

Frames

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Message from the Executive Director



Prof. Hidetoshi Nishimura
ERIA Executive Director

Greetings! With the dawning of a new year, the Economic Research Institute for

ASEAN and East Asia (ERIA) embarks on a more enhanced dissemination of its outputs and activities to introduce the Institute's works.

As the ASEAN Community moves toward 2015, ERIA has been contributing to the Community building process in ASEAN and East Asia through various studies and researches as the "Center of Excellence" in ASEAN and East Asia. ERIA's role is expanding while ASEAN and East Asia are turning into critical moments for their futures.

Our newest dissemination outlet is our *ERIA FRAMES* newsletter. As its name implies, the newsletter aims to present a picture of what the Institute is doing, the highlights of its recent studies and seminars/fora as well as some thoughts and insights from its scholars and key stakeholders on certain ASEAN and East Asia-related issues.

Through our *ERIA FRAMES*, we hope to have a wider and more visible presence among readers in the region.

I am very sure that ERIA will contribute to strengthening and deepening regional integration in ASEAN and East Asia. □

In this Issue

<i>Sustaining the Momentum Beyond 2015</i>	1-5
<i>News Update: AEC Scorecard IV</i>	5
<i>News Update : ERIA Energy Unit Lines Up Research for the Year</i>	6
<i>ERIA Calendar of Activities</i>	6
<i>Thoughts: Indonesia Should Drive Integration</i>	7
<i>Capacity Building Program</i>	8

ASEAN and AEC BEYOND 2015



ASEAN Beyond 2015 workshop series in four cities (photo: ERIA)

Sustaining the Momentum Beyond 2015

In response to and support of the call first made by Indonesian President, H.E. Dr. Yudhoyono, during the opening of the 18th ASEAN Summit in Jakarta in May 2011 to start the "successful discussion on what ASEAN would be beyond 2015 and how to achieve such vision" and also to the Declaration of the ASEAN Leaders to "develop an ASEAN Community's post-2015 vision and its elements...", the Economic Research Institute for ASEAN and East Asia (ERIA) embarked on a major undertaking in 2012 which looked into various areas related to ASEAN and AEC beyond 2015. Tapping a large number of experts and specialists mainly from the ASEAN region to prepare some 40 thought or issues papers on these areas, the nearly year-long study has now been completed and put together into a report titled *ASEAN Rising: Moving ASEAN and AEC Forward Beyond 2015*.

"AEC 2015 is not and should not be looked at as the end but just the beginning of coming up with a truly integrated ASEAN post 2015."

Prof. Iman Pambagyo, Dir. Gen. of International Trade Cooperation of Indonesian Trade Ministry

The results of the study were presented to various stakeholders in a series of four workshops entitled → 2



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ASEAN Beyond 2015 held in four major cities in Southeast Asia: Jakarta, Kuala Lumpur, Yangon and Manila, with each workshop focusing on a specific pillar of the framework proposed by the study to move forward beyond 2015 and toward an “ASEAN Rising”. Each workshop aimed to engage with the stakeholders and generate feedback, especially on the recommendations regarding the ways forward. It is hoped that the results of the study as well as the discussions based on the workshops would be useful to ASEAN officials as they start pondering and preparing for the successor AEC Blueprint post 2015.

In his presentation of the study’s highlights during the four workshops, Dr. Ponciano Intal, Jr., ERIA Senior Researcher and co-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. For this, there may be a need for some rethinking or creative thinking on how things are done and would have to be done.

Still, he said that there is reason for optimism as he cited the significant economic progress and transformation that have taken place in many of the ASEAN Member States (AMSs) in the last three decades. Poverty rates in the region, for instance, have significantly decreased from 45 percent in 1990 to 14 percent in 2010. The poverty gap reduced significantly from 14 percent in 1990 to 3 percent in 2010. During this time, the ASEAN middle class also expanded from 15 percent in 1990 to 37 percent in 2010.

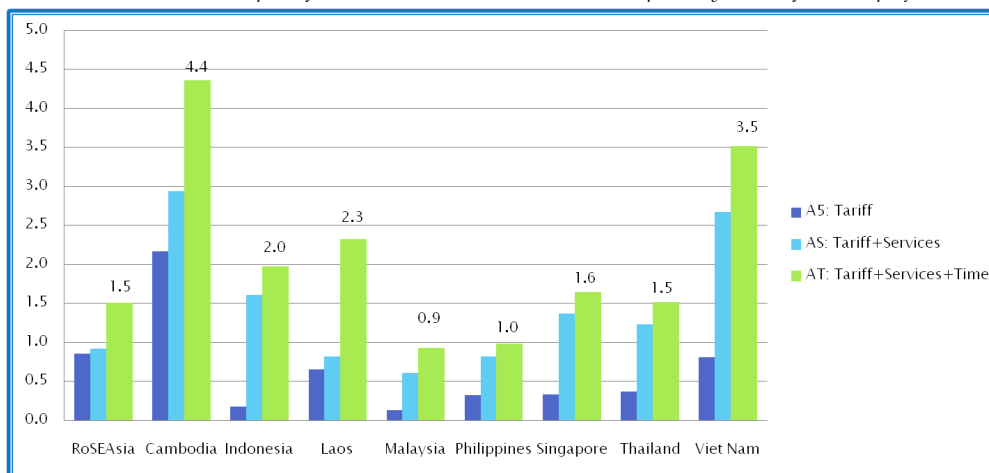
He continued that the AEC will not only affect the economy but also development as a whole which could lead ASEAN to achieve a successful integration, “The good news is, all the AEC frameworks and measures are not only measures for regional economic integration but in fact also give significant support measures for development in the region. AEC will not be completed in 2015, *nor was it meant to be*. Nonetheless, AEC is a major milestone in the region as an integration effort.”

JAKARTA

The workshop in Jakarta, Indonesia was held on 16 November 2013 in cooperation with CSIS (Centre for Strategic and International Studies). With Jakarta’s theme on *Integrated and Highly Contestable ASEAN*, the Director General of International Trade Cooperation of the Indonesian Trade Ministry, Prof. Iman Pambagyo, noted the importance of gaining lessons from the experiences of other regional integration initiatives like the European Union but at the same time making sure that ASEAN has its own identity. Thus, it is important to be aware of the various issues – political and social -- that may have an impact on the realization of AEC beyond 2015 and find solutions to address them. The Director General also revealed that Indonesia has come up with a blueprint to prepare itself for beyond 2015 even though there are factors that somehow deter its progress such as the disagreements among certain groups within and outside of government.

Meanwhile, Rizar Indomo Nazaroedin, the director of regional cooperation in the Investment Co-

Potential Economic Impact of AEC Measures on AMSs’ GDP (Computed by Itakura for MTR project.)



-ordinating Board (BKPM), emphasized the importance of improving the competitiveness of Indonesian resources, “We have to think of how to be competitive instead of just focusing on the integration. Some say Indonesia is not ready, whilst actual integration could introduce us to parties which could help us increase our competitiveness.”

Regarding the elements in achieving an integrated and highly contestable ASEAN, pursuance of the full implementation of the ASEAN Single Window by 2015 as far as trade facilitation is concerned, is seen to be critical for increased intra-ASEAN trade. Focus of the streamlining/implementation should be on the easing of the process of documents preparation.

The issue of non-tariff measures (NTMs) is one of the key elements to be faced squarely for the AEC to be realized. While there will always be NTMs, the challenge is to make sure that NTMs do not become significant barriers to trade. Thus, it is important to have a regional commitment for individual ASEAN countries to do a comprehensive review of NTMs in their respective countries.

In all aspects of working toward and beyond AEC 2015, the role of the private sector is crucial. Therefore, there should be a clear framework for private sector engagement, whether it is in streamlining NTMs, discussing the regulatory environment, harmonizing standards and conformance, or liberalizing services.

KUALA LUMPUR

The second workshop was held in cooperation with the Ministry of Trade and Industry of Malaysia and the Institute for Strategic and International Studies (ISIS) in Kuala Lumpur, Malaysia on 19 November 2013 focusing on becoming a *Competitive and Dynamic ASEAN*.

Senior Director of the ASEAN Economic Cooperation Division from the Ministry of Trade and Industry (MITI) of Malaysia P. Ravindran said that it is important to first have a reality check on what is happening. According to him, the biggest challenges are how to reduce the development gap and how to

negotiate on a common ground. The AEC post 2015 must also highlight the process of how ASEAN moves forward. He added that there must be a feeling of “belonging” for regional integration. Many countries in the region, for example, seem to be imposing new trade restrictions which goes against liberalizing and some measures coming from ASEAN countries are even non-tariff barriers (NTBs).

Another panelist, Mr. Steven Wong of ISIS, noted that while there is no lack of political will, it is the “political won’t” that will cause the problem in terms of countries undergoing structural change to benefit from integration. In the end, the states that are able to promote change at a rapid pace like Viet Nam will gain the most benefits. Likewise, it is important to see what the ASEAN states will do together and individually. In the ultimate analysis, if the four pillars suggested by the study are not implemented, then the ASEAN community will be economically fragmented.

In relation to that, there is also a need to put policy priorities on the table to move forward, according to another panelist, Prof. Tham Siew Yean. She said that the four pillars of the AEC Blueprint are all interlinked with one another, “So how do we prioritize in terms of short-term, middle-term and long-term?”

Concerns were also raised on the need for more involvement by the private sector in terms of providing recommendations and giving advice to the various governments in moving forward. Most engagements in ASEAN are at the government level but are not trickled down enough to the private sector.

YANGON

The third leg of the workshop series on ASEAN and AEC Beyond 2015 was held on 23 of November 2013 in cooperation with the Ministry of National Planning and Economic Development (MNPED) and Yangon Institute of Economics (YIE) in Yangon, Myanmar. The Yangon workshop focused on an *Inclusive and Resilient ASEAN*.

ERIA Chief Economist and project co-leader Dr. Fukunari Kimura raised concerns regarding geographical, industrial and society gaps among and within AMSs. Nonetheless, he is optimistic that policy makers would be able to create policies that would help narrow the gap, one of which would be in promoting connectivity, both physical and people-to-people, in order to engender inclusiveness, “When we have good connectivity, we can have both growth and inclusiveness.”

A different view toward AEC was conveyed by Mr. U Moe Kyaw, the joint secretary general of the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI). Based on his experience in the region, Mr. Kyaw sees the possibility of AEC working out as rather small. “It’s not going to work, Singapore would be worried about their migrant workers and Thailand won’t let go of the migrant workers from Myanmar. The possibility of why it cannot work is endless.”

Concern was also raised during the discussions on the possible “non-readiness” of some SMEs when investments and products “swamp in” as a result of the liberalization and integration process.

MANILA

The last workshop in the series was held in Manila, Philippines in cooperation with the Philippine Institute for Development Studies (PIDS) on the 26th of November 2013. The focus was on having a *Global ASEAN*. One of the sessions was on the role of the ASEAN structure and institutions in the realization of the AEC targets.

Dr. Wilfrido Villacorta, former Philippine Ambassador and Permanent Representative to the ASEAN, underscored the need for studies on the AEC to look at the big picture where ASEAN economic integration is determined not only by economic variables but also by geo-political and institutional factors. In terms of the institutional aspect, cooperation in ASEAN requires consensus through unanimity. However, this very requirement makes it difficult for ASEAN to introduce reforms and strengthen its institutional structures. Equally difficult is to consider the removal of this requirement; how

would member states who happen, for instance, to be targets of majority censure, react if ASEAN discards consensus and adopts the majority vote approach in arriving at common policies and decisions? How would and can ASEAN survive division among its membership?

Dr. Villacorta also pointed out the impact of geo-politics in mapping out the potential role of ASEAN in the regional and global arenas. With the recent escalation of maritime disputes in the region, it becomes clear that sovereignty concerns and national core interests are not confined to the AMSs alone but rather also involve the Big Powers in East Asia who have their own national self-interests and agenda to advance. Thus, it is necessary for the AMSs “to appreciate more the overarching and intertwined interest that should strengthen their ties and to stand together in resisting the ‘wedge politics’ inflicted by some of the Big Powers”.

In an ideal scenario where ASEAN becomes a formidable bloc serving as balancing force and a powerful collective voice regionally and internationally, Dr. Villacorta foresees the success of the envisaged AEC as crucial. Meeting the targets of the AEC would make the leaders and peoples of ASEAN realize the benefits of regional solidarity and integration for their societies. This would in turn catalyze internal reforms in ASEAN and rationally define the dealings of ASEAN members with each other based not only on traditional national interests but also on common interests.

Meanwhile, in his presentation on the Regional Comprehensive Economic Partnership (RCEP) post 2015, ERIA Senior Policy Coordinator, Mr. Yoshifumi Fukunaga pointed out that in working toward the conclusion of the RCEP as a new regional free trade agreement in 2015, negotiators should aim for, among others, the deepening of liberalization commitments, adoption of a “common concession” approach in the various tariff commitments, introduction of concrete trade facilitation programs, and commitments to liberalize trade in services at a high level.

He noted the importance of the RCEP, especially to the ASEAN and its member states because it will maintain and strengthen, for one, the notion of “ASEAN Centrality”, RCEP being an ASEAN strategy. Assuming that RCEP will take effect on January 1st 2016, Mr Fukunaga presented some possible post-2015 agenda in the RCEP such as the implementation mechanism, open accession clause, and issues on the Trans-Pacific Partnership (TPP) vis-à-vis the RCEP.

Finally, Dr. Erlinda Medalla, Senior Research Fellow at PIDS, noted that the main story of the various presentations is that countries have become closely inter-related and mutually affected by each other’s performance. Hence, there is no other way but for countries to increasingly cooperate. For this, “We need to have a strengthened ASEAN,” she said.

The four workshops showed different views

through the respective focuses in each country. Underpinning the entire discussions, however, was the fact that, as Prof. Iman Prambagyo from Indonesia said, “AEC 2015 is not and should not be looked at as the end but just the beginning of coming up with a truly integrated ASEAN post 2015.”

This was also highlighted by Dr. Intal ; “Despite the criticisms about AEC 2015, there have been substantial achievements. We do not integrate for integration sake but because it gives benefits to the region, firms and people. We hope the strategy and policies would help ensure that such integration eventually benefits all of us.”

In the end, what is needed is a concerted effort among all the member states and stakeholders to continue the ambition and to sustain the momentum of moving *toward* and *beyond* AEC 2015. □

NEWS UPDATE

AEC Scorecard IV: Monitoring the Implementation of the AEC Blueprint

The AEC Scorecard Phase IV Project coordinators and representatives from the participating ERIA Research Institutes Network (RIN) discussed the approach and methodology, expectations and work program of the latest phase in the series of AEC Scorecard projects to monitor compliance to the AEC Blueprint measures. The discussion took place in a two-day workshop on 16 and 17 December 2013 at the ERIA office in Jakarta.

Chairperson of the ERIA Academic Advisory Council, Dr. Hank Lim, said expectations have been building up among policymakers and other stakeholders in the region for the results of this Scorecard project as the final stage toward 2015 inches closer. It is therefore important to have a close monitoring of the implementation of the AEC Blueprint measures and get to the point with regards to the scoring and the reasons behind them. As such, interactive and strategic dialogues with policymakers and the private sector must be regularly held during this time until August 2014 when the initial findings are expected to be presented to the ASEAN Economic Ministers. The objectives of AEC Scorecard IV are: (1) update the scores reported in Phases 1 and 2 of the

ERIA AEC Scorecard Project; (2) compare AEC commitments with actual implementation and policies; (3) analyze results and identify bottlenecks and reasons for said results; (4) explore greater partnership and engagement with the private sector like what was done in the informed regulatory conversations; and (5) generate specific recommendations from stakeholders to make them more useful for AEC 2015 and the successor AEC Blueprint post 2015.

Project co-leaders Dr. Ponciano Intal, Jr., Dr. Dionisius Narjoko and Mr. Yoshifumi Fukunaga emphasized that this phase will not only monitor commitments but also policies and actual implementation. The project will also look into the “whys and hows” of the results. At the same time, the Project will closely interact with the private sector in the AMSs and the ASEAN Business Advisory Council (ABAC) and enlist the support of various ASEAN bodies. The key areas for the Phase IV study are: tariffs, non-tariff measures (NTMs), services, trade facilitation, standard and conformance, investment liberalization, investment facilitation, and transport facilitation. □

ERIA Energy Unit Lines Up Research for the Year

To support the Energy Cooperation Task Force (ECTF) in providing recommendations and assisting in policy formulation in ASEAN and East Asia Summit (EAS) countries, the ERIA Energy Unit regularly undertakes studies along the three work streams of the ECTF, namely: (a) Energy Efficiency and Saving Potential; (b) Bio-fuels for Transport; and (c) Energy Market Integration. Among the studies lined up for this year under each work stream are:

Energy Efficiency and Saving Potential

- Continuation of the country outlooks in ASEAN and East Asia as well as studies on energy price and income elasticity in selected ASEAN and East Asian countries
- Optimum electricity power infrastructure
- Smart urban traffic
- Strategic usage of coal
- Energy access in Myanmar

Bio-fuels for Transport

- Benchmarking of renewable transport fuels
- Asian potential of biofuels market
- Best mix of renewable and conventional energy sources
- Sustainability assessment of geothermal use

Energy Market Integration (EMI)

In the tradition of selecting a theme for each issue of the series of EMI studies, this year's focus will look into gaps in the EMI in general and on energy trade in ASEAN and East Asian countries.

The ERIA Energy Unit also conducts other studies requested by the EAS Energy Ministers Meeting (EMM). For FY 2013-14, it is doing research on *nuclear power safety management* which aims to establish an information-sharing system among ASEAN and East Asian countries on energy security, safety standard and emergency cooperation; *natural gas market* which reviews the current gas market in ASEAN and East Asia; *energy security index* which is a follow-up from last year's establishment of the index based on various criteria and which will test the energy policy changes; and *development of technical guidelines* to put in operation the ASEAN Petroleum Security Agreement (APSA).

To further discuss the details and work programs of some of the studies lined up, a series of inception meetings of the various working groups was held at the ERIA office on 25-27 November and 16-17 December 2013. At the same time, the Working Group on "Energy Outlook Preparation and Analysis of Energy Saving Potential in East Asia" had its second meeting on 18-20 December to present initial results of previously completed studies and to report on the progress of ongoing and additional studies. □

ERIA Calendar of Activities

16-17 December 2013

AEC Scorecard Phase IV Monitoring the Implementation of AEC Blueprint Measures

17 December 2013

1st Meeting of ERIA Research Working Group 2013 for "Study on Development of Energy Security Index and Assessment of Energy Security for East Asia Countries"

18 December 2013

2nd Meeting of the Working Group for Energy Outlook Preparation and Analysis of Energy Saving Potential in East Asia Region

11 January 2014

2nd RIN Meeting in FY2013 in Brunei Darussalam

Indonesia Should Drive Integration

by DIONISIUS NARJOKO

As the biggest country in Southeast Asia, Indonesia is a natural leader of ASEAN. For decades since the association was established in 1967, Indonesia has played an important role maintaining geopolitical stability in the region. This leadership has recently become more demanding due to border disputes within ASEAN and China's territorial claims in the South China Sea.

Indonesia also assumes leadership on ASEAN economic matters, albeit, some would argue, not sufficiently actively. Still, at the Bali Summit in 2003, Indonesia was bold enough to introduce the establishment of an ASEAN Economic Community (AEC) by 2020 (later accelerated to 2015) as the central ASEAN objective and, more recently, during the Bali Summit in 2011, putting in place the Regional Comprehensive Economic Partnership (RCEP) by 2015.

But progress toward establishing the AEC has been modest. While there have been some notable achievements, critical targets for laying a robust foundation of a fully integrated and equitable ASEAN are yet to be achieved. With 2015 now just the year after next, time is running out, and the need to address the challenges and obstacles to realising the AEC was acknowledged by ASEAN leaders at their 2012 Phnom Penh meeting. It is important for ASEAN to make convincing progress in RCEP, a new regional trade agreement built upon the ASEAN+6 FTAs set conveniently to conclude and coincide with the commencement of the AEC in 2015.

ASEAN has now arrived at a critical juncture where the AEC's credibility will

require ASEAN to choose the path of bold action to improve the rules governing ASEAN FTAs. Meaningful progress, in at least some of the more difficult areas, like services liberalization, is therefore important. Moreover, deeper intra-ASEAN integration is a prerequisite for a broader East Asian integration led by ASEAN. ASEAN functions as a 'hub' with linkages or spokes to countries (the dialogue partners); at the same time, the hub serves as a platform for networks of production involving all countries connected through the hub (or ASEAN).

In short, now is the time for ASEAN to really focus on its economic integration agenda, and Indonesia— as the most influential country in ASEAN—should take a leading role in this. Given the impending 2015 deadline, Indonesia should focus on issues that are difficult to solve but critical for AEC's realization. As a number of studies have suggested, non-tariff measures and services liberalization stand out.

ASEAN has been successful in tariff elimination but not so in reducing barriers stemming from non-tariff measures. Significant non-tariff barriers applied by ASEAN member states can negate the positive impact of tariff elimination. And dealing with non-tariff measures is even more important, given that some of them can be used for short-term protectionist purposes.

Services liberalization, meanwhile, is critical—especially for services needed as inputs for production such as logistics, transport and business services. Probably the biggest challenge for ASEAN in services liberalization is how ASEAN member states can arrive at substantially

more open commitments to foreign commercial presences in their domestic economies.

But there are obstacles to Indonesian leadership in ASEAN too. For one, Indonesia faces a number of domestic economic challenges. Issues in infrastructure development, a high dependence on natural resources for generating income, a more rigid labor market, and continuing development gaps between regions within Indonesia are just some of the key concerns. These have eroded the country's overall competitiveness in the past decade or so, especially in comparison with other ASEAN countries. These challenges also indicate that the country's economic structure is (or will be) changing, and will likely still be doing so for many years to come, continuing the process started in the early 2000s.

The best way forward would be for Indonesia to engage both challenges— domestic economic reform and reform of ASEAN leadership—together. Commitment to achieving AEC and RCEP by 2015 will have the effect of instilling discipline at home for implementing the necessary domestic reforms. Even if the 2015 deadlines are not met, a decisive resolution to Indonesia's domestic issues will benefit the country's competitiveness, regardless of whether the region is fully integrated. At the same time, improvements to competitiveness will create momentum for increasingly bringing Indonesia into a more integrated region. □

Dionisius Narjoko is an Economist at ERIA, Jakarta. This commentary is a slightly condensed version of the article Why Indonesia Needs to Drive Integration which appeared in East Asia Forum Quarterly October-December 2013. This is being reprinted with permission.

Thoughts provides commentaries and perspectives on certain ASEAN and regional-related issues written by ERIA scholars and other stakeholders in the region. This writeup is also available online at: <http://www.eria.org/news/FY2014/01/why-indonesia-needs-to-drive-integration.html> You may forward any feedback to the editor of ERIA FRAMES at info@eria.org

Capacity Building for Development

Since 2008, the Economic Research Institute for ASEAN and East Asia (ERIA) has held several capacity building seminars on various topics related to regional integration in the new ASEAN member countries (Cambodia, Laos, Myanmar, and Viet Nam) as part of its mandate to help narrow the development gaps in the region and to help upgrade the analytical and research capabilities of the new members as they integrate with ASEAN.

In the latter part of 2013, ERIA capacity building seminars focused on the topics of Regional Comprehensive Economic Partnership (RCEP), Competition Law, Consumer Protection, SMEs and Intellectual Property Rights. These topics are critical in achieving ASEAN's vision of regional economic integration as well as full integration into the global economy. They also provide basic knowledge infrastructure for innovation which is a key element in enhancing competitiveness.

Together with the Ministry of Commerce of Cambodia, ERIA held a two-day capacity building seminar entitled "Strengthening Cambodia's Competitiveness in Regional Integration" on 31 October - 01 November 2013 in Phnom Penh, Cambodia. This was later followed by the capacity building seminar held on 21 - 22 November 2013 in Vientiane, Lao PDR in cooperation with the Foreign Trade Policy Department of Laos' Ministry of Industry and Commerce. Both seminars were attended by more than

200 participants from government, business and academic sectors of each country.

Meanwhile, the capacity building seminar held in Halong Bay, Viet Nam on 25 November 2013 with the title "Upgrading Viet Nam's Position in Regional Integration" focused specifically on RCEP and was organized in collaboration with Viet Nam's Ministry of Industry and Trade (MOIT). Because of the more specialized focus, a smaller group of potential players of around 30 government officials from Hanoi and 11 representatives from Halong attended.

The last in the series of capacity building seminars on the abovementioned topics was held in Nay Pyi Taw, Myanmar on 28 - 30 November 2013 with more than 200 representatives from government, academe and the private sector in attendance. In consonance with Myanmar's role as ASEAN Chair for 2014, the seminar was aptly titled "Overcoming Challenges Ahead: Myanmar ASEAN Chair 2014, AEC and Beyond 2015" and was co-organized with Myanmar's Ministry of National Planning and Economic Development (MNPED).

In their respective opening remarks, the honorable keynote speakers of the four seminars stressed the importance of the topics to be discussed, especially in enabling the participants to enhance their knowledge and capacities on the issues of economic integration, fair competition and competitiveness. □

Capacity building reports could be requested from Planning and Coordination Director at hiroschi.okasaki@eria.org

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It describes recently completed and ongoing research as well as highlights of seminars, workshops and symposia, and feedback from capacity building workshops. Thoughts and perspectives on regional issues as written by ERIA officials and scholars and other stakeholders in the region are also presented. ERIA FRAMES may be downloaded for free at www.eria.org

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