



ERIA and IDE-JETRO Hold Roundtable on Connectivity and Innovation

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The Economic Research Institute for ASEAN and East Asia (ERIA) and the Institute of Developing Economies - Japan External Trade Organization (IDE-JETRO) held a Roundtable on Connectivity and Innovation in Jakarta on 30 January 2018.

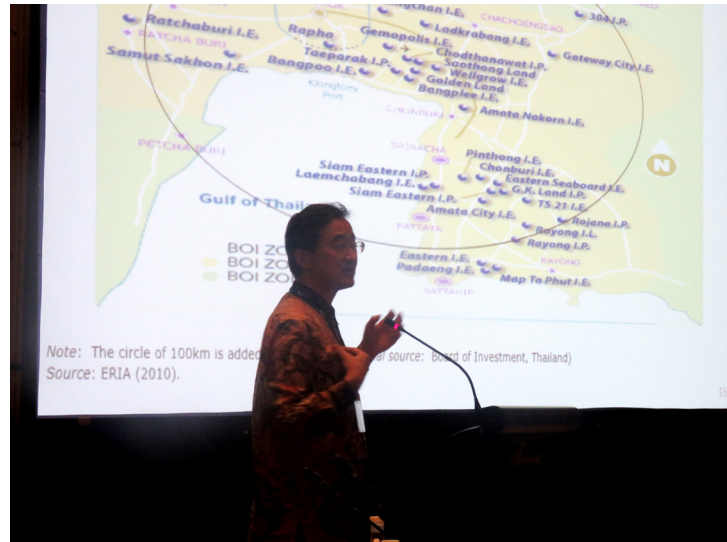
The one-day event was held in conjunction with the annual Research Institutes Network meeting for fiscal year 2017 that was held the day before (full RIN meeting article on [page 5](#)). Several foreign dignitaries attended the event, namely H.E. Amb Elizabeth P. Buensuceso, Ambassador of the Philippines to ASEAN; H.E. Amb Kim Young Chae, Ambassador of the Republic of Korea to ASEAN; H.E. Amb Suresh Reddy, Ambassador of India to ASEAN; H.E. Amb Stephanie Lee, Ambassador of New Zealand to ASEAN; and H.E. Amb Phasporn Sangasubana, Ambassador of Thailand to ASEAN.

In his opening remarks, ERIA President Prof Hidetoshi Nishimura underlined the urgency of discussing connectivity and innovation towards ASEAN Economic Community (AEC) 2025. 'Under the concept of the third unbundling, the image of infrastructure will be also deconstructed, from physical to digital. I am looking forward to discuss with you how this movement change the concept of connectivity, and what is necessary towards the AEC 2025 on connectivity issues,' said Prof Nishimura.

Moreover, he stated that innovation would become an important element for ASEAN member states to escape from the middle income trap and whether the economic policy of each country could promote innovation.

ERIA's Chief Economist Prof Fukunari Kimura delivered an insightful presentation *How Can Connectivity Support Innovation?*, which supported Prof Nishimura's statements. Prof Kimura emphasised the need for countries to acknowledge the imminence of the third unbundling and to incorporate it into the development strategy. He stated that AEC, ASEAN Socio-Cultural Community (ASCC), and Master Plan of ASEAN Connectivity (MPAC) must be reorganised in order to take care of old agenda and to prepare for new challenges.

Both Prof Nishimura and Prof Kimura used the concept of the third unbundling introduced by Prof Richard Baldwin, one of the world's greatest thinkers on globalisation, in



Prof Fukunari Kimura, ERIA Chief Economist, deliver a presentation on 'How Can Connectivity Support Innovation?'

his book *The Great Convergence: Information Technology and the New Globalization* published in 2016. ERIA and the Centre for Strategic and International Studies (CSIS) held a private discussion with Prof Baldwin last year in Jakarta.

The afternoon sessions of the roundtable were divided into two sessions, the first session discussed Connectivity in East Asia and the second session discussed Innovation in East Asia. In her closing remarks, Dr Yuri Sato, the executive vice president of IDE-JETRO reiterated the key message of the day. 'Today, countries are at least facing two unbundling tranches: the second (manufacturing) and the third (the new wave), this should serve as an impetus for policymakers to address the distinct challenges that come with the second and third unbundling,' she said. ■

Innovation would become an important element for ASEAN member states to escape from the middle income trap and whether the economic policy of each country could promote innovation.



Yuanita Suhud
Research Associate at ERIA

ASEAN Rides the E-commerce Wave: Infrastructure, Human Capital, and Regulatory Frameworks

'Over the past decade, there has been a global boom in e-commerce, driven by rapidly expanding middle classes, increasing Internet penetration, and the widespread adoption of smart phones around the world.'

With the emergence of the digital economy driving economic growth and creating new business opportunities around the world, how can the ASEAN nations catch this wave and ride it? What obstacles do they need to overcome to participate fully in regional and global e-commerce?

Over the past decade, there has been a global boom in e-commerce, driven by rapidly expanding middle classes, increasing Internet penetration, and the widespread adoption of smart phones around the world. With the dramatic success of giant e-commerce businesses such as Amazon and Alibaba, many other businesses around the world are poised to capitalise on these new opportunities. The United Nations Conference on Trade and Development (UNCTAD) estimates that in 2015, the total global value of e-commerce transactions stood at around US\$22 trillion, with this expected to grow at the compound

rate of 19.42% in the period from 2016 to 2020, projected to amount to more than US\$ 44 trillion in 2020.

While the US has dominated the e-commerce sector since its inception, China is one of the few Asian nations to have a strong presence, with both the establishment of strong e-commerce platforms and their widespread acceptance by consumers. Other markets, including those in the 10 Southeast Asian nations, still remain relatively undeveloped. With more than 600 million people living in this region, approximately 8.8% of the world's population, and more than half of the population are under the age of 30, this region holds massive potential. According to a joint study by Google and Temasek Holdings Pte, there will be a 16-fold increase -slightly lower than the aforementioned global projection- in the value of e-commerce transactions in Southeast Asia by 2025. While the potential is evidently

enormous, a number of constraints currently impact the region's ability to reap all the benefits including the availability and reliability of Internet connections and of logistics services; the existence and effective implementation of appropriate legal frameworks; and the availability of the necessary human capital.

At the preliminary stages, participation in e-commerce may require little more than intermittent access to the internet through mobile devices such as smartphones, and perhaps a desktop or a laptop. However, more advanced development requires an internet infrastructure sufficient to enable full participation in cross-border markets at regional and global levels. A recent World Bank development report emphasised the importance of the "middle mile" which requires liberalising markets to build and operate backbone networks and encouraging open access. The development of these networks is

contingent on other infrastructure, including roads, railways, and energy distribution, which will facilitate the development of optical fibre links, internet exchange points, and local caches.

Similarly, the provision of reliable and efficient logistics services is dependent on the quality of roads and port infrastructure which determines the extent to which web-based and other e-commerce services can penetrate particular countries or regions, including the most remote regions. In these areas, almost all ASEAN countries need to make significant improvements, as indicated by their relatively low ranking in performance indices such as the Logistics Performance Index and the Global Competitiveness Index. To address these weaknesses, the provision of sustainable public funding is crucial to enable most ASEAN nations to address infrastructure deficits without recourse to public-private partnership schemes.

In addition, policy and regulatory frameworks need to be strengthened to provide strong legal foundations for the development of the e-commerce sector. While a number of ASEAN nations have made significant efforts to develop these frameworks, the quality of implementation varies widely. In particular, stronger emphasis needs to be placed on addressing cybercrime. It should be emphasised that these frameworks must be flexible and open to revision in response to ongoing developments. Given the rapid evolution of the sector, it is extremely likely that there will be an ongoing need for policymakers to address the impact of new innovations as they develop.

For example, the Indonesian government has been challenged by the sudden emergence and extremely rapid growth of GO-JEK, which was initially launched as an online application-based motorbike taxi service but rapidly morphed into a provider of a range of other services. The emergence of GO-JEK met with opposition from conventional taxi businesses, who felt that the largely unregulated nature of this new service placed them at a distinct competitive disadvantage. While the Indonesian government has made steps towards imposing price controls and fleet restrictions, these measures appear to be ad hoc, short-term measures that have proved to be largely ineffective. This case emphasises the need for the government to adopt comprehensive, adaptive solutions that provide incentives for entrepreneurs to innovate while at the same time providing a sufficient degree of regulation. In particular, with the ability of e-commerce to facilitate transactions across borders, it is vital to harmonise regulations between countries to catalyse further development of e-commerce in the region. This could be achieved by utilising a number of instruments developed by ASEAN, such as the ASEAN Economic Community 2025 Blueprint and the ASEAN ICT Master plan 2020.

Finally, the growth of e-commerce is dependent on ASEAN's human capital, which can only be strengthened through the provision of appropriate education. Improving the quality of education may require substantial changes to the educational system, including reforming the curricula and the management of the sector, together with measures to upgrade the

performance of teachers, educators, researchers and academicians. In particular, greater emphasis should be placed on vocational education.

For ASEAN to reap the full benefits of the rise of digital technology, all of its member nations, separately and jointly, must strive to make improvements in all these four areas. They must see this as an opportunity to adapt, evolve, reform and innovate not only to reap the benefits of e-commerce, but to lay the foundations for sustainable development more generally into the future. ■

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ERIA and IDE-JETRO Hold Research Institute Network Meeting for FY 2017



'I hope today's discussion leads the future research direction, not only for next year, but also for the next ten years,' said Prof Nishimura.

The annual Research Institutes Network (RIN) meeting was held in Jakarta, Indonesia on 29 January 2018, organised by the Economic Research Institute for ASEAN and East Asia together with the Institute of Developing Economies - Japan External Trade Organization (IDE-JETRO).

The meeting was attended by RIN members from 15 organisations across East Asia Summit countries, moderated by Dr Hank Lim Giok-Hay from the Singapore Institute of International Affairs.

ERIA President Prof Hidetoshi Nishimura welcomed the RIN members as he delivered his opening remarks. He went on to briefly explain ERIA's deliverables in 2017 as well as mentioning a milestone that ERIA will pass in 2018 as it celebrates its 10th anniversary.

'I hope today's discussion leads the

future research direction, not only for next year, but also for the next ten years,' said Prof Nishimura.

Mr Daisuke Hiratsuka, President, Bangkok Research Center, JETRO Bangkok / IDE-JETRO applauded ERIA's achievements, adding that 'there is much work should be done by ERIA.'

After the opening remarks, the morning session continued with short presentations from two Malaysian research institutes and ERIA. Shigeki Kamiyama, ERIA's Director General for Research Administration, delivered a presentation on ERIA's Research Projects in FY 2017, followed by several presentations on ERIA's key projects in FY 2017 by ERIA researchers.

In the afternoon, presentations were made on collaborative research projects between ERIA and RIN

members in FY 2017. Prof Fukunari Kimura, ERIA's Chief Economist, also presented ERIA's future study plans including the calls for proposal for collaborative research projects in FY 2018.

The last presentation was delivered by Mr Daisuke Hiratsuka on a key research project by Bangkok Research Center, JETRO Bangkok / IDE-JETRO.

Dr Hank Lim, who was also the Chairperson of RIN, wrapped up the meeting and delivered his closing remarks. ■

ERIA and Universitas Brawijaya Hold 'The Indonesian Economy' Book Discussion



While school completion rates and education attainment have been increasing in Indonesia, the skills of Indonesian workers are still low compared to its neighbours and other comparable countries.

The Economic Research Institute for ASEAN and East Asia (ERIA), together with the Faculty of Economics and Business, Universitas Brawijaya, held a dissemination event for *The Indonesian Economy: Industrial and Trade Policy* in Malang, Indonesia on 22 February 2018.

The Indonesian Economy: Industrial and Trade Policy, co-published by ERIA and Routledge, addressed the theme of how Indonesia should shape its trade and industrial policies in this new world trade environment.

Two contributors of the book talked about their chapters and answered questions from a room full of enthusiastic students. Dr Devanto Pratomo, Senior Lecturer and Researcher at Universitas Brawijaya, emphasised the need for Indonesia to make the most out of opportunities created by the demographic dividend by improving certainty in its labour market. He mentioned two possible solutions to foster more certainty in the labour market: applying similar treatment between permanent and contract workers; and implementing clearer

regulations on outsourcing and fixed term contracting. Dr Pratomo suggested that these two points would improve workers' morale, which in the end would increase productivity due to fewer industrial conflict.

Dr Daniel Suryadarma, a Researcher at SMERU Research Institute, talked about the current education system in Indonesia. He stated that while school completion rates and education attainment have been increasing in Indonesia, the skills of Indonesian workers are still low compared to its neighbours and other comparable countries. Further, Dr Suryadarma emphasised the need to continuously invest in education and if possible to scale it up in order to intensify its effort in catching up with other countries.

In addition to the topics discussed during the event, the book also talks about the impact of local content requirements on Indonesia's manufacturing, FDI and value-added in Indonesia, as well as innovation in the manufacturing and services sectors. The main objective of the

book is to convey two key messages. First, Indonesia should not limit itself to promoting only specific industries (by providing tax incentives or subsidies, or allocating large amount of national spending to develop particular industries) at the cost of other industries and inefficiency of resource allocation. Second, Indonesia should improve the basic condition for growth of all industries including infrastructure, the quantity and quality of workers, as well as access to finance, while at the same time implementing conducive trade and investment policies.

For trade practitioners, the book also introduces an evaluation of new trade instruments such as non-tariff measures like sanitary and phytosanitary measures (SPS), technical barriers to trade (TBT), export measures, and beyond border measures. Moreover, the book looks at industrial policies from a broader perspective such as investment, accessing inputs, labour, services, as well as research and innovation policies. ■

ERIA Holds Workshop to Follow Up 'Lao PDR at the Crossroads'



Since February 2017, ERIA and the three aforementioned agencies have been involved in the framework discussing industrial development strategies for Lao PDR.

The Economic Research Institute for ASEAN and East Asia (ERIA) and the Ministry of Industry and Commerce (MOIC) of Lao PDR held a workshop in Vientiane on 6 February 2018.

The '4th Workshop: Follow Up on Lao PDR at the Crossroads' was chaired by H.E. Madame Khemmani Pholsena, Minister for Industry and Commerce for Lao PDR; Hon Amb Takeshi Hikihara, Ambassador of Japan to the Lao PDR; and Prof Hidetoshi Nishimura, President of ERIA. Several agencies, such as the Japan International Cooperation Agency (JICA), the Japan External Trade Organization (JETRO), and the Japanese Chamber of Commerce and Industry in Vientiane, also attended the Workshop.

Since February 2017, ERIA and the three aforementioned agencies have been involved in the framework discussing industrial development strategies for Lao PDR. It was a follow up of Lao

PDR at the Crossroads: Industrial Development Strategies 2016-2030 that ERIA published in June 2016 in cooperation with MOIC to complement the '8th Five Year National Socio-Economic Development Plan (2016-2020)' and the '10 Year Socio-Economic Development Strategies (2016-2025) and Vision 2030'.

In their opening remarks, Minister Pholsena, Ambassador Hikihara, and Prof Nishimura expressed their appreciation on the hard work of the people involved in this framework and highlighted the importance of creating concrete actions to realise industrial policies. After the remarks, MOIC presented a report on the progress of discussions with ERIA, JICA, and JETRO, which has been developed at four subcommittee working groups: (1) agriculture, food processing, and agricultural value chain, (2) garment and other labour intensive industries (particularly wood processing, artisan crafts,

and IT), (3) small- and medium-enterprises, and (4) industrial estates and special economic zones. From these working groups, MOIC also presented potential projects that should be implemented together these agencies in 2018. In response, the agencies provided useful comments on how to effectively implement projects proposed by MOIC, followed by active discussions among all participants. In particular, ERIA showed an interest in organising its capacity building programme for Lao officials, which was funded by the Australian government.

Potential projects discussed at the workshop are highly expected to materialise to achieve officially-formulated Lao development plans, which would result in steady industrialisation with global competitiveness in the coming years. ■

President of ERIA Pays Courtesy Call on the Secretary-General of ASEAN



Prof Hidetoshi Nishimura, the President of the Economic Research Institute for ASEAN and East Asia (ERIA), paid a courtesy call to the new Secretary-General of ASEAN Hon Dato Paduka Lim Jock Hoi on 1 February 2018.

Dato Lim succeeded the outgoing

Secretary-General Le Luong Minh from Viet Nam on 1 January 2018.

Prof Nishimura expressed his happiness that Dato Lim, who is the chairman of ERIA's Governing Board, has assumed office as SG of ASEAN and promised stronger partnership between ERIA and ASEAN Secretariat.

Dato Lim Jock Hoi expected ERIA's contribution not only in traditional issues, but also in non-traditional cross-cutting issues in the future.

Dato Lim stated that he expected ERIA's contribution not only in traditional issues, but also in non-traditional cross-cutting issues in the future. ■

ERIA among Top Think Tanks Globally

JAKARTA, INDONESIA - 2 February 2018: The Economic Research Institute for ASEAN and East Asia (ERIA) in Jakarta has again been ranked amongst the best think tanks in the world according to the 2017 Global Go To Think Tank Index Report.

ERIA was globally ranked 24th for Top International Economic Think Tanks this year, a significant improvement from last year's rank at number 32. It is a category which included many of the world's most famous think tanks like Brookings Institution and the Peterson Institute

for International Economics. Also at the global level, ERIA came in at 23 for Best Think Tank Network because of its Research Institutes Network and Energy Research Institutes Network - two networks that include influential research institutes from across the region.

'These are excellent results for such a new organisation - ERIA is just celebrating its 10th anniversary this year. I am proud of the small team of experts at ERIA and all of our colleagues across the region who have worked hard to make ERIA into such an excellent institution,' stated

Prof Hidetoshi Nishimura, President of ERIA.

Conducted by the Think Tanks and Civil Societies Program (TTCSP) of the Lauder Institute at the University of Pennsylvania, the annual Global Go To Think Tank Index ranks the world's leading think tanks in a variety of categories. Over 1,900 peer institutions and experts from the print and electronic media, academia, public and private donor institutions, and governments around the world participate in the ranking process, which evaluates over 6,500 think tanks. ■

CLMV Countries Must Go Beyond Regional Integration

Dubbed South-east Asia's last frontier market, Myanmar has been one of ASEAN's most high-profile destinations for investors since the country's opening. There are concerns about the pace of reform in Myanmar, but according to preliminary results from a survey conducted by the Singapore Institute of International Affairs (SIIA) on *"Foreign Investor Perceptions of ASEAN's Market Potential"*, the business community remains upbeat about Myanmar's growth potential.

This is not a flash in a pan. A recent study conducted by the Economic Research Institute for ASEAN and East Asia (ERIA) also found that investors are "returning their focus towards ASEAN", and a key factor is the rise of Cambodia, Laos, Myanmar and Vietnam, collectively known as the CLMV countries. For example, the ERIA report found that Japanese multinational companies (MNCs) have increased their business operations in Myanmar by close to 1000 per cent in just over six years.

Growth challenges

However, the region faces dampening global prospects for trade and investment. Major economies have seen a rise in anti-globalisation sentiment, a trend punctuated by Brexit and US President Donald Trump's decision to pull out from the Trans-Pacific Partnership (TPP).

The CLMV countries are also in danger of losing their comparative advantage. The ERIA study highlighted that the CLMV economies have benefited from having low wages - even lower than the likes of China. However, wages have begun to move upwards, and the CLMV countries are struggling to provide alternative comparative advantages to investors.

Currently, the CLMV countries have the lowest wage costs in ASEAN, led by Myanmar at just over US\$2000 per annum in 2016, compared to US\$6000 in Thailand. However, while Myanmar remains a cheaper destination in absolute terms, its year-on-year increase in wages is 6.5 per cent, compared to just 1.7 per cent in Indonesia and 4.4 per cent in Malaysia.

Recommendations for CLMV countries

Despite the global rise in protectionist sentiment, ASEAN should still remain open to trade and investment. However, present circumstances mean that instead of relying solely on exports to the West for growth, ASEAN member states should also focus on regional integration via the ASEAN Economic Community.

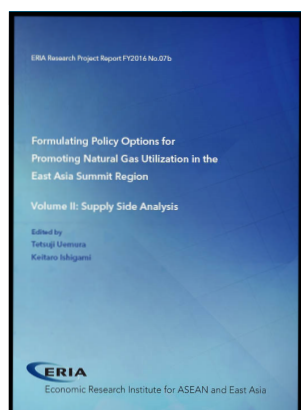
The ERIA study highlighted ASEAN's infrastructure gap and need for "better regulations" as two key areas

for improvement. In particular, ASEAN needs to improve transport infrastructure, as this will provide both an immediate boost to the construction sector as well as fuelling long-term economic growth. Along with improving infrastructure, smoothening regulations will help to reduce business costs and attract major investors. This form of regional integration has the potential to become what ASEAN needs - a new form of comparative advantage.

However, for CLMV countries, efforts to maintaining investor interest cannot stop at regional integration. CLMV countries must strive to narrow their national income gap, build strong SMEs and nurture local industries. Such a strategy will not only help to improve investor confidence, but will also form the basis of sustainable growth and domestic consumption that does not rely on foreign MNCs to provide job creation and FDI.

By 2050, ASEAN is slated to become the fourth largest economy in the world, if taken as a whole. The rise of the CLMV countries is a major factor in that growth and will drive investor interest in ASEAN, but in light of challenging global circumstances, ASEAN countries, and the budding CLMV economies in particular, need to continue working towards regional integration and narrowing internal development gaps. ■

Publications

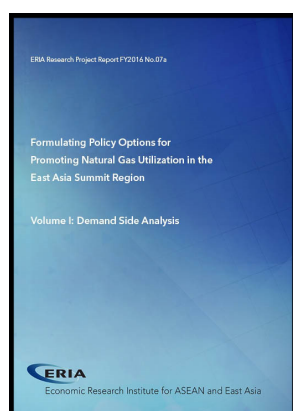


Formulating Policy Options for Promoting Natural Gas Utilization in the East Asia Summit Region Volume II: Supply Side Analysis

Edited by Tetsuji Uemura and Keitaro Ishigami

There is an increasing interest in understanding the demand potential of natural gas and its implication in the East Asia Summit region. This ERIA study was proposed by Japan at the 10th East Asia Summit Energy Ministers Meeting in 2016. Comprising two volumes, this report focuses on ASEAN and India markets and aims at understanding the future natural gas demand and estimating the size of the market on the demand side, and correspondingly deriving the necessary investment in infrastructure on the supply side. From both sides, the challenges and policy options are drawn.

This volume, dedicated to the supply side analysis, tries to identify the most suitable and feasible supply chain solutions based on the size of demand, main users of natural gas, technical constraints, geographical constraints, as well as available existing transport infrastructure. The estimated investment for additional natural gas supply chain by 2030 is US\$81 billion altogether.

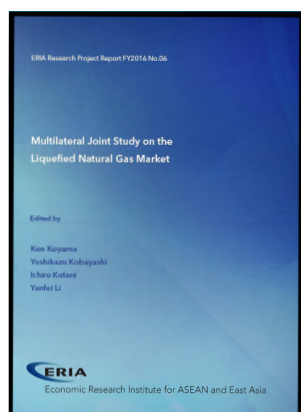


Formulating Policy Options for Promoting Natural Gas Utilization in the East Asia Summit Region Volume I: Demand Side Analysis

Edited by The Institute of Energy Economics, Japan

There is an increasing interest in understanding the demand potential of natural gas and its implication in the East Asia Summit region. This ERIA study was proposed by Japan at the 10th East Asia Summit Energy Ministers Meeting in 2016. Comprising two volumes, this report focuses on ASEAN and India markets and aims at understanding the future natural gas demand and estimating the size of the market on the demand side, and correspondingly deriving the necessary investment in infrastructure on the supply side. From both sides, the challenges and policy options are drawn.

This volume, dedicated to the demand side analysis, asserts that various policies are needed to maximize demand potential. These include clear policy indications for promoting use of natural gas, enhancing economic competitiveness of natural gas, support for developing supply infrastructure and institutional and capacity building.

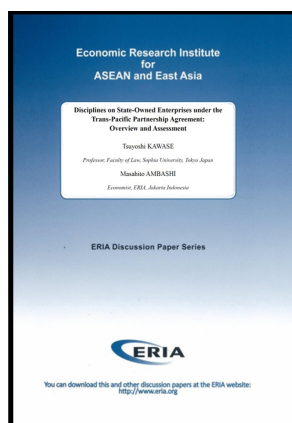


Multilateral Joint Study on the Liquefied Natural Gas Market

Edited by Ken Koyama, Yoshikazu Kobayashi, Ichiro Kutani, and Yanfei Li

The increased use of liquefied natural gas (LNG) is expected to solve many of the energy and environmental problems of the East Asia Summit region by ensuring a stable energy supply at an affordable price. This is especially true considering its abundant and geographically diversified resource base, as well as reducing carbon emissions by replacing more of the carbon-intensive energy. The LNG market in the region, however, has not expanded as much as expected in the early 2010s. This paper thus proposes recommendations to policymakers and the LNG producers and consumers on how they can use natural gas more in Asia.

The expanded use of LNG in Asia will depend on two conditions: its competitiveness against other energy sources, and sufficient investment in every part of the value chain. The report summarizes 'who does what' to achieve these two conditions.



Disciplines on State-Owned Enterprises under the Trans-Pacific Partnership Agreement: Overview and Assessment

By Tsuyoshi Kawase and Masahito Ambashi

This paper analyses the disciplines of state-owned enterprises (SOEs) stipulated in Chapter 17 of the Trans-Pacific Partnership Agreement (TPP). The introduction of the extensive disciplines on SOEs was led by the concern that SOEs are likely to disturb fair international competition regime by conducting business activities not depending on economic rationality and anticompetitive activities. Major provision of this chapter includes definitions and the scope of application, commercial considerations and non-discriminatory treatment, non-commercial assistance, and transparency. While Chapter 17 can be appreciated as the first comprehensive and detailed discipline on SOEs including that of the WTO-plus, it still has problems and remaining issues concerning the disciplines. Nevertheless, the very fact that the TPP includes specific rules for SOEs is appreciated as a first step towards disciplining them in the future.

Upcoming Events

ERIA and ASEAN-Japan Centre: 'ASEAN 50th Anniversary Symposium IV'

Date: 1 March 2018
Venue: Tokyo, Japan

ERIA, IDE-JETRO, Kyoto University and Waseda University Joint International Economic Symposium

Date: 2 March 2018
Venue: Jakarta, Indonesia

The 2nd workshop on Second Phase of Service Supply Chain

Date: 2-3 March 2018
Venue: Jakarta, Indonesia

The 12th Empirical Investigations in Trade and Investment Conference

Date: 8-10 March 2018
Venue: Tokyo, Japan

The First Workshop of Better Expenditure Management of Infrastructure Finance

Date: 11-12 March 2018
Venue: Singapore

ERIA and AMCHAM Briefing

Date: 16 March 2018
Venue: Jakarta, Indonesia

Workshop on NTMs in ASEAN

Date: 20-22 March 2018
Venue: Phuket, Thailand

The Second Workshop of 'ERIA project on GVC, Cities, Cities and Urban Amenities: Implications for Services Trade Liberalisation in East Asia and ASEAN'

Date: 21-22 March 2018
Venue: Adelaide, Australia

The First Policy Dialogue on Distributional Impacts of Disasters: Adaptation Road Map

Date: 25-26 March 2018
Venue: Singapore

The Second Meeting of ERIA's Working Group on Energy Poverty in ASEAN, India and China

Date: 9-10 April 2018
Venue: Bangkok, Thailand

About Us

The Economic Research Institute for ASEAN and East Asia (ERIA) is an international organisation based in Jakarta, Indonesia that conducts in-dept research on issues facing the people and governments of ASEAN and East Asia.

ERIA works closely with the ASEAN Secretariat and research institutes from across East Asia and beyond to provide innovative and analytical research and policy recommendations. Our projects are organised under three research pillars:

- Deepening Economic Integration
- Narrowing Development Gaps
- Achieving Sustainable Development



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