

Key Messages:

- Global circulation of talent is critical to boost innovation and entrepreneurship ecosystems, as exemplified by Silicon Valley in California. Moreover, there are indications that the mobility of the highly skilled (or diaspora) is not only benefitting the location to where the highly skilled move, but also the countries from which they come.
- ASEAN's skills base needs to improve. OECD's Program for International Student Assessment (PISA), global higher education rankings, and research productivity statistics indicate an improving trend. However, barring Singapore, the rest of ASEAN must enhance competitiveness to catch up with other regions.
- Digital nomad visas and talent attraction schemes are becoming popular in ASEAN, especially post-pandemic. These schemes vary considerably from country to country. While these measures can be a valuable tool to attract global talents to individual countries and the region, the type of visa matters and emphasis should be placed on the development of well-functioning ecosystems and linkages between foreign and domestic talents.

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Attracting Global Talents: Bringing Digital Nomads and the Highly Skilled into ASEAN

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The advancement of technology and borderless working accelerated by the coronavirus disease (COVID-19) has pushed the Association of Southeast Asian Nations (ASEAN) to rethink its strategy in the race for global talent. ASEAN needs to address domestic challenges and gaps in talent and skills development. The rise of 'digital nomads' and digital talent mobility can provide a significant boost to ASEAN's competitiveness on the global stage by contributing to innovation, business creation, and economic growth. This brief explores approaches taken by ASEAN countries to attract and retain global talent and digital nomads, highlighting characteristics of digital nomad and talent visas as well as strategic policies ASEAN must consider to create a vibrant ecosystem in this sphere.

The race for global skilled workers and talents has intensified due to COVID-19

Since the coronavirus disease (COVID-19) pandemic hit, the world has been moving irreversibly toward a remote and borderless work environment. In the decades leading up to COVID-19, technological advances have allowed a growing number of people to work remotely. As the pandemic upturned the world of work, the number of 'digital nomads' – individuals and professionals with the ability to work online and remotely – is rising, with many people experiencing remote working for the first time and seeking to do so while moving from one place to another (Cook, 2023; Newbold et al., 2022; Aroles et al., 2020). Digital nomads – including remote workers, entrepreneurs and freelancers – have further expanded the possibilities of global talent mobility.

Inflows of highly skilled individuals are a key resource for knowledge-based economies as they are an important driver of innovation and entrepreneurship (Kerr, 2019; McKinsey, 2021). Numerous studies have highlighted the critical role of mobile highly skilled individuals in fostering innovation and entrepreneurship ecosystems (Boeri et al., 2012; Kerr, 2016). Moreover, there are indications that the mobility of the highly skilled (or diaspora) is not only benefitting the location where highly skilled move to but also the countries where they come from (Terrazas, 2010).

It is therefore not surprising that the pursuit of global talent has become a critical aspect of business and economic strategies worldwide. In an increasingly interconnected and competitive world, companies, organisations, and countries are actively seeking skilled professionals from diverse backgrounds and locations to drive innovation, fill specialised roles, and boost economic growth. Companies can now access a wider

pool of candidates, regardless of their physical location, enabling them to tap into expertise from different parts of the world without the need for relocation. Moreover, countries around the world are engaged in a competitive race to produce the best global talents. Countries such as Switzerland, Canada, Sweden, the United States, and Japan invest heavily in education, research, technology, and inclusive policies to produce, attract, and retain the best global talents, positioning themselves as dynamic hubs for innovation, economic growth, and cultural diversity (INSEAD, Global Talent Competitiveness Index, 2022).

Tapping into the global talent pool, ASEAN needs to catch up

As the attraction and retention of global talent pool becomes increasingly competitive, it is essential for Association of Southeast Asian Nations (ASEAN) countries to enhance their efforts to attract and retain top talents. While the region offers unique advantages, such as a fast pace of digital transformation and a growing economy (Ing and Markus, 2023), it needs to address several challenges to catch up with other countries in tapping into the global talent pool (Ajmone Marsan, 2022).

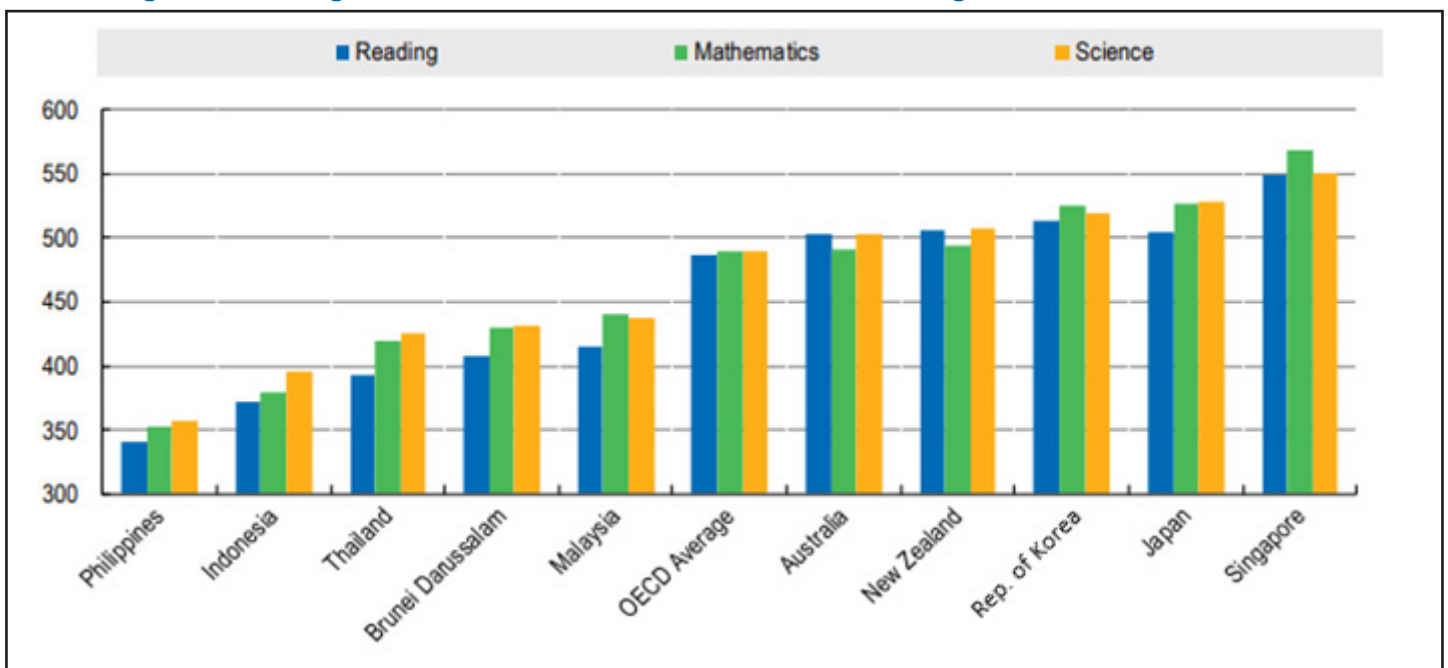
First, education and skills development, especially with a focus to create a talent pool that is equipped to excel in technology and creativity-driven industries, remain a challenge. The Organisation for Economic Co-operation and Development (OECD) Program for International Student Assessment (PISA) compares secondary-level students' skills and knowledge mainly in science, reading, and mathematics. The PISA rank shows that out of

77 participant countries, China is at the top of the list followed by Singapore, Japan, and the Republic of Korea, while the top 40 is dominated by European countries. Other ASEAN countries participating in the assessment rank considerably below: Malaysia ranks 48th, Brunei Darussalam 53rd, Thailand 60th, Indonesia 70th, and the Philippines 76th (Figure 1).

A similar picture appears also when looking at tertiary education. The *Times Higher Education* 2023 ranking reveals that the majority of the top 50 universities are concentrated in Europe and North America. Only two universities from Singapore, the National University of Singapore (ranks 19th), and Nanyang Technological University (ranks 36th), with no other ASEAN universities included. Emerging economies such as Viet Nam and Thailand have started to increase education expenditure and put strong emphasis on technology and innovation in higher education, although concerns around graduate employment and skill mismatch (especially the shortage of graduates in STEM) appear to persist (ASEAN Secretariat-SHARE, 2023). In terms of research productivity (measured through number of scientific publications and citations), while ASEAN exhibits improvements over the last decade, there is still a gap between Singapore and Malaysia and the rest of ASEAN (Sukoco, Putra, and Wicaksono, 2023).

Second, barriers to innovation, entrepreneurship and digital skills need to be addressed to foster a workforce capable of competing on the global stage. The digital divide is one of the main concerns, as unequal access to digital technologies and the internet amongst different groups, such as urban-rural disparities, income levels, education levels, and gender, are still apparent (Ajmone

Figure 1: Ranking of ASEAN and East Asian Countries in Reading, Mathematics, and Science



OECD = Organisation for Economic Co-operation and Development, PISA = Program for International Student Assessment. Source: OECD PISA 2018.

Marsan, 2022). For instance, digital adoption remains unequal amongst the CLMV countries – Cambodia, Lao PDR, Myanmar, and Viet Nam – thereby limiting their ability to make the most of the growing internet economy in the region (ASEAN Secretariat-SHARE, 2023). Gaps in digital capacity and infrastructure also pose a barrier in making online learning available for all, including unreliable and slow internet connection, the high cost of devices, the lack of skills in using digital tools, and quality concerns. While the region has been characterised by the emergence of entrepreneurial communities, especially in some of its cities and emerging technology sectors such as healthtech, e-commerce and digital payment (Ajmone Marsan, 2022; Litania and Shukla, 2022), ways to measure innovative entrepreneurial behaviours and landscape are still limited (Rosiello, Vidmar, and Ajmone Marsan, 2022).

Therefore, while strengthening domestic capabilities should remain a key priority for ASEAN governments, simultaneously attracting skilled global talents can provide a significant boost to the competitiveness of ASEAN countries. Policies to raise domestic skills and to attract global talent should be perceived as the two sides of the same coin: if talent attraction policies are well-designed and linkages to local communities are developed, highly skilled circulation is an important channel to strengthen domestic innovation and entrepreneurship ecosystems. Moreover, with its natural amenities, favourable climate,

renowned cuisine and low-cost destinations, ASEAN is well positioned to attract global talent flows.

Attracting global talents and the emergence of digital nomad visa programmes in ASEAN

While ASEAN countries are catching up to produce and retain talents that can compete at the global level, the rise of digital nomads can be a way to help fill this gap. Following the COVID-19 pandemic, there has been a swift government effort across ASEAN to prepare their countries as preferred destinations to attract more digital nomads and foreign professionals to accelerate domestic economic development and growth (for instance in the technology sector and knowledge-based industries such as digital, biotech, medical, as well as in the creative economy industries). Attracting digital nomads at the same time can be seen as opportunities for knowledge sharing between global talent with local talent.

Some of the efforts to attract global and digital nomads include introducing dedicated visa programmes tailored to remote workers. These visa programmes allowed digital nomads to stay for extended periods, making it more feasible for them to work and reside in these countries legally. Key characteristics of digital nomad and global talent visa programmes in some of ASEAN Member States are shown in Table 1.

Table 1: Digital Nomad and Global Talent Visas in ASEAN Member States

Country	Key Characteristics				
	Type of Visa	Remote Work Authorisation	Visa Eligibility	Visa Validity	Quality of Talents
Brunei Darussalam	Professional Visit Pass	No	Professionals or companies looking to open and operate business venture	3 months	-
Cambodia	E-class Ordinary Visa	No	Business owners and individuals who received invitation for business purposes	3 months	-
Indonesia	Golden Visa	Yes	High-skilled and high-earning individuals and companies with certain investment value in Indonesia	10 years	Talent in the field of digitalisation and AI, health, research and technology
Malaysia	DE Rantau	Yes	Open to a relatively wide scope of professionals with certain annual income	1 year	Targeted to both foreign and local digital nomads, tech entrepreneurs, business owners, freelancers and industry players.

Table 1: *Continued*

Country	Key Characteristics				
	Type of Visa	Remote Work Authorisation	Visa Eligibility	Visa Validity	Quality of Talents
Philippines	Startup Visa	No – companies or foreign talents' works must be registered in the Philippines	For startups and startups enablers	5 years	Business creators, innovators, and technology talents
Singapore	Entre Pass	No – companies or business ventures must be registered in Singapore	For entrepreneurs who have incorporated a private limited company in Singapore	2 years	Business creators, skills development
	Tech.Pass	Yes	Tech professionals with certain track record achievements	2 years	Tech enabler in AI, data science, cyber security and fintech.
	ONE Pass	Yes	High-skills professionals and high-income earners	5 years	Top talents in business, arts and culture, sports, science and technology, academia and research
Thailand	Long-Term Residence (LTR) Visa	Yes	High-skills professionals, high-income earners, and pensioners	10 years	Talents who belong to companies or research institutions that are involved in more than 10 industrial or technological categories including electric vehicles, electronics, medicine, and defense.
Viet Nam	Startup Visa	No – companies must be set up in Viet Nam	Foreign investors with certain amount of capital contribution	Up to 5 years	-

Note: Given the fast-evolving issues pertaining to digital nomads in ASEAN, the information in the table represents the situation at the time of writing.

Sources: Fujiwara (2022); Suhenda (2023); Suruga (2022); Ho (2022); Khmer Times (2023); Malaysia Digital Economy Cooperation – DE Rantau; Ministry of Manpower, Singapore – Overseas Network and Expertise Pass, Kingdom of Cambodia e-Visa Kingdom of Cambodia webpage; Ministry of Foreign Affairs, Brunei Darussalam – Type of Visa, Department of Trade and Industry (DTI), Philippines: Innovative Startup Act.

- i. **Brunei Darussalam.** The country has not yet introduced a specific digital nomad visa programme. However, through the Ministry of Home Affairs, it offers relevant visa options for foreign nationals including entrepreneurs, investors, and business owners who are looking to start and operate a local venture. For digital talents interested in working in Brunei Darussalam, they would typically need to obtain the appropriate visa based on their purpose of visit and the nature of their work. The most common visa types for foreign workers in Brunei Darussalam are the 'Employment Pass' and the 'Professional Visit Pass.'
- ii. **Cambodia.** Although there is no specific regulation dedicated to digital nomads in Cambodia, the country offers the 'E-Class Ordinary Visa' (E-visa) for foreigners who wish to stay in Cambodia for an extended period of time. The visa allows multiple entries with a longer duration of stay in Cambodia, allowing travellers and remote workers to stay longer compared with the ordinary tourist visa.
- iii. **Indonesia.** In September 2023, the Ministry of Tourism and Creative Economy introduced a 'Golden Visa' programme. Clear regulations and benefits have not yet been elaborated, but it is said that

under the Golden Visa programme, foreign talents could be granted a permit to stay for up to 10 years. The visa programme will aim to target high-earning companies and high-intellectuals, especially in the fields of technology, digital, research, and health. Companies or individuals wishing to obtain the Golden Visa must also invest at least \$50 million or \$350,000, respectively, in Indonesia.

- iv. Malaysia.** Amongst ASEAN members, Malaysia has been pushing rapidly to attract digital talents to the country. On October 2022, Malaysia Digital Economy Corporation (MDEC) created DE Rantau Pass that aims to solidify Malaysia's path to becoming digital nomad hub in ASEAN. Different from other ASEAN countries, the DE Rantau is geared to attracting more ecosystem players (from information technology professionals to industry players) by developing a comprehensive local ecosystem suitable for digital nomad lifestyle, both for local talents and foreign nomads. For foreign nomads, the visa will allow them to stay for 12 months with three main benefits: 1) the creation of DE Rantau Hubs, which MDEC states are certified nomad-ready accommodations; 2) access to the digital nomad community and ecosystem; and 3) DE Rantau Nomad Pass for qualified foreign digital nomads. The pass is open to a relatively wide scope of remote workers and freelancers, with a relatively low-cost visa fee and monthly income requirement, allowing a larger segment of the digital-nomad community to qualify.
- v. Philippines.** Although no specific government visa for digital nomads has been enacted yet, the Innovation and Startup Act (RA11337) of the Philippines provides for the creation of three types of visas for foreigners who plan to support and or invest in the local startup economy. The visas have an initial 5-year validity and may be renewed or extended for another 3 years. The visas encompass a startup owner visa, a startup employee visa, and a startup investor visa specifically designated for individuals or entities registered in the Philippines.
- vi. Singapore.** Singapore has been leading the talent race in ASEAN, spearheading efforts to attract digital talents and coordinate initiatives for digital nomads through the Ministry of Manpower. The country has at least five types of visas including the EntrePass, Tech.Pass, and Overseas Network and Expertise (ONE) Pass. The EntrePass is for foreign entrepreneurs who wish to start and operate a business in Singapore. It is tailored for individuals who have innovative business ideas and the potential to contribute to Singapore's economy. The Tech.Pass is a specialised work pass programme introduced to attract top tech talent from around the world to work and live in Singapore. It targets experienced tech professionals, entrepreneurs, executives, and experts in emerging

technologies. Lastly, the ONE Pass has recently been introduced to target high-skills professionals, high-income earners, including top talent in business, arts and culture, sports, science and technology, and academia and research. The programme will allow people to stay at least 5 years and work at multiple organisations and companies.

- vii. Thailand.** In September 2022, Thailand introduced a Long-Term Residence visa targeting affluent global citizens, foreign retirees, and highly skilled professionals earning a minimum annual income of US\$80,000. The visa will be valid for 10 years with multiple re-entry permits, digital work permits, a reduction in personal income tax rates, and a streamlined immigration process. The Thai government aims to attract one million participants to the programme within the next 5 years.
- viii. Viet Nam.** Viet Nam introduced a Startup Visa, also known as an Investment Visa. This visa, granted by the Government of Viet Nam, is for foreigners establishing or investing in a local company. It comes in four types based on offered duration. The Startup Visa enables global talent to obtain a temporary residence card and allows them to sponsor their families for visa visits.

Looking at the current landscape, the approach to digital nomad visas in ASEAN countries varies, reflecting the different stages of digitalisation and technology talent development across the region. Firstly, some of the more advanced ASEAN countries such as Singapore, Indonesia, and Thailand are exploring or implementing specific visa programmes to attract high-skilled professionals, tech talents, and high-income earners and retirees. In the case of Singapore, Indonesia, and Thailand, the new visa category is set to be a residency-by-investment-style visa, leveraging on the long-duration (10-year visa validity for Indonesia and Thailand, including for spouses and children) and long-term investment by the visa holder (through government bonds investment, foreign direct investment, or property investment). The creation of this visa is expected to boost long-term economic growth and creation of new jobs, including digital entrepreneurs.

Malaysia has opted to take a different approach by building an integrated ecosystem to attract both local and foreign digital nomads. The DE Rantau programme is designed to promote digital professional mobility and tourism across Malaysia. By offering a short duration of stay (1 year duration, with ability to bring spouse and children) and a minimum annual income of \$21,000 per year, the scheme is designed to be accessible to plenty of potential applicants, including digital freelancers, independent contractors, and remote workers. While the scheme primarily targets individuals in the information technology industry, there are no restrictions preventing talents from applying for the visa. In addition to the creation of certified accommodation hubs and communities that support

nomadic living through 'DE Rantau Nomad Pass,' a range of local services including travel, tourism, transportation, e-commerce, and e-payments are also available to pass holders. Local nomads can also register for benefits and discounts within the ecosystem established by this initiative, which will be shared with foreign digital nomads.

Secondly, other ASEAN Member States were primarily focusing on visa programmes related to entrepreneurs and foreign investors. Countries such as Brunei Darussalam, Viet Nam, and the Philippines may prioritise attracting foreign direct investment and fostering business growth, with the visa policies tailored to meet the needs of investors and entrepreneurs looking to set up businesses or invest in the country.

Digital nomad communities are unlikely to thrive in isolation; therefore, there is a need to cultivate a supportive ecosystem to foster their growth and positive impact

As the landscape of remote work and digital nomadism evolves, the visa policies and approaches of ASEAN countries may continue to change to adapt to global trends and meet the demands of the emerging digital workforce. Fostering a supportive ecosystem is essential to encourage its growth and maximise its positive impact on both individuals and the host countries. Key elements to support the ecosystem for digital nomads include:

- a) Digital infrastructure:** to attract and retain digital nomads, countries should invest in robust digital infrastructure, including high-speed internet connectivity, reliable co-working spaces, and digital-friendly public services.
- b) Legal and Regulatory Clarity:** clarity in tax regulations and employment laws related to remote work can encourage digital nomads to choose a particular destination.
- c) Entrepreneurship and Innovation:** Encouraging entrepreneurship and innovation can lead to the growth of digital nomad-friendly businesses and create job opportunities for both locals and remote workers.
- d) Digital Skills Development:** Investing in digital skills development and tech education can create a pool of skilled talent within the local population and attract tech-savvy digital nomads.
- e) Cultural and Social Integration:** Building a community and fostering social connections amongst digital nomads and with the local population can help create a supportive and inclusive environment.

By nurturing a supportive ecosystem, ASEAN countries can position themselves as attractive destinations for digital nomads, benefiting from their economic contributions, cultural exchange, and the diversity of perspectives they bring. Collaboration amongst countries in ASEAN and globally can also lead to the creation of a network of

digital nomad-friendly destinations, further enriching the overall digital nomad experience.

Conclusions and Policy Recommendations

- *Attracting global talents is crucial for ASEAN, serving as a complementary policy to upgrading domestic skills rather than a substitute.* The two approaches go hand in hand and ASEAN policymakers should consider national and regional talent attraction schemes.
- *Attracting highly skilled digital nomads is crucial for developing ASEAN's innovation, entrepreneurship ecosystems, and the creative economy. However, the visa policy should emphasise the linkages between the digital nomad community and the local ecosystem, fostering collaboration with local talents, domestic companies (both multinational enterprises and small and medium-sized enterprises), and educational institutions.* Incentives should prioritise knowledge spillovers between local and foreign talent, fostering local talent's confidence to compete globally. Additionally, integrating digital nomads into the chosen local society requires providing essential services such as housing, education, healthcare, and as well as awareness of local cultures.
- *Policymakers should anticipate and address potential negative consequences of attracting global talent, such as increased prices in local communities.* This may lead to higher rents, food prices, and service costs. To mitigate these effects, policymakers should connect the global talent diaspora with local communities to showcase the benefits and implement schemes to prevent adverse reactions.

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