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.
ERIA provides analytical research and policy recommendations.
WHAT IS ERIA

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.

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

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.
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.

MESSAGE FROM THE 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.”

Prof. Hidetoshi Nishimura
Executive Director
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.

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

THE BEGINNING
On 23 August 2006, during the 13th Consultation Meeting held between the ASEAN Economic Ministers and the Ministry of Economy, Trade and Industry of Japan (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 Inverse Group chaired by Dr. Hadi Soesastro, and the Ministry of Economy, Trade and Industry, proposed to establish a think tank called ERIA. 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. Shino 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 endeavors to build the ASEAN Economic Community (AEC) and support its role as the driver of the wider economic integration. The results of its research work 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 those countries in the integration process.

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

Fy 2008

Fy 2012
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 2008. 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 endeaveour 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 its Connective Corridors 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 appreciation during the Fifth East Asia Summit held on 28 October 2010. In this connection, ERIA’s utilisation.

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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 facilitating and liberalisation reforms. At the start of 2013, the Project entered its fourth phase which considers AEC commitments with actual implementation and policies in the AMFs 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 these FTAs by ASEAN business sectors. At the same time, ERIA also provided intellectual support to the Regional Comprehensive Economic Partnership (RCEP) negotiations, 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 and AEC 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 “Evolution 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 “Realising 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-Centred 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.  

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EVENT HIGHLIGHTS

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.

ERS 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.
EVENT HIGHLIGHTS

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.

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 Sukchorat, 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.

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.
**EVENT HIGHLIGHTS**

**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 related 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 issues presented in 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 academic/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).
EVENT HIGHLIGHTS

Economic Research Institute for ASEAN and East Asia
Annual Report 2013

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

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, there has been attention to the NRB industries which need to be addressed in order to achieve a stronger and resilient economic growth and development in East Asian economies.

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
an increasing need for private participation. One

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Cambodia, Laos PDR and Myanmar

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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: 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 ERA 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 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 CO2 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 modelling, 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...
The objective of this research was to define appropriate utilisation of biodiesel fuel by establishing the quality standard and quality control/methodology 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.


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 Asia 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 to 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 resources 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 challenge, 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 stage of the study, biofuel supply and demand outlook was projected and analyzed for each selected country. Established results of other ERIA working groups were also utilised for the “Business as Usual (BAU)” case.


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.
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. 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 measures identified by the ASEAN Economic Community (AEC) Blueprint. In support of the realisation of AEC 2015, ERIA has undertaken the monitoring and analysis of priority measures identified by the ASEAN Economic Community (AEC) Blueprint.

• 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.

• 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 APAS 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 (RCEP) 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 AMS. 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 trade and investment from automotive parts suppliers. The study includes current states and conditions faced by automobile OEMs and parts suppliers. The study includes current states and conditions faced by automobile OEMs and parts suppliers.

The automotive and auto parts industry is one of the key sectors for ASEAN to realize the AEC. This has been a priority for many countries and is critical to improving the region’s competitiveness.

6. ASEAN Regional Integration and the Automotive 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 prioritized. The free trade system which began with the Brand to Brand Complementation (BBC) scheme in 1997 and finalised with the creation of the ASEAN Trade in Goods Agreement (ATIGA) in 2003, ASEAN has created a highly developed free trade system that is unique in Asia. In this, the automotive sector has been prioritized. The free trade system which began with the Brand to Brand Complementation (BBC) scheme in 1997 and finalised with the creation of the ASEAN Trade in Goods Agreement (ATIGA) in 2003.

ASEAN Regional Integration and the Automotive 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 prioritized. The free trade system which began with the Brand to Brand Complementation scheme in 1997 and finalised with the creation of the ASEAN Trade in Goods Agreement (ATIGA) promoted intra-regional trade and investment from automotive original equipment manufacturers (OEMs) and auto parts suppliers.

The automotive and auto parts industry is one of the key sectors for ASEAN to realize the 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 automotive 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 crucial role in this growth by providing critical legal framework 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.


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 regulation for SMEs; access to finance; technology and technology transfer; international market expansion; promotion of entrepreneurial education; and more effective representation of SMEs’ interests. The study findings include designation of significant 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 examine IP policies for investment promotion. The Action Plan advocates 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. This project 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
The potential saving was 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 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 an emerging issue 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.

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 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 coordinating 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 on and learning from the accident in Japan.
Since the share of natural gas in the Total Primary resources and reduction of environmental burden, diversification of energy, effective use of domestic gas due to factors like economic efficiency, 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.

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.

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.

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.

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.

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.
FAME (Fatty Acid Methyl Ester) has an essential role in the first generation biodiesel fuel production. Moreover, the first generation biofuels have some problematic aspects such as indiscriminate harvesting of energy crops and/or conflict with food production. On the other hand, first generation biofuels have some problematic aspects such as indiscriminate harvesting of energy crops and/or conflict with food production. In this study, feasibility of next generation biofuels such as non-edible feedstock, 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 the electrolysis of water, is an extension of the next generation biofuels.

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 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 production. 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 the electrolysis of water, is an extension of the next generation biofuels.

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 which 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

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...

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.

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.

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**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.

**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.
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>Dr. Stephen Greenville AO</td>
<td>Former Deputy Governor of the Reserve Bank of Australia</td>
</tr>
<tr>
<td>China</td>
<td>Professor Zhang Yunling</td>
<td>Professor of International Economics; Academy Member and Director of Academy Division for International Studies, Chinese Academy of Social Sciences</td>
</tr>
<tr>
<td>India</td>
<td>Dr. Rajiv Kumar</td>
<td>Senior Fellow, Center for Policy Research; Former Secretary General of the Federation of Indian Chamber of Commerce &amp; Industry (FICCI)</td>
</tr>
<tr>
<td>Japan</td>
<td>Mr. Fujita Mitsuaki</td>
<td>Chairman and CEO of Canon Inc., Honorary Chairman of Nippon Keidanren (Japan Business Federation)</td>
</tr>
<tr>
<td>Korea</td>
<td>Mr. Suck Rae Cho</td>
<td>Chairman and Chief Executive Officer, Hyundai Corporation; Honorary Chairman, Federation of Korean Industries</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Dr. John Wood, Aced (Retd), QSO (Adjunct Professor)</td>
<td>Pro Chancellor, University of Canterbury; Former Senior New Zealand Diplomat</td>
</tr>
<tr>
<td>ASEAN Secretariat</td>
<td>H. E. Le Luong Minh</td>
<td>Secretary General, ASEAN</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Country</th>
<th>Name</th>
<th>Position</th>
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<tbody>
<tr>
<td>Brunei (Chairman)</td>
<td>Dato Paduka Lim Jock Hoe</td>
<td>Permanent Secretary, Ministry of Foreign Affairs and Trade</td>
</tr>
<tr>
<td>Cambodia</td>
<td>H.E. Dr. Hang Chhuon Naron</td>
<td>Minister of Education, Youth, and sports of Cambodia, Permanent Vice Chairman of the Supreme National Economic Council</td>
</tr>
<tr>
<td>Indonesia</td>
<td>Prof. Dr. Jusuf Anwar</td>
<td>Senior Group Advisor, CT CORP; Former Minister of Finance</td>
</tr>
<tr>
<td>Laos</td>
<td>H.E. Mr. Bounkhlavy Souphanthong</td>
<td>Vice Minister of Planning and Investment</td>
</tr>
<tr>
<td>Malaysia</td>
<td>Tan Sri Datuk Azmat bin Kamaluddin</td>
<td>Group Chairman, UAMW Holdings Berhad</td>
</tr>
<tr>
<td>Myanmar</td>
<td>H.E. LeL Loi Thein</td>
<td>Deputy Minister, Ministry of National Planning and Economic Development</td>
</tr>
<tr>
<td>Philippines</td>
<td>Dr. Ramon Miller Qureshi</td>
<td>Chairman and CEO, Small Business Corporation, Department of Trade and Industry</td>
</tr>
<tr>
<td>Singapore</td>
<td>Ambassador Barry Desker</td>
<td>Dean, S. Rajaratnam School of International Studies (RSIS)</td>
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<tr>
<td>Thailand</td>
<td>H.E. Sirait Ratsapana</td>
<td>Permanent Secretary, Ministry of Commerce of Thailand</td>
</tr>
<tr>
<td>Viet Nam</td>
<td>Prof. Le Xuan Ba</td>
<td>Former President, Central Institute for Economic Management (CIEM)</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Name</th>
<th>Position and Affiliation</th>
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<tbody>
<tr>
<td>Australia</td>
<td>Prof. Dr. Peter Drysdale</td>
<td>Emeritus Professor, Crawford School of Economics &amp; Government, Australia</td>
</tr>
<tr>
<td>China</td>
<td>Prof. Zhang Yuyan</td>
<td>Director, Professor, Institute of World Economics &amp; Politics, Chinese Academy of Social Sciences (CASS), Beijing, China</td>
</tr>
<tr>
<td>India</td>
<td>Mr. Pravin Kumar Agarwal</td>
<td>Senior Fellow and Director, The Energy and Resources Institute (TERI), India</td>
</tr>
<tr>
<td>Japan</td>
<td>Dr. Takashi Shirozhi</td>
<td>President, Institute of Developing Economies, Japan External Trade Organization (IDETRO)</td>
</tr>
<tr>
<td>Malaysia</td>
<td>Mohd. Radzuan bin Abdul Halim</td>
<td>Director, Financial Mediation Bureau (FMB) (A Columnist and Writer), Malaysia</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Prof. Gary Richard Hawke</td>
<td>Emeritus Professor, Victoria University of Wellington, and Senior Fellow, NZ Institute of Economic Research, New Zealand</td>
</tr>
<tr>
<td>Singapore</td>
<td>Prof. Dr. Frank Lim Gock-Hay (Chairman)</td>
<td>Senior Research Fellow, Singapore Institute of International Affairs (SIIA), Singapore</td>
</tr>
</tbody>
</table>

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.

Brunel: Brunei Darussalam Institute of Policy & Strategic Studies (BDIPS)
Cambodia: Cambodian Institute for Cooperation and Peace (CICP)
Indonesia: Centre for Strategic and International Studies (CSIS)
Lao: 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/ETRO)
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)
ANNEX D
ERIA OFFICIALS & RESEARCHERS

RESEARCH

Top left - right:
Sothea Oum (Economist), Shigeru Kimura (Special Advisor to the Executive Director on Energy Affairs), Yanfei Li (Energy Economist), Venkatachalam Aribunzohi (Energy Economist), Ponciano Intel 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)
ANNEX E
SUMMIT STATEMENTS FOR 2013

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

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

1. We discussed various environmental issues (including climate change and sustainable development) which are inextricably linked and global in nature. We welcomed the launch of the 2014 Global Climate Change Summit in Kuala Lumpur, Malaysia in November 2013 and the launch of the 2014 International Conference on Energy, Technology and Environment in Seoul, South Korea in October 2013.

2. We appreciated the CMEF (2th) Ministerial Meeting on 10 May 2013, which expressed ASEAN’s strong will to formulate effective regional policy recommendations to achieve greater connectivity and to address the global challenges in the fields of energy and the environment.

3. We expressed the concern of the 2th ASEAN+3 Ministerial Meeting on 27-28 April 2013, which highlighted the need for continued efforts by ASEAN countries to conduct their national and regional initiatives to prevent and control climate change.

4. We agreed to further strengthen the RLG and ASEAN’s platform for achieving sustainable economic development in the region.

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Annex Report 2013

Economic Research Institute for ASEAN and East Asia

Annual Report 2013

Economic Research Institute for ASEAN and East Asia
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

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
12. Intellectual Property Policies for Investment Promotion
13. Development Potential of the Content Industry in East Asia and ASEAN – Phase 2

16. Strategic Usage of Coal in the EAS Region – Phase 1
17. International Cooperation in Nuclear Safety Management in East Asian Countries – Phase 1
18. Energy Efficiency Improvement in the Transport Sector through Transport Improvement and Smart Community Development in the Urban Area – Phase 1
### 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
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

### ANNEX F
LIST OF COMPLETED AND ONGOING RESEARCH BY THEME

#### RESEARCHER
Venkatachalam ANBU MOZHI

<table>
<thead>
<tr>
<th>PUBLICATIONS</th>
</tr>
</thead>
</table>
LIST OF OUTREACH ACTIVITIES OF ERIA RESEARCHERS

Yoshihumi Fukunaga


RESEARCHER

PUBLICATIONS

INTERNATIONAL WORKSHOPS/CONFERENCES/EVENTS/LECTURE/RESEARCH NEW MEETINGS (IF PRESENTER: UPDADED: HANDOUT)


3. Presenter: "ASEAN and the RCPF Strategy", Asian Trade Strategies Regional and Global Trade Arrangements, Australian National University Crawford School of Public Policy, Canberra, 18 September 2013.


HAN Phoumin


RESEARCHER

PUBLICATIONS

INTERNATIONAL WORKSHOPS/CONFERENCES/EVENTS/LECTURE/RESEARCH NEW MEETINGS (IF PRESENTER: UPDADED: HANDOUT)


2. ASEAN Integration Monitoring Report, a joint report by the ASEAN Secretariat and the World Bank, 2013.


Li Yan Hng

1. Presenter, ASEAN Senior Economic OF/Lab Meeting (SEOM) on Regional Integration, April 22-25, 2014.


## List of Outreach Activities of ERIA Researchers

<table>
<thead>
<tr>
<th>RESEARCHER</th>
<th>PUBLICATIONS</th>
<th>INTERNATIONAL WORKSHOPS/CONFERENCES/LECTURES/REVIEW MEETINGS (AS PRESENTER/UPDATER/MENTOR)</th>
</tr>
</thead>
</table>
### ANNEX G

**LIST OF OUTREACH ACTIVITIES OF ERIA RESEARCHERS**

<table>
<thead>
<tr>
<th>RESEARCHER</th>
<th>PUBLICATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Presenter and Chair, “Experiences from India and South America”, Seminar on Regional Infrastructure Development Fund, Indonesian Ministry of Finance, 26 November 2013, Jakarta.</td>
</tr>
<tr>
<td>8.</td>
<td>Adjudicator, National Essay Competition on “Indonesia’s Economic Outlook 2014”, Kempen Faculty of Economics, University of Indonesia, October 2013, Jakarta.</td>
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### ANNEX H

**SEMINARS/SYMPOSIAS**

<table>
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<tr>
<th>DATE</th>
<th>EVENT</th>
<th>VENUE</th>
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<tbody>
<tr>
<td>May 2013</td>
<td>Symposium on East Asia Development Model on “Middle Income Trap and East Asia Economic Transition”, Beijing, China (120 participants), co-organized by International Studies, CAS, China with cooperation of Institute of Economics, NODIC, China</td>
<td>Beijing, China</td>
</tr>
<tr>
<td>Jun 2013</td>
<td>ERIA Symposium on “The Economic Integration of East Asia and Japan’s Growth” Tokyo, Japan (250 participants), ERRA Symposium on “The Economic Integration of East Asia and Japan’s Growth”, supported by The Sankai 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</td>
<td>Tokyo, Japan</td>
</tr>
<tr>
<td>Jul 2013</td>
<td>Symposium on “Economic Integration in East Asia” Hanon, Vietnam (300 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 Vietnam.</td>
<td>Hanon, Vietnam</td>
</tr>
<tr>
<td>Aug 2013</td>
<td>4th ASEAN Connectivity Symposium “Partnering Private Sector for ASEAN Connectivity” 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</td>
<td>Bandar Seri Begawan, Brunei Darussalam</td>
</tr>
<tr>
<td>Sept 2013</td>
<td>Universiti Brunei Darussalam: ERIA-Harvard Symposium on “SME Development and Innovation towards a People-Centered ASEAN Community”, 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</td>
<td>Bandar Seri Begawan, Brunei Darussalam</td>
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### ANNEX I

#### MEDIA EXPOSURE

<table>
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<tr>
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<th>MEDIA WHERE IT APPEARED</th>
<th>EVENT</th>
<th>DATE</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>ASEAN Economic Research Institute builds Capacity Building Efforts of PPP/PRP Program</td>
<td>Public-Private Partnership Center</td>
<td>Capacity Building Program</td>
<td>12 Apr 2013</td>
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<tr>
<td>2</td>
<td>Call for More Investment in Infrastructure</td>
<td>The Cambodia Daily</td>
<td>Capacity Building in Cambodia on PPP</td>
<td>12 Apr 2013</td>
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<tr>
<td>3</td>
<td>ERIA and ASEAN: Provide a Model</td>
<td>The Nation</td>
<td>written by Prof. Gary Hawke</td>
<td>18 Apr 2013</td>
</tr>
<tr>
<td>4</td>
<td>Japan, EU look to trade pact as way to lift up economies</td>
<td>The Japan Times</td>
<td>Commented by Prof. Fukuura Kimura</td>
<td>19 May 2013</td>
</tr>
<tr>
<td>5</td>
<td>Trade and RCEP</td>
<td>People's Daily</td>
<td>Commented by Mr. Noe</td>
<td>27 May 2013</td>
</tr>
<tr>
<td>6</td>
<td>Cambodia, the harmonious order to attract investment</td>
<td>People's Daily</td>
<td>Commented by Dr. Ponsieo Krah Jr.</td>
<td>27 May 2013</td>
</tr>
<tr>
<td>7</td>
<td>Private side can spark investment</td>
<td>The Phnom Penh Post</td>
<td>Capacity Building in Cambodia on PPP</td>
<td>5 Jul 2013</td>
</tr>
<tr>
<td>8</td>
<td>Steering ASEAN into an Economic Community</td>
<td>The Star, Malaysia</td>
<td>Cover Prof. Hidetsuki Nakamura</td>
<td>21 Jul 2013</td>
</tr>
<tr>
<td>9</td>
<td>RCEP: belt and highway (RCEP gives bigger economic potential)</td>
<td>Indonesia Today</td>
<td>Interview with Mr. Yoshikuni Futome</td>
<td>31 Jul 2013</td>
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<tr>
<td>10</td>
<td>Moving ASEAN and AEC Forward Beyond 2015</td>
<td>AJUS-Commentary</td>
<td>Written by Prof. Hidetsuki Nakamura</td>
<td>14 Aug 2013</td>
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<tr>
<td>11</td>
<td>45th ASEAN Economic Ministers (AEM)</td>
<td>Jakarta, Indonesia</td>
<td>45th ASEAN Economic Ministers (AEM) Meeting</td>
<td>17 Aug 2013</td>
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<tr>
<td>12</td>
<td>45th ASEAN Economic Ministers (AEM)</td>
<td>Bangkok, Thailand</td>
<td>45th ASEAN Economic Ministers (AEM) Meeting</td>
<td>17 Aug 2013</td>
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<tr>
<td>13</td>
<td>SHA: should involve all commitments in open market, essays say</td>
<td>The Brunei Times</td>
<td>ASEAN Business &amp; Investment Summit</td>
<td>21 Aug 2013</td>
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<tr>
<td>14</td>
<td>MoF/IT holds 4th ASEAN Connectivity Symposium</td>
<td>Romeko Bulletin</td>
<td>4th ASEAN Connectivity Symposium</td>
<td>28 Aug 2013</td>
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## ANNEX I  
### MEDIA EXPOSURE

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<th>EVENT</th>
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<tbody>
<tr>
<td>15</td>
<td>ASEAN PPP centre’s creation mulled</td>
<td>The Brunei Times</td>
<td>ASEAN Connectivity Symposium</td>
<td>28 Aug 2013</td>
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<tr>
<td>16</td>
<td>PPP seen filling gap in infra financing</td>
<td>The Brunei Times</td>
<td>ASEAN Connectivity Symposium</td>
<td>29 Aug 2013</td>
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<tr>
<td>17</td>
<td>ASEAN beyond 2015: Can higher growth be sustained?</td>
<td>Today Online</td>
<td>Written by: Dr. Porciano S. Intal Jr.</td>
<td>4 Sep 2013</td>
</tr>
<tr>
<td>18</td>
<td>Ceremony marks opening of workshop on renewable energy</td>
<td>Borneo Bulletin</td>
<td>East Asia Summit Energy Cooperation Task Force (EAS ECTP)</td>
<td>9 Sep 2013</td>
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<tr>
<td>19</td>
<td>Brunei eyes feed-in tariff system</td>
<td>Borneo Bulletin</td>
<td>the 2nd ERA Editors Roundtable</td>
<td>9 Sep 2013</td>
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<tr>
<td>20</td>
<td>Alternative energy policies could double share of renewable energy in Asia by 2035</td>
<td>The Brunei Times</td>
<td>East Asia Summit Energy Cooperation Task Force (EAS ECTP)</td>
<td>9 Sep 2013</td>
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<tr>
<td>21</td>
<td>Investing in energy saving technology is economical</td>
<td>The Brunei Times</td>
<td>East Asia Summit Energy Cooperation Task Force (EAS ECTP)</td>
<td>9 Sep 2013</td>
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<td>22</td>
<td>Journalists meet to talk AEC challenges</td>
<td>The Brunei Times</td>
<td>the 2nd ERA Editors Roundtable</td>
<td>9 Sep 2013</td>
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<tr>
<td>23</td>
<td>Brunei commitment towards development of alternative energylauded</td>
<td>Borneo Bulletin</td>
<td>East Asia Summit Energy Cooperation Task Force (EAS ECTP)</td>
<td>10 Sep 2013</td>
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<td>24</td>
<td>2nd ERA Editors Roundtable Discussions</td>
<td>RTB News</td>
<td>the 2nd ERA Editors Roundtable</td>
<td>11 Sep 2013</td>
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<td>25</td>
<td>ASEAN to establish AEC by 2016</td>
<td>Mizima News</td>
<td>the 2nd ERA Editors Roundtable</td>
<td>12 Sep 2013</td>
</tr>
<tr>
<td>26</td>
<td>ASEAN SecGen Congratulates Brunei for Job Well Done</td>
<td>Brudirect.com</td>
<td>the 2nd ERA Editors Roundtable</td>
<td>12 Sep 2013</td>
</tr>
<tr>
<td>27</td>
<td>Media play vital role in building an ASEAN Community</td>
<td>Borneo Bulletin</td>
<td>the 2nd ERA Editors Roundtable</td>
<td>12 Sep 2013</td>
</tr>
</tbody>
</table>

<table>
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<tr>
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<th>EVENT</th>
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<tbody>
<tr>
<td>28</td>
<td>RCEP can pave the way towards TPP</td>
<td>The Brunei Times</td>
<td>the 2nd ERA Editors Roundtable</td>
<td>12 Sep 2013</td>
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<tr>
<td>29</td>
<td>Hoping for peaceful Synta solution</td>
<td>The Brunei Times</td>
<td>the 2nd ERA Editors Roundtable</td>
<td>12 Sep 2013</td>
</tr>
<tr>
<td>30</td>
<td>Media role vital for ASEAN progress</td>
<td>The Brunei Times</td>
<td>the 2nd ERA Editors Roundtable</td>
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<td>31</td>
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<td>Timor Leste must wait for full ASEAN membership</td>
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<td>Trade first casualty of territorial dispute with China</td>
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<td>Media role vital for ASEAN progress</td>
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<td>Brunei ministers join APEC session on “Aging ASEAN”</td>
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<td>37</td>
<td>SMEs for people-centred ASEAN</td>
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<td>38</td>
<td>The Development and Innovation Essential for SMEs</td>
<td>AS2 Brunei</td>
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<td>39</td>
<td>Brunei urged to invest in education for economic growth</td>
<td>Dawn.com</td>
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<td>16 Sep 2013</td>
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<td>40</td>
<td>ASEAN faces calls for reform</td>
<td>Bangkok Post</td>
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<td>41</td>
<td>Success of SMEs critical for long-term sustainable growth of region: ASEAN seizes</td>
<td>Borneo Bulletin</td>
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### Media Exposure

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<td>ASEAN connectivity to boost PHL growth</td>
<td>Business Mirror</td>
<td>Executive Capacity Building in Thailand</td>
<td>21 Oct 2013</td>
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<td>Thailand hosts IRRI meeting for ASEAN economic development research</td>
<td>National News Bureau of Thailand</td>
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<td>22 Oct 2013</td>
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<td>ASEAN countries pushing GMS regional interconnectivity</td>
<td>People’s Daily</td>
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<td>23 Oct 2013</td>
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<td>46</td>
<td>Thailand hosts IRRI meeting for ASEAN economic development research</td>
<td>Pattaya Mail</td>
<td>Executive Capacity Building in Thailand</td>
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<td>47</td>
<td>Reduce or eliminate non-tariff barriers is key (International Perspective)</td>
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<td>48</td>
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<td>Freedom, Myanmar</td>
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<td>IRRI Media Workshop Challenges Ahead: Myanmar’s ASEAN Chair 2014 and Beyond (in Myanmar Language)</td>
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<td>50</td>
<td>More than nine issues are required to be talked including restoration of internal political stability during Myanmar’s term of ASEAN Chairmanship</td>
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<td>52</td>
<td>Intellectual Property Law: Important part to promote the economic growth of ASEAN and East Asia (Khmer)</td>
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<td>53</td>
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<td>Capacity Building in Laos</td>
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<td>Plan to reform economy for ASEAN Integration</td>
<td>Cambodia Daily</td>
<td>Capacity Building in Cambodia</td>
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<td>IRRI Capacity Building in Lao PDR (Lao’s language)</td>
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<td>Expert: No support should be given for unsustainable SMEs</td>
<td>Freedom, Myanmar</td>
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<td>30 Nov 2013</td>
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<td>57</td>
<td>Myanmar leads ASEAN into 2014</td>
<td>East Asia Forum</td>
<td>Written by Ms. Anita Prasath</td>
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<td>58</td>
<td>The value of ASEAN integration and the WTO regime</td>
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<td>Interview with Prof. Hidetoshi Nishimura</td>
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<td>ASEAN Korea Center to hold seminar on regional economy</td>
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<td>Why Indonesia needs to lead in economic integration</td>
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<td>Written by Dr. Donius Narjaya</td>
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<td>Manila Bulletin</td>
<td>Commented by Dr. Yafari Li</td>
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<td>64</td>
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<td>Prof. Hidetoshi Nishimura with Prime Minister Thonglue (in Lao Language)</td>
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<td>Prof. Hidetoshi Nishimura, Executive Director, IRRI met Prime Minister H.E. Thonglue</td>
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<td>Still some missing Eras</td>
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<td>Commented by Prof. Hidetoshi Nishimura</td>
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<td>1</td>
<td>ASEAN Regional Cooperation on Competition Policy</td>
<td>Casey Lee and Yoshihiro Fukunaga</td>
<td>ERIA Discussion Paper 2013-03 Posted April, 2013</td>
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<td>Ken Ikuta, Yoshihiro Fukunaga, Kunio Hayashi</td>
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<td>Sumiya Charest, Kiki Fumagalli, Natapong Natapon, Reese Brindley and Thomas Tanopopaphap</td>
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<td>Impact of Recent Crops and Disasters on Regional Production/Distribution Networks and Trade in Japan</td>
<td>Mitsuaki Ando</td>
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<tr>
<td>31</td>
<td>Development and Restructuring of Regional Production/Distribution Networks in East Asia</td>
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<td>ASEAN Beyond 2015: The Imperatives for Further Institutional Changes</td>
<td>Raul Salme</td>
<td>ERIA Discussion Paper 2014/01 Published: January, 2014</td>
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<td>38</td>
<td>Competition Law Enforcement in Malaysia: Some Recent Developments</td>
<td>Casey Lee</td>
<td>ERIA Discussion Paper 2014/02 Published: January, 2014</td>
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<td>Disaster Management in ASEAN</td>
<td>Yaqoob Sattouf and Fauziah Zen</td>
<td>ERIA Discussion Paper 2014/03 Published: January, 2014</td>
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<td>1 Jul 2013</td>
<td>ERIA Capacity Building Seminar 2013 in Laos PDR (PPP) “Utilizing Efficient Infrastructure Development Framework”</td>
<td>Vientiane, Laos PDR</td>
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<td>4 Jul 2013</td>
<td>ERIA Capacity Building Seminar 2013 in Cambodia (PPP) “Utilizing Efficient Infrastructure Development Framework”</td>
<td>Phnom Penh, Cambodia</td>
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<td>27 Sep 2013</td>
<td>ERIA Media Workshop in Myanmar <em>Challenges Ahead: Myanmar’s ASEAN Chair 2014 and Beyond</em></td>
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<td>31 Oct - 1 Nov 2013</td>
<td><strong>ERICA Capacity Building Seminar 2013 in Phnom Penh, Cambodia (RCEP, Competition Law, Consumer Protection, IPR)</strong> &quot;Strengthening Cambodia’s Competitiveness in Regional Integration&quot;</td>
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