concerns; (b) the differences and gaps between the use of bilateral MoUs and the Cross-Border Transport Agreement (CBTA) in the borders of the Mekong Region which can affect the transport facilitation during the transition period; (c) the differences between the East-West Economic Corridor (EWEC) and the MIEC; (d) the potential gains and contributions of forthcoming AEC transport measures; and (e) the areas that need to be addressed after the AEC measures are in place.

This study will cover both passenger and freight transport and will conduct comprehensive stocktaking among domestic regulations, bilateral MoUs, sub-regional initiatives, and possible AEC measures.

**11. Innovation, Technology Transfers, Finance and Internationalisation of Small and Medium Enterprises' Trade and Investment Policy: Best Practices for ASEAN**

The results of the ASEAN SME Policy Index scoring on eight policy areas (i.e., institutional framework; access to support services; cheaper and faster start-up and better legislation and regulation for SMEs; access to finance; technology and technology transfer; international market expansion; promotion of entrepreneurial education; and more effective representation of SMEs' interests) show that there is a lot to be done in order to move towards the best practice in each of these policy areas. The most significant gaps and low regional standing are on technology and technology transfer, access to finance, promotion of entrepreneurial education, cheaper, faster start-up and better regulations, and access to support services. It is therefore important to fast track the processes in support of narrowing policy gaps in ASEAN Member States, especially in the areas of technology development and transfers, access to finance, and regional strategy to boost SMEs' participation in trade and investment in ASEAN and East Asia. For this, identifying and sharing policy best practices in these areas are critical in fostering regional SMEs' policy cooperation

and providing practical policy implementation. The project would thus focus on the following policy areas of best practices: (a) SMEs' support policy for innovation, technological development, diffusion, and transfers; (b) facilitating SMEs' access to finance; and (c) promoting SMEs' participation in trade and investment in the region.

**12. Intellectual Property Policies for Investment Promotion**

This study was requested by the ASEAN-Japan Heads of Intellectual Property Offices (IPOs) to examine IP policies for investment promotion.

ASEAN adopted the "ASEAN Intellectual Property Rights (IPR) Action Plan 2011-2015" in 2011. The Action Plan recognises the need for ASEAN to ensure the protection and enforcement of IPRs of trading partners to be able to encourage foreign



direct investment (FDI) in the region. In order to do this, there is a need to identify the protection and enforcement measures pertaining to IPRs which are essential for FDI.

This study investigates the current status of IP regime and IP policy in the ASEAN Member States (AMSs) and how the AMSs should develop their IP-related policies in order to promote investments from MNCs. The main tool for this study is the use of interview survey. Selected MNCs that are considering expansion into the AMSs and those already in the AMSs are to be interviewed with a common set of questionnaires so as to identify the opportunities and challenges of the IP landscape in the AMSs.

**13. Development Potential of the Content Industry in East Asia and ASEAN - Phase 2**

This project is the second phase of the study on the development of content industry in the ASEAN and East Asia Region. In Phase 1, the study found that the market growth of the content industry (TV broadcasting, film, animation, games and music) for five countries, namely, China, Korea, Thailand, Malaysia, and the Philippines was higher than their GDP growth, indicating the growth potential of the industry. This growth also leads to a large scale labor absorption. In particular, the audiovisual content industry (TV broadcasting, film and animation) in the five countries can reach USD 200 billion at a GDP growth scenario. In addition, it also has the potential to reach USD 257 billion at a potential scenario. While all the

countries recognise the key policy issues and adopt relevant policy measures, these factors are not well organised enough to establish a strong industry and the government support measures are inadequate. Growing international demand also calls for stricter countermeasures against piracy, which is one of the industry's most serious problems, and global competition requires more aggressive governmental involvement. Following the Phase 1 study, and inviting the same members from semi-government institutions, this second Phase updates the key data (especially the content market size) and policy information by using the same methodology. Then, it examines the implementation status, policy impacts as well as perceived policy needs by utilising survey questionnaires to the private sector. It likewise aims to verify the policy recommendations presented in the Phase 1 study.

The findings and recommendations of Phase 2 will be published in July 2014.

**14. Disaster Risks, Social Preferences and Policy Effects: Field Experiment Studies in Selected East Asia Countries**

A number of devastating natural disasters have hit both developed and developing countries in recent times. Disasters can have serious negative effects not only on lives but also on the survivors' livelihoods in the aftermath. To identify effective policies to facilitate livelihood recovery of the victims of a disaster, it is imperative to clarify whether the disasters affect the poor

disproportionately. Work has recently begun to investigate the welfare impacts of natural disasters as well as man-made disasters such as economic crises through price changes.

The objectives of this project are:

- (i) to fill in the remaining large gap in the literature on behavioural impacts of disasters. Such a study is also indispensable in terms of designing and implementing appropriate post-disaster policies,
- (ii) to identify effective reconstruction and rehabilitation policies by quantifying people's behavioural responses to each policy in order to negate impact of such policies, and
- (iii) to provide policy recommendations at the community, national and regional levels.

#### **15. Energy Outlook and Analysis of Energy Saving Potential in East Asia Region**

In response to the Cebu Declaration on East Asia Energy Security in 2007 which emphasised that energy efficiency and conservation would be one of the ways to maintain energy security and mitigate climate change, Japan proposed to undertake a study of the energy savings and CO2 emission reduction potential in the EAS region. The study would quantify the total potential savings under the individual energy saving goals and action plans of each country. The potential saving was defined as the difference between the primary and final energy demand in the Business-As-Usual (BAU) scenario and Alternative Policy Scenario

(APS) – Energy Efficiency and Conservation (EEC) promotion case - of the energy outlook.

In September 2012, the 6th EAS Energy Ministers Meeting (EMM 6) held in Phnom Penh requested ERIA to prepare and analyse an appropriate energy outlook for the region taking into consideration the premises earlier made. Consequently, ERIA embarked on preparing and analysing an appropriate energy outlook of all EAS countries beginning 2013. This study would provide insights to national energy ministers in establishing goals and action plans to improve energy efficiency in their respective countries. The project also aims to prepare a methodology for the monitoring and implementation of energy saving goals and action plans of each of the EAS countries.

In addition, this year's study will include several other studies that are related to energy efficiency and saving potentials. These include, among others, energy price elasticity in selected ASEAN and East Asia Countries, impact of energy subsidies in Indonesia, and application of bottom-up approaches in road transport and household sectors.

#### **16. Energy Efficiency Improvement in the Transport Sector through Transport Improvement and Smart Community Development in the Urban Area – Phase 2**

Smart urban traffic is a research topic endorsed by the 6th EAS Energy Ministers Meeting (EMM 6) in 2012 in view of the rapid growth of passenger vehicle ownership in the urban centers of Asia.

The phenomenon has been causing a number of socio-economic issues, including chronic traffic congestion. This study identifies infrastructure investment and traffic demand management as the focus issues in transport improvement for Asian cities. Accordingly, Phase 1 of the study (2012-2013) shows that with small amounts of investment for road infrastructure improvements, a maximum of 2 percent travel time reduction and 15 percent of fuel saving could be achieved, in a 2 km section of Kuningan road in Jakarta.

This year's Phase 2 will analyse how to attract private car users for a modal shift into using the Bus Rapid Transit (BRT) system and assess the impact on the transport system in urban areas. Travel time reduction is identified as one of the most critical factors, especially for major cities like Jakarta. A field survey in Jakarta is being conducted to reveal the possible percentage of modal shift. The study will not only draw relevant policy recommendations but also apply analysis to the other cities of EAS countries.

#### **17. International Cooperation in Nuclear Safety Management in East Asian Countries – Phase 2**

The need for international collaboration in nuclear emergency preparedness and responses in the EAS region has become imperative after the Fukushima accident. The urgency, according to ERIA's energy outlook study, is further emphasised by the planned nuclear power development in the region, especially in China, India, Thailand, and Viet Nam. Thus, it is necessary to review appropriate nuclear

security and safety management measures and to establish a shared awareness in the context of energy situations, infrastructure, technological levels and other related circumstances of emerging countries in East Asia.

This research targets emerging countries in East Asia that plan to introduce or expand nuclear power generation or consider the possibility thereof, and compares the present situation in these countries with regard to safety regulations and nuclear security systems. This is to identify problems in establishing an information sharing system for accidents and in considering desirable cross-border cooperation. Through these efforts, this study aims to achieve the 3Ss - enhancement of nuclear safety standards and nuclear security, and establishment of nuclear non-proliferation safeguards - in East Asia.

Phase 2 (2013-2014) of this study will share: (1) information on and learning from the accident at the Fukushima Dai-ichi Nuclear Power Plant, (2) information on the safety standards and safety regulation systems in East Asian countries which utilise nuclear energy, and (3) information concerning safety regulation systems among East Asian countries that are considering the introduction of nuclear power generation.

**18. Development of Energy Security Index and Assessment of Energy Security for East Asia Countries – Phase 3**

Following the Cebu Declaration for Energy Security in East Asia, ERIA has regularly been conducting Energy Security Index (ESI) assessment for EAS countries to reflect the current status of energy security and accordingly, identify the most effective policies. This particular study is now Phase 3.

In many East Asian countries, energy demand is expected to grow in the long run due to their high economic growth and social development. It is also projected that energy production, particularly fossil fuel production, in East Asian region will not be able to meet the growing energy demand and that the region will have to face rising energy import dependency. At the same time, there are also emerging challenges in energy supply in the world energy market such as geopolitical risks, market power risks and natural disaster/accidental risks, among others. Given these factors, enhancement of energy security is becoming one of the top priority policy issues for each EAS country.

**19. Sustainable Development of Natural Gas Market in the EAS Region**

EAS countries have a growing demand for natural gas due to factors like economic efficiency, diversification of energy, effective use of domestic resources and reduction of environmental burden. Since the share of natural gas in the Total Primary Energy Supply in EAS countries is relatively low

except for a few countries, there remains much room to expand the use of natural gas.

To make the natural gas use sustainable, appropriate actions need to be taken through a supply chain such as exploration and production, necessary import, transmission, distribution and consumption. This would also include attracting investment for developing gas fields to enhance natural gas supply, increasing efficiency of natural gas use, and developing required infrastructure for natural gas supply. At the same time, strengthening existing capability and enhancing transparency of gas markets is important. This study aims to draw policy recommendations to address the abovementioned issues for the sustainable use of natural gas in the EAS region. The first phase of this project (2013-2014) analyses the potential of natural gas demand as well as the supply potential of natural gas in EAS countries. The study will then formulate a supply-demand outlook of natural gas. Based on this outlook, the study will analyse the possible changes in natural gas supply-demand situation and accompanying future opportunities and risks. The study will then present preliminary policy recommendations for the sustainable development of the natural gas market. The second phase of the project (2014-2015) will analyse the possibility of natural gas trading in the region and the potential of and challenges to supply infrastructure.

The study will cover countries in the EAS region that are currently exporting or importing natural

gas, namely, Australia, Brunei Darussalam, China, India, Indonesia, Japan, Korea, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Viet Nam.

**20. Strategic Usage of Coal in the EAS Region: A Technological Potential Map – Phase 2**

In the EAS region, Australia, Indonesia, China, India and Viet Nam produce large quantities of coal, and compared with other energy sources which are largely imported, an increased intensity of coal usage in the EAS region has the merit of enhancing energy security.

However, with the increase in demand for coal, notably in China and India, the supply-demand relationship of coal has become askew in recent years. In order to facilitate the economic development within the region, a cost effective and sustainable electricity supply system should be promoted. In addition, the dissemination of Clean Coal Technology (CCT) for clean and efficient usage of coal in the EAS region is of pressing importance.

The first phase of this study has been completed which focused on the economic return from investments in different types of coal technologies. Its major findings were that investments in clean coal technologies with high efficiency will bring higher return including savings in coal utilisation. However, the upfront cost of investment in clean coal technologies remains a barrier for the developing countries.

This second phase of the project will focus on updating the information from the earlier study and on finalising the laying out of a technological potential map to facilitate the deployment and dissemination of the CCT. This map, upon completion, will be practical for use by policymakers in the deployment and dissemination of technologies in their respective countries.

**21. Energy Market Integration in East Asia Region: Deepening, Understanding and Moving Forward**

Since the inception of the EAS Energy Cooperation Task Force (ECTF) work stream on Energy Market Integration (EMI) in 2005, the research has been actively promoted by East Asia governments to better understand matters impacting on energy trade liberalisation and investment, energy infrastructure, pricing reform and deregulation of domestic energy markets.



For the first six EMI studies, a theme was selected each year to have a key focus. The past EMI study themes focused on the review of the regional commitment of EAS countries, the benefits from EMI, the electricity market, theories, subsidies and renewable energy (RE). This Fiscal Year representing the seventh study, the EMI theme will once again look into gaps in the EMI in general and then focus on the energy trade in ASEAN and East Asia.

There will be 12 studies to be included in this year's EMI research, among which will focus on the welfare impacts of price equalisation in energy market integration; energy trade practices in India; deregulation, competition and market integration in China's electricity sector; case studies of the Greater Mekong Sub-region; and energy intensity and economic growth trade-off in selected ASEAN and East Asia countries.

## 22. Benchmarking of Renewable Mobility Energy in EAS Countries

Asian Countries are actively promoting the introduction of the first generation biofuels such as bioethanol and biodiesel fuel due to soaring oil prices and increasing energy consumption. On the other hand, first generation biofuels have some problematic aspects such as indiscriminate harvesting of energy crops and/or conflict with food supply. Therefore, these issues have put a brake on large-scale trading of these biofuels. Moreover, the first generation biodiesel fuel FAME (Fatty Acid Methyl Ester) has an essential

weak point of low-oxidation stability, which limits its long-term storage. The switchover to next generation biofuels, for example, non-edible feedstock, alcohols, ethers and/or synthetic hydrocarbons made from woody biomass are therefore the next avenue for East Asia and ASEAN countries to establish the Sustainable Mobility Society. Hydrogen, which can be made from electrolysis of water, is an extension of the next generation biofuels.

In this study, feasibility of next generation of biofuels such as non-edible feedstock, synthetic hydro-carbons, ethanol/buthanol, ethers, hydrogen etc. will be evaluated scientifically and economically, and proposals will be made for practical policies for each country's government.

## 23. Best Mix of Renewable and Conventional Energy Sources for Sustainable Development

Most of the countries in East Asia are currently dependent on fossil fuel imports to meet their energy needs. However, there is a high potential for renewable energy sources in this region that could help in the efforts to have a better environment. Availability of renewable energy sources is dependent on the local conditions in the Asian countries. Renewable energy initiatives in communities cannot be sustainable without their acceptance by local people. In this research, therefore, feasibility studies will be conducted on the sustainable energy systems using renewable energy sources suitable for various Asian communities and based on environmental,

economic and social considerations. There will be two phases of the study, namely, (a) Phase 1 which will develop a screening method to determine the merits and demerits of the initiatives taken from the environmental, economic and social perspectives of sustainability; and (b) Phase 2 which will develop guidelines for a sustainable and workable energy system.

## 24. Sustainability Assessment of Utilising Conventional and New-Type Geothermal Resources in East Asia

Many Asian countries have been attempting to develop the geothermal resources of their territories. While geothermal resources vary from country to country, countries with rich high-temperature resources have mostly utilised their geothermal resources by conventional steam power generation. Heat extraction from the deeper undergrounds of volcanoes has also been studied in some places.

Geothermal technologies such as reservoir engineering, monitoring techniques, scale-controlling techniques etc., which are all essential for the sustainable utilisation of geothermal resources for both power generation and direct use, have some common and universal aspects. This research aims at extracting those common and field depending aspects, finding common/ individual solutions and sharing information to improve technology for the sustainable geothermal utilisation in Asian countries.

The output of this study will be a collection of case studies and a procedure manual of guidelines for the sustainable development and utilisation of geothermal resources.

## 25. Energy Efficiency Roadmap Formulation in East Asia

In the 4th East Asian Summit (EAS)-Energy Ministers Meeting held in 2010, the Ministers appreciated the steady implementation of Action Plans to achieve voluntary energy efficiency goals by the EAS participating countries. The Ministers also welcomed the Energy Efficiency Roadmap Formulation Project as a means to accelerate the deployment of energy efficient technologies.

As there are increased uncertainties in terms of economic growth, particularly in the emerging countries, ASEAN and the Greater Mekong Sub-region (GMS) have attracted more attention globally. Given this increased interdependence and discrepancies in the region, particularly in the field of economic activities that include energy and electricity transactions, the energy efficiency research of Lao PDR was completed in 2013. Another energy study on Myanmar focusing on how to improve energy and electricity access in the country's rural areas has also been recently undertaken.

For the Myanmar study, a first report identifying three approaches to improve electricity access in the rural areas had been prepared and included as a chapter in the Myanmar Comprehensive

Development Vision (MCDV) which was completed in 2013.

This energy efficiency roadmap study will now examine these three approaches and look into the ground reality since the official data and statistics are not sufficient and fully reliable. Towards this end, the study will conduct fieldwork, comparative study and actor analysis in the neighbouring countries, case studies of good practices of small scale renewables and Independent Power Producers (IPPs) in the region, and grid development simulation. In 2014, a joint study with Chulalongkorn University will also be undertaken on the investor and investment environment analysis on the Thailand side of the border.

#### **26. Potential of Biofuel Markets in East Asia**

In Asia, the use of biofuels has evolved as a policy response to attain energy security and fight global environmental issues. The oil price rise in the early 2000s has accelerated the efforts for energy security through the utilisation of biofuels. Hence, policies and measures for the promotion of biofuels have become very important.

In this regard, therefore, the purpose of this study is to survey biofuel promotional measures in East Asia and to address the issue and make suggestions for policies for the design and implementation of a biofuel market in East Asia. It is important to understand the future biofuel market which is based on current and planned policy and technologies. Thus, the study will cover

the following elements: (a) literature survey of production and utilisation technologies of biofuels, (b) literature survey of policies and programs to promote the utilisation of biofuels, (c) outlook of supply and demand of biofuels in East Asia using econometric analysis and forecasting, and (d) study of required policies and programs, e.g., law and regulation, subsidies, standardisation, technology development, etc. to nurture and deploy a healthy biofuel market in the East Asia region. ■



## DISSEMINATION ACTIVITIES



Recently, ERIA has also enhanced its dissemination function as it adopted a dual-pronged strategy of continuing to make its studies and publications available...

To ensure that the results and recommendations of its studies are properly channeled to and reach their intended audience, ERIA organises seminars and symposia, either on its own or jointly with other institutions, wherein highlights of its research findings and recommendations are presented to concerned officials as well as other important stakeholders in the various countries of the region. At the same time, the Institute maintains a close liaison with local and international media in having its studies and activities reported in the media within the region. In addition, ERIA regularly publishes Research Project Reports, Discussion Papers and Policy Briefs which are made available online for wider dissemination.

Recently, ERIA has also enhanced its dissemination function as it adopted a dual-pronged strategy of continuing to make its studies and publications available on its website and at the same time disseminating them through more focused and stratified distribution/ mailing lists. Moreover, the Institute also strengthened its Publications program in FY 2013 with the hiring of two editorial and publication staff to further enhance its capacity to produce more publications. In this regard, a new publication outlet – the *ERIA Frames* newsletter – has been introduced.

### SEMINARS AND SYMPOSIA

ERIA has been conducting seminars and symposia which help nurture a sense of community in the region as it seeks inputs and feedback from stakeholders regarding the key results and recommendations of the ERIA studies. The seminars and symposia serve as the venue for presenting, disseminating and promoting the Institute's research results. In FY 2013, ERIA worked largely in cooperation with regional and multilateral institutions and academia such as the ASEAN Secretariat, Asian Development Bank, Harvard University and Singapore Institute of International Affairs in conducting said seminars and symposia. Annex H lists these major seminars and symposia.

### ERIA IN THE NEWS

In FY 2013, ERIA activities were reported and published by a number of international media based in Asia such as *The Nation*, *Jakarta Post* and *East Asia Forum*. Interviews with ERIA key officials and researchers/economists as well as with members of the ERIA Governing Board and Academic Advisory Council on some of the findings and implications of ERIA's studies and activities likewise saw print in various major newspapers and magazines in the region. Annex I enumerates the media mileage that ERIA had in FY 2013.

### PUBLICATIONS

Fiscal year 2013 proved to be bountiful in terms of publications as the Institute produced 12 Research Project Reports, 40 Discussion Papers and three Policy Briefs. In January 2014, ERIA also launched a new category to its list of publications – its bi-monthly newsletter called the *ERIA Frames*. Two issues came out during the fiscal year, namely, the maiden issue (January-February) and the March-April issue.

The complete list of publications released in FY 2013 is shown in Annex J.

#### **Research Project Reports**

Twelve Research Project Reports (RPRs) were published for the year, eight of which dwelled on energy-related issues such as the development of an energy security index for East Asia, strategic usage of coal in the EAS region, and international cooperation on nuclear safety management in East Asian countries. The focus on energy-related issues highlights the continuing importance of energy concerns in the ERIA research agenda. The other topics under the RPR series were on trade and integration matters (*The Road to Bali*), ASEAN and AEC beyond 2015, content industry in ASEAN and East Asia, and the ASEAN SME Policy Index.

**Discussion Papers**

In FY 2013, a total of 40 Discussion Papers (DPs) were released, a large number of which were outputs of the ERIA flagship project on “ASEAN Rising: ASEAN and AEC Beyond 2015”. This represents the biggest number so far in terms of DPs released since ERIA’s establishment in 2008. As seen in Figure 1, a total of 107 DPs have been issued since 2008, with 67 DPs released between 2008 and 2013, averaging 13 to 14 papers per year, and then followed by a spike in the number beginning April 2013 which led to a total of 40 DPs for FY 2013.



Figure 1. ERIA Discussion Papers Released (FY2008 – 2013)

**Policy Briefs**

Repackaged either from a Research Project Report or a Discussion Paper, Policy Briefs (PBs) look at specific aspects of a particular issue taken up in the ERIA studies and the implications for policy. They include the key policy issues and policy recommendations based on the results or findings of the studies.

For FY 2013, the Institute issued three Policy Briefs dealing with the ongoing reforms and economic transition in Myanmar. The first one revisits the role of the Dawei Project and reaffirms its importance in the era of reforms in Myanmar, emphasising that the project has significant additional benefits for the whole Mekong region. The second Policy Brief points to the need to restructure the Myanmar bureaucracy and transform it into a development agent of change. And the third one underscores the importance of Myanmar remaining on course in its program of reforms while pursuing its economic growth, and recommends a development model for Myanmar that is inclusive, people-centered and sustainable. The focus on Myanmar is in recognition of its Chairmanship role of ASEAN for 2014.

**ERIA Frames**

Launched in January 2014, the *ERIA Frames* newsletter is the latest in the Institute’s category of publications. The newsletter presents a bi-monthly picture of the Institute’s works and activities on ASEAN and East Asia issues. It describes recently completed and ongoing research projects as well as highlights of seminars, symposia, meetings and workshops, including feedback from capacity building workshops. Thoughts and perspectives on regional issues as written by ERIA scholars and other stakeholders in the region are also presented.

For its maiden issue (January-February), *ERIA Frames* presented highlights of the series of workshops held in four major cities in the ASEAN region in November 2013 on ERIA’s flagship project on ASEAN and AEC Beyond 2015. It also featured the insights of one of ERIA’s economists on “Why Indonesia should drive integration” in the newsletter’s Thoughts section.

The March-April issue, meanwhile, dwelled on partnership as a running theme as it took a glimpse at the collaborative work between ERIA and its Research Institutes Network (RIN) over the years and the promise of a closer working alliance between ERIA and the OECD in the Southeast Asian region with the setting up of the OECD Southeast Asia Regional Programme. It also presented excerpts from the meetings of the ERIA Executive Director with key officials and academics of well-known European development and knowledge institutions. For the newsletter’s Thoughts section, ERIA’s Senior Policy Coordinator presented his perspectives on why and how the AEC experiences should serve as a foundation for RCEP. ■





**CAPACITY BUILDING PROGRAM**

One of ERIA's mandates is to help enhance research capacities in countries in the ASEAN region in need of improvement of public policymaking and research abilities in order to build up confidence in these countries as they join and enter the regional integration process. In this connection, ERIA has regularly conducted capacity building seminars and workshops in the CLMV (Cambodia, Lao PDR, Myanmar and Viet Nam) countries, in particular, over the past five years.

In FY 2013, ERIA held capacity building seminars on the topics of Public Private Partnership as a framework for efficient infrastructure development; Regional Comprehensive Economic Partnership (RCEP); consumer protection; intellectual property right (IPR); and strengthening of competitiveness in regional integration in Cambodia, Lao PDR, Viet Nam and Myanmar. For Myanmar, the seminars were specially tailored to respond to the challenges that Myanmar faces ahead as ASEAN Chair for 2014. In addition, a Media Capacity Building workshop was also held in Myanmar to acquaint news editors and journalists on the issues that would be taken up during the entire year of discussions under Myanmar's ASEAN chairmanship in 2014 and prepare them in shaping and disseminating information on ASEAN and AEC beyond 2015.

Fiscal year 2013 also saw the start of ERIA's very first Executive Capacity Building Seminar-Workshop which is designed for government officials in the CLMV countries and Thailand at the level of Deputy Director General who would eventually become key players as senior officials in their respective countries in the fields of transport, development planning, trade and commerce. A two-part seminar-workshop on connectivity for regional development was held in Bangkok and then Chiang Mai and Chiang Rai in Thailand for these officials. About 30 participants from CLMV and Thailand were in attendance.

Annex K enumerates the capacity building seminars and workshops held in FY 2013 that were jointly organised by ERIA and its partner institutions in the countries concerned, with the support of the Bangkok Research Center-JETRO Bangkok. ■

In FY 2013, ERIA held capacity building seminars on the topics of Public Private Partnership, Regional Comprehensive Economic Partnership, and competitiveness, among others.



**GENERAL AFFAIRS**

Four major developments highlighted the management decisions for fiscal year 2013.

One was the strengthening of the Energy Unit, with the assignment of a Special Advisor to the Executive Director on Energy Affairs and the addition of two energy economists, in order to enrich ERIA's capacity to look into and analyse energy-related issues.

Two was the enhancement of the publication and dissemination function, with the designation of a Chief Editor and Publication Director, and one assistant, to increase the Institute's capacity in producing publications.

Three was the setting up of a program where ERIA received visiting officers from the Ministry of National Planning and Economic Development of the Union of the Republic of Myanmar as part of the capacity building of Myanmar's human resources. Two officers stayed for six months each at ERIA while four stayed for three months each. During their stay, the officers participated in ERIA seminars and workshops, symposia, internal meetings and the like.

And four and finally, ERIA, through its Executive Director, has endeavoured to broaden its reach

to wider arenas as it linked up with international institutions like the OECD and the International Energy Agency (IEA). In FY 2013, ERIA co-published the "Southeast Asia Energy Outlook" with the IEA and worked closely with the OECD in the development and preparation of the ASEAN SME Policy Index. The Executive Director also visited Europe in January 2014 to meet with international organisations and prominent think tanks and introduce ERIA's activities and work. ■





Annexes

# ANNEX A GOVERNING BOARD MEMBERS

The Governing Board is the supreme decision making body of ERIA and consists of 17 members, 16 of whom come from member countries with

various backgrounds (e.g. academia, policy makers and business), and the Secretary General of ASEAN.

*As of February 2014*

<b>Brunei (Chairman)</b>	Dato Paduka Lim Jock Hoi	Permanent Secretary, Ministry of Foreign Affairs and Trade
<b>Cambodia</b>	H.E. Dr. Hang Chuon Naron	Minister of Education, Youth, and sports of Cambodia, Permanent Vice Chairman of the Supreme National Economic Council.
<b>Indonesia</b>	Prof. Dr. Jusuf Anwar	Senior Group Advisor, CT CORP; Former Minister of Finance
<b>Laos</b>	H.E. Mr. Bounthavy Sisouphanthong	Vice Minister of Planning and Investment
<b>Malaysia</b>	Tan Sri Datuk Asmat bin Kamaludin	Group Chairman, UMW Holdings Berhad
<b>Myanmar</b>	H.E. Lei Lei Thein	Deputy Minister, Ministry of National Planning and Economic Development
<b>Philippines</b>	Dr. Ramon Millar Quesada	Chairman and CEO, Small Business Corporation, Department of Trade and Industry
<b>Singapore</b>	Ambassador Barry Desker	Dean, S. Rajaratnam School of International Studies (RSIS)
<b>Thailand</b>	H.E. Srirat Rastapana	Permanent Secretary, Ministry of Commerce of Thailand
<b>Viet Nam</b>	Prof. Le Xuan Ba	Former President, Central Institute for Economic Management (CIEM)

<b>Australia</b>	Dr. Stephen Greenville AO	Former Deputy Governor of the Reserve Bank of Australia
<b>China</b>	Professor Zhang Yunling	Professor of International Economics; Academy Member and Director of Academy Division for International Studies, Chinese Academy of Social Sciences
<b>India</b>	Dr. Rajiv Kumar	Senior Fellow, Center for Policy Research; Former Secretary General of the Federation of Indian Chamber of Commerce & Industry (FICCI)
<b>Japan</b>	Mr. Fujio Mitarai	Chairman and CEO of Canon Inc.; Honorary Chairman of Nippon Keidanzen (Japan Business Federation)
<b>Korea</b>	Mr. Suck Rai Cho	Chairman and Chief Executive Officer, Hyosung Corporation; Honorary Chairman, Federation of Korean Industries
<b>New Zealand</b>	Dr. John Wood, Amd (Retd), QSO (Adjunct Professor)	Pro Chancellor, University of Canterbury; Former Senior New Zealand Diplomat
<b>ASEAN Secretariat</b>	H. E. Le Luong Minh	Secretary General, ASEAN

## ANNEX B ACADEMIC ADVISORY COUNCIL MEMBERS

The Academic Advisory Council is composed of internationally renowned East Asia Summit countries' scholars and experts from universities, research institutions, the private sector, international organisations and non-governmental organisations. The Council provides advice and support to the Office of the Executive Director on:

The annual work program;  
Review and evaluation of the research outcomes;  
and Review and evaluation of the performance of researchers.

*As of February 2014*

Australia	Prof. Dr. Peter Drysdale	Emeritus Professor, Crawford School of Economics & Government, Australia
China	Prof. Zhang Yuyan	Director, Professor, Institute of World Economics & Politics, Chinese Academy of Social Sciences (CASS), Beijing, China
India	Mr. Pravin Kumar Agarwal	Senior Fellow and Director, The Energy and Resources Institute (TERI), India
Japan	Dr. Takashi Shiraishi	President, Institute of Developing Economies, Japan External Trade Organization (IDE-JETRO)
Malaysia	Mohd. Radzuan bin Abdul Halim	Director, Financial Mediation Bureau (FMB) (A Columnist and Writer), Malaysia
New Zealand	Prof. Gary Richard Hawke	Emeritus Professor, Victoria University of Wellington, and Senior Fellow, NZ Institute of Economic Research, New Zealand
Singapore	Prof. Dr. Hank Lim Giok-Hay (Chairman)	Senior Research Fellow, Singapore Institute of International Affairs (SIIA), Singapore

## ANNEX C RESEARCH INSTITUTES NETWORK

The Research Institutes Network consists of research institutes from 16 East Asia Summit countries. ERIA requests the Research Institutes Network to:

- Support ERIA's research activity by providing country information and research findings

from individual countries and giving advice on research themes and policy recommendations;

- Encourage the dissemination of ERIA's research outcomes to policymakers and political leaders who implement policies as well as to opinion leaders in member countries; and
- Support ERIA's capacity building programs.

Brunei	Brunei Darussalam Institute of Policy & Strategic Studies (BDIPSS)
Cambodia	Cambodian Institute for Cooperation and Peace (CICP)
Indonesia	Centre for Strategic and International Studies (CSIS)
Laos	National Economic Research Institute (NERI)
Malaysia	Malaysian Institute of Economic Research (MIER)
Myanmar	Yangon Institute of Economics (YIE)
Philippines	Philippine Institute for Development Studies (PIDS)
Singapore	Singapore Institute of International Affairs (SIIA)
Thailand	Thailand Development Research Institute (TDRI)
Viet Nam	Central Institute for Economic Management (CIEM)
Australia	Australian National University (ANU)
China	Chinese Academy of Social Sciences (CASS)
India	Research and Information System for Developing Countries (RIS)
Japan	Institute of Developing Economies (IDE/JETRO)
Korea	Korea Institute for International Economic Policy (KIEP)
New Zealand	New Zealand Institute of Economic Research (NZIER)

# ANNEX D ERIA OFFICIALS & RESEARCHERS



## EXECUTIVE DIRECTOR

Executive Director  
Prof. Hidetoshi Nishimura



## GENERAL AFFAIRS

Left - right:  
Yasushi Iwata (General Manager),  
Anita Prakash (Policy Relations Director),  
Kyota Yamamoto (Deputy General Manager),  
(not in photo : Takashi Goto, Finance Director)



## COMMUNICATION & PUBLICATION

Left - right:  
Hiroshi Okasaki (Planning and Coordination Director),  
Jennifer Liguton (Chief Editor and Publication Director),  
Kavi Chongkittavorn (Senior Communication Advisor)



## RESEARCH

Top left - right:

Sothea Oum (Economist), Shigeru Kimura (Special Advisor to the Executive Director on Energy Affairs), Yanfei Li (Energy Economist), Venkatachalam Anbumozhi (Energy Economist), Ponciano Intal Jr. (Senior Researcher), Yoshifumi Fukunaga (Senior Policy Coordinator), Fukunari Kimura (Chief Economist), Dionisius Narjoko (Economist),

Bottom left - right:

Yasushi Ueki (Economist), Muhamad Sowwam (Research Associate), Frilla Sebayang (Managing Officer for Research Operations (Legal Affairs)), Fauziah Zen (Economist), Lili Yan Ing (Economist), Made Cynthia Rini (Research Associate), Chandra Triputra (Research Associate), Shimpei Yamamoto (Managing Director for Research Affairs)

Not in Photo:

Shujiro Urata (Senior Research Advisor to the Executive Director), Han Phoumin (Energy Economist)

**Chairman's Statement of the 23rd ASEAN Summit 2013, 10 October,  
Bandar Seri Begawan, Brunei Darussalam**

(AIFS) Framework and its Strategic Plan of Action (SPA-PS) 2009-2013. We acknowledged the good progress made in the implementation of the ASEAN Plus Three Emergency Rice Reserve (APTERR) Agreement, including the establishment of the APTERR Council, and also on the ASEAN Multi-Sectoral Framework on Climate Change, Agriculture and Forestry towards Food Security (AFCC). We supported the initiation of the work on developing the post-2015 vision, objectives and goals of the ASEAN Cooperation in Food, Agriculture and Forestry sector towards 2020. We were pleased with the implementation of the ASEAN Plus Three Comprehensive Strategy on Food Security and Bioenergy Development (APTCS-FSBD) to address climate change, water resources sustainability and bio-energy development in the context of food security.

29. We reaffirmed our commitment to realise the potential of SMEs to increase their contribution to the region's economic development and to promote inclusive growth. We welcomed the revision of the ASEAN Strategic Action Plan for SME Development 2010-2015 (SAP SMED) as part of rigorous efforts to align our work with the dynamic economic landscape and regional architecture, as well as the development of a draft Strategic Roadmap to enhance SMEs across the region. We were also pleased to note the continuing support of dialogue partners through various initiatives to promote SME development. In this regard, we welcomed the convening of the Universiti Brunei Darussalam-Economic Research Institute for ASEAN and East Asia (ERIA)-Harvard Symposium entitled "SME Development and Innovation Towards a People-Centred ASEAN Community", held on 14 September 2013 in Brunei Darussalam.

30. Recognising the need for effective coordination and engagement between various ASEAN-related business associations, we commended the ASEAN Business Advisory Council for the successful convening of the 1<sup>st</sup> Joint Consultation Meeting of ASEAN Business Councils in Bandar Seri Begawan, Brunei Darussalam on 18 August 2013. We therefore looked forward to future iterations that will further support private sector development within and beyond the region, with the greater aim of ensuring a successful realisation of the AEC by 2015.

31. We welcomed efforts to further strengthen the IAJ as ASEAN's platform for achieving equitable economic development in the region. We looked forward to the results of the Mid-

45. We also adopted the ASEAN Declaration on Strengthening Social Protection, which sets out principles, strategies and mechanisms in accordance with the domestic laws and policies of ASEAN Member States in ensuring equitable access to services, social welfare and justice as well as development of social services for all to bring about prosperity in the region.

46. We agreed on the urgent need to accelerate actions to reduce risk factors caused by the four main noncommunicable diseases, namely cardiovascular diseases, cancers, diabetes and chronic respiratory diseases. We recognised that they are not only the leading cause of death in most ASEAN Member States but that increasingly younger people are affected by premature death caused by such medical conditions. We therefore adopted the Bandar Seri Begawan Declaration on Noncommunicable Diseases.

**ASEAN Connectivity**

47. We noted the progress in realising the MPAC and emphasised the importance of increasing its implementation rate, particularly through more effective coordination, communication and resource mobilisation. We recognised the importance of mobilising financial and technical resources, utilisation of the AIF, and the promotion of public-private partnership (PPP) especially through collaboration with dialogue partners and external parties.

48. We recognised the importance of ensuring synergy and mutual reinforcement between sub-regional cooperation arrangements and the MPAC. We also welcomed the ASEAN Connectivity Coordinating Committee's (ACCC) engagement with dialogue partners, external parties as well as the private sector in the implementation of the MPAC. In this connection, we welcomed the outcomes of the 4<sup>th</sup> ASEAN Connectivity Symposium entitled "Partnering Private Sector for ASEAN Connectivity" held in Bandar Seri Begawan, Brunei Darussalam, on 27 August 2013 with the contribution of the ERIA.

**Chairman's Statement of the 8th East-Asia Summit 2013, 10 October,  
Bandar Seri Begawan, Brunei Darussalam**

FINAL

11. We recognised the close collaboration of the ASEAN Centre for Energy (ACE), the International Energy Agency (IEA), the Economic Research Institute for ASEAN and East Asia (ERIA), and other parties in conducting energy outlook studies for the Southeast Asia and the EAS regions. We welcomed publication of the Special Report on "Southeast Asia Energy Outlook" in connection with the IEA's 2013 edition of the World Energy Outlook (WEO 2013) that manifested a robust analysis on Southeast Asia's energy prospects.

**Environment**

12. We discussed various environmental issues including climate change and sustainable development, which are immediate regional and global concerns. We recalled the 2007 Singapore Declaration on Climate Change, Energy and the Environment and encouraged our relevant ministers to carry out its implementation, as appropriate, including in further strengthening cooperation in environmental conservation and biodiversity preservation and protection, capacity building and information sharing in weather forecast systems.

13. We appreciated the outcome of the 4<sup>th</sup> High-Level Seminar on Environmentally Sustainable Cities (HLS-ESC) held on 21-22 March 2013 in Ha Noi, Viet Nam, co-organised by Australia, Indonesia, Japan and Viet Nam. We noted the proposal by Australia to work with EAS partners on climate change impacts on rural livelihoods, as a driver for migration to cities, and urban resilience through two climate change

recognised the necessity of focusing on "business connectivity", which leads to building effective supply chain networks across the region with upgrading of industries and development of supporting industries, and looked forward future contributions of the EAS Economic Ministers' Meeting to advance business connectivity in cooperation with other initiatives.

34. We also emphasised the importance of deepening economic integration through trade liberalisation initiatives such as RCEP aimed at narrowing the development gaps and maximising mutual benefits. In this regard, we appreciated analytical works and policy recommendations by the ERIA for maximising benefits of economic integration through coordinated cooperation among all EAS participating countries, and encouraged ERIA for its continued contribution to the region through its research and policy recommendations, including proposing a region-wide industrial cluster policy which will attain optimal production networks to further promote growth in ASEAN from a medium- and long-term perspective.

35. With a view to enhancing trade and investment within the region, we underscored the importance of transparency and predictability in regulations and their application. In this regard, we stressed that measures on travel and goods, including food, must be consistent with the World Trade Organization (WTO) and other relevant international obligations and standards.

**Economic Research Institute for ASEAN and East Asia (ERIA)**

36. We welcomed the Statement of ERIA's 6<sup>th</sup> Governing Board Meeting issued on 4 May 2013, which expressed ERIA's strong will to formulate effective region-wide policy recommendations to achieve greater connectivity and to address the global issues, and anticipates closer communication with policy makers. We also commended ERIA's activities in various fields such as Small and Medium Enterprises (SME), Energy, as well as on Connectivity including the Myanmar Comprehensive Development Vision and in this regard, encouraged ERIA to continue its support to the ASEAN and EAS activities.

**Food Security**

37. Recalling our commitment to cooperate in promoting food security and nutrition as stipulated in the 2012 Phnom Penh Declaration on the EAS Development

# ANNEX F

## LIST OF COMPLETED AND ONGOING RESEARCH BY THEME

### A. COMPLETED RESEARCH

#### *Deepening Economic Integration*

1. ASEAN Rising: ASEAN and AEC Beyond 2015
2. Globalisation and Performance of Small and Large Firms
3. AEC Scorecard Phase 3 – Towards Informed Regulatory Conversations and Improved Regulatory Regime: Logistics Sector and Trade Facilitation

#### *Narrowing Development Gaps*

4. Entrepreneurship and Local Technological Capacity in the East Asian Natural Resource-based Production Network
5. Financing Infrastructure in ASEAN Member States: Fiscal Landscape and Resources Mobilisation
6. Social Security System and Fiscal Policy in India, China, Japan and Indonesia
7. Public Private Partnership in ASEAN Countries Phase 2: Institutional Assessment to Develop Public Private Partnership System in Cambodia, Lao PDR and Myanmar
8. ASEAN SME Policy Index 2014: Towards Competitive and Innovative ASEAN SMEs

#### *Achieving Sustainable Economic Development*

9. Preparing for Natural Disasters: ASEAN Perspectives

#### *Energy-related Research*

10. Economic Impact Evaluation of Investments on the Energy Savings and Low Carbon Emitting Technologies in East Asia – Phase 2
11. Analysis of Energy Saving Potential in the East Asia Region
12. Benchmarking of Biodiesel Fuel Standardisation in East Asia
13. Extending the ERIA Working Group Methodology for Sustainability Assessment of Biomass Utilisation in East Asian Countries – Phase 5
14. Effective Investment of Power Infrastructure in East Asia through Power Grid Interconnection
15. Development of Energy Security Index and Assessment of Energy Security for East Asia Countries – Phase 2

16. Asian Potential of Biofuel Markets – Phase 2
17. Energy Market Integration in East Asia Summit Region: Renewable Energy and Its Deployment into the Power System
18. Strategic Usage of Coal in the EAS Region – Phase 1
19. International Cooperation in Nuclear Safety Management in East Asian Countries – Phase 1
20. Energy Efficiency Improvement in the Transport Sector through Transport Improvement and Smart Community Development in the Urban Area – Phase 1

### B. ONGOING RESEARCH

#### *Deepening Economic Integration*

1. ASEAN Economic Community Scorecard Phase 4: Monitoring the Implementation of AEC Blueprint Measures
2. Regional Comprehensive Economic Partnership Related Studies
3. ASEAN + 1 Free Trade Agreements: The Use of FTAs in ASEAN
4. Meaning of Indian Economic Dynamism for the East Asia Economic Integration Process
5. Trade in Value Added of Southeast Asia
6. ASEAN Regional Integration and the Automobile and Auto Parts Industry
7. Analysis of Competition Laws in East Asian Countries
8. FDI Policies and Performance in ASEAN Region
9. Study and Survey on Intra-ASEAN Non-Tariff Measures on Trade and Foreign Direct Investment

#### *Narrowing Development Gaps*

10. Cross-border Soft Infrastructure Improvement in the Inland ASEAN
11. Innovation, Technology Transfers, Finance and Internationalisation of Small and Medium Enterprises' Trade and Investment Policy: Best Practices for ASEAN
12. Intellectual Property Policies for Investment Promotion
13. Development Potential of the Content Industry in East Asia and ASEAN – Phase 2

**Achieving Sustainable Economic Development**

14. Disaster Risks, Social Preferences and Policy Effects: Field Experiment Studies in Selected East Asia Countries

**Energy-related Research**

15. Energy Outlook and Analysis of Energy Saving Potential in East Asia Region
16. Energy Efficiency Improvement in the Transport Sector through Transport Improvement and Smart Community Development in the Urban Area – Phase 2
17. International Cooperation in Nuclear Safety Management in East Asian Countries – Phase 2
18. Development of Energy Security Index and Assessment of Energy Security for East Asia Countries – Phase 3
19. Sustainable Development of Natural Gas Market in the EAS Region
20. Strategic Usage of Coal in the EAS Region: A Technological Potential Map – Phase 2
21. Energy Market Integration in East Asia Region: Deepening, Understanding and Moving Forward
22. Benchmarking of Renewable Mobility Energy in EAS Countries
23. Best Mix of Renewable and Conventional Energy Sources for Sustainable Development
24. Sustainability Assessment of Utilising Conventional and New-Type Geothermal Resources in East Asia
25. Energy Efficiency Roadmap Formulation in East Asia
26. Potential of Biofuel Markets in East Asia

RESEARCHER	PUBLICATIONS	INTERNATIONAL WORKSHOPS/CONFERENCES/LECTURES/PEER-REVIEW MEETINGS (AS PRESENTER, SPEAKER, PANELIST)
Venkatachalam ANBUMOZHI	<ol style="list-style-type: none"> <li>1. “Low-Carbon Green Growth as an Inclusive Development Model: Policy Change and Learnings from Asia” with X. Yao in <i>International Journal of Green Growth and Development</i>, 2014, Vol. 1 (1), pp. 11-21.</li> <li>2. Towards a Low Carbon Asia: Challenges of Economic Development with M. Kawai, ADBI Working Paper No. 462, January 2014, Asian Development Bank Institute.</li> <li>3. Climate Change and Food Supply in the Asia-Pacific Region” with V.R. Reddy in <i>Productivity and Sustainable Inclusive Development</i>, 2014, APO 50th Anniversary Publication. Tokyo: Asian Productivity Organization, pp. 57-69.</li> <li>4. “Managing Energy, Water and the Environment” with B. Bhattacharya in <i>ASEAN, the PRC and India: The Great Transformation?</i>, 2014, Tokyo: Asian Development Bank Institute (in print).</li> <li>5. “Prospects and Challenges of Integrating Disaster Risk Management and Climate Change Adaptation” with M. Liu and K. Kikkawa, Input paper for Global Assessment Report on Disaster Risk Management 2015, 2014, United Nations Office for Disaster Risk Reduction.</li> <li>6. “Real Sector Policy Issues” with W. Thoorbeck, B. Bhattacharya and G. Pasadilla in <i>Global Financial Crisis and Rebalancing the Growth</i>, 2014, Tokyo: Asian Development Bank Institute (in print).</li> <li>7. “Low-Carbon Goods and Services: International Cooperation on Technological Innovation, Transfer and Funding Needs” with K. Kalirajan and T. Nguyen in <i>Development Issues</i>, 2013, New Delhi: SAGE</li> <li>8. “Tracking MDG Implementation” with A. Singh in <i>Millennium Development Goals and Community Initiatives in the Asia Pacific</i>, 2013, Springer, pp. 1-10.</li> </ol>	<ol style="list-style-type: none"> <li>1. Presenter, “Low-Carbon Energy Systems for 21st Century” in Global Leadership Program, Korea Development Institute School and Ministry of Strategy and Finance, Seoul, Korea, 3-14 March 2014.</li> <li>2. Presenter, “Measurement, Reporting and Verification (MRV) for Low Carbon Development Actions: Experiences from Asia, World Bank-Jakarta, 26 February 2014.</li> </ol>

RESEARCHER	PUBLICATIONS	INTERNATIONAL WORKSHOPS/CONFERENCES/LECTURES/ PEER-REVIEW MEETINGS (AS PRESENTER, SPEAKER, PANELIST)
<b>Yoshifumi FUKUNAGA</b>	<ol style="list-style-type: none"> <li>1. <i>ASEAN Economic Community and Japan</i> (co-authored book in Japanese and published from Bun-shin-do). Also contributed two chapters, namely, Chapter 8 "The Development and Current State of ASEAN's IPR Cooperation" and Chapter 12 "Towards ASEAN Economic Community Post 2015 Vision", both in Japanese. December 2013.</li> <li>2. "Dispute Settlement Mechanism in the Regional Comprehensive Economic Partnership" (written in Japanese) in <i>Japan International Economic Law Society</i> No. 22, 2013, pp. 167-190.</li> </ol>	<ol style="list-style-type: none"> <li>1. Panelist, Dialogue Forum on MSMEs and ASEAN-led FTAs: Opportunities and Challenges. ASEAN Business Advisory Council, Jakarta, 27 March 2014.</li> <li>2. Panelist, Symposium "Dampak Perjanjian Perdagangan (FTA) di Indonesia: Studi dan Hasil Survei Perspektif Bisnis CSIS 2013", Centre for Strategic and International Studies, Jakarta, Indonesia, 18 March 2014.</li> <li>3. Presenter, "ASEAN and the RCEP Strategy", Asian Trade Strategies: Regional and Global Trade Arrangements, Australian National University Crawford School of Public Policy, Canberra, 18 September 2013.</li> <li>4. Presenter, "RCEP and its Implication to ASEAN's External Economic Relations", ASEAN Dialogue, The Habibie Center, Jakarta, 29 July 2013.</li> <li>5. "Development of RCEP and ERIA's FTA Study", East Asian Business Council, Tianjin, 18 June 2013.</li> <li>6. Presenter, "Tasks and Future Prospect of RCEP: ERIA's FTA Study", International Conference on East Asian FTAs: China-Japan-Korea FTA and RCEP, Korean Institute of Economic Policy, Seoul, 14 June 2013.</li> <li>7. "RCEP and FTAAP", APEC Business Advisory Council Regional Economic Integration Working Group, Manila, 22 January 2013.</li> </ol>
<b>HAN Phoumin</b>		<ol style="list-style-type: none"> <li>1. Keynote speaker, "Oil and Gas Security in the EAS Region in the Future", APEC Oil and Gas Security Forum sponsored by the Asia Pacific Economic Cooperation (APEC), 25 March 2014, Tokyo.</li> <li>2. Keynote speaker, "Energy Market Integration: The Infrastructure Investment and its Implications", Seminar on Philippines' Energy and Infrastructure Development and Japan's Contribution to Philippine Infrastructure Development, 21 February 2014, Manila.</li> </ol>

RESEARCHER	PUBLICATIONS	INTERNATIONAL WORKSHOPS/CONFERENCES/LECTURES/ PEER-REVIEW MEETINGS (AS PRESENTER, SPEAKER, PANELIST)
		<ol style="list-style-type: none"> <li>3. Presenter, "Energy Market Integration: Renewable Energy and its Deployment into the Power System", Exploring Cooperation Seminar (Energy Cop and RSDD-KSDD Joint Session) sponsored by the Asian Development Bank, 20 February 2014, Manila.</li> <li>4. Discussant/Reviewer as part of the Energy Experts Team of the 2nd Southeast Asia Oil and Gas Security Exercise sponsored by the Indonesian Ministry of Energy and Mineral Resources, 22-24 October 2013, Jakarta.</li> <li>5. Discussant/Reviewer as part of the Energy Experts Team of the 1st Southeast Asia Oil and Gas Security Exercise sponsored by the Thai Ministry of Energy, 17-19 September 2013, Thailand.</li> <li>6. Keynote speaker, "Strategic Usage of Coal in ASEAN and EAS Region and its Policy Implications", Clean Coal Day International Symposium organised by J-COAL, Japan, 4-5 September 2013, Tokyo.</li> </ol>
<b>Lili Yan ING</b>	<ol style="list-style-type: none"> <li>1. <i>Trade Policy in Indonesia: How to Move Forward the Agenda</i> with M. E. Pangestu and S. Rahardja (forthcoming)</li> <li>2. ASEAN Integration Monitoring Report, a joint report by the ASEAN Secretariat and the World Bank, 2013.</li> <li>3. <i>Indonesia di Pusaran Kerjasama Ekonomi, Indonesia dan APEC</i> (in Bahasa Indonesia), 2013, Ministry of Foreign Affairs, Republic of Indonesia.</li> <li>4. "Indonesia: Can it be a New Growth Pole?" in <i>The Journal of Indonesian Economic Quarterly</i>, May 2013.</li> <li>5. Column Writer, Side Views, "The Value of ASEAN Integration and the WTO Regime" in <i>The Malaysian Insider</i>, December 11, 2013. (Opinion Editorials/TV)</li> </ol>	<ol style="list-style-type: none"> <li>1. Presenter, ASEAN Senior Economic Officials Meeting (SEOM) on Regional Integration, April 22-25, 2014</li> <li>2. Speaker, Trade and Development Symposium sponsored by the International Center for Trade and Sustainable Development and the Centre for Strategic and International Studies (CSIS)-Indonesia, at the margin of the Ninth World Trade Organization (WTO) Ministerial Conference, December 5, 2013, Bali.</li> <li>3. Panelist, Leveling the Playing Field-the Next Steps for ASEAN (Session 2), ASEAN Business and Investment Summit, 20 August 2013, International Convention Center, Brunei.</li> </ol>

RESEARCHER	PUBLICATIONS	INTERNATIONAL WORKSHOPS/CONFERENCES/LECTURES/ PEER-REVIEW MEETINGS (AS PRESENTER, SPEAKER, PANELIST)
<b>Yanfei LI</b>	<ol style="list-style-type: none"> <li>1. "Non-renewable Resources in Asian Economies: Perspectives of Availability, Applicability, Acceptability and Affordability" in <i>Handbook of Environmental Economics</i>, London and New York: Routledge (Forthcoming in 2014).</li> <li>2. "The Revealed Relationships Between Energy Consumption and Economic Growth: Causality, Macroeconomics, New Trend and Implications" in <i>Handbook of Clean Energy Systems</i>, Singapore: Wiley (Forthcoming in 2014).</li> <li>3. "Power Generation and Cross-border Grid Planning for the Integrated ASEAN Electricity Market: A Dynamic Linear Programming Model" in <i>Energy Strategy Reviews</i>, September 2013, Vol. II, Issue 2, Elsevier.</li> </ol>	
<b>Dionisius NARJOKO</b>	<ol style="list-style-type: none"> <li>1. "MNEs and Energy Efficiency in Southeast Asian Manufacturing" with E.D. Ramstetter, S.B.H. Ahmad and A. Kohpaiboon in <i>Asian Economic Papers</i>, 2013, 12 (3), pp. 120-147.</li> <li>2. "A Latecomer Adjusting to Crises" with H. Aswicahyono and H. Hill in Adam Szirmai, Wim Naude and Ludovico Alcorta (eds) <i>Twenty-First Century: New Challenges and Emerging Paradigms</i>, 2013.</li> <li>3. "Why Indonesia Needs to Drive Integration" in <i>East Asia Forum Quarterly</i> 2013, 5 (4), pp 14-15; and available online at <a href="http://press.anu.au?p=269271">http://press.anu.au?p=269271</a>.</li> <li>4. "Small and Medium Enterprises' Access to Finance: Evidence from Selected East Asian Economies" with C. Harvie and S. Oum in <i>Journal of Banking and Finance</i>, forthcoming.</li> <li>5. "Ownership and Energy Efficiency in Indonesian Manufacturing" with E.D. Ramstetter in <i>Bulletin of Indonesian Economic Studies</i>, forthcoming.</li> <li>6. "Globalization and Innovation in Southeast Asia" with C. Lee in <i>Asian Economic Policy Review</i>, forthcoming.</li> <li>7. "Indonesian Manufacturing Post 1997/98 Crisis: Do Better Firms Enter the Industry?" in <i>Bulletin of Indonesian Economic Studies</i>, forthcoming.</li> </ol>	<ol style="list-style-type: none"> <li>1. Speaker/Presenter, High-level Policy Dialogue with the Ministry of Finance, Republic of Indonesia, sponsored by the Indonesian Ministry of Finance and AusAid, 2013, Jakarta.</li> <li>2. Speaker/Presenter, KADIN-AFAS Forum, sponsored by KADIN (Indonesia Chamber of Commerce), 2013, Jakarta.</li> <li>3. Resource Person/Expert, Bappenas- SME, sponsored by Bappenas (National Agency Planning, Republic of Indonesia), 2013, Jakarta.</li> <li>4. Resource Person/Expert, Focus Group Discussion-Bappenas on SME, sponsored by Bappenas (National Agency Planning, Republic of Indonesia), 2013, Jakarta.</li> <li>5. Resource Person/Expert, Focus Group Discussion-Bappenas on Trade and Investment, sponsored by Bappenas (National Agency Planning, Republic of Indonesia), 2013, Jakarta.</li> <li>6. Paper Presenter, Asian Economic Panel, sponsored by the Asian Economic Panel (AEP), 13-14 March 2014, Seoul, Korea.</li> </ol>

RESEARCHER	PUBLICATIONS	INTERNATIONAL WORKSHOPS/CONFERENCES/LECTURES/ PEER-REVIEW MEETINGS (AS PRESENTER, SPEAKER, PANELIST)
<b>Sothea OUM</b>		<ol style="list-style-type: none"> <li>1. Presenter, "ASEAN SME Policy Index: Final Report, 33rd ASEAN SMEWG Meeting, 25 November 2013, Yangon, Myanmar.</li> <li>2. Presenter, "ASEAN SME Policy Index Towards Good Practices", Enterprise Performance in Asia Conference, November 2013, Cebu City, Philippines.</li> <li>3. Presenter, "SME Participation in Regional Production Networks and Access to Finance: ASEAN Perspectives", APEC Workshop on Trade Finance, July 2013, Lombok, Indonesia.</li> <li>4. Guest Lecturer, "ASEAN and East Asia Integration", Royal University of Phnom Penh, Institute of Foreign Languages, Department of International Studies, June 2013, Phnom Penh, Cambodia.</li> <li>5. Presenter, "ASEAN SME Policy Index: Progress Report", 32nd ASEAN SMEWG Meeting, June 2013, Vientiane, Lao PDR.</li> </ol>
<b>Fauziah ZEN</b>	<ol style="list-style-type: none"> <li>1. "Government Fiscal Support for Financing Long Term Infrastructure Projects in ASEAN Countries" <i>PIDS Discussion Paper 2013-08</i> with Gilberto Llanto, Makati: Philippine Institute for Development Studies.</li> <li>2. PPP for Infrastructure in ASEAN Member States: How Do Developing Countries Utilize and Get Benefit from the Scheme?" in <i>Regional and City Planning Journal</i>, Bandung Institute of Technology (forthcoming 2014).</li> <li>3. <i>Municipal Development Funds: An Alternative to Finance Regional Infrastructure</i> (book in Bahasa), 2013, Jakarta: Indonesian Ministry of Finance.</li> <li>4. "Financing Regional Investment to Enhance Public Service (chapter in book in Bahasa Indonesian), 2013, Jakarta: Indonesian Ministry of Finance.</li> </ol>	<ol style="list-style-type: none"> <li>1. Presenter, "Policy Alternatives to Push Regional Investment Forward", National Seminar of Finance Minister's Advisory Team, Indonesian Ministry of Finance, 11 February 2014, Jakarta.</li> <li>2. Presenter, "Study on Municipal Development Fund for Regional Infrastructure Finance", National Seminar of Finance Minister's Advisory Team, Indonesian Ministry of Finance, 10 February 2014, Jakarta.</li> <li>3. Resource Person, Roundtable Discussion on "Taking Forward the Connectivity Agenda in APEC", APEC Senior Officials' Meeting, Office of the Chair, 18-20 December 2013, Batam, Indonesia.</li> <li>4. Presenter and Moderator, ASEAN-Japan Workshop on "Identifying Possible Framework for PPP Infrastructure Development to Accelerate ASEAN Connectivity", ASEAN Secretariat-Japan Mission, 3 December 2013, Jakarta.</li> </ol>

## ANNEX G LIST OF OUTREACH ACTIVITIES OF ERIA RESEARCHERS

RESEARCHER	PUBLICATIONS	INTERNATIONAL WORKSHOPS/CONFERENCES/LECTURES/ PEER-REVIEW MEETINGS (AS PRESENTER, SPEAKER, PANELIST)
		<p>5. Observer/Delegate, "The 2nd Asia Pacific Infrastructure Partnership (APIP) Dialogue with the Government of Indonesia", Indonesian Ministry of Finance, 2 December 2013, Jakarta.</p>
		<p>6. Presenter and Chair, "Experience from India and South America", Seminar on Regional Infrastructure Development Fund, Indonesian Ministry of Finance, 26 November 2013, Jakarta.</p>
		<p>7. Presenter, National Seminar on "National Research Direction and Agenda", National Research Council of the Republic of Indonesia, 31 October 2013, Jakarta.</p>
		<p>8. Adjudicator, National Essay Competition on "Indonesia's Economic Outlook 2014", Kanopi Faculty of Economics, University of Indonesia, October 2013, Jakarta.</p>
		<p>9. Speaker, The 2nd International Planocosmo Conference on "Infrastructure and Regional Growth for Inclusive Development", Bandung Institute of Technology, 21-22 October 2013, Bandung, Indonesia.</p>
		<p>10. Speaker, Workshop on "Enhancing Connectivity through Multi-layered Regional Frameworks: The Roles of Dialogue Partners", Ministry of Foreign Affairs of Thailand, 19 July 2013, Bangkok.</p>

## ANNEX H SEMINARS/SYMPOSIA

DATE	EVENT	VENUE
May 2013	<b>Symposium on East Asia Development Model on "Middle Income Trap and East Asia Economic Transition"</b> Beijing, China (120 participants), Symposium on East Asia Development Model on "Middle Income Trap and East Asia Economic Transition", co-organised by International Studies, CASS, China with cooperation of Institute of Economics, NDRC, China	Beijing, China
Jun 2013	<b>ERIA Symposium on "The Economic Integration of East Asia and Japan's Growth"</b> Tokyo, Japan (250 participants), ERIA Symposium on "The Economic Integration of East Asia and Japan's Growth", supported by The Sankei Shimbun, Japan Association of Travel Agents, All Nippon Travel Agents Association, Ministry of Economy, Trade and Industry of Japan, Ministry of Foreign Affairs of Japan, and Ministry of Land, Infrastructure, Transport and Tourism of Japan	Tokyo, Japan
Jul 2013	<b>Symposium on "Economic Integration in East Asia"</b> Hanoi, Viet Nam (350 participants), Symposium on "Economic Integration in East Asia", co-organised by Japan External Trade Organisation (JETRO) and Federation of Japanese Chambers of Commerce and Industry in ASEAN, supported by Ministry of Industry and Trade of Viet Nam.	Hanoi, Viet Nam
Ags 2013	<b>6th ASEAN and Asia Forum "Changing Paradigm: Conflict, Competition, Cooperation"</b> Singapore (350 participants), 6th ASEAN and Asia Forum "Changing Paradigm: Conflict, Competition, Cooperation", co-organised by Singapore Institute of International Affairs (SIIA)	Singapore
Ags 2013	<b>4th ASEAN Connectivity Symposium "Partnering Private Sector for ASEAN Connectivity"</b> Bandar Seri Begawan, Brunei Darussalam (140 participants), 4th ASEAN Connectivity Symposium "Partnering Private Sector for ASEAN Connectivity", co-organised by the Ministry of Foreign Affairs and Trade of Brunei Darussalam and ASEAN Secretariat	Bandar Seri Begawan, Brunei Darussalam
Sept 2013	<b>Universiti Brunei Darussalam-ERIA-Harvard Symposium on "SME Development and Innovation towards a People-Centered ASEAN Community"</b> Brunei Darussalam (150 participants), Universiti Brunei Darussalam-ERIA-Harvard Symposium on "SME Development and Innovation towards a People-Centered ASEAN Community" co-organised by Universiti Brunei Darussalam (UBD) and Harvard University	Bandar Seri Begawan, Brunei Darussalam

DATE	EVENT	VENUE
Sept 2013	<b>ERIA Editors' Roundtable on ASEAN "Challenges Ahead: AEC 2015 and Beyond"</b> Bandar Seri Begawan, Brunei Darussalam (70 participants), ERIA Editors' Roundtable on ASEAN "Challenges Ahead: AEC 2015 and Beyond" in cooperation co-organised by Prime Minister's Office, Brunei Darussalam	Bandar Seri Begawan, Brunei Darussalam
Oct 2013	<b>The 13th International Convention of the East Asian Economic Association (EAEA): "Opportunities and Challenges for Asian Economics in the New Millennium"</b> Singapore (150 participants), The 13th International Convention of the East Asian Economic Association (EAEA): "Opportunities and Challenges for Asian Economies in the New Millennium" in cooperation with EAEA and ADB	Singapore
Dec 2013	<b>Session "East Asian Economic Integration and the WTO"</b> Bali, Indonesia (70 participants), Session "East Asian Economic Integration and the WTO" at the ICTSD Bali Trade and Development Symposium, organised by the International Center for Trade and Sustainable Development (ICTSD) and the Centre for Strategic and International Studies (CSIS)	Bali, Indonesia
Mar 2014	<b>The 8th Annual Empirical Investigations in Trade and Investment (EITI) Conference</b> Phuket, Thailand (30 participants), The 8th Annual Empirical Investigations in Trade and Investment (EITI) Conference, co-organised by Keio University, Japan	Phuket, Thailand

NO	TITLE OF NEWS OR ARTICLE	MEDIA WHERE IT APPEARED	EVENT	DATE
<b>2013</b>				
1.	ASEAN Economic Research Institute lauds Capacity Building Efforts of PHL PPP Program	Public-Private Partnership Center	Capacity Building Program	12 Apr 2013
2.	Call for More Investment in Infrastructure	The Cambodia Daily	Capacity Building in Cambodia on PPP	12 Apr 2013
3.	ERIA and ASEAN Provide a Model	The Nation	written by Prof. Gary Hawke (comment)	18 Apr 2013
4.	Japan, EU look to trade pact as way to lift up economies	The Japan Times	Commented by Prof. Fukunari Kimura	19 May 2013
5.	Trade and RCEP	People's Daily	Commented by Mr. Isono	27 May 2013
6.	Cambodia, the harmonious order to attract investment	People's Daily	Commented by Dr. Ponciano Intal Jr.	27 May 2013
7.	Private side can spark investment	The Phnom Penh Post	Capacity Building in Cambodia on PPP	5 Jul 2013
8.	Steering ASEAN into an Economic Community	The Star, Malaysia	Cover Prof. Hidetoshi Nishimura	21 Jul 2013
9.	RCEP Beri Potensi Ekonomi Lebih Besar (RCEP Gives Bigger Economic Potential)	Indonesian Finance Today	Interview with Mr. Yoshifumi Fukunaga	31 Jul 2013
10.	Moving ASEAN and AEC Forward Beyond 2015	AJISS-Commentary	Written by Prof. Hidetoshi Nishimura	14 Aug 2013
11.	45th ASEAN Economic Ministers (AEM)	Jakarta Shinbun	45th ASEAN Economic Ministers (AEM) Meeting	17 Aug 2013
12.	45th ASEAN Economic Ministers (AEM)	Asahi Shinbun	45th ASEAN Economic Ministers (AEM) Meeting	17 Aug 2013
13.	SMEs should evolve to be competitive in open mart, experts say	The Brunei Times	ASEAN Business & Investment Summit	21 Aug 2013
14.	MoFAT holds 4th ASEAN Connectivity Symposium	Borneo Bulletin	4th ASEAN Connectivity Symposium	28 Aug 2013

NO	TITLE OF NEWS OR ARTICLE	MEDIA WHERE IT APPEARED	EVENT	DATE
<b>2013</b>				
15.	ASEAN PPP centre's creation mulled	The Brunei Times	ASEAN Connectivity Symposium	28 Aug 2013
16.	PPP seen filling gap in infra financing	The Brunei Times	ASEAN Connectivity Symposium	29 Aug 2013
17.	ASEAN beyond 2015: Can higher growth be sustained?	Today Online	Written by Dr. Ponciano S. Intal Jr.	4 Spt 2013
18.	Ceremony marks opening of workshop on renewable energy	Borneo Bulletin	East Asia Summit Energy Cooperation Task Force (EAS ECTF)	9 Spt 2013
19.	Brunei eyes feed-in tariff system	Borneo Bulletin	the 2nd ERIA Editors Roundtable	9 Spt 2013
20.	Alternative energy policies could double share of renewable energy in Asia by 2035	The Brunei Times	East Asia Summit Energy Cooperation Task Force (EAS ECTF)	9 Spt 2013
21.	Investing in energy saving technology is economical	The Brunei Times	East Asia Summit Energy Cooperation Task Force (EAS ECTF)	9 Spt 2013
22.	Journalists meet to talk AEC challenges	The Brunei Times	the 2nd ERIA Editors Roundtable	9 Spt 2013
23.	Brunei Commitment towards development of alternative energy lauded	Borneo Bulletin	East Asia Summit Energy Cooperation Task Force (EAS ECTF)	10 Spt 2013
24.	2nd ERIA Editors Roundtable Discussions	RTB News	the 2nd ERIA Editors Roundtable	11 Spt 2013
25.	ASEAN to establish AEC by 2016	Mizzima News	the 2nd ERIA Editors Roundtable	12 Spt 2013
26.	ASEAN Sec-Gen Congratulates Brunei for Job Well-Done	Brudirect.com	the 2nd ERIA Editors Roundtable	12 Spt 2013
27.	Media plays vital role in building an ASEAN Community	Borneo Bulletin	the 2nd ERIA Editors Roundtable	12 Spt 2013

NO	TITLE OF NEWS OR ARTICLE	MEDIA WHERE IT APPEARED	EVENT	DATE
<b>2013</b>				
28.	RCEP can pave the way towards TPP	The Brunei Times	the 2nd ERIA Editors Roundtable	12 Spt 2013
29.	Hoping for peaceful Syria solution	The Brunei Times	the 2nd ERIA Editors Roundtable	12 Spt 2013
30.	Media role vital for ASEAN progress	The Brunei Times	the 2nd ERIA Editors Roundtable	12 Spt 2013
31.	Media role in ASEAN growth	The Brunei Times	the 2nd ERIA Editors Roundtable	12 Spt 2013
32.	Timor Leste must wait for full ASEAN membership	The Brunei Times	the 2nd ERIA Editors Roundtable	12 Spt 2013
33.	Trade first casualty of territorial dispute with China	Business Mirror	the 2nd ERIA Editors Roundtable	12 Spt 2013
34.	Media role vital for ASEAN progress	Eleven Myanmar	the 2nd ERIA Editors Roundtable	12 Spt 2013
35.	Brunei mendapat sanjungan Setiausaha Agong ASEAN	Media Permata	the 2nd ERIA Editors Roundtable	12 Spt 2013
36.	The 2nd ERIA Editors Roundtable	People's Daily, China	the 2nd ERIA Editors Roundtable	13 Spt 2013
37.	SMEs for people-centred ASEAN	The Brunei Times	The Brunei Darussalam-ERIA-Harvard Symposium	15 Spt 2013
38.	The Development and Innovation Essential for SMEs	ASZ Brunei	The Brunei Darussalam-ERIA-Harvard Symposium	15 Spt 2013
39.	Brunei urged to invest in education for economic growth	Dawn.com	The Brunei Darussalam-ERIA-Harvard Symposium	16 Spt 2013
40.	ASEAN faces calls for reform	Bangkok Post	the 2nd ERIA Editors Roundtable	16 Spt 2013
41.	Success of SMEs critical for long-term sustainable growth of region: ASEAN sec-gen	Borneo Bulletin	the 2nd ERIA Editors Roundtable	18 Spt 2013

NO	TITLE OF NEWS OR ARTICLE	MEDIA WHERE IT APPEARED	EVENT	DATE
<b>2013</b>				
42.	ASEAN connectivity to boost PHL growth	Business Mirror	Executive Capacity Building in Thailand	21 Oct 2013
43.	Mekong subregion infrastructure connectivity critical for single ASEAN market in 2015	Business Mirror	Executive Capacity Building in Thailand	22 Oct 2013
44.	Thailand hosts ERIA meeting for ASEAN economic development research	National News Bureau of Thailand	Executive Capacity Building in Thailand	22 Oct 2013
45.	ASEAN countries pushing GMS regional interconnectivity	People's Daily	Executive Capacity Building in Thailand	23 Oct 2013
46.	Thailand hosts ERIA meeting for ASEAN economic development research	Pattaya Mail	Executive Capacity Building in Thailand	23 Oct 2013
47.	Reduce or eliminate non-tariff barriers is key (International Perspective)	People's Daily, China	Executive Capacity Building in Thailand	13 Spt 2013
48.	ERIA: Myanmar can learn from past ASEAN chairs	Freedom, Myanmar	Capacity Building in Myanmar	28 Spt 2013
49.	ERIA Media Workshop Challenges Ahead: Myanmar's ASEAN Chair 2014 and Beyond (in Myanmar Language)	Daily Eleven, Myanmar	Media Workshop in Myanmar	28 Spt 2013
50.	More than nine issues are required to be talked including restoration of internal political stability during Myanmar's term of ASEAN Chairmanship	Daily Eleven, Myanmar	Media Workshop in Myanmar	28 Spt 2013
51.	ERIA Media Workshop Challenges Ahead: Myanmar's ASEAN Chair 2014 and Beyond	Daily Eleven, Myanmar	Media Workshop in Myanmar	28 Spt 2013
52.	Intellectual Property Law Important part to promote the economic growth of ASEAN and East Asia (Khmer)	Everyday.com	Capacity Building in Cambodia	31 Oct 2013
53.	Capacity Building to integrate regional economy	Vientiane Times	Capacity Building in Lao PDR	1 Nov 2013
54.	Plans to reform economy for ASEAN Integration	Cambodia Daily	Capacity Building in Cambodia	1 Nov 2013

NO	TITLE OF NEWS OR ARTICLE	MEDIA WHERE IT APPEARED	EVENT	DATE
<b>2013</b>				
55.	ERIA Capacity Building in Lao PDR (Lao's language)	Lao Economic Daily	Capacity Building in Lao PDR	23 Nov 2013
56.	Expert: No support should be given for unsustainable SMEs	Freedom, Myanmar	Capacity Building in Myanmar	30 Nov 2013
57.	Myanmar leads ASEAN into 2014	East Asia Forum	Written by Ms. Anita Prakash	5 Dec 2013
58.	The value of ASEAN integration and the WTO regime	The Jakarta Post	Written by Ms. Lili Yan Ing	11 Dec 2013
59.	Prevent "spaghetti bowl" effect (International Forum)	People's Daily, China	Interview with Prof. Hidetoshi Nishimura	12 Dec 2013
<b>2014</b>				
60.	ASEAN-Korea Center to hold seminar on regional economy	Korea Times	ASEAN Seminar in Korea	2 Feb 2014
61.	Accessing ASEAN's opportunities	Trade Finance	ERIA Discussion Paper Series, The Impact of AFTA on Intra-AFTA Trade	6 Feb 2014
62.	Why Indonesia needs to lead in economic integration	East Asia Forum	Written by Dr. Dionisius Narjoko	3 Mar 2014
63.	Natural Gas Summit set March 12-13 in Makati	Manila Bulletin	Commented by Dr. Yanfei Li	7 Mar 2014
64.	An ASEAN Intra-Energy Market?	The Diplomat	Envisioned by ERIA	11 Mar 2014
65.	Prof. Hidetoshi Nishimura with Prime Minister Thongsing (in Lao Language)	Lao Newspaper	Prof. Hidetoshi Nishimura, Executive Director, ERIA met Prime Minister H.E. Thongsing	21 Mar 2014
66.	Still some missing links	Bangkok Post	Commented by Prof. Hidetoshi Nishimura	31 Mar 2014

### A. Research Project Reports (RPR)

NO	PUBLICATION	AUTHOR	INFORMATION
1	Analysis on Energy Saving Potential in East Asia	Shigeru Kimura	ERIA Research Project Report 2012-19 Posted: June, 2013
2	Study on Effective Investment of Power Infrastructure in East Asia through Power Grid Interconnection	Ichiro Kutani	ERIA Research Project Report 2012-23 Posted: June, 2013
3	Study on the Development of an Energy Security Index and an Assessment of Energy Security for East Asian Countries	Ichiro Kutani	ERIA Research Project Report 2012-24 Posted: June, 2013
4	Study on Asia Potential of Biofuel Market	Kaoru Yamaguchi	ERIA Research Project Report 2012-25 Posted: June, 2013
5	Study on the Strategic Usage of Coal in the EAS Region	Hironobu Oshima	ERIA Research Project Report 2012-27 Posted: June, 2013
6	Study on International Cooperation Concerning Nuclear Safety Management in East Asian Countries	Tomoko Murakami	ERIA Research Project Report 2012-28 Posted: June, 2013
7	Study on Energy Efficiency Improvement in the Transport Sector through Transport Improvement and Smart Community Development in the Urban Area	Ichiro Kutani	ERIA Research Project Report 2012-29 Posted: June, 2013
8	Energy Market Integration in East Asia: Renewable Energy and its Deployment into the Power System	Fukunari Kimura, Han Phoumin, Brett Jacobs	ERIA Research Project Report 2012-26 Posted: August, 2013
9	The Road to Bali: ERIA Perspectives on the WTO Ministerial and Asian Integration	Yoshifumi Fukunaga, John Riady, Pierre Sauvé	ERIA Research Project Report 2012-31 Posted: November, 2013
10	ASEAN Rising: ASEAN and AEC Beyond 2015	Ponciano Intal, Jr., Yoshifumi Fukunaga, Fukunari Kimura, Phoumin Han, Philippa Dee, Dionisius Narjoko, Sothea Oum	January, 2014
11	Study on the Development Potential of the Content Industry in East Asia and the ASEAN Region	Sirisak Koshpasharin and Kensuke Yasue	ERIA Research Project Report 2012-13 Posted: March 2014
12	Advance copy: ASEAN SME Policy Index 2014 Towards Competitive and Innovative ASEAN SMEs	ERIA SME Research Working Group	ERIA Research Project Report 2012-8 Posted: March 2014

### B. Discussion Papers (DPs)

NO	PUBLICATION	AUTHOR	INFORMATION
1	ASEAN Regional Cooperation on Competition Policy	Cassey Lee and Yoshifumi Fukunaga	ERIA Discussion Paper 2013-03 Posted: April, 2013
2	How Far Will Hong Kong's Accession to ACFTA Impact its Trade in Goods?	Kohei Shiino	ERIA Discussion Paper 2013-04 Posted: May, 2013
3	The Impact of AFTA on Intra-AFTA Trade	Misa Okabe and Shujiro Urata	ERIA Discussion Paper 2013-05 Posted: May, 2013
4	A CGE Study of Economic Impact of Accession of Hong Kong to ASEAN-China Free Trade Agreement	Ken Itakura, Yoshifumi Fukunaga, Ikumo Isono	ERIA Discussion Paper 2013-06 Posted: May, 2013
5	Assessing the Progress of Services Liberalization in the ASEAN-China Free Trade Area (ACFTA)	Yoshifumi Fukunaga and Hikari Ishido	ERIA Discussion Paper 2013-07 Posted: May, 2013
6	Long-run Economic Impacts of Thai Flooding: Geographical Simulation Analysis	Ikumo Isono & Satoru Kumagai	ERIA Discussion Paper 2013-08 Posted: July, 2013
7	Index-Based Risk Financing and Development of Natural Disaster Insurance in Developing Asian Countries	Sommarat Chantarart, Kirk Pannangpetch, Nattapong Puttanapong, Preesan Rakwatin and Thanasin Tanompongphandh	ERIA Discussion Paper 2013-09 Posted: August, 2013
8	Impact of Disasters and Role of Social Protection in Natural Disaster Risk Management in Cambodia	Sann Vathana, Sothea Oum, Ponhrith Kan, Colas Chervier	ERIA Discussion Paper 2013-10 Posted: August, 2013
9	Economic and Welfare Impacts of Disasters in East Asia and Policy Responses: The Case of Viet Nam	Le Dang Trung	ERIA Discussion Paper 2013-11 Posted: August, 2013
10	Impact of Recent Crises and Disasters on Regional Production/ Distribution Networks and Trade in Japan	Mitsuyo Ando	ERIA Discussion Paper 2013-12 Posted: August, 2013
11	Impact of Natural Disasters on Production Networks and Urbanization in New Zealand	Brent Layton	ERIA Discussion Paper 2013-13 Posted: August, 2013

NO	PUBLICATION	AUTHOR	INFORMATION
12	Impact of Disasters and Disaster Risk Management in Singapore: A Case Study of Singapore's Experience in Fighting the SARS Epidemic	Allen Yu-Hung Lai and Seck L. Tan	ERIA Discussion Paper 2013-14 Posted: August, 2013
13	Impact of Natural Disasters on Agriculture, Food Security, and Natural Resources and Environment in the Philippines	Danilo C. Israel and Roehlano M. Briones	ERIA Discussion Paper 2013-15 Posted: August, 2013
14	Growing an ASEAN Voice?: A Common Platform in Global and Regional Governance	Simon Tay	ERIA Discussion Paper 2013-16 Posted: September, 2013
15	Competition Policy Challenges of Single Market and Production Base	Cassey Lee and Yoshifumi Fukunaga	ERIA Discussion Paper 2013-17 Posted: September, 2013
16	Managing Economic Shocks and Macroeconomic Coordination in an Integrated Region: ASEAN Beyond 2015	Ruperto Majuca	ERIA Discussion Paper 2013-18 Posted: September, 2013
17	Making Myanmar the Star Growth Performer in ASEAN in the Next Decade: A Proposal of Five Growth Strategies	Toshihiro Kudo, Satoru Kumagai, So Umezaki	ERIA Discussion Paper 2013-19 Posted: September, 2013
18	Thought/Issues Paper on ASEAN Food Security: Towards a more Comprehensive Framework	Barry Desker, Mely Caballero-Anthony, Paul Teng	ERIA Discussion Paper 2013-20 Posted: October, 2013
19	Moving MPAC Forward: Strengthening Public-Private Partnership, Improving Project Portfolio and in Search of Practical Financing Schemes	Hisanobu Shishido, Shintaro Sugiyama, Fauziah Zen	ERIA Discussion Paper 2013-21 Posted: October, 2013
20	Toward a Single Aviation Market in ASEAN: Regulatory Reform and Industry Challenges	Alan Khee-Jin Tan	ERIA Discussion Paper 2013-22 Posted: October, 2013
21	Small and Medium Enterprises' Access to Finance: Evidence from Selected Asia Economies	Charles Harvie, Dionisius Narjoko, Sothea Oum	ERIA Discussion Paper 2013-23 Posted: October, 2013
22	Streamlining NTMs in ASEAN: The Way Forward	Olivier Cadot, Ernawati Munadi, Lili Yan Ing	ERIA Discussion Paper 2013-24 Posted: October, 2013
23	Reconstructing the Concept of "Single Market and Production Base" for ASEAN beyond 2015	Fukumari Kimura	ERIA Discussion Paper 2013-25 Posted: October, 2013

NO	PUBLICATION	AUTHOR	INFORMATION
24	Who Disseminates Technology to Whom, How, and Why: Evidence from Buyer-Seller Business Networks	Tomohiro Machikita and Yasushi Ueki	ERIA Discussion Paper 2013-26 Posted: November, 2013
25	Financial Integration Challenges in ASEAN beyond 2015	Maria Monica Wihardja	ERIA Discussion Paper 2013-27 Posted: November, 2013
26	Stimulating Innovation in ASEAN Institutional Support, R&D Activity and Intellectual Property Rights	Rajah Rasiah	ERIA Discussion Paper 2013-28 Posted: November, 2013
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32	Impact of the 2011 Floods, and Flood Management in Thailand	Nipon Poaponsakorn and Pitsom Meethom	ERIA Discussion Paper 2013-34 Posted: November, 2013
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36	Asian Fragmentation in the Global Financial Crisis	Toshihiro Okubo, Fukunari Kimura, Nozomu Teshima	ERIA Discussion Paper 2013-38 Posted: December, 2013

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37	ASEAN Beyond 2015: The Imperatives for Further Institutional Changes	Rizal Sukma	ERIA Discussion Paper 2014-01 Posted: January, 2014
38	Competition Law Enforcement in Malaysia: Some Recent Developments	Cassey Lee	ERIA Discussion Paper 2014-02 Posted: January, 2014
39	Disaster Management in ASEAN	Yasuyuki Sawada and Fauziah Zen	ERIA Discussion Paper 2014-03 Posted: January, 2014
40	Non-renewable Resources in Asian Economies: Perspectives of Availability, Applicability, Acceptability, and Affordability	Youngho Chang and Yanfei Li	ERIA Discussion Paper 2014-04 Posted: February, 2014

#### C. Policy Briefs (PBs)

NO	PUBLICATION	AUTHOR	INFORMATION
1	Dawei Revisited: Reaffirmation of the Importance of the Project in the Era of Reforms in Myanmar	Ikumo Isono and Satoru Kumagai	ERIA Policy Brief 2013-01 Posted: May, 2013
2	Effective Bureaucracy can Facilitate Economic Reforms in Myanmar	Anita Prakash	ERIA Policy Brief 2013-02 Posted: June, 2013
3	The Economic Transition in Myanmar: Towards Inclusive, People Centered and Sustainable Economic Growth	Anita Prakash	ERIA Policy Brief 2013-03 Posted: August, 2013

#### D. ERIA Frames

NO	PUBLICATION	AUTHOR	INFORMATION
1	ERIA official newsletter "ERIA FRAMES" (January - February 2014 Issue)	ERIA	Posted: January, 2014
2	ERIA official newsletter "ERIA FRAMES" (March - April 2014 Issue)	ERIA	Posted: March, 2014

DATE	EVENT	VENUE
1 Jul 2013	<b>ERIA Capacity Building Seminar 2013 in Lao PDR (PPP) "Utilizing Efficient Infrastructure Development Framework"</b> Vientiane, Lao PDR (80 participants), ERIA Capacity Building Seminar 2013 in Lao PDR on Public Private Partnership (PPP) "Utilizing Efficient Infrastructure Development Framework", co-organised by the Ministry of Industry and Commerce and supported by the Bangkok Research Center (BRC) JETRO Bangkok	Vientiane, Lao PDR
4 Jul 2013	<b>ERIA Capacity Building Seminar 2013 in Cambodia (PPP) "Utilizing Efficient Infrastructure Development Framework"</b> Phnom Penh, Cambodia (150 participants), ERIA Capacity Building Seminar 2013 in Cambodia on Public Private Partnership (PPP) "Utilizing Efficient Infrastructure Development Framework", co-organised by Ministry of Commerce and supported by Cambodian Institute for Cooperation and Peace (CICP) and Bangkok Research Center (BRC), JETRO Bangkok	Phnom Penh, Cambodia
24 Jul 2013	<b>ERIA Capacity Building Seminar 2013 in Nay Pyi Taw, Myanmar (PPP) "Utilizing Efficient Infrastructure Development Framework"</b> Naypyitaw, Myanmar (70 participants), ERIA Capacity Building Seminar 2013 in Myanmar on Public Private Partnership (PPP) "Utilizing Efficient Infrastructure Development Framework", co-organised by Ministry of National Planning and Economic Development (NPED) and supported by Yangon Institute of Economics and Bangkok Research Center (BRC), JETRO Bangkok and JETRO Yangon	Nay Pyi Taw, Myanmar
27 Spt 2013	<b>ERIA Media Workshop in Myanmar "Challenges Ahead: Myanmar's ASEAN Chair 2014 and Beyond"</b> Yangon, Myanmar (80 participants), ERIA Media Workshop in Myanmar: "Challenges Ahead: Myanmar's ASEAN Chair 2014 and Beyond", supported by Myanmar Journalists Association (MJA), Mizzima Media, DVB, and Bangkok Research Center (BRC), JETRO Bangkok	Yangon, Myanmar
20 - 25 Oct	<b>ERIA Executive Capacity Building Seminar and Workshop "Executive Leaders Summit 2013 in Thailand" "Building Robust, Efficient and Value Creating Connectivity for Regional Development"</b> Bangkok, Thailand (40 participants), ERIA Executive Capacity Building Seminar "Building Robust, Efficient and Value Creating Connectivity for Regional Development", co-organised by Ministry of Commerce, Thailand and supported by Bangkok Research Center (BRC) JETRO Bangkok  Chiang Mai and Chiang Rai, Thailand (30 participants), ERIA Executive Capacity Building Workshop "Building Robust, Efficient and Value Creating Connectivity for Regional Development", co-organised by Ministry of Commerce, Thailand and supported by Bangkok Research Center (BRC) JETRO Bangkok	Bangkok, Chiang Mai and Chiang Rai

DATE	EVENT	VENUE
31 Oct - 1 Nov 2013	<b>ERIA Capacity Building Seminar 2013 in Phnom Penh, Cambodia (RCEP, Competition Law, Consumer Protection, IPR) "Strengthening Cambodia's Competitiveness in Regional Integration"</b> Phnom Penh, Cambodia (1st day: 300 participants; 2nd day: 200 participants), ERIA Capacity Building Seminar 2013 in Cambodia on RCEP, Competition Law, Consumer Protection and IPR "Strengthening Cambodia's Competitiveness in Regional Integration", co-organised by Ministry of Commerce, Cambodia and supported by Bangkok Research Center (BRC), JETRO Bangkok	Phnom Penh, Cambodia
21 - 22 Nov 2013	<b>ERIA Capacity Building Seminar 2013 in Lao PDR (RCEP, Competition Law, Consumer Protection, IPR) "Strengthening Lao PDR's Competitiveness in Regional Integration"</b> Vientiane, Lao PDR (1st day: 200 participants; 2nd day: 100 participants), ERIA Capacity Building Seminar 2013 in Lao PDR on RCEP, Competition Law, Consumer Protection and IPR "Strengthening Lao PDR's Competitiveness in Regional Integration", co-organised by the Ministry of Industry and Commerce, Lao PDR and supported by the Bangkok Research Center (BRC), JETRO Bangkok	Vientiane, Lao PDR
25 Nov 2013	<b>ERIA Capacity Building Seminar 2013 in Vietnam (RCEP) "Upgrading Vietnam's Position in Regional Integration"</b> Halong Bay, Vietnam (40 participants), ERIA Capacity Building Program 2013 in Vietnam: RCEP Seminar "Upgrading Vietnam's Position in Regional Integration", co-organised by the Ministry of Industry and Trade of Vietnam and supported by the Bangkok Research Center (BRC), JETRO Bangkok	Halong Bay, Viet Nam
28 - 30 Nov 2013	<b>ERIA Capacity Building Seminar 2013 in Nay Pyi Taw, Myanmar (RCEP, Competition Law, Consumer Protection, IPR) "Overcoming Challenges Ahead: Myanmar's ASEAN Chair 2014, AEC and Beyond 2015"e Leaders Roundtable"</b> Naypyitaw, Myanmar (1st day: 250 participants; 2nd day: 200 participants, 3rd day: 200 participants), ERIA Capacity Building Seminar 2013 in Myanmar on RCEP, SME, Competition Law, Consumer Protection and IPR "Overcoming Challenges Ahead: Myanmar's ASEAN Chair 2014, AEC and Beyond 2015", co-organised by Ministry of National Planning and Economic Development, and supported by Yangon Institute of Economics, Bangkok Research Center (BRC), JETRO Bangkok and JETRO Yangon	Nay Pyi Taw, Myanmar

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