



STATEMENT OF THE NINETEENTH GOVERNING BOARD MEETING
ERIA (Economic Research Institute for ASEAN and East Asia)
23 June 2026
ASEAN Headquarters, Jakarta, Indonesia

1. ASEAN remains one of the world's most dynamic regions, but current global uncertainties, including disruptions to energy supplies in the Strait of Hormuz and heightened geopolitical tensions, pose significant risks and challenges to the region. These developments highlight the growing interconnectedness of economics, technology, energy, and security, reinforcing the need to strengthen ASEAN's resilience, competitiveness, and long-term sustainability. As ASEAN enters a new phase of development under the ASEAN Community Vision 2045, priority areas include economic resilience, energy security and sustainability, industrial competitiveness, digital transformation, and demographic change.
2. Amidst growing geopolitical and economic uncertainties, strengthening **ASEAN's resilience** has become increasingly important. Preserving an open, transparent, and rules-based trading system, while deepening regional integration, connectivity, and co-operation, will be essential to sustaining growth, enhancing economic security, and maintaining ASEAN's attractiveness as a hub for trade, investment, and innovation.
3. **Energy security and sustainability** have emerged as defining regional priorities for ASEAN. Recent disruptions in global energy markets have highlighted the vulnerability of energy and critical supply chains, reinforcing the importance of regional co-operation in strengthening both energy resilience and economic security. ASEAN Member States are advancing decarbonisation, renewable energy, regional power interconnection, transition finance, carbon pricing, and low-carbon industrial development. At the same time, intensifying climate and environmental challenges – including marine plastic pollution, biodiversity loss, land degradation, and disaster risks – require stronger governance, regional co-operation, and greater investment in adaptation and resilient infrastructure.
4. **Industrial competitiveness** is central to ASEAN's long-term growth and economic resilience. As global production networks evolve, opportunities in semiconductors, critical minerals, electric vehicles, advanced manufacturing, and data centres can drive industrial upgrading and value creation. Strengthening regional supply chains,

industrial capabilities and policies, and co-operation in strategic sectors will be essential to ensuring ASEAN's competitiveness and economic security in an increasingly complex global environment.

5. **Digital transformation** continues to underpin ASEAN's sustainable and inclusive future. The successful conclusion of negotiations on the ASEAN Digital Economy Framework Agreement (DEFA) marks a major milestone towards deeper digital integration and regional economic connectivity. At the same time, rapid developments in artificial intelligence, advanced manufacturing, quantum technologies, digital trade, and other emerging technologies are creating new opportunities for productivity growth, innovation, and inclusion. ASEAN must continue strengthening its digital ecosystem, promoting trusted digital governance, while fostering innovation and inclusion across the region.
6. **Demographic change** is reshaping ASEAN's economic and social landscape. While some ASEAN Member States continue to benefit from a young and growing workforce, others are facing population ageing and increasing pressures on healthcare and social protection systems. Addressing these diverse demographic trends will require policies that support workforce participation, productivity growth, active and healthy ageing, and social resilience. At the same time, strengthening human capital through education, skills development, lifelong learning, talent mobility, and workforce adaptability will be essential to ensuring that ASEAN remains competitive, innovative, and inclusive, and progresses towards becoming a high-income region with quality growth.

ERIA's Strategic Contributions to ASEAN's Priorities

Amidst growing uncertainty and evolving regional and global dynamics, the Economic Research Institute for ASEAN and East Asia (ERIA) continues to serve as a regional policy think tank and development partner in support of ASEAN's long-term development agenda. ERIA's work has directly contributed to ASEAN's efforts across five strategic priorities: economic integration and resilience, digital transformation and innovation, energy transition and sustainability, environmental sustainability and food security, and human capital and demographic resilience.

1. Strengthening Economic Integration, Economic Resilience, and Industrial Competitiveness

ERIA strengthened its support for ASEAN's economic integration and resilience agenda through direct contributions to Malaysia's ASEAN Chairship in 2025 and key ASEAN economic processes. ERIA served as Advisor to the ASEAN Trade in Goods Agreement (ATIGA) Upgrade Negotiations Committee, supporting the successful conclusion and signing of the upgraded agreement. ERIA also provided analytical support for the review of the ASEAN-India Trade in Goods Agreement (AITIGA), contributed to the ASEAN-GCC economic co-operation agenda, and supported the ASEAN Geo-Economic Task Force (AGTF). In addition, ERIA advanced its work on co-ordinated industrial policy, semiconductor supply chains, critical minerals, electric vehicles, and regional production networks, including the development of the ASEAN Framework for Integrated Semiconductor Supply Chains (AFISS), endorsed by ASEAN Economic Ministers in 2025. These efforts reinforce ASEAN's long-term competitiveness, economic resilience, and strategic positioning in an increasingly uncertain global environment.

2. Advancing Digital Transformation, Innovation, and Emerging Technologies

Through its Digital Innovation and Sustainable Economy Centre (E-DISC), ERIA provided analytical inputs to the ASEAN Digital Economy Framework Agreement (DEFA) negotiations, including studies on data governance, digital supply chains, open government data, and digital readiness. ERIA also expanded its work on artificial intelligence and emerging technologies through the ASEAN-Japan AI Innovation Co-Creation Roadmap, contributions to regional AI governance discussions, and support for ASEAN AI initiatives. To strengthen innovation ecosystems, ERIA convened the Second ASEAN Start-up Roundtable, organised the One ASEAN Startup Award 2025, and facilitated cross-border collaboration through the E-DISC Innovate Bridge programme, connecting startups, investors, and policymakers across ASEAN and its partners.

3. Accelerating Energy Transition and Security

Through the Asia Zero Emission Centre (AZEC), ERIA advanced regional co-operation on decarbonisation, carbon pricing, transition finance, and low-carbon development pathways. In response to emerging global energy disruptions, ERIA also provided timely policy recommendations to strengthen ASEAN's energy resilience and supply chain security. ERIA further supported research and policy dialogue on climate resilience, sustainable energy systems, and pathways towards net-zero transitions while ensuring energy affordability, accessibility, and security.

4. Promoting Environmental Sustainability and Food Security

Through the Regional Knowledge Centre for Marine Plastic Debris (RKC-MPD), ERIA supported evidence-based policy development and regional knowledge sharing on environmental management. This included work on marine plastic pollution, circular economy initiatives, biodiversity conservation, climate resilience, and sustainable resource management. ERIA also supported the ASEAN Blue Economy Forum and the development of ASEAN Eco-tourism Standards Phase 2 and the ASEAN Tourism Outlook Report, promoting sustainable tourism growth and responsible resource use across the region. In parallel, ERIA advanced work on food security and sustainable agriculture through research on digitalisation in agriculture and food systems, regenerative agriculture, and resilient agricultural supply chains, helping strengthen ASEAN's long-term food resilience amidst climate and environmental challenges.

5. Enhancing Human Capital, Healthcare, and Demographic Resilience

Recognising the profound demographic and labour market transitions taking place across ASEAN, ERIA continued to support policy development on human capital and quality growth, healthcare, and workforce readiness. ERIA's work focused on scaling workforce resilience and adaptability, preparing ASEAN talent for the future of work, and strengthening regional healthcare co-operation. ERIA also advanced research on demographic transitions, fertility trends, silver economy, and health security. Through the ERIA School of Government and its initiatives, ERIA contributed to strengthening institutional capacity and developing future leaders equipped to address increasingly complex regional challenges.

Recommendations of the Governing Board Members

We, the Governing Board Members, recognise the increasingly complex and uncertain environment facing ASEAN and East Asia and reaffirm the important role of ERIA in supporting ASEAN's long-term vision, regional integration, competitiveness, and resilience. We, therefore, recommend that ERIA continues to strengthen its role as a trusted knowledge partner and think tank for ASEAN and its member states by prioritising the following areas:

- **Evidence-Based Research and Policy Design**

1. Supporting the implementation of the ASEAN Community Vision 2045 and its various Community Strategic Plans 2026–2030 through evidence-based research and policy advice.

2. Advancing research and policy dialogue on geoeconomic developments, economic security, strategic trade management, supply chain resilience, and responses to external shocks and emerging regional and global challenges.
3. Supporting ASEAN's energy transition and sustainability agenda through research on energy security, renewable energy, transition finance, carbon markets, decarbonisation technologies, regional energy connectivity, climate resilience, and sustainable development.
4. Promoting ASEAN's industrial transformation and competitiveness through research and policy recommendations on co-ordinated industrial policy, semiconductors, critical minerals, advanced manufacturing, electric vehicles, and other strategic industries.
5. Facilitating informed policymaking on digital transformation and human capital development, including the development of the ASEAN Digital Economy Framework Agreement (DEFA) Implementation Plan, and intensive knowledge work on health care, demographic transition, and active ageing.
6. Supporting ASEAN and its member states in responding to the evolving regional and global economic architecture, including the effective implementation and future development of regional economic frameworks such as the Regional Comprehensive Economic Partnership (RCEP) and other initiatives that strengthen regional integration and economic co-operation.

- **Institutional and Technical Support**

1. Continuing ERIA's support for the ASEAN Member State serving as ASEAN Chair, particularly the Philippines during its 2026 ASEAN Chairship.
2. Providing technical assistance and implementation support to ASEAN Member States and ASEAN sectoral bodies in advancing regional initiatives, agreements, and reforms.
3. Supporting the implementation of the ASEAN Digital Economy Framework Agreement (DEFA) and strengthening ASEAN's digital ecosystem, innovation capacity, and governance capabilities.
4. Supporting Timor-Leste's effective integration into ASEAN through targeted policy support, technical assistance, and institutional strengthening.
5. Assisting ASEAN Member States in implementing regional economic agreements, including RCEP and other emerging regional initiatives, to maximise their benefits and strengthen regional connectivity.

6. Deepening engagement with governments, businesses, academia, international organisations, and dialogue partners to strengthen regional co-operation, foster innovation, and facilitate knowledge exchange.
7. Reinforcing ERIA's role as a regional platform that bridges research, policy, and implementation, ensuring that its work delivers practical, impactful, and measurable outcomes for ASEAN and East Asia.
8. Strengthening ERIA's long-standing partnership with ASEAN through a Memorandum of Understanding that reinforces a shared commitment to deeper collaboration and the pursuit of common objectives.

- **Capacity Building**

1. Supporting the implementation of ASEAN's long-term vision through demand-driven and tailored capacity-building initiatives and programmes for ASEAN and its member states.
2. Enhancing ASEAN's human capital development and demographic resilience through initiatives on quality growth, education, skills development, healthcare, ageing societies, silver economy, workforce adaptability, and future talent mobility.
3. Strengthening capacities in emerging policy areas, including economic security, energy transition, digital governance, advanced technologies, industrial transformation, and regional economic integration.
4. Facilitating knowledge sharing, institutional learning, peer-to-peer exchanges, and leadership development training amongst ASEAN stakeholders to support effective policy implementation, regional integration, and ASEAN centrality in an evolving regional economic landscape.

We also reaffirm our strong support for ERIA's mission and strategic direction and encourage it to mobilise additional resources through a broader, more diversified funding base to strengthen its institutional capacity to effectively implement its mandate and deliver meaningful contributions to regional integration, development, and emerging priorities. We call on ERIA member countries, including the ASEAN Member States, to consider increasing their financial contributions to ERIA.