

Chapter 18

Towards a Resilience Agenda for the Post-2025 ASEAN Economic Community

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This chapter should be cited as
Tijaja, J. and A.S. Park (2025), 'Towards a Resilience Agenda for the Post-2025
ASEAN Economic Community', in Rillo, A.D and B. Shepherd (eds.), *Where Next?
Priorities for the ASEAN Economic Community Post-2025*. Jakarta, Indonesia:
Economic Research Institute for ASEAN and East Asia, pp. 423-436.

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1. Introduction

As the Association of Southeast Asian Nations (ASEAN) Economic Community (AEC) approaches the last mile of its 2025 journey, preparations for its post-2025 strategic plan are underway to support the operationalisation of the ASEAN Community Vision 2045. Whilst neither the plan nor the vision is publicly available yet, they will need to address at least three foreseeable challenges.

First, geopolitical and geoeconomic forces will continue to shape global dynamics for years to come, marking the end of a unipolar period of past decades. Second, ASEAN recognises the increasingly complex, cross-cutting challenges facing the region. These challenges require more effective cross-sector and cross-pillar coordination, raising associated institutional difficulties. Third, the AEC needs a more agile approach to support the ambitious 20-year vision, requiring improved planning and decision-making processes across AEC stakeholders. Altogether, these challenges call for greater regional resilience to deliver the post-2025 AEC agenda and the ASEAN Community Vision 2045.

In an era marked by heightened risk and uncertainty, international policymakers are increasingly prioritising resilience as a strategic goal. Resilience is often described as the ability to 'bounce back' from stressors and shocks. More ambitious interpretations involve structural transformation towards green transition and sustainable development, focusing on 'bouncing forward' rather than just 'bouncing back'. These differing perspectives present both opportunities and challenges for building resilience within ASEAN.

One significant issue is the ambiguity amongst policy stakeholders regarding appropriate definitions of and methods for building resilience, and ASEAN is no exception. Despite the growing use of resilience language within ASEAN, there is no shared framework or common terms of reference for coordinating resilience-building efforts. This lack of coherence suggests a missed opportunity for articulating and implementing

an AEC and broader ASEAN resilience agenda, whilst also posing the risk of being influenced – if not disadvantaged – by external resilience agendas that may not adequately reflect the region's priorities or interests.

This chapter argues that resilience can serve as a pathway to achieve regional objectives, addressing key challenges for post-2025 AEC strategic planning in alignment with the ASEAN Community Vision 2045. Whilst a full AEC or ASEAN resilience agenda extends beyond this chapter's scope, it sheds light on potential directions for the post-2025 AEC agenda. This includes an analysis of the term's growing significance and application, an exploration of how resilience works within ASEAN's past policies, and an examination of present geopolitical and geoeconomic contexts. The chapter concludes with policy recommendations, suggesting pathways for what a resilience agenda could look like for the post-2025 AEC.

1.1. Present Challenges and the Need for an AEC and ASEAN Resilience Agenda

This section highlights the present challenges facing ASEAN and the AEC, underscoring the need for a regional resilience agenda. Firstly, geopolitical and geoeconomic tensions continue to grow with little sign of abating. What began as a simple tariff war between the United States (US) and China in 2018 has expanded to include export restrictions (e.g. US advanced technology, Chinese critical minerals), capital flow controls (e.g. inward and outward investment), and indirect discriminatory subsidies. Increasingly, technology has become a new frontier for strategic competition. The ensuing fragmentation and decoupling may align with geopolitical and geoeconomic strategies but come at a significant cost, often borne by developing regions like ASEAN (Goes and Bekkers, 2022; IMF, 2023).

These geopolitical and geoeconomic challenges intersect with non-geopolitical factors. For example, some supply chains are already shifting away from China due to rising domestic labour costs (Storey, 2023). Not all diversification or de-risking efforts are geopolitically driven. Diversified sourcing to enhance supply chain resilience is a basis for risk management or good business sense (Park, Nayyar, and Low, 2013; Tijaja and Faisal, 2014). Amidst increasing risk and uncertainty, firms and governments must address systemic vulnerabilities. The frequency and severity of social-ecological shocks (e.g. natural and man-made disasters) and stressors (e.g. stagflation, global warming) have raised calls for systemic resilience. In a time marked by polycrisis or permacrisis, distinguishing, isolating, and addressing geopolitical, geoeconomic, and other systemic crises have become increasingly challenging.

The AEC and ASEAN community face similar struggles in navigating this multidimensional, interconnected polycrisis (Tijaja and Park, 2023). Such complexity exposes the AEC to manifold risks and uncertain headwinds, which, in turn, undermine confidence in the open, rules-based multilateralism that has supported AEC's growth over past decades. Instead, unilateral actions are becoming more common, to the detriment of multilateral norms.

This scenario points to a future where ASEAN may no longer be able to rely on the stability of past multilateral systems to safeguard regional economic interests. Whilst crises can present opportunities, how should ASEAN respond to a polycrisis? One potential solution lies in developing a regional ASEAN and AEC resilience agenda. This approach should not be misinterpreted as a rejection of multilateralism. On the contrary, regional and global multilateralism should reinforce each other. Strengthening multilateralism should be viewed as essential to ASEAN's resilience, opening global channels for cooperation on shared challenges or objectives (e.g. middle powers, South–South and triangular cooperation; see Ardhani and Alvian [2023], Howe and Park [2019], Park [2022])

Associating ASEAN resilience with resilient multilateralism also counters the risk of inward or isolationist responses to polycrisis and uncertainty. The entangled challenges of today, including climate change, pandemic recovery, and financial crises, all require collective action. Without concerted efforts to build resilient regional and global multilateralism, competition amidst economic uncertainty could lead to negative cycles and zero-sum outcomes (Park, 2022). As ASEAN Member States (AMS) refocus on national priorities, the risk of weakening ASEAN centrality and regional collective action increases. To mitigate the risk, AMS need clear evidence that ASEAN can deliver public goods and solutions beyond the capabilities of any single country (e.g. regional economic stability, transboundary haze management, maritime security).

The polycrisis framing ASEAN's post-2025 strategic plans presents an opportunity to reimagine how an ASEAN resilience agenda could strengthen ASEAN centrality and action in the face of regional risks and uncertainties. The opportunity is not one to be forfeited to external partners or other multilateral frameworks. Just as the term 'Indo-Pacific' gained prominence through the ASEAN Outlook on the Indo-Pacific, the concept of 'resilience' opens an opportunity to establish an agenda tailored to regional priorities (Anwar, 2020; Park, 2023). However, the opportunity is neither guaranteed nor obvious in present resilience policy discussions. Building an ASEAN resilience agenda requires a critical awareness of how resilience can be leveraged to serve regional priorities, including those highlighted in the ASEAN Community Vision 2045. To this end, it is important to start with a shared understanding of resilience and how it has been used by ASEAN and the AEC thus far.

1.2. What We Talk About When We Talk About Resilience

Resilience is often described in academia and policy as a system's ability to 'bounce back' or 'bounce forward' (Park, 2024). In theory, resilience can apply to any kind of system, whether mechanical, environmental, financial, or otherwise. It is, in fact, a concept used across a wide range of natural and social science disciplines, including economics, ecology, engineering, politics, and psychology. In its more technical applications, resilience is a precise concept. For example, it might indicate the speed at which a market recovers from financial shocks or serve as an alternative measure of mechanical strength, such as the tensile strength of bamboo compared to brittle ceramic or brick (Bellini, 2017; Park, 2023; Vitale et al., 2022).

However, in policy and practice, the term ‘resilience’ is often used less technically. Harkening back to the idea that ‘ambiguity is the lifeblood of diplomacy’, the term’s inherent ambiguity has allowed it to be used in multiple – and sometimes inconsistent – ways. This adaptability arguably enables another key feature of resilience: its ‘whole-of-society’ approach, which recognises systemic complexity and interconnectedness. For example, resilience in climate policy offers a common language for a wide range of actors and dimensions involved in social-ecological systems and climate action.

The ability to offer a common language points to a distinction between technical and political uses of resilience. Technically, resilience supports the consistent analysis of systemic risks and uncertainties, encompassing a broad tent of concepts and tools across an array of disciplines and sectors. In policy, this technical scope may extend to methods of foresight analysis, measurement scorecards, or specialised metrics for modelling risks (Kim and Marcouiller, 2020; Tan, 2021).

These technical approaches are, in turn, embedded in the political discourses that shape resilience policy and practice. Beyond its technical applications, resilience also serves specific policy priorities and interests, which raises not only the technical question of what resilience can measure but also the political question of who employs resilience and for whose benefit. Some critical scholars argue that resilience policies can perpetuate exclusionary or violent politics, such as neoliberal inequality or authoritarian practices (see Gutierrez [2020], Lewis and Sagnayeva [2020], and Wares [2022]).

Nonetheless, the political use of resilience does not inherently imply conflict or harm. Its broad tent of concepts, dimensions, and actors can also render politics as the ‘art of the possible’. Indeed, the rise of resilience policy can be associated with a shared reckoning with the need for effective cooperation against interconnected global threats. The past few decades have brought plenty of examples, from the coronavirus disease (COVID-19) pandemic to the global financial crisis, geopolitical instability, and worsening natural disasters.

Understanding the technical and political uses of resilience will be useful when considering ASEAN’s use of the term in the past, present, and future. Amidst the many ways in which policy actors speak about resilience, distinguishing between technical and political uses will be key to understanding both the possibilities and the limits of resilience policy in envisioning a post-2025 AEC.

1.3. Looking Back to Look Forward: How ASEAN and the AEC Have Used Resilience to Date

One compelling feature of resilience within ASEAN is its consistent application across all three community pillars, both in the past and present. Likewise, the AEC has harnessed resilience to respond to a growing array of regional challenges. This section draws on a systematic review of ASEAN policy documents to unpack the various resilience policies and associated initiatives. The review includes a content analysis of the ASEAN summit chairperson’s statements and ASEAN annual reports from 2004 to 2023. Three distinct waves of resilience policies can be identified in response to contemporaneous ASEAN challenges. It should be noted that the main methodology used for this section, i.e. content analysis, has its limitations. It captures only those instances where the term ‘resilience’ is explicitly mentioned in key ASEAN documents and may inadvertently exclude areas that implicitly contribute to the ASEAN resilience agenda.

The first wave, spanning from 2004 to 2012, represents a relatively modest set of resilience policies. This initial set encompasses all three key pillars of the ASEAN Community: the AEC, the ASEAN Political Security Community (APSC), and the ASEAN Socio-Cultural Community (ASCC). However, the drivers of these policies notably diverge across each pillar.

During the 2000s and 2010s, the AEC emphasised financial resilience in response to the 1997 Asian financial crisis, which led to the establishment of the Chiang Mai Initiative by the ASEAN+3 Finance Ministers' Meeting. The initiative was further strengthened into the Chiang Mai Initiative Multilateralism (CMIM) in 2010, following the 2008 global financial crisis. Additional efforts were made to monitor capital flows to bolster financial resilience against macroeconomic shocks. ASEAN also strengthened its financial resilience to natural disasters through disaster risk financing and insurance initiatives launched in 2011, which entered a second phase in 2019. Another AEC priority focused on strengthening the resilience of micro, small, and medium-sized enterprises (MSMEs), recognising their significant contribution to the ASEAN economy and employment. Although the practical measures undertaken to strengthen MSME resilience have not been readily apparent, the topic intersects with ASCC concerns, including priorities tied to social development and stable jobs for women and youth.

The ASCC was active in pursuing resilience policies related to disaster and youth resilience. Notable amongst these was the establishment of the ASEAN Coordinating Centre for Humanitarian Assistance in 2011 to enhance disaster resilience, motivated by the devastating 2004 Indian Ocean earthquake and tsunami. In contrast, the APSC produced the least explicit indicators of resilience policies, mainly through regular affirmations of its core aim to enhance 'national and regional resilience'.

Resilience policy language saw a notable increase in activity during a second wave from 2013 to 2019. Within the AEC, priorities concerning macroeconomic and SME resilience were extended into several adjoining sectors, such as energy and food security, trade and investment, tourism, and transport. Whilst the first wave was partly driven by the 2008 global financial crisis, the second was a response to the ensuing macroeconomic instability in capital markets and trade. In response, the AEC developed policy instruments, including insurance facilities and infrastructure funds, to support a growing resilience agenda that emphasised regional trade and economic integration.

The ASCC, in turn, expanded its previous focus on disaster resilience to encompass climate resilience. This significantly expanded the potential scope of resilience activities, enabling responses not only to sudden shocks (e.g. natural and manmade disasters) but also to chronic stressors exacerbated by climate change. The broadened approach included sector initiatives, such as promoting women's entrepreneurship, potentially aligning with AEC activities.

Beyond geoeconomic and environmental risks, the second period brought geopolitical risks. These required rapid responses to emerging security issues that were increasingly transnational and unconventional (e.g. non-military threats). Consequently, the APSC's resilience policy agenda expanded to include transnational crime, maritime security, terrorism, cyber resilience, and climate security. Echoing the rapid expansion in resilience agendas across all three pillars, 2018 was declared the year of 'An innovative and resilient ASEAN' under Singapore's ASEAN chairmanship (ASEAN, 2018).

However, the third wave of expansion in ASEAN resilience policies began with the onset of the COVID-19 pandemic in 2020, amidst growing geopolitical and geoeconomic risks. The period led to increased recognition of a state of polycrisis or permacrisis, where resilience policies and narratives were urgently put to work across all ASEAN pillars. Whilst previous waves pointed to potential alignments in addressing

interconnected challenges, the current wave has brought the most notable overlaps in policy challenges. The pandemic proved to be more than a health crisis; it demanded a whole-of-society response with cross-sector coordination. High levels of coordination were required across multiple social sectors (Kim and Kim, 2020). A key example of this response was the adoption of the ASEAN Comprehensive Recovery Framework (ACRF) and its Implementation Plan (Box 1; ASEAN 2020a, 2020b).

Box 1. ASEAN Comprehensive Recovery Framework: An Exit Strategy from the COVID-19 Pandemic

The framework was adopted in 2020 under Viet Nam's ASEAN chairmanship, as the region faced the unprecedented challenge of a global pandemic. The framework comprises five broad strategies: 1) enhancing health systems, 2) strengthening human security, 3) maximising the potential of the intra-ASEAN market and broader economic integration, 4) accelerating inclusive digital transformation, and 5) advancing towards a more sustainable and resilient future. The approach highlighted the region's recognition of the pandemic as a multidimensional crisis, extending beyond health. The framework is accompanied by an implementation plan that outlines priority initiatives and activities under the five initiatives, along with their outputs or deliverables, implementation phases (reopening, recovery, resilience), and the lead and supporting sector bodies. In practice, the initiatives cover both existing and planned initiatives and new undertakings.

Internally, the framework provides stakeholders within the region with confidence and clarity on ASEAN's path forward and the value it adds during challenging times. Externally, it signals ASEAN's strategic directions and regional cooperation priorities for overcoming the pandemic. The framework has received unanimous support from various partners and has been instrumental in mobilising support and prioritising resource allocation in the years following the pandemic. As ASEAN enters the post-pandemic phase, many of the framework's broad strategies remain relevant and are expected to inform the development of ASEAN's post-2025 agenda.

In addition to the framework, a few COVID-19-specific initiatives were introduced during the pandemic, including the ASEAN COVID-19 Response Fund (which evolved into the ASEAN Response Fund for Public Health Emergencies and Emerging Diseases), the ASEAN Centre for Public Health Emergencies and Emerging Diseases, and the Memorandum of Understanding on the Implementation of Non-Tariff Measures for Essential Goods.

The cross-sector and cross-pillar nature of resilience is evident in many of today's interconnected global challenges. For instance, maritime conflict and natural disasters have intensified pressure on supply chain resilience. Climate change has increased the burdens for the AEC, ranging from the need for climate and disaster insurance mechanisms to recurring risks of zoonotic diseases, future epidemics and pandemics, and the high costs associated with the green transition. Even the virtual space is vulnerable, as regional economic integration efforts increase the demand for critical cybersecurity infrastructure to strengthen regional cyber resilience.

The recent history of AEC and broader ASEAN resilience policies point to several triggers behind the growing influence of resilience in international policy. The first is the response to interconnected risks. The increasingly entangled nature of 21st-century international society has prompted a reckoning with globalisation and the interdependencies it fosters (Park, 2020, 2021). Resilience, as a conceptual response to systemic risks, addresses the limitations of past policy tools by recognising complexity and interconnectedness.

The second driver is resilience as a response to the pervasive effects of climate change. Policymakers have accepted that climate change is an enduring reality. Beyond mitigation efforts, they focus on climate change adaptation to minimise disruptions to daily social and economic activities. Together, these strategies form climate-resilient responses. For example, climate-resilient agriculture may include technological innovations that reduce water usage or encourage a shift to more climate-resilient crops. The third driver, particularly relevant to the AEC, is the response to disruptions in supply chains observed during the COVID-19 pandemic, when mobility and production restrictions affected the provision of essential goods and exposed vulnerabilities from supply chain over-concentration. The disruptions have reinforced the need for supply chain resilience, highlighting the importance of anticipating and managing them in key parts of the supply chains.

Lastly, the backdrop of growing geopolitical and geoeconomic tensions compound environmental crises and bring economic and security concerns into closer orbit or overlap (Tijaja and Tong, 2023). Strengthening resilience against actions by countries that are less aligned geopolitically or geoeconomically is crucial. Efforts related to supply chain decoupling, or derisking (the preferred euphemism), fall under this category.

Amidst present geopolitical, geoeconomic, and environmental dynamics, the cross-cutting challenges seem unlikely to abate, nor does the need for resilience. Yet, the rapid rise of resilience in the AEC, ASEAN, and broader international policy has not come without problems. Unclear and inconsistent definitions of resilience can impair policy effectiveness by complicating its application and implementation. The evolving use of resilience within ASEAN may be outpacing the development of its institutions and infrastructure. The increasing cross-sector nature of the ASEAN resilience policy has yet to translate into increased cross-pillar coordination. This poses operational constraints that need to be considered in not only a post-2025 AEC resilience policy agenda but also a post-2025 ASEAN agenda. We now turn to addressing the present challenges in ASEAN's resilience efforts.

1.4. Resilient Futures: Resilience for a Post-2025 ASEAN Economic Community

The past three waves of ASEAN resilience policies have seen rapid growth in both scale and scope. However, the expansion brings with it both opportunities and challenges, which present significant considerations for ASEAN and the AEC in shaping the post-2025 agenda (Table 18.1).

Table 18.1. Key Opportunities and Challenges for Utilising Resilience in International Policy

Opportunities	Resilience as a rallying call A new consensus for global action	A platform for international cooperation
		A platform for interdisciplinary innovation
Challenges	Resilience as a siren song A new mechanism for political control	A problem of language
		A problem of measurement
		A problem of trade-offs
		A problem of control

Source: Park (2024).

2. Resilience as a Forum for Collective Action

Resilience is not a novel concept for ASEAN, but its application has grown in response to the current context, which demands a better response to the polycrisis. The expanding application of resilience opens new avenues for ASEAN to use it as a strategic tool.

At the technical level, the AEC’s resilience agenda can focus on how different aspects of economic integration and cooperation endure, respond to, and recover from shocks, stressors and crises. Beyond financial, trade, and supply chain resilience, the development of climate resilience – covering areas such as smart agriculture, energy, and transport transition – will likely take centre stage, alongside critical infrastructure resilience. Digitalisation and cyber resilience must go hand in hand with the AEC’s aim to become a leading regional digital economy, covering digital connectivity and interoperability, cybersecurity, and digital inclusion.

The word ‘resilience’ need not be explicitly referred to in sector work agendas. What must be avoided is the superficial incorporation of resilience in all sector initiatives, which merely adds to the extensive AEC agenda without creating a meaningful impact. Instead, sector bodies should assess how future challenges and uncertainties may impact their work plans, and develop strategies to minimise risks and respond effectively. In many cases, such efforts will call for inter-sector and even inter-pillar cooperation.

At a strategic level, ASEAN can use its resilience agenda to galvanise swift ASEAN Community–wide responses to multidimensional crises that cannot be sufficiently addressed through standard mechanisms. The ACRF is one example (Box 1). Another is the introduction of the ASEAN Outlook on the Indo-Pacific (AOIP), which asserted the region’s narrative amidst competing external discourses. ASEAN has used the AOIP to advance its priorities in areas such as maritime and blue economy cooperation as well as in infrastructure development.

As crises and uncertainties are expected, resilience will increasingly be a vehicle for collective action, with use cases that may be outward- or inward-oriented. For example, amidst geopolitical and economic fragmentation and diminishing enthusiasm for global cooperation, ASEAN’s collaboration with like-minded nations to uphold an open, inclusive, rules-based multilateral trading system serves as an economic resilience strategy, as this system has underpinned the region’s growth. Similarly, prioritising industry- and technology-responsive skills development, informed by economic opportunities and the

near-term challenges of an ageing population, is an economic resilience strategy to safeguard economic productivity. The former example highlights the need for closer collaboration between the political security and economic pillars, whilst the latter highlights the importance of cooperation between the economic and socio-cultural pillars.

At the institutional level, weakening multilateralism and prolonged geopolitical and geoeconomic tensions threaten ASEAN's institutional relevance. Preserving this relevance requires bolstering ASEAN's institutional resilience. Achieving this involves strengthening ASEAN's capacity to monitor and respond promptly to complex multidimensional issues whilst consistently reaffirming its importance to both internal and external stakeholders (Tijaja et al., 2024). Whilst progress has been made in improving cross-pillar coordination, decision-making processes, and operational methods, more concrete follow-up is needed. Article 21.2 of the ASEAN Charter on Implementation and Procedure, which outlines the ASEAN Minus X formula for flexible participation in economic commitments, may need to be applied more broadly as ASEAN faces increasingly complex challenges. Platforms for raising alarms and discussing potential disruptions should be made available without sector- or pillar-based constraints.

Asserting ASEAN's institutional appeal and relevance is more complex. Internally, it calls for better prioritisation and effective follow-up on AEC commitments to ensure tangible benefits for AMS and stakeholders. This complexity highlights the need to streamline and refocus the work agenda. Strengthening feedback loops with stakeholders, such as businesses, MSMEs, entrepreneurs, and the workforce, will help keep the AEC agenda relevant and contribute to institutional resilience.

Externally, AMS should promote ASEAN's positions and narratives, align bilateral and plurilateral engagements with the ASEAN agenda, and coordinate on relevant issues. Consistent messaging about how ASEAN and its members expect their partners to engage, as well as clear communication of regional priorities and concerns, is needed, especially in the context of proliferating parallel frameworks.

3. Resilience as a Design Goal in ASEAN's Institutional Structure

To strengthen its institutional resilience, ASEAN should also focus on its being as an organisation rather than solely an association of nations, emphasising the need for concrete improvements to ASEAN institutions. In 2014, whilst the ASEAN Community Vision and Blueprints 2025 were being drafted, ASEAN established a high-level task force (HLTF) on Strengthening the ASEAN Secretariat and Reviewing the ASEAN Organs. The HLTF produced a report with detailed recommendations on strengthening ASEAN's institutional structure and operational methods to better support the ASEAN Community Vision 2025 and its associated blueprints. ASEAN had regularly monitored and reported on the implementation of the recommendations, which helped ensure complete follow-up to the recommendations.

In the current round of monitoring and reporting, ASEAN adopts a more phased approach. In 2020, under Viet Nam's chairmanship, the review of the ASEAN Charter's implementation was initiated alongside the mid-term review of the three ASEAN Community Blueprints 2025 (Seah, 2020). The review led to a series of ASEAN processes, including the development of a scoping report by the ASEAN Secretariat to assess institutional structures, examine the implementation of ASEAN rules and procedures, identify

implementation gaps, and recommend improvements. In 2023, under the chairmanship of Indonesia, which has long championed the strengthening of ASEAN institutions, the ASEAN Coordinating Council adopted the Rules of Procedure to Support Decision-Making Process at the ASEAN Summit. The adoption of the rules aimed to facilitate urgent and specific decision-making at the ASEAN Summit when consensus could not be reached, enabling more timely responses. However, faster coordination and decision-making processes may be required not only in the absence of consensus but also in cases that demand a whole-of-community response.

For greater resilience, ASEAN needs a more meaningful interface across sectors and pillars for discussion and decision-making. Cross-pillar coordination has long been recognised as essential, but the challenge lies in its practical application. Existing cross-pillar bodies, such as the Joint Consultative Meeting and the ASEAN Coordinating Council, have historically been more focused on administrative and reporting functions, with limited opportunities for more substantive cross-pillar discussions. Within the AEC, the Committee of the Whole for the AEC, which serves as the coordinating committee for the AEC pillar, lacks the authority to enforce decisions on sector bodies. It relies on the chairs of the bodies to follow up on decisions, and it cannot compel representatives from coordinating committees of other pillars to act.

One option could be to use the momentum from the post-2025 strategic planning process to formalise community-wide discussions and institutionalise platforms or forums dedicated to cross-cutting themes. These would bring together bodies and pillars for joint initiative development and implementation. However, this should be done with caution to minimise lengthy and resource-intensive processes and the proliferation of more documents and frameworks.

To enhance effectiveness and efficiency, it may be necessary to streamline and refresh AEC sector bodies to ensure that they remain relevant and effective, updated with current agenda and priorities. The post-2025 strategic planning process offers good momentum for this initiative. Many AEC sector bodies were established decades ago, and few have been evaluated for their capacity to go beyond routine operations and deliver impactful initiatives within their sectors. Ideally, a periodic review mechanism should be in place to ensure that AEC institutions remain agile and effective.

The AEC should explore more innovative working methods beyond formal meetings, such as intersessional communications, inclusive focus group dialogues, the establishment of task forces with clear terms of reference – including conditions for their dissolution – and avenues for the direct reporting of key issues to senior official bodies such as the Joint Consultative Committee (JCM). The JCM's agenda should be made more substantive, extending beyond processes and procedures to include updates, exchanges of views, decisions, and reports on substantive cross-pillar themes. Better use and monitoring of transparency and consultation provisions in existing AEC agreements can advance the AEC agenda more meaningfully than dedicating resources to the constant development of documents and strategies. Cross-forum coordination must be encouraged to help ASEAN advance its positions in broader regional and global arenas by working with like-minded partners. Indonesia's initiative to host an ASEAN Caucus on the sidelines of Asia-Pacific Economic Cooperation meetings in 2023 helped raise ASEAN's priorities and aligned narratives. Greater coordination amongst AMS during the Indo-Pacific Economic Framework negotiations is a positive development. The signing of memorandums of understanding between ASEAN and the Pacific Island Forum, as well as with the Indian Ocean Rim Association, is a good start but should lead to meaningful cooperation activities. ASEAN would do well to draw a map of forums for collaboration and alignment of issues of interest, potentially starting with the concrete implementation of the AOIP.

4. Prioritising Next Steps and the Risks of Inaction

It is useful to summarise what the AEC's priority resilience agenda could be and to reflect on the implications of continuing with business as usual.

The AEC's resilience priorities should include assessing the impact of geoeconomic fragmentation and developing strategies to respond to the emergence of parallel engagement frameworks by partners outside ASEAN-led mechanisms and processes. Establishing cross-pillar and cross-sector coordination mechanisms to address priority cross-cutting issues, such as climate change and economic security, is essential. Sector bodies should be urged to incorporate responses to systemic risks and uncertainties into their planning process, and cross-forum coordination with like-minded countries should be strengthened to promote and align with ASEAN's positions and priorities.

The consequences of inaction are significant. First, without sufficiently addressing resilience in its post-2025 agenda, the AEC will be less prepared to devise timely and effective responses to challenges, whether unanticipated or linked to known megatrends. This could lead to slower decision-making, fragmented or partial responses, and ineffective coordination across sectors or pillars, disrupting the achievement of AEC's goals.

Second, the AEC and ASEAN would become more susceptible to external narratives on resilience. Whilst external alignment can sometimes be beneficial, particularly given the transboundary nature of many challenges, periods of geopolitical and geoeconomic tension could see the ASEAN resilience agenda co-opted by external interests. This risk is heightened when ASEAN relies on external support to implement its resilience strategies.

Third, if the AEC lacks the capacity to respond to or overcome challenges, it risks losing relevance for both its internal and external stakeholders. For internal stakeholders, this could lead to a diminished commitment to the ASEAN agenda or a reallocation of resources towards other cooperation platforms or bilateral and plurilateral relations deemed to be more effective. For external stakeholders, reduced interest in investing in ASEAN-led frameworks and mechanisms could result in a shift in focus towards bilateral relations with the AMS and engagement with alternative frameworks introduced by themselves or others.

Last, the AEC risks missing the opportunity to use its resilience narrative as a powerful tool to galvanise collective action on issues of interest and concern to ASEAN. The ASEAN resilience agenda could effectively address parallel resilience and related agendas introduced by other global actors. As a channel for international cooperation, a regional resilience agenda would not only strengthen ASEAN centrality but also foster engagements with parallel agendas, frameworks, and actors within and beyond the region.

5. Conclusion

This chapter underscores the relevance of a resilience agenda for the AEC and ASEAN, particularly within the context of the post-2025 agenda. It highlights the increasingly complex challenges facing the region and emphasises the urgent need for effective, collective action. In particular, the transnational and cross-sector nature of these challenges requires innovative institutions and policy strategies. It draws attention to the political contexts and potential risks associated with resilience agendas promoted by different entities. The chapter calls on the region to prioritise institutional resilience amidst ongoing geopolitical and geoeconomic tensions and climate change, aiming to ensure ASEAN's sustained relevance and appeal to both internal and external stakeholders.

Resilience is not a novel concept for ASEAN; it has historically embraced it in times of crisis, although without necessarily expounding on it. Recently, however, there has been a marked increase in the technical use of the term across multiple sectors of ASEAN's activities. Today, the resilience agenda takes place in an increasingly charged geopolitical and geoeconomic arena.

The post-2025 strategic planning process provides ASEAN with a valuable opportunity to mainstream resilience at technical, strategic, and institutional levels. This chapter offers concrete recommendations for ASEAN policymakers to better mainstream resilience, including testing new approaches to tackling multidimensional challenges that require rapid and cross-cutting responses, mapping key issues and potential platforms for cross-fora coordination with like-minded partners, and strengthening ongoing stakeholder feedback loops.

Recognising the constraints on resources and the numerous strategies and frameworks already in place, this chapter does not suggest the creation of a new body or a resilience-specific framework. Instead, it proposes a comprehensive resilience agenda that extends beyond the term's literal usage in ASEAN statements and documents. This agenda should cover initiatives, actions, and supportive institutions to better prepare ASEAN for challenges and crises, provide a platform for coordinated action within ASEAN and beyond, strengthen ASEAN institutions, and safeguard the organisation's relevance.

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19.

Monitoring the ASEAN Economic Community: Towards a New Approach Post-2025

Aladdin D. Rillo, Philippe De Lombaerde, and Tomy Waskitho

1. Introduction

It has been observed on a number of occasions that the development effectiveness and impact of regional economic cooperation or integration policies crucially depends on the implementation and uptake of regionally agreed policies, and that monitoring, including indicator-based monitoring, can be an important part of the policy puzzle (Schiff and Winters, 2003; World Bank, 2005; De Lombaerde, Estevadeordal, and Suominen, 2008; De Lombaerde, Saucedo Acosta, and Vida, 2017).

In the case of the Association of Southeast Asian Nations (ASEAN), monitoring systems to accompany the regional integration process include the ASEAN Community Progress Monitoring System initiated in 2000, and the ASEAN Economic Community (AEC) Scorecard, developed in 2008 in response to the signing of the AEC Blueprint in 2007.¹ The blueprint was updated in 2018 as the AEC 2025 Consolidated Strategic Action Plan (CSAP).

The creation of the AEC, with a 2020 target date, was proposed at the Heads of Government Meeting/the 8th ASEAN Summit in Phnom Penh in November 2002. The AEC was agreed in principle at the October 2003 ASEAN Summit in Bali (Plummer, 2006). The AEC is essentially conceived as a common market, taking into account the specific institutional *context* of ASEAN. Its legal situation has been considered as complex because of the absence of a treaty base, a *hard* definition of the common market, and a court (Pelkmans, 2024). The AEC consists in practice of a set of building blocks of a common market, some of which were already operating before the announcement of the AEC.

¹ For an earlier proposal for an indicator-based monitoring system for ASEAN, see Dennis and Yusof (2003), in the context of the ASEAN–Australia Regional Economic Policy Support Facility.

Trade liberalisation was initiated in 1992 with the ASEAN Free Trade Area, characterised by gradual tariff reductions or eliminations through the Common Effective Preferential Tariff scheme. The ASEAN Trade in Goods Agreement (ATIGA) was signed in 2009 and entered into force in 2010.² In addition to expanding the scope of the Common Effective Preferential Tariff, the ATIGA included provisions on the codification and reduction of non-tariff measures, rules of origin, trade facilitation, and sanitary and phytosanitary measures. A new institution was also created: the Coordinating Committee for the Implementation of the ATIGA.

Trade in services was first dealt with through the ASEAN Framework Agreement on Services (AFAS), in force since 1998. The AFAS has made gradual progress through a sequence of packaged liberalisation commitments, especially since the AEC Blueprint (2008–2015). The ASEAN Trade in Services Agreement was signed in 2020 as the new legal instrument for the integration of the services market. With the ASEAN Trade in Services Agreement, the commitment schedules under the AFAS, which are based on a positive list approach, will be transformed into schedules of non-conforming measures, based on a negative list approach in combination with time frames. For air transport, telecommunications, and financial services, separate routes are explored. For air transport services, the ASEAN Single Aviation Market was proposed in 2007, and open skies protocols have followed.

Liberalisation and regulation of financial services and capital movements are guided by the 2018 CSAP but are generally less ambitious in terms of market integration. The outlier here is intra-ASEAN foreign direct investment, which has been liberalised with few exceptions. Foreign direct investment policies are guided by the ASEAN Comprehensive Investment Agreement, which took effect in 2012, consolidating and building on two pre-existing agreements: the Framework Agreement on the ASEAN Investment Area and the ASEAN Investment Guarantee Agreement. Meanwhile, for the movement of skilled labour, the provisions are guided by Mutual Recognition Agreements (MRAs), which allow for the skills, accreditations, and experience of skilled workers to be recognised outside their home country. Current MRAs encompass six sectors: engineering, nursing, architecture, medicine, dentistry, and tourism. Two framework agreements are in place – surveying qualifications and accountancy services (ASEAN, n.d.).

This chapter is organised as follows: in section 2, the current AEC monitoring framework is assessed. Section 3 presents international mapping and benchmarking of indicator-based monitoring experiences worldwide, with a focus on their aims and scope. Building on the two preceding sections, section 4 presents guidance on how to adapt the AEC monitoring system for the future.

² For an evaluation of the ATIGA, see ERIA (2021).

2. Assessment of the AEC Monitoring Framework

The evolution of the AEC monitoring approach from the first (2008–2015) to the second (2016–2025) blueprints highlighted significant advancements in the approach to monitoring ASEAN economic integration. Initially developed in 2008, the so-called ‘AEC Scorecard’ served as a compliance tool to measure the implementation of the AEC blueprint and track countries’ adherence to their commitments. This scorecard focused on four elements: a single market and production base, a highly competitive economic region, equitable economic development, and full integration into the global economy. However, it primarily ensured compliance rather than evaluating the impact of these measures (Rillo, 2017). The AEC Scorecard’s monitoring and reporting initially followed a biennial cycle, covering the periods of 2008–2009, 2010–2011, 2012–2013, and 2014–2015 (ASEAN, 2015a).

In the first AEC Blueprint (2008–2015), monitoring was done through simple reporting and updating of measures by various working bodies responsible for implementing the measures in their respective areas. In calculating the implementation rate, a measure was considered as implemented only when all the activities under the said measure were fully completed by all ASEAN Member States (AMS). Country-specific measures to be implemented by individual AMS were not counted as measures for ASEAN, but these measures were counted for the country scorecard.

The Economic Research Institute for ASEAN and East Asia (ERIA) also conducted a series of studies to monitor the implementation and compliance status of selected AMS in relation to the scorecard from 2009 to 2014.³ ERIA found that the AEC Scorecard indicated a positive development in trade facilitation, and the results of the scorecard exercise by ERIA showed that Singapore was making good progress on the ASEAN standards and conformance roadmap for priority investment sectors such as automotives, cosmetics, electrical and electronics equipment, medical devices, and pharmaceuticals (Lim, Aw, and Loke, 2015).

The AEC Blueprint 2025, adopted at the 27th ASEAN Summit in November 2015, reflects a more comprehensive and dynamic approach. Covering 2016–2025, the blueprint expands its focus to five characteristics: (i) a highly integrated and cohesive economy; (ii) a competitive, innovative, and dynamic ASEAN; (iii) enhanced connectivity and sectoral cooperation; (iv) a resilient, inclusive, people-oriented, and people-centred ASEAN; and (v) a global ASEAN. This iteration emphasised not only compliance but also the strategic implementation of measures across various sectors through detailed sectoral work plans.

Furthermore, the transition from the 2008 to the 2016 version of the AEC monitoring approach represented a shift from a compliance-centric approach to a more holistic and strategic framework. This evolution underscored the need for a broader and deeper evaluation of ASEAN economic integration, encompassing both compliance and the tangible impact of integration efforts on the region’s economic landscape.

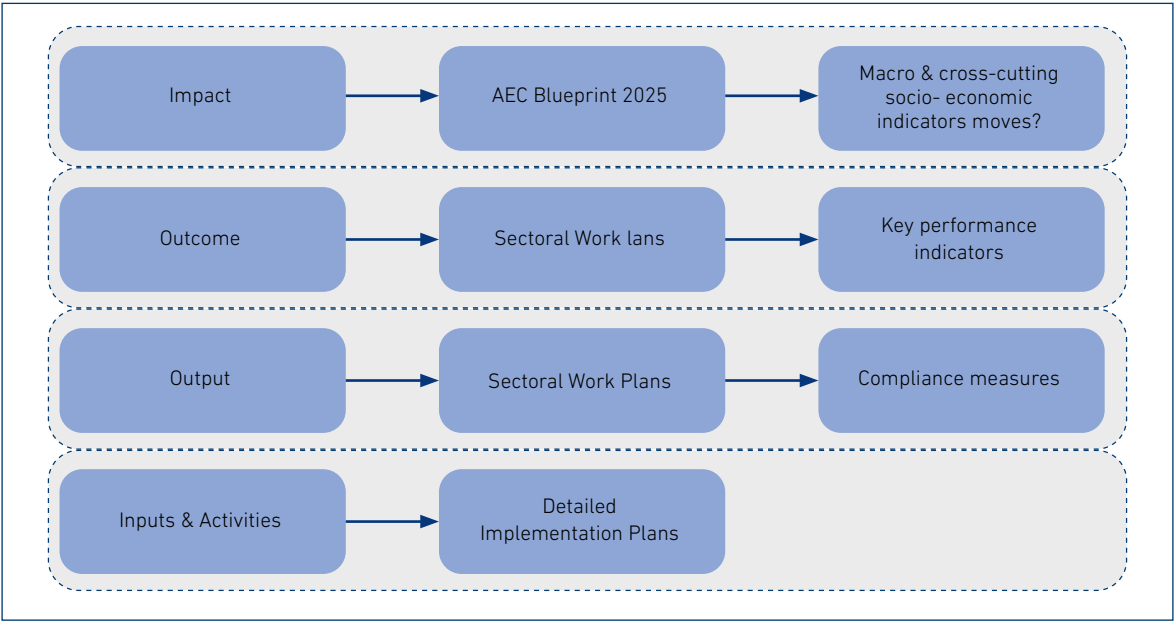
³ For further details, see Aldaba et al. (2010); Intal, Narjoko, and Simorangkir (2011); and Lim, Aw, and Locke (2015).

To support this enhanced monitoring framework, the ASEAN Secretariat's ASEAN Integration Monitoring Directorate (AIMD) played a critical role in ensuring the effective implementation and oversight of regional commitments and policies. The AIMD's mandate includes leading regional surveillance and economic integration monitoring; providing policy and technical advice; shaping economic research and policy analysis; ensuring effective communication and reporting on economic integration; and offering capacity development for monitoring, analysis, and research.⁴

AMS, recognising that regional economic integration is a dynamic ongoing process as economies as well as domestic and external environments are constantly evolving, adopted the AEC 2025 Blueprint. The AEC 2025 Blueprint was envisioned to provide a comprehensive strategy towards achieving deeper integration and economic resilience. With the new five characteristics of the 2025 blueprint, ASEAN needed to review its implementation and monitoring approach, to one that was more holistic, strategic, and impact focused.

Figure 19.1 details the current monitoring approach towards the 2025 AEC.

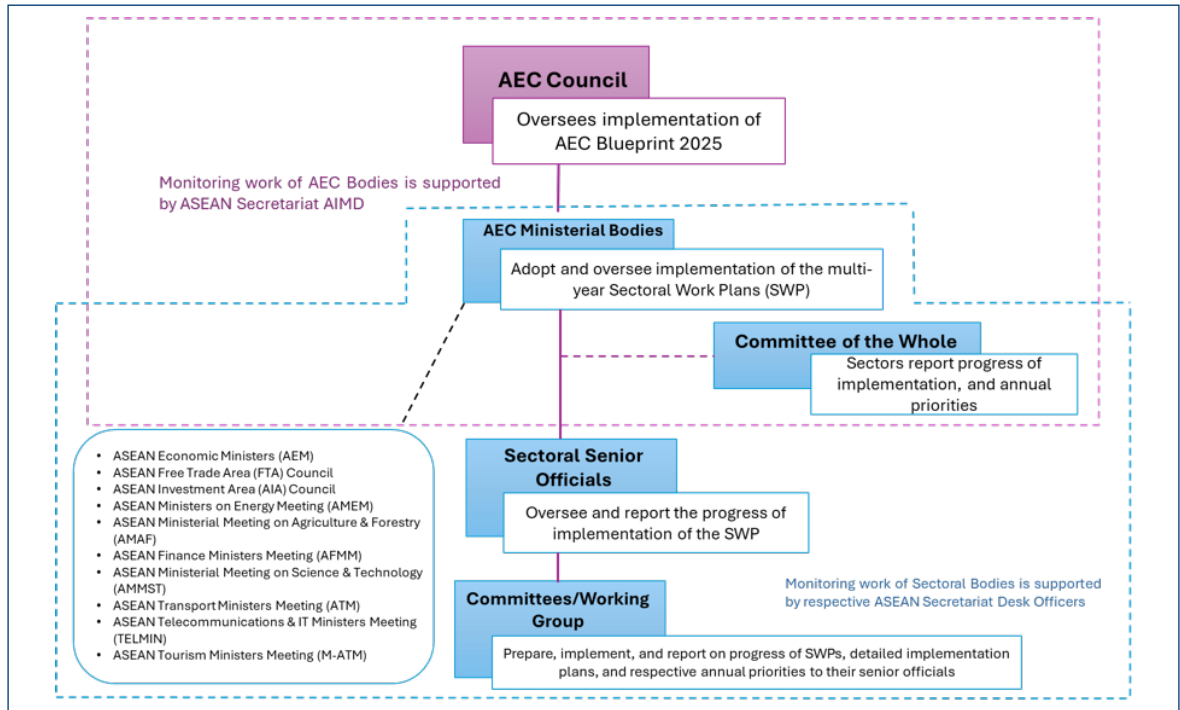
Figure 19.1. AEC 2025 Monitoring and Evaluation Framework



AEC = ASEAN Economic Community, ASEAN = Association of Southeast Asian Nations.
Source: ASEAN (2017b).

Figure 19.1 details the shift from compliance monitoring to outcome evaluation in the new AEC 2025 Monitoring and Evaluation (M&E) Framework. Figure 19.2 presents an overview of the roles of AEC bodies and sectoral bodies in monitoring the implementation of the AEC Blueprint 2025 at the aggregate level and the sectoral work plans (SWPs) at the sectoral level and of the ASEAN Secretariat, which shows that monitoring now involves more stakeholder participation.

⁴ For further details, see ASEAN (2017b).

Figure 19.2. Roles of AEC Bodies and Sectoral Bodies in Monitoring the AEC

AEC = ASEAN Economic Community, AIMD = ASEAN Integration Monitoring Directorate, ASEAN = Association of Southeast Asian Nations, IT = information technology, SWP = sectoral work plan.

Source: ASEAN (2017b).

The Mid-Term Review (MTR) on the AEC 2025 Blueprint provided a pivotal opportunity to assess the AEC's performance over 5 years, identify areas for improvement, and adjust strategies towards the 2025 vision. The MTR covered 23 SWPs, 1,700 action lines, and 370 key performance indicators. It included external studies and surveys targeting businesses operating within ASEAN, alongside consultations with the ASEAN Business Advisory Council and research institutions (ASEAN, 2021). ASEAN must take into consideration emerging and cross-cutting issues. Therefore, the MTR opened up opportunities to calibrate new approaches and initiatives moving forward, which may be continued towards a post-2025 ASEAN.

The AEC 2025 M&E process has three components: compliance monitoring, outcome monitoring, and impact evaluation. Compliance monitoring in the AEC tracks the implementation of key outputs aligned with the strategic goals of the AEC Blueprint 2025 and relevant SWPs. Enhanced from its 2015 predecessor, the M&E framework now includes outcome monitoring and impact assessment, providing a more comprehensive approach to progress tracking. The AEC 2025 CSAP compiles key action lines from all SWPs, serving as the primary guide for ASEAN's economic integration from 2016 to 2025. These action lines are reviewed periodically through an annual prioritisation process, setting intermediary milestones and ensuring the timely execution of initiatives across sectors (ASEAN, 2017b).

Meanwhile, outcomes monitoring in the AEC assesses progress towards the strategic goals outlined in the AEC Blueprint 2025 and relevant SWPs. This process uses key performance indicators (KPIs) to measure changes in sectoral and economic indicators resulting from the blueprint's implementation. Regular monitoring of these KPIs provides essential feedback to stakeholders, helping guide decisions on the prioritisation, sequencing, or even phasing out of initiatives. Examples of KPIs include the utilisation rate of ATIGA preferential tariffs, intra-ASEAN trade, and foreign direct investment flows. Data sources for these KPIs range from ASEAN statistics to external databases and inputs from various organisations.

Furthermore, impact evaluation goes beyond monitoring by assessing how regional economic integration strategies and goals impact the broader socio-economic environment of AMS, using empirical research and studies. As part of the AEC 2025 M&E process, impact evaluation is essential for testing the effectiveness of integration approaches on socio-economic development. This evaluation provides valuable insights for policymakers and stakeholders, enabling them to review and refine existing initiatives. Feedback from stakeholders, including private sector engagement and business councils, plays a vital role in verifying the impact of integration efforts. Additionally, AIMD country visits and independent assessments help ensure compliance and assess the national implementation of regional initiatives, providing further verification of regional economic integration progress.

ASEAN's monitoring approach has evolved from a compliance-based system to a more strategic, impact-driven framework under the AEC Blueprint 2025, focusing on outcomes, cross-sectoral cooperation, and deeper economic integration. Whilst improvements have been made from the earlier version, ASEAN could still improve and learn from the experiences of other regions regarding monitoring in the context of regional organisation, as will be further explained in the following section.

3. What Can Be Learned from Monitoring Experience of Other Regions?

Monitoring in the context of regional organisations (and of the underlying regional integration processes) covers multiple instruments, corresponding to a diverse range of monitoring mandates in diverse institutional contexts. The instruments range from descriptive annual reports to sophisticated indicator-based monitoring systems (De Lombaerde, Estevadeordal, and Suominen, 2008). The ambition and complexity of regional institutions is typically reflected in the sophistication of the monitoring instruments.

If we narrow the focus to indicator-based regional integration monitoring systems, broadly speaking, three categories of such systems can be considered: The first group of indicator systems focuses on the implementation of regional integration policies and measures, i.e. the process of regional integration, rather than the outcomes and impact. They are essentially scoreboards or scorecards. The AEC Scorecard, which tracks the compliance of AMS with the commitments listed in the AEC Blueprint, is an example of such systems (ASEAN, 2010; Rillo and dela Cruz, 2016; Rillo, 2017).

The historical example of this category of systems is the European Commission Single Market Scoreboard, launched in 1997, which was renamed the Internal Market Scoreboard in its eighth edition in 2001 (European Commission, 1997, 2001; Fernández Moriana, Vida, and De Lombaerde, 2017). The scoreboard generated quite some impact in the framework of the construction of the European Union (EU) common market. Although the scoreboard initially focused on reporting the transposition of single market directives in a series of annual reports, it has evolved towards an online platform, covering the performance of EU member states on other governance tools, and in its more recent iterations it has included *de facto* regional integration indicators.

On the African continent, the East African Community (EAC) Common Market Scorecard was launched in 2014 to monitor EAC member state compliance with the obligations derived from the EAC Common Market Protocol and related instruments (World Bank EAC Secretariat, 2014; Ombudo K'Ombudo, De Lombaerde, and Borda, 2017). More recently, the African Multidimensional Regional Integration Index was launched in 2020 by the African Union Commission in collaboration with regional economic communities (African Union, 2020). It has a somewhat broader remit than the previous cases. It monitors the implementation of the Abuja Treaty and, more specifically, the implementation of the African Economic Community, as well as Agenda 2063 and its focus on structural and socio-economic transformation.

The second group of indicator systems does not take treaty obligations or policy commitments as the main point of departure, even if they can be part of them but have a broader scope and feature indicators of *de facto* regional integration (reflecting the importance and evolution of intra-regional trade, investment and people mobility, and macro-economic convergence), i.e. these systems focus on outcome and impact indicators, sometimes combined with process indicators. The ASEAN Community Progress Monitoring System is an example of such a more general indicator system (ASEAN, 2012, 2017a, 2017b; Rillo, 2017).

In the Asian context, several indicator systems fit this category, though they do not necessarily focus on a specific regional organisation. They include the United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) Index of Asia-Pacific Regional Integration Effort (Ye and Mikic, 2016); the Asian Development Bank (ADB) Asia-Pacific Regional Integration Index (Huh and Park, 2017, 2018); and more recently, ADB's Asia-Pacific Regional Cooperation and Integration Index (and the related Enhanced Framework) (Park and Claveria, 2018; ADB, 2021). The Eurasian Development Bank (EDB) also developed its System of Indicators of Eurasian Integration (De Lombaerde, 2009; Vinokurov, 2010, 2014; EDB, 2012, 2017, 2019; Vinokurov, Libman, and Pereboyev, 2017).

In an African context, the Assessing Regional Integration in Africa Index of the United Nations Economic Commission for Africa (UNECA) (Tanoe, 2017) and the Africa Regional Integration Index (AU, AfDB, and UNECA, 2016a, 2016b, 2019a, 2019b, 2019c) should be mentioned. Other proposals for indicator systems in this category include the EU Integration Index (König and Ohr, 2013; König, 2017) and the Latin American and Caribbean Economic System (SELA) Integration Index for Latin America and the Caribbean (SELA, 2016).

The third group of indicator systems is one where regional integration indicators are incorporated into monitoring systems with a broader scope. In an Asian context, these include the UNESCAP Digital and Sustainable Regional Integration Index 2.0, which is part of UNESCAP's Regional Integration and Value Chain Analyzer; the United Nations Economic and Social Commission for Western Asia (UNESCWA) Arab Economic Integration System of Indices (UNESCWA, 2006–2009, 2014, 2015, 2018, 2021), in which a limited number of *de facto* regional integration indicators (i.e. trade, investment and remittances) is part

of a large set of more than 100 indicators, covering 'potentialities', 'policies', and 'outcomes', including globalisation indices; and the Asia–Europe Meeting Sustainable Connectivity Indices (Becker et al., 2019a, 2019b), in which interregional connectivity is also covered and where the system includes a three-dimensional sustainability sub-index. In an African context, the African Union Development Agency–New Partnership for Africa's Development Dashboard should be mentioned, in which African integration corresponds to a subset of (continental) performance indicators on Agenda 2063 (Aspiration 2), in addition to Sustainable Development Goal (SDG) performance indicators (NEPAD, n.d.).

Over the last decades, indicator-based monitoring systems have become more sophisticated, thanks to technological advances as well as increased data availability. However, the reported efforts have not necessarily been sustained over longer periods of time, which points to the fact that the governance of such systems is not always adequate and/or there is not always a consensus amongst stakeholders (including technocrats and member states) about the underlying methodology and/or the interpretation of the monitoring results.

It is also clear that adequate monitoring goes hand in hand with (regional) policy implementation and the involvement of interest groups and citizens more broadly in the regional integration process. Composite indices are thereby not essential ingredients.

4. Towards a New Approach to Monitoring the AEC

The evolution of AEC monitoring from the 2008–2015 to the 2016–2025 blueprints shows significant improvements in tracking regional integration. The initial AEC Scorecard (2008–2015) focused on compliance, measuring the implementation of the blueprint's four pillars – single market, competitive region, equitable development, and integration into the global economy – through a binary system. Meanwhile, the AEC Blueprint 2025 introduced a more comprehensive framework that emphasises both compliance and the broader impact of integration across five interrelated and mutually reinforcing characteristics: (i) a highly integrated and cohesive economy; (ii) a competitive, innovative, and dynamic ASEAN; (iii) enhanced connectivity and sectoral cooperation; (iv) a resilient, inclusive, people-oriented, and people-centred ASEAN; and (v) a global ASEAN (ASEAN, 2017a).

The current M&E framework, led by the AIMD, includes outcomes monitoring and impact evaluation to measure adherence and tangible socio-economic effects. The framework involves regular stakeholder engagement, including private sector feedback, and country visits to verify compliance and assess real-world implementation. This marks a more strategic and inclusive approach to ASEAN's economic integration, ensuring measurable and impactful progress.

If a new AEC blueprint is agreed for the post-2025 period, a new monitoring system will be needed, adapted to the new circumstances. The various chapters in this book provide ideas and scenarios for shaping the post-2025 AEC. These can be taken as a point of departure for reflecting on an adequate monitoring system.

The suggested ideas include those that further develop and deepen sectoral agenda, as discussed in the previous chapters:

- In goods trade, new ambitious targets are proposed for trade facilitation, including targets for the implementation of digital technologies and for intra-ASEAN convergence in this area; digital connectivity should be strengthened to support well-functioning global value chains in which ASEAN participates; non-tariff barriers to digital trade should be made transparent and/or reduced; and a clear sustainability strategy should be incorporated in trade policy.
- In services trade, progress is possible in reducing barriers to trade, regulatory convergence, and institutional performance amongst AMS, as well as in the protection of service-related intellectual property rights.
- Regarding the negotiation or upgrading of trade agreements, recommendations include the upgrading of bilateral (i.e. member state) free trade agreements (FTAs) to ASEAN-level FTAs; the alignment of the substantive commitments of ASEAN in FTAs and the AEC objective; the negotiation of digital trade provisions; and the adoption of a proactive stance on gender and economic inclusion provisions.
- In the area of energy, a proactive strategy to protect and consolidate energy security is proposed that acts on four axes (4A framework): availability of energy resources, technological applicability of harnessing energy resources, societal acceptability of using energy resources, and affordability of using energy resources.
- The connectivity agenda, as outlined in the Master Plan on ASEAN Connectivity 2025, needs updating: requiring regulatory harmonisation, strengthened digital dimension, strengthened funding mechanisms, strengthened regional institutions, and capacity building; and freer flows of data should be accompanied by measures to build trust and cybersecurity.
- Competition policy needs further strengthening in the face of a (possibly) increasing market power trend.

A new monitoring system can contribute to strengthening information sharing mechanisms within the AEC, and thus contribute to economic policy coordination.

New sectoral commitments, in terms of policy measures or outcomes, can form the basis for the new monitoring system, especially if they are clearly formulated and quantified. These can include formula-based flexibilities and (revised) transition periods.

The ideas also include the consolidation or strengthening of transversal agendas, again as highlighted in previous chapters, including:

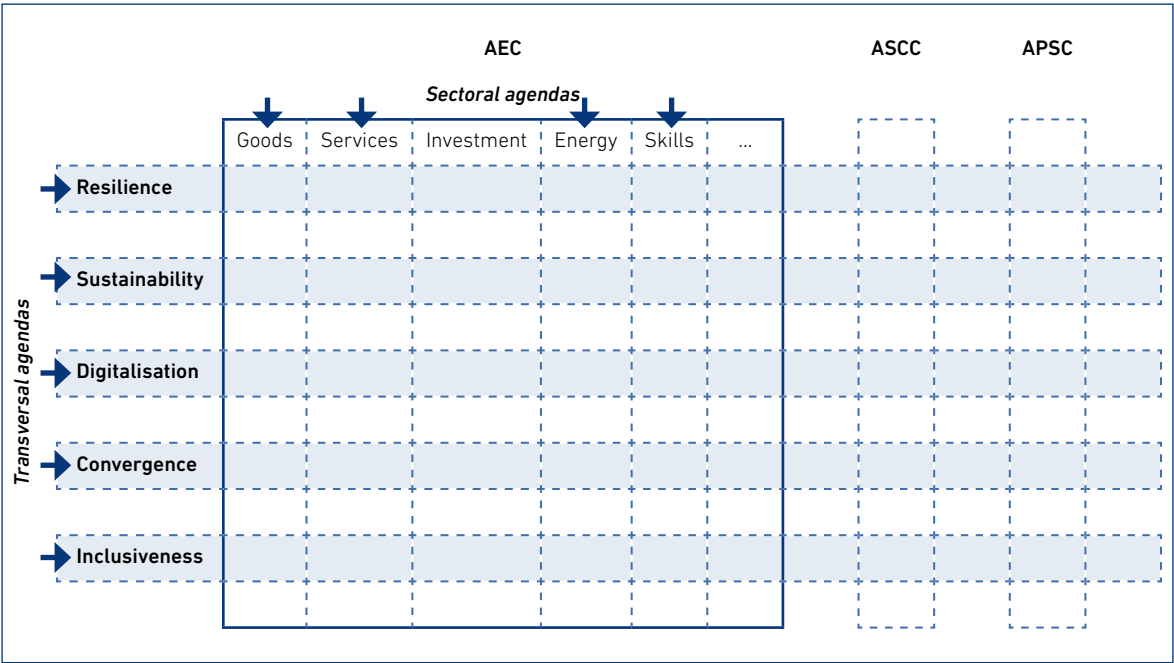
- consolidating the *convergence agenda*, in place since the 2000 Initiative for ASEAN Integration;
- formulating a coherent *sustainability agenda*, which should imply the alignment of ASEAN's objectives with the globally defined SDGs;
- introducing a *resilience agenda* as a strategic tool to help achieve the ASEAN Community Vision 2045;
- upgrading the *digitalisation agenda*, moving from the existing nine frameworks (2016–2023) with an emphasis on digital trade, not only towards a deepening of this agenda but also towards a broadening of the agenda in the direction of an ASEAN Digital Community 2045; and
- formulating an *inclusiveness agenda*.

These transversal agendas can build on guidelines developed by ASEAN sectoral bodies over the last years, as in the case of sustainable development where mainstreaming sustainability across sectors has been attempted.

These transversal agendas are not only cross-sector (within the AEC framework) but are likely to extend beyond the AEC pillar into the other two pillars (Figure 19.3). The convergence agenda is, for example, connected to ASEAN strategies on economic integration, physical connectivity, institutional connectivity, and people-to-people connectivity. The inclusiveness agenda is connected to poverty reduction strategies as part of the AEC but is also connected to the inclusiveness criterion in the ASEAN Socio Cultural Community Blueprint, 2016–2025. The gender equality and women’s empowerment agenda in the AEC is clearly connected to the Socio Cultural Community, which plays a leading role in this area, and the ASEAN Political Security Community, so far supported by the ASEAN Gender Mainstreaming Strategic Framework, 2021–2025. Likewise, it is recommended to roll out a digitalisation strategy across all pillars, covering elements such as data governance, value-added enhancement, improved digital connectivity, and digital inclusivity.

The transversal agendas are also overlapping to some extent. In Chapter 9 by Simon Feeny, for example, the overlap between the convergence and resilience agendas is pointed at when referring to the importance of building and monitoring the resilience of lower-income AMS and vulnerable populations in general. There is also overlap between the digitalisation agenda and the inclusiveness agenda. The multidimensional 2030 Agenda for Sustainable Development also connects these transversal agendas (see, for example, chapter 7 by Anbumozhi, et al.)

Figure19.3. Holistic Approach to Monitoring in ASEAN



AEC = ASEAN Economic Community, APSC = ASEAN Political Security Community, ASCC = ASEAN Socio Cultural Community, ASEAN = Association of Southeast Asian Nations.

Source: Authors.

For the further development of the AEC monitoring framework, various scenarios are available. ASEAN stakeholders will have to take decisions spanning various aspects, translating to a more (or less) ambitious monitoring system. The following questions about the monitoring system will need to be answered:⁵

- Should the monitoring system essentially monitor compliance with regional policy commitments (e.g. commitments to eliminate specific barriers to trade in services) or be a broader system including outcome and impact variables (intra-regional trade in services, convergence in terms of service delivery performance, etc.) – in other words, should it cover *de jure* regionalism, *de facto* regionalisation, or a combination of both?
- Should the monitoring system be centralised or decentralised?
- Should the monitoring system mainly have internal purposes (i.e. serving the ASEAN Secretariat and AMS) and/or external purposes (i.e. serving observers, civil society, citizens, and extra-ASEAN actors)?
- Should the monitoring system be limited to providing an indicator dashboard or also involve analytical work to identify causalities between regional policy implementation and outcomes (as suggested in chapter 9 by Simon Feeny, and chapter 20 by Bernard Hoekman)?
- Should the monitoring system be limited to providing an indicator dashboard or a system that also includes the computation of composite indices?
- Should the monitoring system adopt a logical framework for its organisation (distinguishing between inputs, process, output, outcome, and/or impact indicators; see also chapter 11, Shepherd) or not?
- What technology and what data sets should power the monitoring system?

An effective monitoring system will also have to provide clarity on a number of conceptual issues. These include establishing a common standard and definition of intra-ASEAN development gap(s) as reference points for the operationalisation of convergence policies (chapter 9, Feeny); conceptualising resilience as a multidimensional concept with both technical and political aspects (chapter 18, Tijaja and Park), in addition to basic requirements such as making the logical structure of the system explicit; and distinguishing between *de jure* regionalism and *de facto* regionalisation.

Likewise, a number of measurement issues will have to be addressed. Maximum use should thereby be made of existing measurement efforts in other international organisations such as ERIA, the World Bank, the United Nations Trade and Development (UNCTAD), and the International Trade Centre, e.g. on non-tariff measures (see chapter 20, Hoekman). Measurement issues are also related to the measurement of (aspects of) convergence, resilience, and sustainability performance and impacts. Measurement challenges are, finally, present in the digitalisation agenda, although one can build on existing efforts, including the ASEAN Digital Integration Index.

The monitoring system should also be accompanied by institutional innovations. The capacity of the AIMD could be strengthened, for example (see chapter 7, Anbumozhi et al.). At the same time, the new monitoring system will have to reflect any other institutional adjustments or experimentation within the ASEAN institutions. For the cross-cutting strategic agendas, for example, task forces have been suggested with clear terms of reference and reporting obligations, which would undoubtedly benefit from adequate indicator systems to support their monitoring activities. Likewise, multilevel domain-specific platforms that bring together epistemic communities have been suggested to make ASEAN more effective in reaching its goals (whilst respecting its essential member-driven intergovernmental characteristics).

⁵ See also De Lombaerde (2024).

5. Conclusion

Effective goal-achieving regional policies require monitoring systems as catalysts for policy implementation, accountability, and participation. This is not different for the post-2025 AEC.

The current monitoring apparatus will have to be adjusted or rethought for that purpose, taking into account the level of ambition that the AMS agree on for the AEC. Various proposals for the post-2025 period are suggested in this volume. When rethinking the monitoring system, ASEAN can learn from its own experiences with monitoring for over 20 years, as well as experiences in other regions and regional organisations worldwide. Although the latter do not necessarily offer a very clear direction to follow in the design of monitoring systems, they offer a wide array of useful references and experiences and some interesting recent developments in this field.

Smart choices will have to be made regarding various aspects of this new monitoring framework for the AEC. These aspects are related to scope, centralised versus decentralised, inward versus outward-looking, compliance-oriented versus outcome-oriented, various technical options, etc. In addition, the new framework will have to be able to speak to sectoral and transversal agendas simultaneously. The latter include convergence, sustainability, resilience, digitalisation, and inclusiveness.

The choices that have to be made regarding the new monitoring framework require time and consultations with the various stakeholders. It is recommended to create a steering committee, with representatives from the ASEAN Secretariat, AMS, and external experts, to accompany this process.

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