

平成27年度日アジア太平洋フォーラム（アジア）

Asia-Pacific Forum 2015

“ASEAN Community Building and
Regional Economic Integration in East Asia:
Looking Beyond 2015”

報 告 書

2015年11月26日(木)～27日(金)

(インドネシア ジャカルタ 開催)

一般財団法人 国際経済交流財団



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平成 27 年度日アジア太平洋フォーラム

2015 年 11 月 26 日(木)～11 月 27 日 (金) (於：インドネシア ジャカルタ)

<1 日目> 公開フォーラム



開会の辞 ERIA Mr. Izuru Kobayashi



開会の辞 JEF 日下会長



開会の辞
CSIS Dr. Yose Rizal Damuri



基調講演
H.E. Mr. Rizal Affandi Lukman



スピーカー集合写真



パネルセッション 1
モデレーター JEF 原岡専務理事



パネルセッション1 Amb. Mclean, Dr. Wang,
Dr. Ahn, Mr. Haraoka, Dr. Chaturvedi,
Prof. Tay, Mr. Kasugahara



会場の様子



パネルセッション 2
モデレーター Dr. Intal



パネルセッション 2 Dr. Vo,
Dr. Tangkivanich, Dr. Yap,
Mr. Hotradero, Dr. Cho



パネルセッション 3 Dr. Chan, Dr. Nambiar,
Dr. Damuri, Prof. Urata,
Prof. Hawke, Dr. Armstrong



会場の様子

<2日目> 非公開ラウンドテーブル・ディスカッション



(ERIA) Ms.Prakash, Prof. Nishimura,
(JEF) 日下会長, (CSIS) Dr. Simandjuntak



ディスカッションの様子



ディスカッションの様子



ディスカッションの様子

目 次

1. 開 催 趣 旨	1
2. 開 催 概 要	2
3. 詳 細 日 程	4
4. 出 席 者	9
5. 略 歴	11
6. 議 事 要 旨	
日本語	26
英 語	52
7. 発 表 資 料	78
8. 若手研究者の参加報告	
略歴・感想文	132
9. 参 考 資 料	
9-1. インドネシア新聞記事（インドネシア語/仮訳）	138
9-2. 公開フォーラム来場者アンケート集計	141
10. 成 果	142
11. 共 催 団 体 紹 介	145
12. 事 務 局	147

1. 開催趣旨

国際経済交流財団では、我が国と諸外国との経済交流を促進するため、各年における経済問題を取り上げ、アジア・太平洋地域の専門家・有識者間でこれらの問題解決等について議論を重ねてきた。

アジア・太平洋地域に於けるF T Aの推進を目指して2003年に開始した日アジア太平洋フォーラム（Asia-Pacific Forum）は、2014年のシンガポール開催から、これまでの当地域でのF T Aの拡大及び深化、地域統合の進展、また実体経済におけるglobal value chainの展開を踏まえ、①T P PやR C E Pの交渉の進展に寄与するための従来型トピック、に加えて、②F T A交渉が各国の構造改革を進めるための手段（vehicle）との観点から、貿易投資自由化、ひいては地域経済統合に向けての各国内の政治経済面での制約（“behind-the-border-measures”）、国家間の軋轢などの課題とそれらの克服といった内容を取り上げることにした。

2015年度においては、11月26日（木）、27日（金）にインドネシアのジャカルタに於いて、東アジア・アセアン経済研究センター（ERIA）とインドネシア戦略国際研究所（CSIS）との共催で、2015年12月31日にアセアン経済共同体（AEC）が正式に発足することを踏まえ、その後の東アジアでの地域統合や域内の持続的経済成長に向けての課題や解決策を議論すべく、以下のテーマで公開フォーラム（26日午後 於：フェアモントジャカルタ・ホテル）と非公開ラウンドテーブル・ディスカッション（27日午前 於：ERIA）を行った。フォーラムのタイトルは、「ASEAN Community Building and Regional Economic Integration in East Asia: Looking Beyond 2015（ASEAN共同体構築と東アジアにおける地域経済統合：2015年以降を見据えて）」として、この大きなテーマの下、以下の3つのセッションを設けた。

パネルセッション1：A Decade of East Asia Summit and Economic Regionalism: How can we pursue our growth strategy and achieve structural reform?（東アジアサミットと経済的リージョナリズムの10年間：成長戦略を追求し、構造改革を実現するのはどうすればよいか?）、パネルセッション2：ASEAN Economic Community as Driver of Regional Integration in East Asia: Challenges and Opportunities（東アジア地域統合の牽引力としてのASEAN経済共同体：課題と機会）、パネルセッション3：Regional Economic Integration: Can the New Economic Institutions like RCEP, TPP, and AIIB Deepen the East Asian Economic Integration?（地域経済統合：RCEP、TPP、AIIBなどの新たな経済体制は東アジアの経済統合を深化させられるか?）

なお、本事業は競輪の補助（27-21）を受けて実施した。

2. 開催概要

1. 開催日時： 2015年11月26日（木） 13:30-18:30 公開フォーラム
2015年11月27日（金） 09:00-12:00 非公開ラウンドテーブル・
ディスカッション
2. 開催場所： インドネシア ジャカルタ
会場 <1日目> フェアモントジャカルタ・ホテル
Fairmont Jakarta
Jalan Asia Afrika No.8, Gelora Bung Karno, Senayan,
Jakarta Pusat 10270, Indonesia
<2日目> ERIA 会議室
Sentral Senayan II, 6th floor Jalan Asia Afrika No.8,
Gelora Bung Karno, Senayan Jakarta Pusat 10270, Indonesia
3. 主催者：
日本側： 一般財団法人国際経済交流財団／Japan Economic Foundation (JEF)
インドネシア側： 東アジア・アセアン経済研究センター／
Economic Research Institute for ASEAN and East Asia (ERIA)
インドネシア戦略国際研究所／
Center for Strategic and International Studies (CSIS), Indonesia
4. テーマ：
“ASEAN Community Building and Regional Economic Integration in East Asia: Looking
Beyond 2015”
(ASEAN共同体構築と東アジアにおける地域経済統合：2015年以降を見据えて)

Programme

Panel Session 1 : A Decade of East Asia Summit and Economic Regionalism:

how can we pursue our growth strategy and achieve structural reform?

(パネルセッション1：東アジアサミットと経済的リージョナリズムの10年間：成長戦略を追求し、構造改革を実現するにはどうすればよいか?)

Panel Session 2 : ASEAN Economic Community as Driver of Regional Integration in East Asia: Challenges and Opportunities

(パネルセッション2：東アジア地域統合の牽引力としてのASEAN経済共同体：課題と機会)

Panel Session 3 : Regional Economic Integration: Can the New Economic Institutions like RCEP, TPP and AIIB Deepen the East Asian Economic Integration?

(パネルセッション3：地域経済統合：RCEP, TPP, AIIBなどの新たな経済体制は東アジアの経済統合を深化させられるか?)

5. 出席者： 日本、インドネシア、アジア太平洋地域（計14の国・地域）から計24名
（パネリスト・モデレーター・主催者を含む）、及び若手研究者1名

6. 形 式：

< 1 日目 > 公開フォーラム (聴衆：約140名)

< 2 日目 > 非公開ラウンドテーブル・ディスカッション

(出席者：計24名、及び若手研究者1名)

7. 使用言語： 英語

3. 詳細日程

Asia-Pacific Forum 2015

“ASEAN Community Building and Regional Economic Integration in East Asia: Looking Beyond 2015”

A Conference by:

Japan Economic Foundation, Economic Research Institute for ASEAN and East Asia and
Center for Strategic and International Studies, Jakarta

26 - 27 November 2015, Jakarta Programme

Day 1: Thursday, 26 November 2015

PUBLIC FORUM	
11:45-13:00	Welcome Luncheon Hosted by ERIA Venue: Fairmont Jakarta Hotel, Spectrum Restaurant
13:00-13:30	Registration Venue: Fairmont Jakarta Hotel, Ballroom 1, Ground Floor
13:30-13:45	Welcome Remarks by ERIA, JEF and CSIS Mr. Izuru Kobayashi, COO (Chief Operating Officer), Director General of Administration and Personnel Department, ERIA Mr. Kazumasa Kusaka, Chairman and CEO, Japan Economic Foundation Dr. Yose Rizal Damuri, Head, Department of Economics, CSIS, Jakarta
13:45-14:00	Keynote Address: The Future of East Asia Integration: East Asia Summit and ASEAN Community Beyond 2015 H. E. Mr. Rizal Affandi Lukman , Deputy Minister of International Economic Cooperation at the Coordinating Ministry of Economic Affairs The East Asia Summit will complete 10 years of existence in November 2015. A decade of regionalism and economic integration is a good time to evaluate

	<p>the outcomes and also the challenges ahead for this group of 18 countries. The ASEAN has been the driver of East Asia Summit, as also it has been central to all economic regionalism and integration efforts in East Asia. As ASEAN becomes an ASEAN Community in 2015, it is again a sweet coincidence to evaluate ASEAN's contribution to the East Asian integration, and more specifically the economic integration. There is also the overarching concerns of security, environment and human development, as also the quality of development in the region. 2015 is also a landmark year to assess the future concerns of the region and the forces that will influence the integration of East Asia beyond 2015.</p>
14:00-14:05	<p>Photo Session</p>
14:05-15:20	<p>Panel Session 1: A Decade of East Asia Summit and Economic Regionalism: how can we pursue our growth strategy and achieve structural reform?</p> <p>As Asia looks forward to become the driver of the world's economy, the East Asian regionalism and economic integration has formally completed 10 years in the East Asia Summit and the ASEAN Economic Community has been formed in 2015. But there are challenges ahead for the economic integration. Individual member countries guard their national interests, economic growth is facing headwinds. Whether East Asia can achieve economic growth is dependent upon how each member country can achieve its economic structural reform in order to take full advantage of regional economic integration.</p> <p>Security concerns also remain heightened in the region. How can the East Asia Summit maintain a delicate balancing act between national and regional interests and become a driver of regional integration in the years ahead?</p> <p>Moderator: Mr. Naoyuki Haraoka, Executive Managing Director, Japan Economic Foundation</p> <p>Panelists: (5 minutes each)</p> <ol style="list-style-type: none"> 1. Amb. Murray McLean AO, Chair, Australia-Japan Foundation, Australia 2. Dr. Zhenyu Wang, Director of China National Committee for Pacific Economic Cooperation, China 3. Dr. Choong-Yong Ahn, Chairman, Korea Commission for Corporate Partnership, Korea 4. Dr. Sachin Chaturvedi, Director General, Research and Information

	<p>System for Developing Countries, India</p> <p>5. Prof. Simon S C Tay, Chairman, Singapore Institute of International Affairs, Singapore</p> <p>6. Mr. Daiki Kasugahara, President Director, Jakarta Office, Japan External Trade Organization (JETRO), Japan</p>
15:20-15:35	Coffee Break
15:35-16:50	<p>Panel Session 2: ASEAN Economic Community as Driver of Regional Integration in East Asia: Challenges and Opportunities</p> <p>The year 2015 is a critical one for the community-building efforts of East Asia. The region plays an increasingly greater role as a growth center of the world and continues to attract global attention, even as the realisation of the ASEAN Community is on the doorstep. ASEAN has accomplished remarkable achievements as it moves towards being a formal community by the end of this year. The ASEAN Community takes center stage in December 2015 amid global concerns of structural economic imbalances and fragile security. How can ASEAN Community continue to drive the East Asian integration beyond 2015 and what are the likely challenges?</p> <p>Moderator: Dr. Ponciano S. Intal, Senior Economist, ERIA</p> <p>Panelists: (5 minutes each)</p> <ol style="list-style-type: none"> 1. Dr. Vo Tri Thanh, Vice President, Central Institute for Economic Management, Vietnam 2. Dr. Somkiat Tangkitvanich, President, Thailand Development Research Institute, Thailand 3. Dr. Josef T Yap, Professorial Lecturer, School of Economics, University of the Philippines 4. Mr. Poltak Hotradero, Head of Research Division, Indonesia Stock Exchange, Indonesia 5. Dr. Cho Cho Thein, Professor, Department of Applied Economics, Yangon University of Economics, Myanmar
16:50-17:05	Coffee Break

17:05-18:20	<p>Panel Session 3: Regional Economic Integration: Can the New Economic Institutions like RCEP, TPP and AIIB Deepen the East Asian Economic Integration?</p> <p>New regional engagements, which emphasises deeper economic integration among countries of East Asia, and have a greater focus on building a more integrated region, are taking place. The Trans-Pacific Partnership (TPP), Regional Comprehensive Economic Partnership (RCEP) and the Asian Infrastructure Investment Bank (AIIB) will significantly influence economic developments in the East Asia region. With TPP and RCEP negotiations scheduled to conclude soon, how can we realise the potential and opportunities of these mega-regionals? How can AIIB be an instrument of sustainable and inclusive growth in the region?</p> <p>Moderator: Dr. Yose Rizal Damuri, Head, Department of Economics, CSIS, Jakarta</p> <p>Panelists: (5 minutes each)</p> <ol style="list-style-type: none"> 1. Dr. Man-Jung Mignonne Chan, Founder and CEO, Out-of-the-Box Consultancy, Chinese Taipei 2. Dr. Shankaran Nambiar, Senior Research Fellow, Malaysian Institute of Economic Research, Malaysia 3. Prof. Shujiro Urata, Professor of Economics, Graduate School of Asia-Pacific Studies, Waseda University, Japan 4. Prof. Gary Hawke, Emeritus Professor, Victoria University of Wellington, New Zealand 5. Dr. Shiro Armstrong, Co-Director, Australia Japan Research Center, Australian National University, Australia
18:20-18:30	<p>Closing Remarks by ERIA</p> <p>Ms. Anita Prakash, Director General for Policy Relations, ERIA</p>
19:00-21:00	<p>Welcome Dinner Hosted by JEF</p> <p>Venue: Diamond 1 & 2, 3rd floor, Fairmont Jakarta Hotel</p>

Day 2: Friday, 27 November 2015

PRIVATE ROUNDTABLE DISCUSSION Venue: ERIA, 5 th floor, Sentral Senayan II	
09:00-09:05	Welcome Remarks by ERIA Prof. Hidetoshi Nishimura President of Economic Research Institute for ASEAN and East Asia
09:05-10:20	Private Roundtable Discussion The roundtable will review the sessions at the Public Forum and identify new discussion themes for next year's Asia Pacific Forum. Moderator: Mr. Kazumasa Kusaka Chairman and CEO, Japan Economic Foundation
10:20-10.40	Coffee Break
10:40-11:55	Private Roundtable Discussion Continued Moderator: Prof. Hidetoshi Nishimura President of Economic Research Institute for ASEAN and East Asia
11:55-12:00	Closing Remarks by JEF Mr. Kazumasa Kusaka Chairman and CEO, Japan Economic Foundation
12:00-13:00	Farewell Luncheon Hosted by ERIA and JEF Venue: ERIA, 5 th floor

4. 出席者

(氏名のアルファベット順 24名)

- Dr. Choong-Yong AHN, Chairman, Korea Commission for Corporate Partnership
- Dr. Shiro ARMSTRONG, Co-Director, Australia Japan Research Center, Australian National University
- Dr. Man-Jung Mignonne CHAN, Founder and CEO, Out-of-the-Box Consultancy
- Dr. Sachin CHATURVEDI, Director General, Research and Information System for Developing Countries
- Dr. CHO Cho Thein, Professor, Department of Applied Economics, Yangon University of Economics
- Dr. Yose Rizal DAMURI, Head, Department of Economics, Center for Strategic and International Studies (CSIS), Indonesia
- Mr. Naoyuki HARAOKA, Executive Managing Director, Japan Economic Foundation (JEF)
- Prof. Gary HAWKE, Emeritus Professor, Victoria University of Wellington
- Mr. Poltak HOTRADERO, Head of Research Division, Indonesia Stock Exchange
- Dr. Ponciano S. INTAL, Jr., Senior Economist, Economic Research Institute of ASEAN and East Asia (ERIA)
- Mr. Daiki KASUGAHARA, President Director, Jakarta Office, Japan External Trade Organization (JETRO)
- Mr. Izuru KOBAYASHI, Chief Operating Officer, Economic Research Institute for ASEAN and East Asia (ERIA)
- Mr. Kazumasa KUSAKA, Chairman and CEO, Japan Economic Foundation (JEF)
- Dr. Shankaran NAMBIAR, Senior Research Fellow, Malaysian Institute of Economic Research
- Amb. Murray MCLEAN AO, Chair, Australia Japan Foundation
- Prof. Hidetoshi NISHIMURA, President, Economic Research Institute for ASEAN and East Asia (ERIA)
- Ms. Anita PRAKASH, Director General, Policy Relations, Economic Research Institute for ASEAN and East Asia (ERIA)
- Dr. Djisman SIMANDJUNTAK, Chair of the Board of Directors of CSIS Foundation
- Dr. Somkiat TANGKITVANICH, President, Thailand Development Research Institute
- Prof. Simon SC TAY, Chairman, Singapore Institute of International Affairs
- Prof. Shujiro URATA, Professor of Economics, Graduate School of Asia Pacific Studies, Waseda University

- Dr. VO Tri Thanh, Vice President, Central Institute for Economic Management
- Dr. Zhenyu WANG, Director, China National Committee for Pacific Economic Cooperation, China; Associate Research Fellow at China Institute for International Studies(CIIS)
- Dr. Josef T YAP, Professorial Lecturer, School of Economics, University of Philippines

(若手研究者 1名)

- Mr. Kensuke YANAGIDA, Research Fellow, Japan Institute of Internatilnal Affairs

5. 略歴

Biographies of Panelists

公開フォーラム基調講演者



H.E. Dr. Rizal Affandi Lukman

**Deputy Minister for International Economic and Financial Cooperation,
Coordinating Ministry for Economic Affairs, Republic of Indonesia**

He received his bachelor degree in Industrial Engineer in 1986 from ITB (Bandung Institute of Technology), Indonesia. Magister in International relations in 1993 from International University of Japan, Nigata Japan and PhD in International Development, Nagoya University Japan.

Since November 2010, he has been appointed as the Deputy Minister for International Economic Cooperation, Coordinating Ministry for Economic Affairs. He has written various articles for academic journals, mostly in the topic of Economic Affairs, Monetary Finance, and management. He has also been speaker in various International workshops and seminar. Aside from academic world, he also had some experience in cooperate sector as independent commissioner in Pertamina Hulu Energy and Krakatau Wajatama Company.

出席者



Mr. Kazumasa Kusaka

Chairman and CEO, Japan Economic Foundation (JEF)

Kazumasa Kusaka has been Chairman and CEO of the Japan Economic Foundation (JEF) since April 1, 2013, and is also a Professor at University of Tokyo Graduate School of Public Policy. He previously served for 36 years in Japan's Ministry of International Trade and Industry (MITI), rising to become vice-minister for international affairs in the reorganized Ministry of Economy, Trade and Industry (METI) in 2004. During his long career in public service, Kusaka was seconded to the International Energy Agency (IEA)/OECD and was Japan's senior official for Asia-Pacific Economic Cooperation (APEC). He played a central role in Asia's economic integration, promoting FTAs in the region as well as serving as a senior official negotiating the Doha development agenda of the WTO. He was head of Japan's Energy Agency and held director-general positions in technology and environmental policy in addition to trade and investment-related areas within METI. He was also instrumental in finalizing the Kyoto Protocol, and developing Japan's energy and environment policies. Among many other posts Kusaka has held are Special Adviser to the Prime Minister on Global Warming, senior vice president of Mitsubishi Electric, executive adviser to Dentsu Inc., and president of the Japan Cooperation Center for the Middle East.



Prof. Hidetoshi Nishimura
President, Economic Research Institute for ASEAN and East Asia (ERIA)

Graduated from the Faculty of Law, the University of Tokyo. Joined the Ministry of International Trade and Industry in 1976. Has assumed numerous positions, including Representative of the Asia-Pacific Region of the Japan Overseas Development Corporation, Director of the Southeast Asia and Pacific Division of the Trade Policy Bureau, Vice Governor for International Affairs of Ehime Prefecture, Director-General of the Business Support Department of the Small and Medium Enterprise Agency, Executive Managing and President of the Japan- China Northeast Development Association. Assumed position of ERIA Executive Director in June 2008 and ERIA President in June 2015. Visiting Professor of Waseda University, Darma Persada University, Miyazaki Sangyo-Keiei University and Fellow of Meiji Institute for Global Affairs, Meiji University.



Dr. Djisman Simandjuntak
Chair of the Board of Directors of CSIS Foundation

Djisman Simandjuntak is a senior economist and Chair of the Board of Directors of CSIS Foundation. He has worked on a wide array of issues, many in the field of international economics and macroeconomics. Moreover, he also lectures at various national universities, and is the Executive Director of the Prasetya Mulya Business School until January 2004. He also serves as an independent commissioner at the Lippo Bank.

Djisman obtained his bachelor's from the Faculty of Economics at Parahiyangan University, Bandung in 1973. Then, in 1979, he entered the *Diplom Rer-Pol* program at the University of Cologne, majoring in Monetary Economics and Public Finance. He immediately joined the PhD program at the same university, and obtained his PhD in International Economics in 1983.

Research Interest : Macroeconomics, International Economics



Dr. Yose Rizal Damuri

Head Department of Economics, Center for Strategic and International Studies (CSIS), Indonesia

Yose Rizal Damuri, Head of the Department of Economics, Center for Strategic and International Studies. His research activities focus on international trade, regional integration and globalization of value chain. He is active in several research and advisory networks both in Indonesia and in East Asia, such as Indonesia Service Dialogue (ISD) and Asia-Pacific Research and Training Network on Trade (ARTNeT).

Yose also teaches International Economics courses at the Faculty of Economics University of Indonesia. In addition, he occasionally writes in local and national newspapers. He received his Bachelor of Economics from the Faculty of Economics, University of Indonesia. He continued his study at the National Centre for Development Studies, Australian National University (ANU), Canberra and got his Master of Economics of Development (MEcDev). He received his PhD in International Economics from the Graduate Institute of International Studies (HEI), Geneva, Switzerland.



Mr. Naoyuki Haraoka

Executive Managing Director, Japan Economic Foundation

Born in Tokyo in 1955. After graduating the University of Tokyo in 1978 (Bachelor of Economics), he joined MITI (Ministry of International Trade and Industry) of Japanese government. Having been posted in the industrial policy section and the international trade policy section for a few years, he was enrolled in a two year MPA (Master of Public Administration) programme at Woodrow Wilson School of Princeton University in the US on a Japanese government sponsorship. After having acquired MPA at Princeton, he rejoined MITI in 1984 as an economist. Since then he had been posted as Deputy Director and Director of a number of MITI divisions including Research Division of International Trade Policy Bureau. He was also posted in Paris twice, firstly, Principal Economist of Trade Bureau of OECD (Organization of Economic Cooperation and Development) from 1988 to 1992 and secondly Counselor to Japanese Delegation of OECD from 1996 to 1999. After coming back to MITI from his second stay in Paris, at the occasion of the government structural reform in 2001 when MITI was remodeled as METI (Ministry of Economy Trade and Industry) he joined the efforts to found METI research institute, Research Institute of Economy Trade and Industry as its Director of Administration. He became Chief Executive Director of JETRO San Francisco in 2003 and stayed in San Francisco until 2006. He was Director-General of METI Training Institute from 2006 until July, 2007 when he left METI permanently and joined JEF as Executive Managing Director.



Amb. Murray McLean AO
Chair, Australia Japan Foundation, Australia

Murray McLean is Chair, Australia Japan Foundation (since 2012); a Vice Chancellor's Professorial Fellow at Monash University (since 2012); a non-resident Fellow at the Lowy Institute (since 2014) and Chairman of his family company, Dunmore McLean Pty Ltd.

Formerly a senior officer of the Australian Department of Foreign Affairs and Trade (DFAT), he retired in 2012 after a 42 year career during which he was Ambassador to Japan (2004-2011) initiating negotiations on the FTA and on growing security cooperation as well as leading Australia's response to the earthquake, tsunami and nuclear disasters; Deputy Secretary of DFAT (2004); First Assistant Secretary, North Asia Division (2001-2003), High Commissioner in Singapore (1997-2001); Assistant Secretary, East Asia Branch, (1992-1996), and Consul General, Shanghai.



Dr. Zhenyu Wang
Director, China National Committee for Pacific Economic Cooperation, China; Associate Research Fellow at China Institute for International Studies (CIIS)

He joined China National Committee for Pacific Economic Cooperation (CNCPEC) / China Institute for International Studies (CIIS) in 1998 after graduation from the English Department, Peking University with a MA in linguistics. From 2004 to 2006, Mr. Wang served as Third Secretary and later Second Secretary in the Chinese Embassy in Papua New Guinea. He graduated from the Department of Asia-Pacific Studies, Graduate School of China Academy of Social Sciences (CASS) with a doctorate degree in 2015. His research interests include Economic cooperation in the Asia-Pacific region and Relations between China and Oceanic countries.



Dr. Choong-Yong Ahn
Chairman, Korea Commission for Corporate Partnership, Korea

Dr. Ahn is currently Chairman, Korea Commission for Corporate Partnership (KCCP) and responsible for inducing voluntary collaborations and nurturing synergy between Korea's big businesses and small and medium enterprises. Before taking his current post, he served as Foreign Investment Ombudsman (2006-2014) who is the troubleshooter responsible for resolving grievances raised by foreign investor at the Korea Trade and Investment Promotion Agency in Korea. He is former Chairman of the Presidential Regulatory Reform Committee (2010-2012). He holds also Distinguished Professorship at Graduate School of International Studies, Chung-Ang University. While on sabbatical from Chung-Ang University, he also served several posts such as the President of the Korea Institute for International Economic Policy (2002-2005); Chair of the APEC Economic Committee; Chair of Board, Choheung Bank; consultant to the World Bank; UNIDO Chief Technical Advisor to the Economic Planning Unit of Malaysia to design Malaysia's industrial master plan; and served as President of several academic societies in Korea including the Korea International Economics Association, Korean Association of Trade and Industry Studies, and the Korea Econometric Society.

Dr. Ahn's honors include the Economist of the Year Award from the Maeil Business Daily Newspaper in Korea, the Okita Policy Research Award by the National Institute for Research Advancement in Japan for his publication on "Modern East Asian Economy", and Free Economy Publication Award by the Federation of Korean Industries. Since receiving his Ph.D. from Ohio State University, Dr. Ahn has published many articles in international journals including Review of Economics and Statistics, European Economic Review, Japanese Economic Review, Journal of Asian Economics and Monograph papers in North-Holland, Cambridge University Press, Springer and Edward Elgar, etc



Dr. Sachin Chaturvedi
Director General, Research and Information System for Developing Countries, India

Dr. Sachin Chaturvedi is Director General at the Research and Information System for Developing Countries (RIS), a New Delhi-based autonomous Think-Tank. He was also a Global Justice Fellow at the MacMillan Center for International Affairs at Yale University. He works on issues related to development cooperation policies and South-South cooperation. He has also worked on trade and innovation linkages with special focus on WTO. Dr. Chaturvedi has served as a Visiting Professor at the Jawaharlal Nehru University (JNU) and has also worked as consultant to the UN Food and Agriculture Organisation, World Bank, UN-ESCAP, UNESCO, OECD, the Commonwealth Secretariat, IUCN, and to the Government of India's Department of Biotechnology and the Ministry of Environment and Forests, among other organizations. He has been a Developing Country Fellow at the University of Amsterdam (1996), Visiting Fellow at the Institute of Advanced Studies, Shimla (2003), and Visiting Scholar at the German Development Institute (2007). His experience includes working at the University of Amsterdam on a project on International Development Cooperation and Biotechnology for Developing Countries supported by the Dutch Ministry of External Affairs. Dr. Chaturvedi has also been a member of the IGSAC Committee of Experts for evolving a framework for cooperation on conservation of biodiversity in the SAARC region, as well as a member of the Editorial Board of Biotechnology Development Monitor (the Netherlands) and Asian Biotechnology Development Review (New Delhi). He has authored two books and edited four books apart from publishing several research articles in various prestigious journals.



Prof. Simon SC Tay
Chairman, Singapore Institute of International Affairs, Singapore

Simon Tay is Chairman of the Singapore Institute of International Affairs (SIIA), rated in 2014 as the best in Asia and the Pacific. He is concurrently Associate Professor, teaching international law at the National University of Singapore, and author of the well-received book on Asian regionalism and the role of America, *Asia Alone* (2010, Wiley).

Professor Tay is Senior Consultant at WongPartnership, a leading Asian law firm. He serves on Global Advisory Boards for Toyota Motor Corporation and MUFG, and on the boards of Hyflux Ltd. and Far East Organization. He has also served as Chairman of the National Environment Agency, and has taught as a visiting professor at Yale University, the Fletcher School and Harvard Law School.

He graduated in law from the National University of Singapore (1986) and Harvard Law School (1993), where he won the Laylin prize for the best thesis in international law.



Mr. Daiki Kasugahara
President Director, Jakarta Office, Japan External Trade Organization (JETRO), Japan

Born in Tokyo in 1967. After graduating the University of Tokyo in 1989 (Bachelor of Law), he joined MITI (Ministry of International Trade and Industry). Having been posted in the industrial policy section, he was enrolled in a two year MSFS (Master of Science in Foreign Services) program at Edmund A. Walsh Wilson School of Georgetown University on a Japanese government sponsorship. After having acquired MSFS at Georgetown, he rejoined MITI in 1995 and was posted to a number of MITI/METI divisions including Steel Industry Division. After serving as the Director of Welfare Planning Office of METI, he was posted in Bangkok for the preparation of the establishment of the Economic Research Institute for ASEAN and East Asia (ERIA) in 2007. After the location of ERIA was decided to be in Jakarta, he was transferred to Jakarta in 2008 and served there as its General Manager for 4 years. After finishing service in ERIA, he returned to METI as Director of Asia Pacific Division and served there for three years, from 2012 to 2015. In September 2015, he took the position as the President Director of JETRO Jakarta Office.



**Dr. Ponciano S. Intal, Jr.,
Senior Economist, Economic Research Institute of ASEAN and East
Asia (ERIA)**

Dr. Intal has been the lead coordinator of a number of ERIA projects on ASEAN Economic Community over the past five years, including ASEAN RISING : ASEAN and AEC beyond 2015; the Mid-Term Review of the Implementation of the AEC Blueprint; and the AEC Scorecard monitoring project. At present, he is the lead coordinator of the project Framing the ASEAN Socio-Cultural Community (ASCC) Post 2015 and the project Towards Responsive Regulations and Regulatory Coherence in ASEAN and East Asia: Deconstructing Effective and Efficient Regulatory Management Systems. Dr. Intal also led two important ERIA projects on agricultural trade and development in ASEAN.

Dr. Intal finished his Bachelor Degree in Business Administration major in Economics (summa cum laude) from Mindanao State University, Philippines in 1970 and a Ph. D in Economics from Yale University (New Haven, Connecticut, USA) in 1983.



**Dr. Vo Tri Thanh
Vice President, Central Institute for Economic Management, Vietnam**

Dr. Vo Tri Thanh is currently the Vice President of the Central Institute for Economic Management (CIEM). He holds a Bachelor of Science from the Moscow State University, and a Master degree in Economics and a PhD degree in Economics both from the Australian National University. Dr. Vo Tri Thanh mainly undertakes research and provides consultation on issues related to trade liberalization and international economic integration and macroeconomic policies. His other areas of interests include institutional reforms, financial system and economic development.



Dr. Somkiat Tangkitvanich
President, Thailand Development Research Institute

Dr. Somkiat Tangkitvanich is the President of the Thailand Development Research Institute (TDRI), a leading public policy think tank in Thailand. He obtained his PhD in Computer Science from Tokyo Institute of Technology. He has been recognized as a leading Thai expert in the areas of trade and investment policies, innovation policy, education policy and ICT policy. He is also the main architect of Thai PBS, the first public television in Southeast Asia. Dr. Somkiat was the recipient of the 2008 Thailand Eisenhower Fellowship. Under his leadership, TDRI was nominated “Person of the Year” in 2012 by the Bangkok Post.



Dr. Josef T Yap
Professorial Lecturer, School of Economics, University of Philippines

Josef T. Yap was President of the Philippine Institute for Development Studies, where he worked for 26 years until his retirement on June 30, 2013. While at PIDS, he specialized in macroeconomic policy and applied econometrics. Dr. Yap finished his undergraduate and doctoral studies at the University of the Philippines Diliman and went to the University of Pennsylvania on a post-graduate program. In 2010, Dr. Yap was honored as one of the 100 outstanding alumni of the UP Diliman College of Engineering as part of its Centennial celebration. His current research interest centers on regional economic integration in East Asia. Dr. Yap was the regional coordinator of the East Asian Development Network and was actively involved in the establishment of the Economic Research Institute for ASEAN and East Asia (ERIA). He is co-author of the book *The Philippine Economy: East Asia's Stray Cat? Structure, Finance and Adjustment* and is an Editorial Adviser of the *Asian Economic Journal*. At present, Dr. Yap is a Professorial Lecturer at the University of the Philippines School of Economics.



Mr. Poltak Hotradero
Head of Research Division, Indonesia Stock Exchange, Indonesia

Born in Bandung, Indonesia in 1971. After graduating from Padjadjaran University in Bandung majoring Communication Science in 1996, he started as private fund manager for several years. In 2001 up to 2004 working as securities analyst at PT. Dinamika Usaha Jaya Securities covering telecommunication sector and managing funds for several institutional clients, before leaving the company to study Economics, Finance, and Management in Bristol University, UK supported by Chevening Scholarship from British Foreign and Commonwealth Office. Back to Indonesia he was working for several securities companies as Head of Research and Economist, before joining Indonesia Stock Exchange in 2010. From 2010 up to 2014, he was appointed as President Commissioner of PT. Indonesian Capital Market Electronic Library, a subsidiary of Indonesia Stock Exchange in the business of providing public information about capital market; and at the same time also served as Chairman of Indonesia Capital Market Education Society. Currently, he is working as Head of Research and Development in Indonesia Stock Exchange and also representing Indonesia in ASEAN Exchanges Forum, Asia Oceania Stock Exchange Federation, and in International Capital Market Association.



Dr. Cho Cho Thein
Professor, Department of Applied Economics, Yangon University of Economics

She is currently a Professor of the Department of Applied Economics, and the faculty member of Yangon University of Economics since 2013. She obtained her B.Econ (Economics) in 1986 and M.Econ (Economics) in 1996 from Yangon Institute of Economics. She was in Jawaharlal Nehru University (JNU) New Delhi, India from 1998 to 2004 joining the PH.D course at Center of Economic Study and Planning of School of Social Science. She achieved a Doctor of Philosophy degree in 2004. Her specialty is in International Economics, and Development Economics. She completed the training courses related on "International Trade" under the auspices of Singapore Cooperation Programme in 2007. She joined the training courses on "CGE modeling for trade Policy Analysis" and "Non-Tariff Measures Data Collector" under the auspices of UN-ESCAP and UNCTAD at Thailand, 2015. She is carrying out the research projects with ADB, UN-ESCAP and UNCTAD. She is also involving in ERIA research Myanmar team. She is also a faculty member of Master of Public Administration Programme and taking the Lecture classes and supervising the Research Thesis of the post-graduate.



Dr. Man-Jung Mignonne Chan
Founder and CEO, Out-of-the-Box Consultancy, Chinese Taipei

Dr. Mignonne Chan has extensive experience in academia, government, business, and media. She is Founder & CEO of Out-of-the-Box Consultancy, and sits in many Boards, including Independent Non-Executive Director of Standard Chartered Bank (Chinese Taipei), Executive Board Member of Association of Emerging Market Studies, Board Member of Prospect Foundation, Association of Strategic Environmental Resources, and Sino-U.S. Economic & Cultural Association.

Dr. Chan is currently coaching negotiation for business and government. She also serves as Advisor to the 21st Century Foundation, Chinese Taipei APEC Study Center, Adjunct Associate Professor of the International Doctoral Program on Asian Studies (IDAS), International Master Program on International Studies (IMPIS), and MBA program at the National Chengchi University.



Dr. Shankaran Nambiar
Senior Research Fellow, Malaysian Institute of Economic Research, Malaysia

Shankaran Nambiar is a Senior Research Fellow at the Malaysian Institute of Economic Research (MIER). His research interests include trade policy, development, and institutional economics.

He has been engaged as a consultant for the Ministries of Finance, International Trade and Industry, and the Ministry of Domestic Trade and Consumer Affairs in Malaysia. He has also been a consultant for international agencies such as UNESCAP, UNDP, UNECLAC, ILO, ADBI, ERIA and JETRO. As a consultant, he has worked on areas such as competition policy, distributive trade, industrial development, international trade and trade policy, and poverty. He also has an active interest in regional planning.

He has been a member of the Working Group for the Malaysian Export Council. He was a member of the International Working Group on the Doha Agenda. He has been involved in the drafting of the Third Industrial Master Plan and the Malaysian Consumers' Master Plan. He has also conducted feasibility studies on the US-Malaysia FTA, ASEAN-Pakistan FTA and on the ASEAN-India FTA. In addition, he has been a resource person for capacity-building programmes sponsored by the UN in transition economies in Central and Southeast Asia.

He is author of the recently published book, *The Malaysian Economy: Rethinking Policies and Purposes*. He obtained his PhD in economics from Universiti Sains Malaysia.



Prof. Shujiro Urata
Professor of Economics, Graduate School of Asia Pacific Studies,
Waseda University, Japan

Shujiro Urata is Professor of Economics at Graduate School Asia-Pacific Studies, Waseda University. He is also Specially Appointed Fellow at the Japanese Centre for Economic Research (JCER), Faculty Fellow at the Research Institute of Economy, Trade & Industry (RIETI), and Senior Research Adviser for the President of the Economic Research Institute for ASEAN and East Asia (ERIA) in Jakarta. Professor Urata received his B.A. in Economics from Keio University in 1973 and his M.A. and Ph.D. in Economics at Stanford University in 1976 and 1978. He is a former Research Associate at the Brookings Institution, Economist at the World Bank. He specializes in International Economics and Economics of Development. He has held a number of research and advisory positions including senior advisor to the Government of Indonesia, consultant to the World Bank, OECD, the Asian Development Bank and the Government of Japan. He published and edited a number of books on international economic issues and is an author and co-author of numerous articles in professional journals. His book publications in English include *Multinationals and Economic Growth in East Asia*, co-editor, Routledge, 2006, *Free Trade Agreements in the Asia-Pacific*, co-editor, World Scientific, 2010, *Economic Consequences of Globalization: Evidence from East Asia*, co-editor, Routledge, 2012, and others.



Prof. Gary Hawke
Emeritus Professor, Victoria University of Wellington, New Zealand

Gary Hawke was Head of the School of Government and Professor of Economic History at Victoria University of Wellington. He held visiting appointments at Stanford University, All Souls' College, Oxford, the Australian National University and a number of institutions in Japan. He is a Fellow of the Royal Society of New Zealand, Distinguished Fellow of the NZ Association of Economists and Fellow of the Institute of Public Administration of New Zealand. He is a Companion of the New Zealand Order of Merit. He consults for government on education policy. He is a member of the board of the New Zealand Committee of the Pacific Economic Co-operation Council, NZPECC, a member of the Academic Advisory Council of the Economic Research Institute for ASEAN and East Asia and represents NZ Institute for Economic Research on its Research Institutes Network. He is now Emeritus Professor, Victoria University of Wellington, and Senior Fellow, NZ Institute of Economic Research.



Dr. Shiro Armstrong
Co-Director, Australia Japan Research Center, Australian National University, Australia

Shiro Armstrong is an economist and Fellow at the Crawford School of Public Policy. He is Co-Director of the Australia-Japan Research Centre, Editor of the East Asia Forum, Director of the East Asian Bureau of Economic Research and Research Associate at the Center on Japanese Economy and Business at the Columbia Business School. Shiro is a recipient of an Australian Government Endeavour Research Fellowship, Gary Saxonhouse Prize Fellowship for Japanese Economics, Crawford Award for best research paper on the Japanese Economy, Japan Foundation Fellowship, Pacific Trade and Development Conference (PAFTAD) Fellowship, Vice-Chancellor's Staff Excellence Award for Public Policy and Outreach and twice the Vice Chancellor's Award for Innovation and Excellence in Service Quality. He has been a Visiting Fellow at the Center on Japanese Economy and Business at Columbia University, the John F Kennedy School of Government at Harvard University, China Centre for Economic Research at Peking University and the the University of Tokyo.



Mr. Izuru Kobayashi
Chief Operating Officer, Economic Research Institute for ASEAN and East Asia (ERIA)

Mr. Izuru Kobayashi is the Chief Operating Officer of the Economic Research Institute for ASEAN and East Asia (ERIA). Before assuming said position in July 2015, he held multiple and diverse positions in the Ministry of Economy, Trade and Industry (METI), Government of Japan, including those related to energy, small and medium enterprises, macroeconomic analysis, international trade and economic cooperation, climate change, and rural development. During his four-year stint in Bangkok from 2005 to 2009, He led various cooperation activities under the AEM (ASEAN Economic Minister) –METI (Ministry of Economy, trade, and industry), including support for the establishment of the Economic Research Institute for ASEAN and East Asia (ERIA). He graduated from the University of Tokyo, Faculty of Law and received a degree in Master in Business Administration from Yale School of Management.



Ms. Anita Prakash
Director General, Policy Relations, Economic Research Institute for ASEAN and East Asia (ERIA)

Anita Prakash is Director General (Policy Relations) at the Economic Research Institute for ASEAN and East Asia (ERIA) in Jakarta, Indonesia. Her key role at ERIA is policy support to government and businesses, using the research results of ERIA. She works closely with ASEAN Member states and their Dialogue Partners in the Asia Pacific Region, and also in Europe.

Earlier, she worked with Government of India for strengthening policy reforms in social and economic sectors in India. She was in the implementation team for India's Universal Elementary Education Programme and in India's Look East Policy.

Her research interests are in the area of Public Policy and Political Economy of Development. Her research works cover economic development and cooperation issues in South East and East Asia.

Ms Prakash is a Master of Arts in Political Science (1987) and M. Phil in Development Studies (1990) from Delhi University. She has MBA Degree (2003) from the Australian National University.

6. 議事要旨

(日本語)

以下の日本語サマリーは、ERIA側で作成した英文サマリーを当財団で仮訳したものである。

サマリー (仮訳)

日アジア太平洋フォーラム 2015

『ASEAN 共同体構築と東アジアにおける地域経済統合：2015 年以降を見据えて』

会議共催者：国際経済交流財団、東アジア・アセアン経済研究センター、

インドネシア戦略国際研究所

2015 年 11 月 26 日

ジャカルタ フェアモントホテル

東アジア・アセアン経済研究センター (ERIA)、国際経済交流財団 (JEF)、インドネシア戦略
国際研究所 (CSIS) による開会の挨拶

小林出氏 (ERIA COO 兼管理・人事部門長)

アセアン経済共同体 (AEC) の発足は、すべてのステークホルダーが賞賛すべきことです。今はまさに祝福の時ですが、ASEAN 統合は近い将来において重大な経済的課題に直面します新たな連携協定である環太平洋パートナーシップ (TPP) の導入により、ASEAN の中心性と AEC への関与に疑問が生じています。TPP は ASEAN 諸国に対し、地域との統合深化における課題を提示する可能性もあります。現時点では、マレーシアやベトナムなど数ヶ国の ASEAN 諸国が TPP 加盟の意思を表明しています。ASEAN 諸国のうち非 TPP 参加国が、AEC を深化するよりも TPP 加盟により大きな関心を持つのではないかという懸念が拡大しつつあります。これは地域内の安定性を高めるうえで、ASEAN にとっての課題と言えます。

しかし ASEAN がこのような課題に直面するのは初めてではありません。冷戦終了時、ASEAN はその根本的な存在理由を失いました。また、より規模が大きく、より強力に見える経済協力体制を有する APEC が 90 年代初頭に形成された際にも ASEAN の存在価値は小さくなったように思われました。しかし ASEAN 諸国は APEC が目指したものよりも進歩的な取り組みを案出しました。ASEAN のリーダーたちは 1992 年、AFTA 形成に合意しました。これが東アジア統合にお

ける ASEAN 中心性の出発点でした。AFTA は最終的に AEC となり、世界の投資家に ASEAN が単一市場・生産拠点であることを納得させました。

今また TPP によって生じる課題を克服するため、ASEAN には新たなイニシアティブが必要です。

日アジア太平洋フォーラムは、地域統合に関する議論を触発するための優れた基盤となります。ERIA は ASEAN 統合に強い信念を持っています。統合と中心性を支持するため、ERIA は ASEAN 統合に関する議論推進に尽力を惜しみません。

日下一正氏（国際経済交流財団 会長兼 CEO）

日下氏は 2016 年の ASEAN 経済共同体発足を祝い、ASEAN 諸国が引き続き東アジアの地域経済統合実現のために中心的な役割を果たすことを祈念しました。

日アジア太平洋フォーラムは、持続可能な経済成長を実現するために FTA を推進する目的で、2003 年にシンガポールで初めて開催されました。それ以来この年次フォーラムでの議論は深まり続け、「国内施策（behind the border measures）」と呼ばれる国内政策・施策をも対象としています。

ASEAN 統合からも分かるように、統合の深化は各国および地域の経済・社会・政治に影響をもたらし、それらの問題をどのように克服するかが大きな課題となるでしょう。本フォーラムの真のねらいは、潜在的成長力の実現を妨げる諸要因を把握し、貿易および投資の自由化をテコとして構造改革を推奨することによりそれらの障壁を取り除くことです。

また、所得格差と資産格差の拡大や固定を避けることも一層重要になります。安定した中間層を拡大し、その減少を防ぐことは、間違いなく政治的・社会的安定性に貢献し、潜在的成長力の強化につながります。

「アベノミクス」における成長戦略の中核は、TPP 交渉や RCEP 交渉を通じて構造改革を加速することにあります。これらのメガ FTA は、成長の主要牽引力となる直接投資をさらに拡大することにより、東アジア地域の持続的発展を確保します。

「政治経済（political economy）」という表現から分かるように、この地域の成長戦略を成功させるために我々は経済と政治のダイナミズムを理解し、そこから学ばなければなりません。

ヨセ・リザル・ダムリ博士（CSIS 経済部門 部門長）

2015 年の日アジア太平洋フォーラムは、東アジアにおける地域統合支援を主眼とします。2015 年末までに、ASEAN 諸国は正式に AEC を発足させます。AEC 以外にも TPP のような連携イニシアティブが存在し、インドネシアなどのより多くの国々が連携に加盟しようとしています。また、アジア太平洋地域に沿った連携を推進する RCEP や、AIIB のような新たな開発銀行もあります。各連携協定は域内における経済発展の主要推進力の 1 つとなるでしょう。

このように、ASEAN 諸国は ASEAN 協力へのコミットメントを要請し、将来に向けて統合ロードマップを策定することが重要です。加盟国間の一貫性を強化するため、各国は何をすべきでしょうか？

本フォーラムは、アジア太平洋諸国の統合構築にとって重要な基盤となります。CSISはこの議論構築に全面的な助力を惜しみません。また、国際的な専門家の皆さんからも有意義な議論が得られることと思います。

基調講演：東アジア統合の今後について：東アジアサミットおよび 2015 年以降の ASEAN コミュニティ (H・E・リザル・アフアンディ・ルクマン氏 (インドネシア経済担当調整省副大臣))

2015 年以降の ASEAN および東アジアにとって、地域統合の重要性は非常に重大です。現行の ASEAN 体制は、グローバルな諸課題に対処するにはとても十分とは言えません。クアラルンプールにおける AEC 発足宣言および東アジアサミットは、過去 10 年間における ASEAN 協力の成果を評価するよい機会となるでしょう。

ASEAN はアジアにおける統合の中心的事例でした。これからは様々な課題があります。発展について、また地域安全保障や人材開発などの他の戦略テーマについても、ASEAN 統合の役割を評価するのにふさわしい時です。

AEC は一夜にして成ったものではなく、その成立には 50 年を要しました。これまで ASEAN は物資、労働力および資本の自由な流れに尽力してきました。ASEAN 内で取引される物資の 99.2% は何ら関税障壁なしに流通しています。さらに、マレーシア首相の言葉によれば「ASEAN は他地域の諸国に比べ、2008 年の金融危機から回復できて」います。海外直接投資 (FDI) の流れも 2007 年から 2015 年初頭にかけて大幅に増加しました。ASEAN 諸国にとって、また域内のその他諸国にとっても、非常に大きな潜在的利益が得られました。

ASEAN 諸国が採った政策の多くは完全に遂行されました。インドネシアは引き続き、残る対策を完遂し統合の推進に取り組みます。「膨大な量の規制を改正し、連携協定の一部要求事項を達成するのにインドネシアはまだ努力が足りていない」とはもはや言えなくなるでしょう。

政府もこれまで務めてきたが、民間部門が連携協定の活用を十分に意識し備える必要があることを理解するように引き続き確認していかなければなりません。我々は各ステークホルダーとの対話を継続し、協力体制の潜在力を最大限に引き出さなければなりません。指導者らが集まってイニシアティブを立ち上げて、そのメッセージが完璧に民間部門に伝わることはありません。協定内の各項目を民間部門に対してどう実施するかが課題です。

もう 1 つの課題は、創造的かつ動的な特性を持つ統合経済をはじめとする 2015 年以降のイニシアティブを構築することです。このビジョンを実現するうえで、ASEAN は良好なガバナンス、透明性、および各ステークホルダーを含めた良好な政策レジームを確保する必要があります。

東アジア地域包括的経済連携（RCEP）により、より競争的で効率的な経済に向けてプレッシャーがもたらされます。インドネシア人は大都市でも地方でも積極的にインフラ建設に励み、ビジネス環境を向上させています。この取り組みは ASEAN 内の経済統合に備える重要なものです。

7年間の交渉を経て締結された TPP は、貿易以外にも様々な問題に対応します。この連携体制はグローバル経済活動の 85%をカバーしています。各加盟国政府による正式な批准はまだですが、インドネシアなどの諸国も TPP の連携の経済的潜在力に関心を寄せています。

一方、RCEP は世界人口の半分をカバーしており、その人々の生活水準を向上させる潜在力を持っています。この体制は安全保障上の連携だけでなく、経済的潜在力をも提供します。アジア太平洋自由貿易圏（FTAAP）は高水準の貿易、貿易自由化、および貿易統合を確保するため、次段階の連携を定義するものです。

他にも G20 の首脳陣が提唱するグローバル・インフラストラクチャー・ハブ、国連によるポスト 2015 年開発アジェンダ、国連気候変動会議などのイニシアティブが存在します。これらのイニシアティブはすべて、地域開発のために包括的成長を推進するものです。

G20、APEC および ASEAN という三大枠組みのメインテーマでは、フォーラムの優先事項として「包括性」を強調しています。社会のすべての人々が発展の恩恵を享受できるようにすることが重要です。

アジア太平洋地域は、グローバル課題に取り組むうえで重要な役割を果たしています。各国はこの課題を自国の将来戦略に組み入れる必要があります。TPP、FTAAP、RCEP の導入においては、各イニシアティブの恩恵が全地域に平等に広がることを確保すべきです。

インドネシア政府は、国際的キャリアをお持ちの様々な有識者から、包括性と持続的発展に関する有意義なご意見を聞かせて頂きたいと望んでいます。日アジア太平洋フォーラムにおける有識者の構成により、経済統合および発展にプラスの変化がもたらされることと思います。

パネルセッション 1：東アジアサミットと経済的リージョナリズムの 10 年間：成長戦略を追求し構造改革を実現するにはどうすればよいか

司会：原岡直幸氏（国際経済交流財団 専務理事）

東アジアサミット（EAS）や ASEAN 経済共同体（AEC）の進展が示すように、東アジアのリージョナリズムと経済統合が進展している現在、アジアが世界経済の牽引力となることを目指すうえで、経済統合の前途には未だ様々な課題が待ち受けています。各国はその国益を守ろうとし、経済成長には逆風が吹いています。東アジアが経済成長を実現できるか否かは、各国が域内経済統合の利点をフルに享受するための構造改革をいかに成し遂げられるかどうかにかかっています。また、域内の安全保障上の懸念も引き続き高まっています。EAS が国益と地域の利益との間で微妙なバランスを取り続け、今後の地域統合の牽引力となるには、どうしたらよいのでしょうか？

マレー・マククリーン元大使（現豪日交流基金 会長）

マククリーン大使は初めに「2015 年は地域経済統合に向けて進行中の取り組み、および地域の繁栄強化において重要な節目（EAS 10 周年、AEC 発足、TPP 締結、RCEP 交渉の進捗）となる」という見方を認めました。大使は「地域の安全保障環境もこれらの進展と不可分に結びついている。それは、地域にとって最善の環境とは、戦略的安定性、社会・経済の開放、経済統合を促進するものだからである」と主張しました。

大使は「現在の経済発展・繁栄を強化するだけでなく、地域の安全保障を確保する上でも、積極的な役割を果たす最大の潜在力を有する地域枠組みは EAS である」という認識を示しました。また「AEC の発足により、他の EAS 加盟国企業が ASEAN と取引する新たな経済チャンネルが提供される」と認めました。また、TPP と RCEP の進展についても、これら連携体制の加盟各国にとって潜在的な経済的恩恵が数多くあると確認しました（これら 2 つの協定は、互いに競合するものと捉えるのではなく、インド太平洋地域における自由貿易圏を最終的に実現するための相補的で実現可能なチャンネルと見なすべきだとのこと）。

ただし、多面的で進化する安全保障上の課題が数多く存在しており、これらによって、強い経済成長・経済統合の深化・地域の繁栄を継続するために必要な環境に悪影響が生じることがあってはなりません（例えば、信頼関係に関わる伝統的な安全保障上の対立、海洋および領土に関する対立や力関係の変更、およびテロ、過激派、天災、ヒト感染症のパンデミック、国際犯罪、サイバーセキュリティなどがもたらす非伝統的な安全保障上の脅威など）。

これらのリスクを最小限に抑え、成長を最適化するには、（特に主要国間の）建設的で前向きな二国間関係がこれらの課題に取り組むうえで基礎となります。また、安定的で弾力性のある地域秩序を促進するうえで、ASEAN 中心の地域体制が重要な補足的役割を果たします。

大使は結論として、ASEAN-ANZ 自由貿易協定（FTA）を通じ、また FTA の各開発協力プログラムを通じて、オーストラリアは地域統合を推進する ASEAN の取り組みを支援してきていると表明し、さらに経済統合プロジェクトには枠組みとしての ASEAN だけでなく、東南アジア各国においてもさらなる努力が必要であるという認識を示しました。

ツェンユー・ワン博士（中国太平洋経済協力委員会 理事）

ワン博士は初めに、AEC や RCEP など EAS および東アジア（EA）リージョナリズムの大きな成果として、連結性イニシアティブ、優先地域における機能的協力イニシアティブ、米国およびロシアの EAS 会議参加、EA がグローバル金融危機（GFC）をうまく乗り越え、グローバルな経済

エンジンとして多国間貿易プロセスやグローバル開発アジェンダに貢献し続けている事実を挙げました。博士はまた、これらの成果の主な理由として、ASEAN の中心性、オープンなリージョナリズム、経済協力の様々なプロセスの合流、トップダウンの取り組みにより市場統合のボトムアップなニーズに応じてきたこと、能力造成イニシアティブなどを挙げました。

ワン博士はまた、2015 年以降の ASEAN 共同体にとっての様々な機会と課題を挙げ、もっと RCEP に力を割くべきだと述べました。また、ASEAN が中心性を保持しているため、EAS は対話と協力を推進する様々なチャンネルの 1 つであると指摘しました。そして EAS は「主要国関係の新たなモデル」の推進の場であるべきだと付け加え、「無紛争・無対立」、「相互尊重」、「Win-Win 協力」を強調しました。

ワン博士はまた、域内経済統合、連結性（体制の連結性）の基本部分として、そして物理的連結性イニシアティブを確実に実施するために必要な前提条件として、構造改革を位置付けました。成長促進における構造改革の重要性を強調し、EA 生産ネットワーク、サプライチェーンとバリューチェーン、集団的措置により補完される国内措置、APEC の取り組みとのシナジー、能力造成、長期目標に向けての漸進政策などの拡大を奨励しました。

チュンヨン・アン博士（韓国企業パートナーシップ委員会 委員長）

アン博士は初めに「東アジアの奇跡」と「アジアパラドックス」について説明しました。過去 30 年間、米国と WTO が主導する GATT の下、4 大国をはじめとする東アジアでは輸出中心の発展戦略を採り、「東アジア経済の奇跡」を成し遂げました。初期には第二次大戦後の米国市場に「無制限の」参入を享受し、後には域内各国の地理的近接性を利用して機能的に相互依存を高めていきました。1998 年のアジア金融危機以降、東アジア各国の経済は「東アジアのアイデンティティ」という感覚も持つようになりました。

IMF によれば、中国の購買力平価（PPP）ベースの GDP は 2015 年に米国を追い越し、それとともに中国の「チャイニーズドリーム」と米国の「アジア基軸」政策の間で地域の覇権争いが衝突に向かいつつあり、ナショナリズムの新たな波と覇権競争の高まり（海域の対立を含む）を生み出しているようです。この現象が「アジアパラドックス」を生じさせ、域内の経済的相互依存性が高まる一方で、政治上・安全保障上の協力体制は退行する状況を生んでいます。

アン博士は、環アジア太平洋の経済的・外交的情勢を変えるため、最近 TPP と AIIB という二大体制メカニズムが構築されたことを述べました。また、他のメガ経済圏として RCEP も中国と ASEAN 首脳陣によって交渉中です。RCEP は TPP よりも開放度は低いですが、GDP と貿易量では TPP とほぼ同格です。これら 2 つのメガ交渉は、米中間の抑制と均衡の体制と見られています。彼は TPP と RCEP は今後収束すべきであると主張しました。

アン博士はまたアジア的価値観を重視し、地域全体に相互信頼を構築するボトムアップの取り組みを支持しました。博士は「東アジアの儒教文化で培われた相互信頼は、協力と公共インフラのための価値ある礎石であり、平和のために必要不可欠なものです」と述べました。信頼構築プロセスには、次世代が前進していけるよう一貫したアプローチと正確な歴史の客観的認識が必要です。域内主要国は相互信頼を深めるため、非攻撃的・非独善的・非威圧的であればなりません。

サチン・チャトゥルヴェディ博士（インド発展途上国リサーチ情報システムセンター 所長）

チャトゥルヴェディ博士は、RCEP 加盟国なしでは TPP は求める成果を得られないことは非常に明白だと主張しました。TPP のグローバルな立場は決定的に RCEP 加盟国に依存しています。このことは、他の RCEP 加盟国にとって 2016 年までの協定締結に向けて努力すべきとの教訓でもあります。

TPP と RCEP が実現すれば、経済成長に向けてグローバルな誘引力となります。そのため、RCEP より先に包括的・調和的な非関税措置（NTM）/ 基準の実施が主要課題となるでしょう。加盟各国の経済発展段階がそれぞれ異なること、そして NTM/ 基準に関する規制構造をなくした場合の各国への影響度もそれぞれ異なることについての的確な事実認識が必要です。

チャトゥルヴェディ博士は、RCEP 加盟国間の信用醸成プロセスに向けて次の 3 段階を示しました。1) 国内レベルでの開放を行う。2) 途上国に猶予を持たせ、それらの国々が時間の経過とともに追いつけるようにする。3) 「域内バリューチェーン」推進のために業界協力を行う。これは業界固有の諸規格を収束させ、意匠を保護するために同様に重要です。チャトゥルヴェディ博士はまた、各国の距離を近付け、持続可能な開発目標（SDG）に中心性を持たせるため、アジア地域の金融機関が重要な役割を持っていることを強調しました。

RCEP は経済的潜在力を有するので、グローバル経済を主導する潜在力も持っています。RCEP はソフトグローバルパワーとして誕生したものであり、世界経済におけるアジアの基軸的役割を確保するために地域会議体としての主導的役割を維持すべきです。

サイモン・SC・テイ教授（シンガポール国際問題研究所 会長）

今日のグローバルな成長と安定性を当たり前のもとと見なすことはできません。今後課題が待ち受ける 3 つの分野があります。第一に、TPP、AEC、RCEP があっても、経済変革を追求する必要があることに変わりありません。経済的課題と社会的課題をどちらも優先する改革を断行する政治的意思が必要です。テイ教授は「AEC は変革の大きな取り組みではあるが、あくまで順を追って実現するものです。一方、TPP は変化という点でそれよりはるかに急な動きです」と述べました。

第二に、来年我々が集中すべき取り組み課題として RCEP があります。その進展における主要な問題は、おおむねインドとインドネシアに関するものです。両国首脳陣は、RCEP 交渉が進行する中で両国が直面する様々な障害への取り組み支援をしなければなりません。教授はインドとインドネシアがどちらも海外直接投資 (FDI) を重視していることを説明しました。その中で、前に進むためには両国が FDI と自由貿易改革の相互関連性を理解する必要があります。さもなければ中国-ASEAN FTA がより大きな意義を持つてしまうでしょう。

第三に、テイ教授は ASEAN 域内とインドにおける中日競合の激化について指摘しました。博士は競合は良い事であるとしながらも、過去数ヶ月間にインドネシアやタイ、マレーシアなどで見られたように悪い競合も存在しており、そこでは透明性の欠如やリソースの不適切な配分があったと述べました。その中で、我々の中心性に関する戦略練り直しが必要です。

日本経済とアベノミクス第 2 ステージ (春日原 大樹氏 (JETRO (日本貿易振興機構) ジャカルタ事務所 所長))

アベノミクスによって日本経済はデフレを脱出し、着実な回復軌道に乗ることができました。企業利益も大幅に拡大しました。また、企業の回復により雇用状況も改善されています。これらを踏まえたうえで、春日原氏はアベノミクスの政策焦点が需要から供給へとシフトしている点を指摘しました。このシフトの背景にある課題として、企業の資本投資にまだ明確な改善が見られないこと、日本への海外直接投資 (FDI) が他の主要国と比較して低いままであること、中長期的な人口減少により経済成長に構造的制約があること、そして革新的なサービス・製品による劇的な効果向上と市場拡大が必要とされていることが挙げられます。

安倍政権は金融緩和などの「大胆な金融政策」と景気刺激策などの「柔軟な財政政策」により、需要サイドの経済回復を成し遂げました。次のステージでは、投資促進の観点から構造改革を実行し、劇的な効果向上や労働力確保などの長期課題に取り組む必要があります。このため、日本政府は 2015 年 6 月、供給サイドの改革を推進する「アベノミクス第 2 ステージ」の政策方針を承認しました。

春日原氏は最後にアベノミクスにおける TPP の役割について述べ、「TPP はアジア太平洋地域に高水準のビジネス基盤を実現するものであり、アベノミクスの主要牽引力の 1 つです」と話しました。TPP への参画を通じて 2 つの成果が期待されています。1 つめは、企業向けの市場開発、海外投資および訪日旅行客の拡大などにより、新たなグローバルバリューチェーンを構築すること。2 つめは、TPP 内の改革実施を通じてイノベーションを推進し、各産業を活性化し、生産性を向上させること。まとめると、アベノミクス第 2 ステージでは、TPP 参画を通じて投資拡大とイノベーション推進を行い、優先課題を克服することが期待されています。

パネルセッション1 質疑応答：

聴衆（ジェイミー・ユン氏）は「地域統合が始まり、ASEAN 諸国内の経済対策が強化されつつあるという強い意識がある一方で ASEAN カウンターパートナー間の競合も強まりつつあります。その中で、ASEAN 域内で米中がより協力していくにはどうしたらよいでしょうか？域内における競合と協力のバランスを取るにはどうしたらよいでしょうか？」と述べました。

アン博士は「私のプレゼンテーションの中で、TPP と RCEP により米国と中国の政策は次第に衝突に向かいつつあるように見えると述べました」と指摘しました。「一部の専門家やアナリストは TPP を経済協力体制であると同時に安全保障同盟であると説明していますが、これは米中対立を悪化させかねない危険な考え方だと思います。したがってこの観点から、TPP は特惠地域貿易協定として見るべきです。我々は物資と投資のより自由な流れへの市場アクセスを拡大する必要があります。」

ワン博士は次のように付け加えて述べました。「EAS が成功したことの1つは、米国とロシアを参加させたことです。経済協力と政治・安全保障課題の両方に対応する体制として、米国が参加した EAS は最適な位置にあり、東アジアおよびアジア太平洋における安全保障体制と経済統合体制の互換性を推進することができます。しかしながら、この役割はまだうまく果たせていません。特に地政学的/安全保障的側面においては協力よりも競合が目立っています。EAS は地域の安全保障と繁栄のため、協力を促進する役割を果たさなければなりません。今年 EAS サミットで行われた李克強首相のスピーチからも、米-ASEAN 声明からも、良い兆しを読み取ることができ、多くの共通点、例えば国際秩序の尊重、紛争への平和的対応などを見つけることができました。このことは、EAS という基盤のうえで上記の互換性を促進していく希望が持てることを示しています。」

リザル・アフアディ・リュクマン副大臣から質問がありました：TPP 参加国は、個別の国々にとってデリケートな項目にどのように対処していますか？（例：日本の農作物、マレーシアの国有企業（SOE）など）これらのデリケートな項目は、どのように TPP の導入にあたり対処されていますか？

春日原氏は「TPP 参加国はすべてデリケートな項目を抱えています。これらの項目をなくす方法はありませんが、継続的でオープンな議論を続けることが重要であり、TPP 批准においても継続が必要です」と述べました。

浦田秀次郎博士は、テイ教授に対し、米中協力に関する質問を投げかけました。「テイ教授は悪い/不健全な競合を避け、健全な競合を追求すべきだと話されました。システム提供国（中国、米国、インド）間の協力は健全と見なせますか？これらシステムの受容国である ASEAN には、この競合を健全化するのに果たせる役割はありますか？

テイ教授は次のように答えました。「競合を止めるべきというのは二大国についてではなく、ASEAN 加盟国（AMS）についてです。AMS が中心性を強化するためには、どの国/提供者を頼

るか決めなければなりません。我々は国内インフラが ASEAN の連結性に繋がることを望んでいます。非常に現実的な問題であるにもかかわらず、まだ誰もこれを徹底的に検討しておらず、したがってソリューションも提唱されていません。」テイ教授はまた、RCEP を実効化させることの重要性を強調しました。

春日原氏は、各国における公平な政策決定を促進するうえで東アジア・ASEAN 経済研究センター (ERIA) などの独立機関が重要であること、また優先事項を設定するため非常に中立的な分析データを提供するうえでもこれらの機関が重要であることを強調しました。

マクリーン大使は「現在域内で起きていることを米中の争いとするのは誤りであり、域内にはインド、日本、インドネシアなど他にも多くの非常に重要な国があります。オーストラリアと韓国も主要な役割を果たし、前向きな貢献をすることができます。言い換えれば、すべての国が協力して力を合わせるべきなのです。ASEAN が地域に提供し、その周辺に構築する団結を可能な限り重視していくことが非常に重要です」と付け加えました。

聴衆 (ERIA の所員) から、RCEP と TPP に関する質問がありました。「現在の流れを変えて RCEP を前進させるのは誰でしょうか？経済統合に関して、我々はどのような構造改革を地域統合とともに進めていくべきでしょうか？」

チャトウルヴェディ博士は RCEP と TPP には重複している参加国がある点を指摘し、「どのように巻き返しますか？敗者となるのは誰ですか？ボトムラインはどこですか？実際に流れを変えるのはこれらの国々です」と述べました。また、持続可能な開発目標 (SDG) を重視することが極めて重要であり、17 個の目標のうち 3 個、169 個の指標のうち 18 個が貿易に関するものであると述べました。「RCEP および TPP の各参加国は、自国が取り組むこれらの課題を検討することになります。この観点から、月末までにボトムラインを練り直し、前進への兆しが見えてくるでしょう。」

ワン博士は回答の中で、「何の流れを想定しているかによって答は変わります」と述べました。「高水準・次世代の課題に関する流れであれば、流れを変えるのは TPP です。しかし開発または統合・開発の流れであれば、流れを変えるのは RCEP です。その加盟国、多様性、高水準・次世代の改革推進という観点から **ワン博士**は「グローバルな貿易経済発展の将来を代表するのは RCEP である」という意見です。また、「中国は RCEP の牽引力ではなく、むしろ相互的体制であり、ASEAN がその中心的役割を果たす」と考えていて、**アン博士**と意見を異にしていました。米国が TPP の主導国である一方、中国が RCEP の主導国ではないことは明らかです。

テイ教授はワン博士ともアン博士とも異なる意見であり、次のように述べました。「ASEAN-中国 FTA は RCEP の下位にあり、したがって RCEP の牽引役となるべきです。米国が TPP で果たしている役割を中国が RCEP で果たすことはできません。そして RCEP が弱体すぎるため、ASEAN はインド、日本、韓国などの国々に RCEP で団結することを強制することはできません。その中で RCEP を前進させるためには、『RCEP を進めないのであれば、ASEAN-中国で進めま

すよ』と言って友好的に競争を推進するツールとして、ASEAN-中国 FTA を活用できるのではないのでしょうか。」

ERIA の小林氏は「アン博士は、AIIB は高い基準を持ち、グローバルなベストプラクティスを満たすべきだと話されました」と述べ、次のように質問しました。「既存のグローバル基準はうまく機能しているのでしょうか？もしそうであれば AIIB が存在する必要性は少なくなるように思われます。ということは既存のグローバル基準は域内の巨大なインフラ需要に対応するのに十分な機能を果たしていないのではないのでしょうか。その結果、AIIB 加盟国、特に中国は、地域がインフラ投資を拡大できるような新たな理念や基準を創出する必要があります。その場合、どのような理念が考えられるのでしょうか？」

アン博士は、AIIB イニシアティブにはいくつか未知の疑問が残っていることを認めました。すべての国にとって平等に恩恵をもたらすものか？中国の国益、アジア太平洋の利益、中央アジアの利益、そのどれに利するものなのか？そのうえで博士は結論として「中国の一带一路（OBOR）政策と域内中央アジアの政策に沿ってバランスを取る方法を探し続ける必要があります」と述べ、最後に AIIB ができる限りの調整を行えることを希望すると表明しました。

パネルセッション 2：東アジア地域統合の牽引力としての ASEAN 経済共同体：課題と機会

司会：ポンチアーノ・S・インタル博士（ERIA 上級エコノミスト）

先ほどの議論のテーマは TPP のもたらす課題に終始しましたが、一方で TPP は ASEAN 諸国が域内統合を深化させる機会をもたらす可能性もあります。今回の議論の主題は、今後 AEC という概念の信頼性を確保するうえでのインドネシアの役割です。AEC はより深い地域統合のための推進力と見なすことができますが、その実施は参加諸国のスタンス次第です。

ASEAN 中心性に対するリスク：ヴォー・トリ・タン博士（ベトナム中央経済管理研究所 副所長）

先述されたように、AEC という概念は一般大衆にも共通の知識であり、共同体、連結性、協力性などの基本要素が含まれています。しかし ASEAN にとって最大の課題はアジア太平洋地域の統合に関する中心性の概念です。

これまで、諸国は「中心円戦略」の概念を推進してきました。これは AEC、ASEAN+1、RCEP などの一連の地域統合協定を含むものです。RCEP は既存の AEC および ASEAN+1 の改良版として設計されましたが、エコノミストらは RCEP の進展がないことに懸念を表明しました。参加諸国は複数回の議論を設定しましたが、決議への見方は懐疑的です。RCEP の交渉を進めるうえで ASEAN が重要な役割を果たすことは可能でしょうか？

RCEP や AEC などのイニシアティブとは別に、TPP が提示する潜在的パートナーシップ協定には高度な恩恵と同時に様々な妥協も存在します。TPP はベトナムやマレーシアなどの ASEAN 諸国を含む参加国への投資と貿易転換を推進します。しかしミャンマー、カンボジア、ラオスなど TPP に含まれていない ASEAN 諸国もあります。これらの国では TPP の恩恵を受けないため、域内に

不均衡が発生します。このような非 TPP 参加国のデメリットを最小限にとどめるため ASEAN には何ができるでしょうか？

地域協定とは別に、効果的な統合を構築するうえで「接続性（コネクティビティ）」が大きな役割を果たします。ASEAN の各地域には、MPAC、APEC コネクティビティ、中国と共同の「シルクロード戦略」と呼ばれるイニシアティブなど、主要な接続性プログラムが存在します。これらのプログラムは統合深化には必要不可欠なものですが大胆な取り組みであり、莫大な外部リソースと民間部門からの積極的な参加が必要です。

共同体としての ASEAN は、世界銀行やアジア開発銀行、そしてアジアインフラ投資銀行（AIIB）といった多くの関連国際機関において強い立場にあります。その一方で現状の協力管理体制は不十分なままであり、それが労力やリソースの分散につながっています。利害衝突のため、関係者および ASEAN 諸国間の調整を効果的に行う体制を欠いています。

地域の結束の重要性を実現するため、ASEAN 諸国は ASEAN 中心性の概念をさらに追求すべきです。メンバー国間に強い一体性がなければ、TPP のような主要パートナーシップ協定の渦中で ASEAN の声が顧みられなくなります。このように、ASEAN 諸国が認められるための唯一の方法は、地域的コンセンサスを代表する適切な体制を構築することです。東アジアおよびアジア太平洋の地域統合の将来にとって、ASEAN 中心性は必要不可欠な基盤となります。

東アジアおよびアジア太平洋の地域統合は、ASEAN に開発度格差が根強く残ったままでは成功しません。貿易および持続的開発における諸課題は、市場要因の圧力とアジア太平洋経済統合への新たな要求の圧力の下で考えなければなりません。地政学的な諸問題により関係者間で利害衝突が生じる可能性があるため、政策対応は徹底的に吟味する必要があります。ASEAN 諸国は ASEAN 中心性へのコミットメントを示し、域内における開発度の低い他国を支援しなければなりません。

地域統合の牽引力としての AEC：課題と機会（ソムキアト・タンキットヴァニク博士（タイ開発研究所 所長））

ASEAN+3 および RCEP の導入は、多くの人口が関わる巨大な経済的潜在力を刺激します。どちらのイニシアティブも現行の ASEAN 取り組みを大きく改良するものでした。

AEC は、2016 年までに ASEAN を大きく変える統合基盤として設計されました。しかし実際には AEC は ASEAN 内の統合深化能力を發揮できないかも知れません。ASEAN 自由貿易地域（AFTA）の下、ASEAN 原加盟国は 1993 年から関税率を引き下げてきました。計画された関税引き下げはほぼ計画通りに完了しました。その一方、域内における非関税障壁の撤廃は遅々として進まず、サービスおよび投資の貿易自由化では特に進んでいません。現行の取り組みでは、相互承認協定（MRA）対象となっているのはわずか 8 種類の専門サービスであり、その実施も極めて遅い状況です。域内で生じた大きな変化といえば、CLMV 諸国（カンボジア、ラオス、ミャンマー、ベトナム）において他の ASEAN 諸国に対する関税が撤廃されたことだけです。AEC の諸問題は必ず

しもスピードによるものではなく、むしろ、ASEAN 諸国間のコミットメントが不足している点です。

参加諸国が大きな改革を行うことなく地域統合を実現することはできません。AEC 統合を強化するため、参加諸国はいくつかの方策を実施することができます。まず一つ目で、かつ最優先に、AEC は非関税障壁の撤廃を推進しなければなりません。二つ目は、サービス部門、特にビジネスサービスの自由化。三つ目は、物理的インフラにより ASEAN 地域周辺の輸送網に欠けている箇所を補うこと。最後に、AEC は ASEAN 域内の物資および高度技能労働者の自由な流れを促進しなければなりません。

AEC を実現し、統合の恩恵を享受するには、経済改革と並んで政治的コンセンサスが鍵になります。今後 RCEP の交渉を加速するためにも AEC の実施をしっかりと進めることが必要不可欠です。

経済成長および ASEAN プログラムにおける主要課題：ジョセフ・T・ヤップ博士（フィリピン大学経済学部 教授級講師）

グローバル経済成長には多くの課題があり、ASEAN は地域的にこれらの問題に取り組む努力を行ってきました。その枠組みは内在経済成長理論に基づくものであり、インプットの量とともに質を重視しています。諸課題は「生産要素」「マクロ経済の安定性」「持続可能性の諸問題」という3つに分類されました。

「生産要素」においては、主な課題は物理的インフラへの投資です。アジア開発銀行（ADB）の推定によれば、アジア開発における物理的インフラの必要性を満たすためには 2010 年から 2020 年までに 8 兆米ドルが必要とされています。残念ながら多くの国、特に先進諸国が慢性的な財政危機に直面しているため、利用可能な資金は限られています。他の選択肢として、官民連携（PPP）や AIIB など開発銀行への参加が挙げられます。この文脈での重要テーマは AIIB が大きな推進力になるかどうかという点です。

投資以外にも、技術革新、技能、教育に関する懸念があります。技術革新は経済成長に対する主要な長期的牽引力です。技術革新のスピードが鈍化しているのではないかと懸念があります。しかし、近年においては電気や自動車のように大きな発明はないものの、情報技術、ゲノミクス、ナノテクノロジーといった特定分野で大きな進歩が起きています。ASEAN 諸国は技術革新を促進するため、知的財産権の向上が必要です。

労働市場においては、域内では技能労働者が不足しているため、技能向上の必要があります。現在は高技能労働者が少なすぎる一方で、低～中技能労働者のための職が少なすぎる状況にあります。このミスマッチの問題解決には、官・学および民間部門が緊密に連携して取り組む必要があります。関係者は技術教育・職業訓練（TVET）の活用を促進することもできます。一方、複雑な問題に取り組み、創造的なソリューションを案出できるような革新的思考力を持つ人材や管理職の育成を重視しながら教育の質も上げる必要があります。

2008年グローバル金融危機の経験から、マクロ経済の安定性という面では金融部門の安定性が主な懸念となっています。金融部門の安定性を維持するには、資本移動の規制強化と公的債務整理のメカニズムが必要です。また、高齢化に伴う財政余地の縮小も懸念されています。また、マクロ経済の安定性を実現する必要があることも財政伸縮性を制限しています。世界銀行や国連といった国際機関の資本不足から、公的物資供給が不十分であることは明らかです。マクロ経済の安定性に関連して、政策連携も課題となっています。例えば、最近のG20会議ではグローバルなマクロ経済の不均衡に取り組むことができませんでした。

持続可能性の問題には次の諸問題が含まれています。1) 気候変動に強い焦点を置く環境マネジメント。2) 不平等および包括的成長。3) 経済的リバランシングと製品多様化。4) 多くの国における「人口の冬」問題。

ASEANはこれらの経済成長課題への取り組みを前進させてきました。ASEAN接続性のマスタープランにはASEANハイウェイネットワーク、統合された競争力の高い海洋運送、単一の航空市場などが含まれています。教育においては、ASEANは教育水準を上げるための大学ネットワーク構築に取り組んでいます。域内移住には「ASEAN移住労働者の権利の保護と伸長に関する宣言」に基づいて対応しています。

ASEANはまた、チェンマイ・イニシアティブのマルチ化(CMIM)やASEAN+3マクロ経済調査事務局(AMRO)などの資金協力にも積極的に関与しています。ASEANは現在、経済成長の重要な牽引力となり得る金融・財政統合のロードマップ策定を計画しています。資金協力以外に、包括的成長の問題に取り組むには中小企業開発が必要不可欠です。ASEANでは中小企業開発において大きな成長が見られ、地域における重要な成果となっています。

ASEAN連携の総合目標は、高い競争力を持った単一市場・生産拠点を構築することです。グローバル経済に深く組み込まれたこの地域において、ASEANが公正な経済発展を推進することが重要です。

ASEAN経済共同体：成長の資金調達（ポルタク・ホトラデロ氏（インドネシア株式市場調査部門責任者））

ASEAN諸国間には経済成長度に差があります。各国はAECを通じ、経済的潜在力を発揮する方法を域内他国から学ぶことができます。

ASEANについて考える場合、インドネシアの人口とGDPが地域の大きな部分を占めているため、インドネシアをASEANの平均と見なすことができます。インドネシアの人口はASEANの40.5%を占め、GDPはASEAN合計の40.58%を占めています。域内他国に比べると驚異的な数字です。

話を先に進めると、ASEANにおける開発の資金調達はどのようなパターンでしょうか？

ASEANにおける資金調達に単一のパターンがないことは明白です。銀行資産のGDP比はASEAN諸国間で大きなばらつきがあります。ミャンマーの銀行資産のGDP比は最も低く、32%未満です。

驚くべきことに、インドネシアの比率は ASEAN で二番目に低く、52.2%となっています。ラオス、カンボジア、ブルネイなどインドネシアより小さい国も域内でより高い比率を持っています。シンガポールは域内で突出して高い比率で 271.8%となっています。域内にはこの資金形態での統一性は見られません。

国債発行残高の GDP 比にも非常に大きなばらつきがあります。国債は政府がそのポジションをレバレッジするうえで重要な資金調達源です。ASEAN 5 の中でもインドネシアの国債発行残高の GDP 比はマレーシア、タイ、シンガポール、ベトナムと比較して最も低い部類です。インドネシアは「低レバレッジ国」と分類することができ、債務レバレッジに関して他国から学ぶ必要があります。経済成長を促進するためには、国債はインドネシアにとって重要な資金源となります。

株式市場においては、インドネシアは他の ASEAN 5 国と比較してあまりよい成果を上げていません。驚くべきことに、タイは非常に高い一日の取引額を記録しており、シンガポールよりも高い額となっています。ポートフォリオ多様化の必要性は高まりつつあり、ASEAN はエクイティ多様化の可能性として見られています。

また、2010 年の報告書によれば、ASEAN 諸国間ではミューチュアルファンド資産にも非常に大きなばらつきがあります。インドネシアの GDP 比は非常に低く 2.6%であり、一方シンガポール、マレーシア、タイでは GDP 比が 20%を記録しています。

ASEAN 諸国はお互いから多くを学ぶことができ、AEC の導入がそれを促進するでしょう。AEC は参加国間の知識共有のための体系的基盤となることができます。他地域の国々と比較して、ASEAN には発展の可能性が非常に大きく残されています。地域の潜在力を発揮するため、ASEAN 5 は他の参加国の発展を助けることができます。

チャー・チャー・テイン博士 (ミャンマー ヤンゴン経済大学 応用経済学部 教授)

ASEAN は平和で繁栄する地域へと前進しています。東南アジアの様々な経済を統合することにより、ルールに基づく人間中心の組織に変化しつつあります。AEC が現実になると、多くの新たな機会を目にする国もあれば、その逆となる国もあるでしょう。

AEC 目標の実現を具体的に成し遂げるためには、何よりもまず単一の市場かつ生産ベースを創出することが必要です (AEC 第一の柱)。共通効果特惠関税 (CEPT) 体制に合わせた AMS 間の関税引き下げ以降、関税は非常に急速に引き下げられ、ASEAN-6 では実質的にゼロとなっています。現在は AMS 間の貿易連携強化に向けて非関税措置 (NTM) が特に顕著な潜在的障壁となっています。貿易迅速化に向けて、「ASEAN シングルウィンドウ (ASW)」現実化のための「ナショナル・シングルウィンドウ」を AMS 各国に構築する必要があります。「ASEAN シングルウィンドウ (ASW)」はまだ実施されていません。ASW という AEC 目標を達成するのに必要な「ナショナル・シングルウィンドウ」もほとんどの AMS においてまだ十分に機能していません。AMS のうち CLM 諸国 (カンボジア、ラオス、ミャンマー) においては設置もまだという状態です。ミャンマーでは NTM の実施も進められています。

さらに、各国および地域双方の「貿易レポジトリ」を完全に機能させることも必要です。また、開発格差の縮小も各国・地域双方が取り組むべき主要課題の1つです。さらに、あらゆる関連ステークホルダーとの積極的連携をはじめとする取り組みを通じて人間中心の地域を構築していく上で、人々の参画を拡大していくためには、ASEAN に関する意識向上が引き続き最優先課題となります。ASEAN-6 と CLMV 諸国（カンボジア、ラオス、ミャンマー、ベトナム）の間の開発ギャップは全分野的な性質を持ち、ASEAN 統合プロセスにとって重要事項であるため、我々はポスト 2015 における ASEAN 統合イニシアティブ（IAI）の実施の支援を再確認します。

パネルセッション 2 質疑応答：

司会：

初めに、TPP は先進国のための体制を意図していますが、インドネシアよりも GDP の低いベトナムが連携参加を決定しています。ベトナム参加の背後にある理由は何でしょうか？ベトナムは TPP を利用して国内改革を推進していくのでしょうか？

ヴォー・トリ・タン博士：

ベトナムは AEC 同様、TPP にも参加する準備ができています。TPP は太平洋地域に市場を構築するため米国主導で推進されています。同時にベトナムは TPP が太平洋諸国間に高水準の連携を提示したと感じています。

ベトナムは国内改革を刺激するため、TPP 参加に熱心です。TPP 参加には様々な変化が必要となります。これまで TPP によって制度改革と国内改革を推進することができました。TPP はベトナムにおける統合進化プロセスの転換点になると見られています。

第二に、ベトナムは統合プロセスに関する経験があります。そのため、ベトナム国民はデリケートな諸問題や TPP がもたらす諸課題を克服できるという確信があります。また米国はベトナムにとって主要貿易・投資相手国の1つであるため、TPP は課題だけでなく、ベトナムにとって非常に大きな可能性ももたらします。このように TPP 参加は経済成長の大きな推進力となります。

最後に、TPP の交渉にはデリケートな諸問題が含まれています。しかし国有企業（SOE）をはじめとする TPP 対象分野はベトナムの目的に沿っています。ベトナムは国内制度の改革に努めてきましたが、TPP はその点で巨大な推進力となります。

司会：

TPP 以外にも AEC、RCEP、他の自由貿易協定（FTA）があります。これらは国内改革を刺激することができますか？ASEAN 統合は東アジアおよびアジア太平洋の地域統合に大きな役割を果たしますか？我々は本当に ASEAN 統合の役割を信じているのでしょうか？どのように統合を推進すべきでしょうか？

ポルタク・ホトラデロ氏：

ASEANには様々な統合の段階があります。ASEAN諸国は域内統合を向上させるため、お互いから学ぶ必要があります。ASEANがお互いから学び、ASEAN諸国間の絆を強めるには情報の流れが重要な牽引力となります。

司会：

発表の中で、インドネシアにおけるM2のGDP比および銀行資産のGDP比は最低であるとのことでした。競争の欠如がこの低比率の原因となっている可能性はありますか？この問題を克服するにはどのような方法がありますか？

ポルタク・ホトラデロ氏：

インドネシアでは、クレジットなどの金融商品の利用率は今でも非常に低いです。多くの場合、インドネシア人は非公式の金融商品に頼っています。インドネシアの銀行部門は、すぐにも活用できる潜在力は非常に高いものの、現在もあまり利用されていません。非公式の資金調達以外に、競争も銀行部門の低利用率の原因となりました。この問題を克服する方法としては情報交換が考えられます。このように、すべての参加国において透明性の確保が必要です。

聴衆（ERIA）：

ベトナムはTPPを国内改革の牽引力と考えています。TPPの要求事項に適合するためベトナムが推進しなければならない分野として知的財産一般、競争法、労働基準などがあります。ベトナムはこれらの問題をどのように克服する予定ですか？

ヴォー・トリ・タン博士：

ベトナムと米国はTPPに関して相互理解に努めています。協定遵守以外では、TPPは参加国に一定の状況下である程度の柔軟性を提供しています。例えばベトナムは、TPP内で独立してやれるようになるまでは自国の衣料・繊維産業を保護することができました。

基本的にTPPはルールに基づく協定ですが、同時に各国の要求事項への対応を支援するメカニズムを提供しています。例えば中小企業保護、相談・資金支援など。TPPは特段国内改革を推進するための取り組みではありませんが、参加国がTPPの要求事項を満たすための支援策を提供しています。

司会：

シロ・アームストロング氏のペーパーによれば、RCEPはTPPと比べ、ASEAN諸国にとってより良い体制と見なされています。この論点について少し説明を頂けますか？

シロ・アームストロング博士：

根本的に、TPP には参加希望国が満たさないといけない要求事項の膨大なリストがあります。一方、RCEP の参加時点での要求事項はそれより緩やかですが、取り組み後に順次基準を満たすため、能力造成などの方策とともに意欲的な目標を設定します。ベトナムが TPP 参加を決定したのは、ベトナムにとって巨大な米国の衣料・繊維産業へのアクセスによるところが大きいです。また、ベトナムは国有企業（SOE）の改革に取り組んでいますが、これも TPP 枠組みの中で必要となることです。中国にとっての事情はベトナムとは異なっており、TPP のような外的プロセスが牽引し、米国議会が強制する形での中国 SOE 改革は非常に困難でしょう。意欲的な RCEP があり、参加国が強力に取り組めば、国内構造改革に適した外部環境を創出するのに役立つでしょう。

司会：

ベトナムは繊維・衣料産業で知られていますが、TPP では知的財産権の問題があります。知的財産法は医薬品産業に大きな影響を与える可能性があります。知的保護に基づき、競争の欠如により医薬品価格が高騰する可能性があり、医薬品産業における競争が危険にさらされると考えられます。

TPP では、繊維や e コマースなどの受益産業がいくつかあり、これらの部門は現行の TPP 体制では利益を得ると思われれます。しかしそれはベトナムにとって正しい道でしょうか？

ヴォー・トリ・タン博士：

ベトナムは交渉の中で、TPP 要求事項への対応に一定の柔軟性を獲得しました。TPP の下、いくつかの妥協と課題があるでしょうが、ベトナムはそれが成すべき事だと信じています。中でも知的財産権の問題は、ベトナムは医薬品産業において厳しい方策があることも認めますが、その損失は他の産業、特に衣料・繊維の輸出により取り戻せると信じています。

司会：

AEC の問題に関して、ASEAN は単一の市場・生産拠点を強化するのが賢明です。AEC についてはどのように進めますか？

ASEAN はまだ AEC の準備ができていないことを示す要素があります。各国政府の利害衝突は現在も明らかであり、AEC の前進を阻害しています。AEC の青写真にはいくつか対処すべき問題がありました。

ソムキアト・タンキットヴァニク博士：

AEC に大きな進展が見られない場合、ASEAN は TPP のような他の方策を検討すべきです。ベトナム、マレーシア、ブルネイは TPP 参加を決定しました。一方、インドネシアとタイはまだ立場を決めかねています。AEC が成功しなければ RCEP は前に進みません。ASEAN は自由化を行う

必要があり、そうでなければ他の FTA を選択すべきです。TPP のような協定は、ASEAN 共同体が域内統合を深化させるために外圧かけてくれるかも知れません。

司会：

TPP に関心のある国にはインドネシア、フィリピン、タイ、ミャンマーなどがあります。これらの国は自由化度が低いため問題が多いですが、TPP に参加したいと考えています。例えばフィリピンでさえもまだ製造部門で苦戦しています。AEC は統合深化のための非常に野心的な計画です。TPP は ASEAN 統合にとって恩恵があるのでしょうか？ASEAN は域内統合を深化させるために本当に外圧を必要としているのでしょうか？

ヴォー・トリ・タン博士

TPP は域内統合強化の推進力となり得ます。ベトナムは改革実施に関する自国の経験を他の ASEAN 諸国と喜んで共有します。TPP は他の連携協定を補完する役目を果たすことができます。

司会：

ASEAN における統合プロセスは誰が牽引するのでしょうか？インドネシアでしょうか？もしそうであれば、インドネシアはその立場を重視し、統合が自国にとって有用かどうかを決定しなければなりません。インドネシアは2016年のAEC実現において重要な役割を果たすのでしょうか？

聴衆（ソイ・パルデデ氏）：

ASEAN 統合の主導者としてのインドネシアの役割には疑問があります。AEC の概念は包括的経済統合を重視しており、インドネシア国民の価値観ではあまり馴染みのないものです。インドネシア国民は協調原理を信奉しており、ASEAN 諸国の主導者として名乗りを上げるには消極的だと思われます。

司会：

ソイ・パルデデ氏の主張によれば、インドネシアは ASEAN 諸国の主導者として名乗りを上げるには消極的だとのことでした。インドネシアがそのような状況を選択判断する理由は何でしょうか？

聴衆（ソイ・パルデデ氏）：

インドネシア国民は AEC を排他的なものではなく内包的なものと理解しています。

司会：

歴史的エビデンスによれば、インドネシアはかつて ASEAN 統合の主導者だったことがあります。インドネシアの立場についてどなたかご意見を頂けますか？

ヨセ・リザル・ダムリ博士：

ASEAN におけるインドネシアの立場を示す数字がいくつかあります。インドネシアは ASEAN の GDP のうち 50%を占めており、域内最大の貢献者となっています。この事実からインドネシアは ASEAN、特に経済統合の主導者として一步を踏み出す能力を持っています。残念ながら産業界、政府官僚、政策決定者などインドネシアのステークホルダーからの一般的反応はあまり芳しくありません。「経済統合の拡大から恩恵を受ける」という見方ではなく、「インドネシアは地域統合の犠牲になり、市場にされるだけだ」という見方がなされています。

インドネシアは外的統合よりも国内問題に目を向けているという傾向があります。これはインドネシアのように大きな国では珍しいことではありません。中国は外部重視で成功を経験していますが、その成果は他の発展途上国にとって例外的な事例と見なされています。

それでもインドネシアは ASEAN における経済統合を定義する上でもっと積極的な役割を果たすべきです。そうすることでインドネシアは単にプロセスに従うのではなく、自国の経済的利益を反映できるよう ASEAN を形作り、統合からより大きな恩恵を得られる可能性があります。インドネシアが主導者となる姿勢を見せなければ、インドネシアが排除され他の ASEAN 諸国のための市場になりかねません。

司会：

インドネシアは統合問題を真剣に捉える必要があります。インドネシアは ASEAN の GDP の約 50%を占めています。インドネシアが ASEAN 統合強化に関心を示さない場合、AEC は失敗する運命にあります。ASEAN 地域には多くの可能性があります。インドネシアが ASEAN 共同体に関する考え方を変えることが必要不可欠です。

ソムキアト・タンキットヴァニク博士：

インドネシアが ASEAN 統合の主導者になることを望まない場合、それより小さいタイは TPP などの他の方策を検討しなければなりません。他の ASEAN 諸国は TPP やその他 FTA による何らかの保障を求めなければなりません。この問題によって ASEAN が空中分解し、RCEP の進歩を危うくする恐れがあります。

司会：

議論に基づき、参加諸国は 2016 年に正式発足する AEC の青写真をよく読むことが重要です。AEC の青写真には単一市場連携の概念だけでなく、より深い地域連携が含まれています。

ヴォー・トリ・タン博士

ASEAN 諸国が TPP の恩恵を享受しながら、域内統合の進展を維持することは可能です。

パネルセッション 3：地域経済統合：RCEP、TPP、AIIB などの新たな経済体制は東アジアの経済統合を深化させられるか

司会：ヨセ・リザル・ダムリ博士（インドネシア 戦略国際研究所（CSIS） 経済部門 責任者）

東アジア諸国間のより深い経済統合を重視し、より統合された地域の構築への焦点を強化した新たな地域連携（TPP、RCEP、AIIB）が出現し、東アジア地域の経済発展に大きな影響を与えることとなります。TPP および RCEP の交渉が間もなく決着を予定されている中、我々はこのようにこれらメガ地域の可能性と機会を実現できるのでしょうか？ AIIB は、域内における持続可能かつ包括的な成長の体制にどのようにしたらなれるのでしょうか？

TPP、RCEP、FTAAP、AIIB：成功か失敗か（マン-ジュン・ミニョンヌ・チャン博士（台湾 アウトオブザボックス・コンサルタンシー 創設者兼 CEO））

チャン博士の発表では、アジア太平洋自由貿易圏（FTAAP）の新創設、TPP および RCEP の課題、一帯一路（OBOR）イニシアティブ、アジアインフラ投資銀行（AIIB）、OBOR と AIIB の流れを変えるのは何かについて概観しました。

次世代貿易・投資課題（NGeTI）に対処するため、チャン博士は FTAAP の今後の指針として、APEC の現在の状況を解説しました。これには集合的戦略研究（地域における RTA/FTA の現状調査を含む）、および最終的 FTAAP に向けて考えられる様々な進路の分析が含まれています。進路分析には、「スパゲティ・ボウル現象」の影響評価、「スパゲティ・ボウル現象」効果への対処、APEC 成長戦略および能力造成の持続などが含まれます。

博士の分析によれば、TPP の今後の課題としては、戦略上の不安の兆し（世界貿易のルールを誰が作るのか？）、国内承認に時間がかかりすぎることで、プラチナ基準の実施などがあります。RCEP の今後の課題としては、物品貿易の差別化された自由化（自由化の広さ・深さの点で追いついていない国があるため）、順次削減のモダリティ、いずれはさらに高次の FTA に繋げていくことなどがあります。これは、一部の ASEAN 諸国は自国が準備できていないと認めることに消極的なためです。

チャン博士はまた、開発ベースのグランドプランとして OBOR イニシアティブを紹介し、新たな資金体制として AIIB を紹介しました。博士は地政学的な力学と地理経済学的な状況を考慮し、OBOR と AIIB の流れを変えるのは中国の興隆（平和的か対立的か、「ニューノーマル」の影響）、ルール制定への参画（「プロジェクト評価基準」に適合できるか？すべての当事者に経済的恩恵があるか？）、および「平和と繁栄」であると表明しました。

シャンカラン・ナンビアル博士（マレーシア経済研究所（MIER）上級研究フェロー）

ASEAN は世界で最も活発な経済圏の 1 つです。この地域では消費階層が拡大し、インフラ機会が増大し、グローバル生産ネットワーク参加の潜在能力が高く、貿易・投資の余地が極めて大きくなっています。

自由化と制度改革を推奨する AEC は、ASEAN がグローバルトレンドおよびそれらがもたらす新たな機会を活用する能力を引き出すものであり、正しい方向への大きな一歩です。しかし自由化それ自体だけでは不十分であり、適切なルールと規制枠組みによってサポートされる必要があります。この文脈から、ASEAN 中心性の実現に向けて RCEP は重要かつ必要なステップです。

しかしながら RCEP は、ASEAN の対話相手国から同意を取り付けるというさらなる課題に直面しています。そのためナンビアル博士は、RCEP が低きに合わせるのではなく、適度な基準の採用に努め、それを順次高めていくことを目指してほしいと願っています。RCEP で適切な関心がはらわれるべき要素は、a) 中小企業への配慮、b) 開発格差の縮小、c) 経済協力の 3 つです。これらの問題を無視することはできません。

TPP は東アジアに大きな影響を与えると思われます。TPP 参加国は貿易・投資から恩恵を受け、そのことは ASEAN 内の非 TPP 参加国および ASEAN の対話相手国にデメリットをもたらすと考えられます。このため、一部の ASEAN 諸国は後から TPP 参加を検討する可能性があります。

しかしながら、ASEAN 内の成長と開発は拡大しており、多くのインフラプロジェクトが予想されます。中国は地域をまたぐ野心的な接続性プロジェクトのネットワークを計画しています。また、インドも域内の接続性を向上させる多くのプロジェクトに着手しています。域内のエネルギー需要の高まりによってもインフラおよび投資の向上が必要となるでしょう。この点で AIIB が前向きな役割を果たすこととなります。AIIB は世界銀行や ADB を超える多様な機会を提供することでしょう。

浦田秀次郎博士（早稲田大学 大学院アジア太平洋研究科 経済学教授）

TPP、RCEP、AIIB などの新たな枠組みは、貢献の程度と深さは国によって異なりますが、東アジアにおける地域経済統合の深化に貢献すると思われます。

TPP は東アジアに重大な影響を与えると思われます。それは、TPP が貿易・投資の高度な自由化および包括的・野心的な経済活動ルールにより、物資、サービス、資本、情報の自由な流れが促進されるビジネスしやすい環境を構築するからです。合意された施策は TPP 参加国間の貿易・投資を促進し、そのためにおそらく非 TPP 参加国の貿易・投資が犠牲となるため、それらの国に対

して被差別化と悪影響を避けるために TPP に参加するインセンティブが生じることとなるでしょう。

これまでの交渉の進捗度を考えると、RCEP の締結・制定までにはいくらか時間がかかると思われます。マスコミ報道から判断すると、RCEP は高度な自由化や包括的・野心的なルールという点で TPP よりも低いレベルであると思われます。TPP でそれほど優先されていない RCEP の重要要素は、経済協力です。実際、他の RCEP 参加国が提供する経済協力によって大きな恩恵を受けられる国がいくつかあります。

AIIB の創設により ADB などの他の機関や日本などの他の援助国がアジアでのインフラ建設への財政支援を拡大することになり、インフラ建設に好影響がもたらされます。AIIB は ADB や世界銀行などの他の国際機関と協力してインフラ建設を行い、地域に恩恵をもたらす必要があります。

ゲーリー・ホーク教授（ニュージーランド ヴィクトリア大学ウェリントン 名誉教授）

ホーク教授は「RCEP、TPP、AIIB は東アジアの経済統合を深化させることができる」と主張しました。しかしより大きな疑問は「できるかどうか」ではなく「するかどうか」です。教授は「TPP は地域協定というよりも、二国間協定を繋ぎ合わせたものであり、市場アクセスを適度に拡大し、各産業部門および国際ルールに対する従来型の伝統的手法である」とし、TPP は地域の包括的・革新的成長という課題に関わるものではないと主張しました。

RCEP には3つの主な疑問があります - 「AEC の市場アクセス規範や国際化は拡大されるのか？」 「RCEP は多様性の高い参加国において高度な野心と十分な柔軟性を両立できるのか？」 「RCEP は物資・サービスをともにカバーする既存および将来の国際生産ネットワークを実現できるのか？」 インフラおよび接続性の向上という点では、AIIB には未だ様々な制約があります。ホーク教授は「これらの制約は資金不足によるものよりも、コスト-ベネフィットの連携といったプロジェクト設計によるものが多い」と主張しました。

FTAAP が市場アクセスに関して TPP よりも議論を広げるものであるならば、ドーハラウンドよりうまく行くことは期待できません。FTAAP は、TPP と RCEP の対立点を回避し、WTO の発展を促進し、より広域な統合という課題（AIIB および各開発銀行を含む）を進め、地域全体の革新的・包括的成長への支援を構築するために活用されるべきです。

アジアの地域経済統合を深化させる諸体制（シロ・アームストロング博士（オーストラリア国立大学 豪日研究センター 所長））

アームストロング博士は「二国間貿易協定の影響は微小であり、しばしば誇張されている」と主張しました。二国間協定による貿易創出・貿易転換を示すエビデンスはありません。その理由は

利用率が低く、例外も多い（政治的にデリケートな諸問題のため）ためです。アジアではすでに一国自由化により障壁は低くなっています。

TPP にはその状況を変え、貿易・投資の流れに実際に影響を与える潜在能力があります。好影響が出る分野の 1 つは、発展途上国および一部の先進国（オーストラリアなど）にとって困難な知的財産権（IPR）強化に対する規制を設けたことです。他方、TPP 内の二国間関係で、問題点もあります。例えば、新規参加が難しくなり、交易およびサプライチェーンが単純化されないという点です。さらに、TPP は参加インセンティブとして非参加国が貿易転換によりダメージを受けるように設計されています。アームストロング博士は RCEP を拘束力のあるアジア協力と見なしています。最良の場合、RCEP は AEC を強化・拡大すると思われます。RCEP が提供するのの野心的な目標と能力造成であり、TPP のように高い参加ハードルや罰則を課すことではありません。RCEP が野心的目標を達成すれば、TPP の牽制作用を無効化する可能性を持っています。RCEP と TPP の課題は参加国の拡大です。

アームストロング博士は「開発の交渉は不可能だ」と主張しました。貿易・投資の自由化だけでは経済統合の深化は実現できません。拘束力のあるルールは政府の後退を防ぐことができますが、投資や開発をもたらすことはできません。そのためには能力造成と協力のための枠組みが必要です。博士は最後に、新たなイニシアティブを重視すべきであり、地域に恩恵をもたらすよう発展できる可能性があるとして述べました。新たなイニシアティブを重視し、イニシアティブのさらなる発展に繋げる方法により、アジアの地域の協力から恩恵を受けられるようにするために、ASEAN+6 アジェンダの中に中国による地域公共財としての AIIB や接続可能性としての OBOR を取り込むべきと指摘しました。

パネルセッション 3 質疑応答

ワン博士はセッションの皮切りとして、チャン博士、浦田教授、アームストロング博士に向けて質問をしました。博士の質問は TPP が成功するかということでした。今後参加国は増えるのでしょうか？次世代のグローバル基準となるルールが設定されるのでしょうか？

アームストロング博士は回答の中で、TPP 基準はマス経済、引いては米国が設定するものだと付け加えました。これはかつてアジアがコンセンサスによってルールと基準を設定したのとは対照的です。そのため、大国がはっきりした正当な根拠なしにルールを設定するのではないかという不安があります。したがって、博士は TPP がルールのグローバル基準となることはなく、そうでなければ他の諸国は参加したとらないと考えています。

浦田教授は、アームストロング博士とは少し違う意見だと述べました。教授は TPP 参加に関心がある国の数を考えると、TPP はいずれグローバルな枠組みになると考えています。教授は「TPP が制定されれば、マレーシアやベトナムなどの国は多くの恩恵を得ることができ、そのことが非参加国に対し、負け組にならないために TPP に参加する誘引力になる」と主張しました。教授は

また、「中国も TPP に参加することで多くの恩恵を得ることができ、またより大きなグローバル投資力となることによって中国は被差別化を回避できるため、TPP 参加の主要な動機となる」と考えています。

チャン博士は「TPP がグローバル基準となれるかは分からない」としながらも、次の 4 点を指摘しました。

- 1) 環太平洋連携協定 (TPP) は環大西洋貿易投資連携協定 (TTIP) と比べてはるかに厳格である。
- 2) TPP は RCEP の概念を取り入れていなければ (TPP と RCEP の参加国は一部重複している)、今年成立させることはできなかったであろう。
- 3) 我々が直面しなければならない次世代の課題として、「国境における (at the border) 」、「国境を越えた (across the border) 」、「国内の (behind the border) 」サプライチェーン問題があるが、それ以外に最も困難な次世代の課題は「国内の (behind the border) 」問題である (法的枠組みなど)。しかし、ASEAN 共同体の 3 本柱 (政治・文化・経済) が貴重なベースとなり、各参加国が直面しなければならない法的枠組みを取り入れることができるので、将来の緊張を緩和できる可能性があるとして博士は RCEP を信奉している。
- 4) 中国の場合、中国は米中投資協定に署名しようとしており、これは TPP の一部憲章が設定する一部基準を必ずしも下回るものではないと博士は理解している。中国はまた他の TPP 参加国と個別 FTA を結んでいる。世界第 2 の経済大国である中国が TPP に参加するつもりがあるかは非常に疑わしい。いずれにしても現在の情勢では TPP はグローバル貿易・投資基準となることを目指している。

聴衆 (インドネシア商工会議所 (KADIN) 元会頭 ソイ・パルデデ氏) : 競争政策の要否についてパネリストによる議論を呼びかけました。パルデデ氏は、多国間貿易協定では次のいくつかの (悪) 影響に対処する必要があると述べました。1) 天然資源の過度な開発。2) 国内産業への影響、特に 発展途上国において未だ揺籃期にある産業。3) 中小企業への影響。4) 労使問題。5) 農業。こうしたあらゆる貿易自由化および開発目標の悪影響に対処するには、競争政策が必要ですが、取り上げられていないのが実情です。悪影響に対処するための健全な競争政策を提供するうえで、規制担当者の役割は何でしょうか？

アームストロング博士は「競争政策を義務付けてはならない」と考えています。TPP ではありそうですが、多くの参加国において実施能力が不足しています。

ホーク教授は聴衆に対し「RCEP は TPP だけでなく AEC にも関連付けられていること」を再指摘しました。RCEP の方が未発達ですが、多くの分野で TPP より優れた内容を持っているのは確かであり、競争政策もその 1 つです。さらに、非差別待遇や企業の内国民待遇などに関心があるのであれば、必ずしも TPP に参加せずとも多くの協定が存在しています (例: 中国-ニュージーランド自由貿易協定)。

アームストロング博士はまた聴衆に対し、「インドネシアは本当に TPP に参加を希望するか」という示唆に富んだ質問をしました。他のグローバル主導者らを喜ばせるための政治的策略に過ぎないのでしょうか、それともインドネシアには本当に参加する意思があるのでしょうか？

ダムリ博士は、FTA の影響が微小であるというアームストロング博士の発言についてコメントしました。ダムリ博士によれば、インドネシア戦略国際研究所 (CSIS) は以前、インドネシアの FTA による影響を評価しようと調査を行い、その調査でインドネシアにおける FTA 利用度が非常に低いことが分かりました。おそらく問題の 1 つはいわゆる「スパゲティ・ボウル現象」だと思われます。これは貿易協定が多すぎると人々は自分の事業において（特に自産業部門内で）何が活用できるか分からなくなることを意味します。現在、二国間協定のみならずメガ地域協定が進行中または締結済みであり、この展開はスパゲティ・ボウル現象にどう影響するのでしょうか？

浦田博士は、FTA の活用度評価については 2 種類の調査があると述べました。1) 企業に対する質問調査 (FTA を活用しているか否かを尋ねる)、2) FTA による輸入額を総輸入額で割った貿易統計の利用です。いずれの場合も極めて小さい数字になるのが普通ですが、ここで注意しなければならない点として、1) の手法ではそもそも FTA を活用する必要のない企業があることを考慮しなければなりません。また 2) の手法では多くの輸入において同様に FTA の活用が必要ないことを考慮しなければなりません。このため、調査方法を慎重に選定しなければ数字に大きな狂いが出てしまいます。

ホーク教授は、貿易に関して逆の観点で見ると FTA を結んでいる相手国と、FTA を結んでいない国とを比較すると、FTA を結んでいる国の方が、はるかに貿易の伸びが高くなることはほぼ避けられません。

アームストロング博士は「FTA が貿易・投資に好影響を与えることを示す調査エビデンスはほとんどない」と述べました。オーストラリアは最近中国との FTA を締結したばかり（今月オーストラリアで批准）であり、その主眼は中国内の諸サービスに市場アクセスを得ることです。しかし門戸は開放されたものの、その機会をどのように利用するのでしょうか？どのような機会があるのでしょうか？重要なのはこれらの協定を 1 回限りで終わるものではなく、継続進行するプロセスに転換し、これらの動きを意味あるものにするということです。

ナンビアル博士は「ある意味で RCEP は AEC を拡張する、或いはその上に構築されるものである」と述べました。RCEP にはいくつか TPP には見られない特徴があり、協力や開発格差の縮小はその一例です。博士はまた「タイやフィリピンをはじめとする一部の国は、いずれ自国とマレーシアの競争力格差を埋めるためだけにでも TPP 参加に関心を見せる可能性がある。そのためマレーシアには、後になって TPP のルールが確定されてしまってからではなく、まだ交渉が行われている今のうちに TPP に参加する方がメリットがある」と述べました。

(英語) English Summary drafted by ERIA

Asia-Pacific Forum 2015

“ASEAN Community Building and Regional Economic Integration in East Asia: Looking Beyond 2015”

A Conference by:

Japan Economic Foundation; Economic Research Institute for ASEAN and East Asia; and

Center for Strategic and International Studies, Jakarta

26 November 2015

Fairmont Hotel, Jakarta

Welcoming Remarks by representatives of ERIA, JEF and CSIS

Mr. Izuru Kobayashi, Chief Operating Officer, Director General of Administration and Personnel Department, ERIA

The creation of AEC should be praised by all stakeholders. This is a time for celebration but the ASEAN integration face a crucial challenge in the economy in the coming future. Introduction of new partnership agreement, Trans-Pacific Partnership (TPP) raised questions for ASEAN centrality and their involvement in AEC. TPP might present challenges for ASEAN countries to deepen the integration with the region. At the moment, there are several ASEAN countries who expressed its interest in joining the partnership agreement such as Malaysia and Vietnam. There is a growing concern that non-TPP ASEAN members would be more interested in joining TPP rather than deepening the AEC. This is a challenge for ASEAN, in order to ensure stability within the region.

However, this is not the first time for ASEAN to face such challenge. When the Cold War ended, ASEAN lost the fundamental reason of its existence. Moreover, when APEC, which had larger and seemingly stronger economic cooperation framework, was formed in early 90s, ASEAN seemed to have less value of its existence. However, ASEAN countries came up with a more progressive measures than APEC had aimed for. ASEAN leaders agreed to form AFTA in 1992. This was the start of ASEAN centrality of the East Asia integration. AFTA eventually turned into AEC convincing global investors that ASEAN is a single market and production base.

Now ASEAN need a new initiative that would overcome the challenge posed by TPP.

The Asia-Pacific forum would be a good platform to spark discussion regarding regional integration. ERIA is a huge believer of ASEAN integration. In order to support integration and centrality, ERIA is willing to work intensively to initiate discussions on ASEAN integration.

Mr. Kazumasa Kusaka, Chairman and CEO, Japan Economic Foundation

He congratulated on the beginning of the ASEAN Economic Community in 2016 and hoped that ASEAN continues to play the central role in realizing regional economic integration of East Asia.

This Asia-Pacific Forum first convened in 2003 in Singapore, with the aim of promoting FTAs to realize sustainable economic growth. Since then, the discussions of this annual event have deepened to include domestic policies and measures called the “behind the border measures.”

As is seen in the ASEAN integration, the deepening of the integration impacts the economies, societies, and politics of each individual country and of the region as well, and how to overcome these issues will be a big challenge. The true aim of the Forum is to identify factors that constrain the realization of growth potential and remove those barriers by pushing for structural reform using trade and investment liberalization as leverage.

It will also be increasingly important to avoid expanding or fixing the income gap and asset gap. Expanding solid middle class or preventing its erosion will certainly contribute to the political and social stability, as well as to raising the growth potential.

The core of the growth strategy of Abenomics is placed on accelerating of structural reform through TPP and RCEP negotiations. These mega FTAs assure the sustainable development of the East Asian region through further enhancing direct investment, the key driving force of growth.

As is captured in the expression of “political economy”, we should understand and learn from the dynamism between economics and politics in order for the growth strategies in this region to succeed.

Dr. Yose Rizal Damuri, Head, Department of Economics, CSIS, Jakarta

The 2015 Asia-Pacific Forum is dedicated to support regional integration in East Asia. By the end of 2015, ASEAN countries will officially launch the AEC. Apart from the AEC, we also see other partnership initiatives such as the TPP, which attracts more countries to join the partnership, as well as Indonesia. There is also RCEP which encourages partnership along the Asia-Pacific region and the introduction of new development bank such as the AIIB. Partnership initiatives will be one of the key driver for economic development within the region.

Thus, it is important for ASEAN members to ask their commitment to ASEAN cooperation and establish a roadmap for integration for the future. What member countries should do to enhance the coherency of member states?

The forum will be an important platform for building integration amongst Asia-Pacific countries. CSIS is willing to give their full support to the establishment of this discussion and we believe that there will be a fruitful discussion from international experts.

Keynote Address: The Future of East Asia Integration: East Asia Summit and ASEAN Community Beyond 2015 by the H.E. Mr. Rizal Affandi Lukman, Deputy Minister of International Economic Cooperation at the Coordinating Ministry of Economic Affairs, Republic of Indonesia

The importance of regional integration for ASEAN and East Asia beyond 2015 is highly significant. The current ASEAN arrangement is rarely enough to address global challenges. The declaration of AEC in Kuala Lumpur, as well as East Asia Summit would serve as a good time to evaluate the performance of ASEAN cooperation for the last 10 years.

ASEAN has been the central example for integration in Asia. There are challenges ahead. It is a good time to evaluate the role of ASEAN integration on development and also other strategic topics such as regional security and human development.

AEC is not an overnight process but a process that took five decades. So far, ASEAN has engaged in free flow of goods, labors and capitals. 99.2% of the goods traded in ASEAN circulate without any tariff barriers. Furthermore, the Prime Minister of Malaysia said that ASEAN has been able to recover from the 2008 financial crisis, compared to countries from other regions. FDI flows have been increased significantly since the 2007 until the beginning of 2015. We saw tremendous potential gains for ASEAN countries as well as other countries around the region.

Most of the policies that were taken by ASEAN countries are fully implemented. Indonesia remains committed in fulfilling the remaining measures, in order to promote integration. We could not argue that Indonesia still need to make some effort to revise the exhaustive of amount of regulations and fulfill some requirements of the partnership agreement.

Despite the commitments of the government, we need to ensure that the private sector have to be fully aware and ready to capitalize the partnership agreement. We must continue our communication with our stakeholders in order to maximize the potential of our cooperation. When leaders gather and launch the initiative, the signal is not transmitted perfectly to the private sectors. The challenge is how to implement the points within the agreement to the private sector?

The other challenge is to construct an initiative beyond 2015 that includes an integrated economy with creative and dynamic characteristic. In realizing this vision, ASEAN have to ensure good governance, transparency and good policy regimes which include all stakeholders.

RCEP brings pressure towards more competitive and efficient economy. Indonesian is aggressively building infrastructures in big cities as well as rural areas and enhancing the business climate. This measure will be important for the preparation of the economic integration in ASEAN.

The conclusion of TPP addresses issues beyond trade after seven years of negotiation. This cooperation account for 85% of the global economic activity. It hasn't been officially ratified by the government of each member countries but TPP attracts interest from countries such as Indonesia, due to the economic potential of the cooperation.

On the other hand, RCEP with half of the world population offers the potential to increase the standard of living of the population. The cooperation offers more than just security cooperation but also economic potential. FTAAP will defined the next level of cooperation which ensures high quality trade, trade liberalization and trade integrations.

There are also several initiatives such as the global infrastructure hub which is put forward by G-20 leaders, UN development agenda post 2015 and the conference of UN Climate Change. All of these initiative promote inclusive growth for the development of the region.

The main theme of the three major events, the G-20, APEC and also ASEAN, emphasizes inclusiveness as the priority of the forum. It is important to bring the benefits of the development for all people within the society.

Asia-Pacific regions plays an important role in tackling global challenge. Every member countries need to put this issue within their strategy for the future. The introduction of TPP, FTAAP and RCEP should be ensured that the benefits of the initiatives will be spread equally among all regions.

The Indonesian government is willing to receive fruitful inputs regarding inclusiveness and sustainable development from various knowledgeable speakers with international background. I expect the combination of speakers within the Asia-pacific forum will bring positive changes for economic integration and development.

Panel Session 1: A Decade of East Asia Summit and Economic Regionalism: How can we pursue our growth strategy and achieve structural reform?

Moderated by Mr. Naoyuki Haraoka, Executive Managing Director, Japan Economic Foundation

As Asia looks forward to becoming the driver of the world's economy, with its progress in the East Asian regionalism and economic integration (as evidenced by the progress of the East Asian Summit, EAS, and the ASEAN Economic Community, AEC), challenges still lie ahead for economic integration. Individual member countries guard their national interests and economic growth is facing headwinds. Whether East Asia can achieve economic growth is dependent upon how each member country can achieve its economic structural reform in order to take full advantage of regional economic integration. Security concerns also remain heightened in the region. How can the EAS maintain a delicate balancing act between national and regional interests and become a driver of regional integration in the years ahead?

Amb. Murray McLean AO, Chair, Australia-Japan Foundation, Australia

Amb. McLean first acknowledges the notion that 2015 is a significant milestone in the ongoing progress being made towards regional economic integration and increasing the prosperity of the region (tenth anniversary of EAS, establishment of AEC, conclusion of TPP, and progress in the RCEP negotiation). He argues that the regional security environment is inextricably linked to these achievements since the best environment for the region is one that promotes strategic stability, open societies and economies, and economic integration.

He recognized that EAS is the regional institution that has the most potential to play a positive role not only in helping underpin ongoing economic growth and prosperity, but also in helping ensure regional security. He also acknowledged that the establishment of the AEC offers new economic pathways for business from other EAS member countries to engage with ASEAN. He also accepted that the progress on TPP and RCEP also is full of potential benefit for economies involved in these partnerships (noting that these two agreements should not be seen as in competition with each other, but rather as complementary and viable pathways for the ultimate realization of a free trade area in the Indo-Pacific).

However, there are many multi-faceted and evolving security challenges that must not be allowed to adversely affect the environment that is necessary to continuing strong economic growth, deeper economic integration and prosperity of the region (such as traditional security disputes relating to trust, maritime and territorial disputes and changing power dynamics, and non-traditional security threats posed by terrorism, extremism, natural disasters, human pandemics, transnational crime, and cybersecurity).

In order to minimize these risks and optimize growth, constructive and forward-looking bilateral relationships, particularly among the major powers, are fundamental to addressing these challenges, adding that ASEAN-centered regional institutions will play a crucial complementary role in promoting a stable and resilient regional order.

He concluded by stating that Australia, through the ASEAN-ANZ FTA and through its development cooperation programs, is committed to supporting ASEAN's efforts to advance regional integration, acknowledging that regional integration is a project that needs even greater effort in each SE Asian country as well as by ASEAN as an institution.

Dr. Zhenyu Wang, Director of China National Committee for Pacific Economic Cooperation, China

Dr. Wang started by listing out the great achievements of EAS and East Asian (EA) regionalism, including the AEC and RCEP, connectivity initiatives, functional cooperation initiatives in priority areas, US and Russia's accession to EAS, and the fact that EA fared well in the Global Financial Crisis

(GFC) and remains the global economic engine that contributes to multilateral trade processes and global development agenda. He also outlines the main reasons for these achievements: ASEAN centrality, open regionalism, confluence of various processes of economic cooperation, top-down commitments to meet the bottom-up needs of market integration, capacity building initiatives etc.

Dr. Wang also outlines the opportunities and challenges ahead for the ASEAN Community beyond 2015, stating that more efforts should be diverted to RCEP. He also points out that EAS is one of the channels to promote dialogue and cooperation, since ASEAN retains centrality. He added that the EAS should be a venue to promote the New Model of Major-Country Relations, featuring "no conflict or confrontation", "mutual respect" and "win-win cooperation".

Dr. Wang also identifies structural reform as an essential part of regional economic integration, connectivity (institutional connectivity), and as a necessary precondition to successful implementation of physical connectivity initiatives. He emphasizes the importance of structural reform in promoting growth, encouraging the enhancement of the EA production network, supply chains, and value chains, unilateral actions complemented with collective actions, synergy with APEC efforts, capacity building, and long-range goals with gradualism.

Dr. Choong-Yong Ahn, Chairman, Korea Commission for Corporate Partnership, Korea

Dr. Ahn started by explaining the East Asian Miracle and the Asian Paradox. In the past three decades under the GATT led by the U.S. and WTO, East Asia, especially the four dragon economies, achieved the **East Asian Economic Miracle** by adopting an export-oriented development strategy. They enjoyed "unlimited" access to the U.S. market first after WWII and later took advantage of their own geographical proximity to become more functionally interdependent. Since the Asian financial crisis in 1998, East Asian economies have also developed a sense of an "East Asian Identity."

As China's PPP-based GDP overtook that of the U.S. in 2015, according to the IMF, the regional hegemonic leadership competition between China's "Chinese Dream" and the U.S.' "Pivot to Asia" policy appears to increasingly be on a collision course, causing a new wave of nationalism and heightened hegemonic rivalry, including maritime territorial disputes. This phenomenon caused the **Asian Paradox**, asserting the discrepancy between growing intra-regional economic interdependence on the one hand and backward political and security cooperation on the other.

Dr. Ahn acknowledged that recently, two great institutional mechanisms have been established to alter the economic and diplomatic landscape of the Asia-Pacific rim: the TPP and AIIB. Another mega-economic bloc has also been in negotiations by China and the ASEAN leadership: RCEP. Although less liberalized than the TPP, RCEP nearly equals the GDP and trade volume of the TPP.

Both mega deals are viewed as check and balance acts between the U.S. and China. Dr. Ahn argues that down the road, the TPP and RCEP should be converged.

Dr. Ahn also stresses Asian values and supported a bottom-up approach to building mutual trust across the region. He stated that mutual trust cultivated in the Confucian culture in East Asia is a valuable cornerstone for cooperation and public infrastructure and indispensable for peace. The trust-building process requires a consistent approach and the objective recognition of accurate history so that the next generation can move forward. Major regional powers need to be non-aggressive, non-assertive and non-coercive to deepen mutual trust.

Dr. Sachin Chaturvedi, Director General, Research and Information System for Developing Countries, India

Dr. Chaturvedi claims that it is evidently clear that without the RCEP members, TPP would not have its desired outcome. Its global foothold critically depends on RCEP members. This provides lessons for the other RCEP members for working towards finalizing the Agreement by 2016.

With the TPP and RCEP, there is a global attraction towards economic growth. Due to this, the implementation of comprehensive and harmonized NTMs/standards would be the key issue before RCEP. There has to be adequate recognition of the fact that members are at different stages of economic development and without regulatory structures pertaining to NTMs/standards, the members would be affected differently.

Dr. Chaturvedi listed his three steps towards the process of instilling confidence among RCEP members: 1) liberalizing at the domestic level; 2) more space for laggard countries, so that they may catch up in due course of time; and 3) sectoral cooperation for promoting Regional Value Chains, which is equally important for converging sector specific standards and protect designs. Dr. Chaturvedi also stresses the importance of the role of financial institutions in the Asian region in bringing the countries closer together and to bring centrality to SDG.

RCEP has the potential to lead the global economy as it has the economic potential. It has emerged as a soft global power and this lead role of the regional caucus should be maintained to ensure Asia's pivotal role in the world economy.

Prof. Simon SC Tay, Chairman, Singapore Institute of International Affairs, Singapore

Global growth and stability today cannot be taken for granted. There are three areas in which there are challenges ahead. Firstly, although we have TPP, AEC, and RCEP, we still have to look at economic transformation. There needs to be political will to enforce reform that prioritizes both economic and social issues. Prof Tay commented that although the AEC is a great effort at

transformation, it will only take place over time. The TPP, on the other hand, is much more rushed in terms of change.

Secondly, when it comes to what we should focus on in the upcoming year: RCEP. The key problems in its progress will mostly be for India and Indonesia. The leaders of these two countries will need help in tackling the obstacles they will face in the ongoing RCEP negotiations. He explained that both India and Indonesia emphasize on foreign direct investment (FDI). As such, in order to move forward, they need to understand how FDI and free trade reform links to each other. Otherwise, a China-ASEAN FTA would be more meaningful.

Thirdly, Professor Tay pointed out growing Sino-Japanese competition within ASEAN and in India. He stated that competition can be a good thing. However, bad competition also exists, as shown over the last few months by Indonesia, Thailand, Malaysia, etc, where lack of transparency and misallocation of resources exists. As such, we need to re-strategize our centrality.

Japanese Economy and the Second Stage of Abenomics by Mr. Daiki Kasugahara, President Director, Jakarta Office, Japan External Trade Organization (JETRO), Japan

Abenomics has put the Japanese economy on the path to escape deflation and make a steady recovery. Corporate profitability has increased significantly. Corporate recovery is also driving the improvement of employment conditions. That said, Mr. Kasugahara noted a shift in the policy focus of Abenomics, from demand to supply. The issues behind this shift are that corporate capital investment has yet to see clean improvement, FDI to Japan remains low compared to other major economics, a structural economic growth constraint due to mid/long-term population decrease, and dramatic improvement of effectiveness and market expansion with innovative services and products required.

The Abe Administration has realized the economic recovery on demand side, through “Bold monetary policy” such as monetary easing, and “Flexible fiscal policy” such as stimulus package. For the next stage, it is required to undertake structural reforms in light of investment promotion, and long-term agendas such as dramatic improvement of effectiveness and securing the work force. This is why the Government has approved the policy principle for the Second Stage of Abenomics in June 2015, in order to promote the supply oriented reforms.

Mr. Kasugahara ended with observing the role of TPP in Abenomics. He claimed that the TPP, which provides high-standard business platform in Asia-Pacific region, is one of the important driving forces of Abenomics. Two achievements are expected through taking part in the TPP. Firstly, construction of new global value chain, through market development for corporations, promotion of foreign investments and foreign visitors, etc. Secondly, promoting innovations, invigorating industries, and improving productivity through conducting reforms within TPP. In summary, it is

expected for the Second Stage of Abenomics to overcome its priority subjects, expanding investment and promoting innovations, through TPP participation.

Questions and Answers for Panel Session 1:

Jaime Yung pointed out that there is a strong sense of the beginning of regional integration, and growing economic measurements within ASEAN countries. Competition is also growing among ASEAN counter-partners. As such, how can China and US cooperate more in ASEAN region? How can we balance competition and cooperation among this region?

Dr. Ahn points out that in his presentation, he had mentioned that due to the TPP and RCEP, US and China policies appears to increasingly be on a collision course. Some experts and analysts have described TPP as a security alliance on part of an economic collaborative scheme, but deem this as dangerous way of thinking as it would exacerbate the conflict between China and the US. Therefore, in this regard, TPP should be viewed as a preferential regional trading arrangement. We need to extend market access to freer flow of goods and investment.

Dr. Wang added that one of the successes of the EAS is its enlargement, i.e. including the US and Russia in the group. As an institution to deal with both economic cooperation and political and security issues, EAS is in the best position, after including the US, to promote the compatibility between the security architecture and economic integration architecture in East Asia as well as in the Asia Pacific. However, this role is not yet well played. There seems currently more competition than cooperation, esp. in the geopolitical/security side. The EAS shall play the role of promoting cooperation for the sake of regional security and prosperity. A good sign can be tracked in both Premier Li Keqiang's speech in this year's EAS Summit and the statement between the US and ASEAN, where we can find a lot of commonalities, for instance, respect of the international order, and peaceful management of disputes, etc. This shows that it is hopeful to promote the above-mentioned compatibility on the platform of EAS.

Dr. Rizal Affandi Lukman asks the question: How do TPP countries cope with sensitive issues for specific countries? (e.g. Japan and agriculture products, Malaysia on SOEs etc.) How do these sensitive issues cope with the acquisition of the TPP?

Mr. Kasugahara mentioned that all TPP-member countries have sensitive issues. While there is nothing that can be done to eradicate the existence of these issues, it is important to keep a continuous and open discussion, which should continue in the ratification of the TPP.

Dr. Shujiro Urata posed a question to Professor Tay related to cooperation between China and US. Prof. Tay talked about avoiding bad/unhealthy competition and pursuing healthy competition. Can cooperation between systems providers (China, US, India) be considered healthy? Does ASEAN, as a recipient of these systems, have a role to play to make this competition healthy?

Professor Tay replied that it is not for the two giants to stop competing. It's for the ASEAN member states (AMS). For them to be more central, they need to decide which country/donor they should rely on. As we hope the national infrastructure will link to ASEAN connectivity. Although the problem is quite real, no one has thought it through yet, and so no solution has been brought about. Professor Tay also stresses the importance of bringing RCEP to life.

Mr. Kasugahara stressed the importance of independent institutions such as ERIA in facilitating countries make unbiased policy decision, and the importance of these organizations to provide very neutral analytic data to show what kind of priorities should be set.

Amb. McLean added that it's a mistake to look at what's going on in the region as a competition between China and US. There are a lot of other countries that are very important in the region, such as India, Japan, and Indonesia. Australia and Korea are also able to play key roles and make positive contributions. In other words, this is a combined effort by all countries to work cooperatively. It is very important that we can give as much emphasis to the unity that ASEAN provides in the region and build around that.

A representative from **ERIA** asked about RCEP and the TPP. Who could be the game-changer to move RCEP further? With regards to economic integration, what kind of structural reforms should we think about in moving forward with regional integration?

Dr. Chaturvedi noted an overlapping membership between RCEP and TPP, so how do you promote catching up? Who are the losers? What will be the bottom line? These, he states, will be the actual game-changer. He also mentioned that emphasis on Sustainable Development Goals (SDGs) is extremely important as 3 out of the 17 goals, and 18 out of the 169 indicators are on trade. Members within RCEP and TPP will reflect on these issues that each of them will be undertaking. From that point of view, the bottom line would be refined by the end of the month, and we would have signs of moving forward.

In his answer, **Dr. Wang** stated, "Depends on what game you are talking about." If it is the game of high standards and next generation issues, then TPP is the game-changer. But if it is the game of development or integration and development, then RCEP is the game-changer, due to its membership, diversity, and pursuit of high standard next generation reforms. In his opinion, RCEP represents the future of global trade economic development. **Dr. Wang** also disagrees with **Dr. Ahn** in that he does not think China is the driving force of RCEP, rather RCEP is a mutual force with ASEAN playing a central role. While the US is the leader of TPP, China is definitely not the leader of RCEP.

Prof. Tay disagrees with both Dr. Wang and Dr. Ahn. He mentioned that the ASEAN-China FTA is below RCEP, and therefore should drive it. China is not able to play the role in RCEP that the US does in the TPP, but ASEAN cannot force countries like India, Japan, or Korea to come together on RCEP since it's too weak. As such, to get RCEP moving, we could use the ASEAN-China FTA as a

friendly nudge on competition by saying that if you don't move on RCEP, we will move forward with ASEAN-China.

Mr. Kobayashi from ERIA noted that Dr. Ahn mentioned that the AIIB should meet global best practices with high standards. His question then: Are existing global standards working well? If so, then it probably means that there is less necessity for the AIIB to exist. As such, perhaps existing global standards are not working well enough to meet the huge demand for infrastructure in this region. Consequently, AIIB member countries, especially China, needs to come up with new philosophies or standards based on which region is able to increase their infrastructure investment. In this case, what kind of philosophies would that include?

Dr. Ahn admitted that the AIIB initiative still brings about a few unknown questions. Will it benefit all countries equally? Does it serve Chinese national interest, Asia-Pacific interest, or Central Asia's interest? As such, he concluded that we still need to find a balancing act along China's OBOR policy and the regional Central Asia's policy. He ended by expressing his hope that AIIB will be able to accommodate as much as possible.

Panel Session 2: ASEAN Economic Community as Driver of Regional Integration in East Asia: Challenges and Opportunities

Moderated by Dr. Ponciano S. Intal, Senior Economist, ERIA

The topic of the previous discussion circled around the challenge posed by TPP but, on other hand, TPP could present an opportunity for ASEAN countries to deepen the integration within the region. One of the main question of this discussion will be the role of Indonesia in ensuring the credibility of the AEC concept in the future. AEC could be considered as a facilitator for deeper regional integration but the implementation depends on the stance of its member countries.

The Risks for ASEAN Centrality by Dr. Vo Tri Thanh, Vice President, Central Institute for Economic Management, Vietnam

As mentioned before, the concept of AEC is a common knowledge among general audience which includes principals such as community, connectivity, and cooperation but the biggest challenge for ASEAN is the concept of centrality, concerning Asia-Pacific integration.

Previously, countries have been promoting the concept of "Centric Circle Strategy" which includes series of regional integration agreement, such as AEC, ASEAN +1 and RCEP. RCEP was designed as an improvement over the existing AEC and ASEAN +1 but economists expressed their concern over the lack of progress of RCEP. Member countries have staged multiple rounds of discussion but the view remains sceptic over the resolution. Could ASEAN play a significant role in pushing the negotiation of RCEP?

Apart from the initiatives such as RCEP and AEC, TPP presents a potential partnership agreement with high quality benefits but also compromises. TPP promotes investment and trade diversion to its

member countries, including ASEAN countries such as Vietnam and Malaysia. However, there are several ASEAN countries that are not included in TPP such as Myanmar, Cambodia and Laos. These countries will not enjoy the benefits of TPP, hence, imbalance may rise within the region. What could ASEAN do to minimize disadvantages of its non-TPP member countries?

Beside regional agreements, connectivity will play a major role in building effective integration. There are major connectivity programs around the regions of ASEAN such as MPAC, APEC Connectivity and an initiative, in cooperation with China, called the Silk Road strategy. These programs are essential, yet ambitious, for deepening integration but it requires huge external resources and active engagement from the private sector.

ASEAN, as a community, hold a strong position in many relevant international institutions such as the World Bank, Asian Development Bank, and also AIIB. On the other hand, management of ongoing cooperation remains poor, hence lead to the dispersion of efforts and resources. Coordination amongst stakeholders and ASEAN countries shows ineffective mechanism which rise from conflicts of interest.

ASEAN countries should explore the concept of ASEAN centrality further, in order to realize the importance of regional unity. In the absence of a strong coherence between members, ASEAN voice will not be regarded in the middle of major partnership agreement, such as TPP. Thus, the only way for ASEAN countries, to be recognized, is through the establishment of a good mechanism which represents a regional consensus. ASEAN Centrality will be an essential foundation for the future of East Asia and Asia Pacific Integration.

East Asia and Asia Pacific integration will not succeed under persistent development gap in ASEAN. Challenges in trade and sustainable development should be considered under the pressure of market force and new requirements for Asia Pacific economic integration. Conflict of interests may rise among stakeholders due to geo-political problems, thus, policy response should be designed thoroughly. ASEAN countries have to show their commitment to ASEAN centrality and support less developed member countries within the region.

AEC as a Driver for Regional Integration: Challenges and Opportunities Dr. Somkiat Tangkitvanich, President, Thailand Development Research Institute, Thailand

The introduction of ASEAN +3 and RCEP prompt a vast economic potential which involves a huge number of global population. Both initiatives were a significant improvement over the current ASEAN arrangements.

AEC was designed as a platform for integration which will change the ASEAN significantly by 2016. However, in reality, the AEC might not fulfill its potential for deepening integration in ASEAN. Under the AFTA, the original ASEAN members have reduced their tariff rate since the 1993. The planned tariff reduction is almost finished as planned. On the other hand, little progress in eliminating non-trade barriers could be found within the region, especially the liberalization of trade

in services and investment. Under the current arrangement, there are only 8 professional services that are subject to MRA, though the implementation remains extremely slow. The only major changes that occurred within the region is the elimination of tariff in CLMV countries for other ASEAN members. The problems of AEC don't necessarily depends on speed but also the lack of commitments among ASEAN countries.

Regional integration will not be achieved by members without any significant reform. In order to strengthen AEC integration, members could implement several alternatives. First and foremost, the AEC have to encourage elimination of non-tariff barriers. Second, liberalization of the service sectors, especially business services. Third, provide missing transportation links around the ASEAN region through physical infrastructure. Lastly, AEC has to facilitate the free flow of goods and high-skilled workers within the ASEAN region.

To establish AEC and reap the benefit of integration, political consensus will be key, as well as economic reform. Major progress in the implementation of AEC will be essential to speed up the negotiation of RCEP in the future.

Major Challenges to Economic Growth and ASEAN'S Programs by Dr. Josef T. Yap, Professorial Lecturer, School of Economics, University of the Philippines

There are many challenges to global economic growth and ASEAN has made efforts to address these issues on a regional basis. The framework is based on endogenous economic growth theory which highlights the quality as well as quantity of inputs. The challenges were classified into three categories; factors of production, macroeconomic stability, and issues of sustainability.

Under factors of production, the main challenge is investment in physical infrastructure. ADB estimated that US\$ 8 trillion is required between 2010 and 2020 in order to meet the requirements of physical infrastructure in developing Asia. Unfortunately, many countries are facing a chronic fiscal crisis, particularly advanced economies. This limits available funds. There are alternatives such as engagement in public private partnerships or development banks such as the AIIB. In this context, a key question is whether AIIB will provide a significant boost.

Apart from investment, there are concerns regarding innovation, skills and education. Innovation is a main long-term driver for economic growth. There is concern that the rate of innovation is slowing down. However, while there has been no major invention like electricity or the automobile in recent history, there are major advances in selected areas such as information technology, genomics, and nanotechnology. ASEAN countries have to improve intellectual property rights in order to promote innovation.

In the labor market, there is a need for skills enhancement due to the lack of skilled workers within the region. The situation can be characterized as too few high-skilled workers and too few jobs for low-to-medium skilled workers. This issue of mismatch should be addressed through close coordination between academe, government and the private sector. Stakeholders could also

encourage the use of Technical and Vocational Education and Training (TVET). Meanwhile, the quality of education should also be improved with focus on nurturing innovative thinkers and managers who could address complex issues and develop creative solutions.

Financial sector stability is the main concern in the area of macroeconomic stability because of the experience with the 2008 Global Financial Crisis. There should be stronger regulation on capital flows and a sovereign debts workout mechanism in order to maintain the stability of the financial sector. There is also concern about narrow fiscal space due to ageing population. Lack of fiscal flexibility is also due to the need to achieve macroeconomic stability. Inadequate supply of public goods is evident through the undercapitalization of international institutions like the World Bank and UN. Policy coordination is also a problem related to macroeconomic stability. For example, the recent G-20 meeting could not address the global macroeconomics imbalances.

Included under the issue of sustainability are: i) environmental management which focuses heavily on climate change; ii) inequality and inclusive growth; iii) economic rebalancing and product diversification; and iv) the problem of demographic winter in many countries.

ASEAN has made progress to address these challenges to economic growth. There is a master plan for ASEAN connectivity which includes ASEAN highway network, integrated and competitive maritime transport and single aviation market. In education, ASEAN is trying to establish a university network in order to increase the quality of education. Intra-regional migration is managed through the ASEAN Declaration on The Protection and Promotion of the Rights of Migrant Workers.

ASEAN is also involved actively in financial cooperation such as the CMIM and AMRO. ASEAN is planning to create a roadmap for monetary and financial integration which would be an important driver for economic growth. Apart from financial cooperation, SME development will be essential to address the issue of inclusive growth. ASEAN is experiencing significant growth in SME development which is a remarkable achievement for the region.

The overall goal of ASEAN cooperation is to create a single market and production base with high competitiveness. It is important for ASEAN to promote equitable economic development within the region which is deeply integrated with the global economy.

ASEAN Economic Community: Financing Growth by Mr. Poltak Hotradero, Head of Research Division, Indonesian Stock Exchange, Indonesia

There are differences in economic growth amongst ASEAN countries. Countries could learn through other members within the region through AEC, in order to fulfill their economic potential.

If we are talking about ASEAN, Indonesia could be considered as the average of ASEAN since Indonesia's population and GDP count for a large fraction of the region. Indonesia contributes 40.5% of ASEAN's population while GDP accounts for 40.58% of ASEAN's total. The numbers are staggering compared to other countries within the region.

If we talk further, what is the pattern of financing in ASEAN for development?

Apparently, there are no single pattern of financing in ASEAN. There is a huge difference the ratio banks assets to GDP among ASEAN countries. Myanmar has the lowest bank asset to GDP ratio which is less than 32%. Surprisingly, Indonesia has the second lowest ratio in ASEAN OF 52.2%, even though Laos, Cambodia and Brunei, which is smaller in size, ranked higher within the region. Singapore stands out within the region with a ratio of 271.8%. There is no uniformity in this form of financing within the region.

Government bond outstanding ratio to GDP also shows huge variation. Government bond is an important source of financing for the government to leverage their position. Even amongst the ASEAN 5, Indonesia has one of the lowest government bond outstanding ratio compared to Malaysia, Thailand, Singapore and Vietnam. Indonesia could be classified as under-leveraged and should learn from other countries regarding debt leverage. Government bond will be an important source for Indonesia, in order to boost economic growth.

In the equity market, Indonesia hasn't performed really well compared to other ASEAN-5 countries. Surprisingly, Thailand recorded high volumes of daily trading value, higher than Singapore. There is a growing need for portfolio diversification and ASEAN is seen as potential for equity diversification.

There is also a huge variance in mutual fund assets amongst ASEAN countries based on a report from 2010. Indonesia recorded a feeble 2.6% assets share of GDP while other countries such Singapore, Malaysia and Thailand recorded 20% of share of GDP.

ASEAN countries could learn a lot from each other especially with the introduction of AEC. AEC could serve as a systematic platform for knowledge sharing for member countries. Compared to countries from other regions, ASEAN has a huge potential to develop. ASEAN-5 could help other member countries to develop in order to fulfill the potential of the region.

Dr. Cho Cho Thein, Professor, Department of Applied Economics, Yangon University of Economics, Myanmar

ASEAN is in moving forward to a peaceful and prosperous community. It has been transforming into a Rules-based and People centered organization by integrating Southeast Asia's diverse economies. When the AEC happens in reality, some countries will see many new opportunities presented to them and the reverse for others.

To attain the concrete achievement of AEC goal, we have to first of all, ensure to create the Single Market and production based (first pillar of AEC). After reducing the tariffs among AMSs in line with the CEPT scheme, tariffs are coming down very fast and are practically zero for the ASEAN-6. Now non-tariff measures (NTMs) have become particularly salient as a potential barrier to smoother trade linkages among AMSs. For trade facilitation, we need to establish the National Single Window (NSW) in AMSs for materialize the ASEAN Single Window (ASW). The ASEAN Single Window

(ASW) is not yet operative. To reach the AEC goal ASW, National Single Windows are not yet fully operational in most AMSs; and indeed, for three AMSs (CLM), they have yet to be put in place. The implementation of NTM in Myanmar is also underway.

In addition, it is the need for the full operationalization of both national and regional trade repositories. Narrowing development gaps is also one of the main challenges to be tackled at national as well as at regional level. Furthermore, raising awareness on ASEAN should remain the top priority for greater participation of people in the building of people-centered community through among other, active engagement with all relevant stakeholders. Owing to the cross-cutting nature of development gap between ASEAN-6 and CLMV countries and its significance to the ASEAN integration process, we reaffirm to support for the implementation of the IAI in post-2015.

Questions and Answers for Panel Session 2:

Moderator:

In the beginning, TPP is meant to be an organization for developed country. However Vietnam, which has a lower GDP than Indonesia, has decided to join the cooperation. What is the reason behind Vietnam involvement? Does Vietnam use TPP an alternative to push domestic reform?

Dr. Vo Tri Thanh:

Vietnam is poised to be involved in TPP as well as the AEC. The TPP is driven by the United States in order to establish a market in the Pacific region. At the same time, Vietnam feels that TPP offered a high quality cooperation among Pacific countries.

Vietnam is keen to join the TPP, in order to stimulate domestic form. Involvement in TPP requires various changes. So far, TPP has been able to promote institutional reform and domestic reform. TPP is seen as a turning point of Vietnam in the process of deepening integration.

Secondly, Vietnam has had experience regarding the process of integration. Thus, Vietnam believe that it can overcome sensitive issues and the challenges that is posed by TPP. Apart from challenges, TPP provides a huge potential for Vietnam since the United States is one Vietnam's major trading and investment partner. Thus, engagement in TPP would give a significant boost in economic growth.

Lastly, TPP involves sensitive issues within the negotiation. However, the areas that were addressed by the TPP is consistent with the objective of Vietnam, especially SOE. Vietnam has been trying to reform their domestic institution and TPP provides a huge boost in that regard. **Moderator:**

Apart from TPP, there is also AEC, RCEP and other FTA's. Could they stimulate domestic reform? Does ASEAN integration played a huge role for East Asia and Asia Pacific integration? Do we really believe in the role of ASEAN integration? How to promote integration?

Mr. Poltak Hotradero:

There are stages of integration in ASEAN. ASEAN countries should learn from each other in order to improve integration within the region. The flow information will be a key driver for ASEAN to learn from each other, in order to strengthen the bond between ASEAN countries.

Moderator:

In the presentation, Indonesia has the lowest M2 to GDP ratio and bank asset to GDP ratio. Is it possible that the lack of competition cause Indonesia to perform poorly in that ratio? What could be done to overcome this issue?

Mr. Poltak Hotradero:

The utilization of financial products, such as credit, is still very low in Indonesia. Most of time, Indonesians rely on informal financial products. The banking sector of Indonesia is still under-utilized even though the potential is huge for the taking. Apart from informal financing, competition also caused under-utilization of the banking sector. Transfer of information could be an alternative to overcome this issue. Thus, transparency should be ensured by all member countries.

ERIA:

TPP is considered by Vietnam as a driver for domestic reform. Intellectual property in general, competition law and labor standards are some of the aspects that Vietnam has to pursue, in order to comply with the requirements of TPP. What is Vietnam plan to overcome this issues?

Dr. Vo Tri Thanh:

Vietnam and US is trying to understand each other in regards to TPP. Apart from the compliance to the agreements, TPP offers some flexibility for their member countries in certain circumstances. Vietnam, for example, has been able to protect their garment and textile industry before they could perform independently within the TPP.

Basically, TPP is a rule-based arrangements but TPP also offers mechanism to support countries in managing the requirements. For example, protection to SME, consultation and financial supports. TPP is not specific attempt to push domestic reform but they also provide measures to support member countries to fulfill the requirements of TPP.

Moderator:

Based on Shiro's paper, RCEP is considered as a better arrangement for ASEAN countries, compared to TPP. Could Mr. Shiro Armstrong give some explanation regarding the argument?

Dr. Shiro Armstrong:

Fundamentally, TPP contains an exhaustive list of requirements that needs to be fulfilled by the member countries in order to join. On other hand, RCEP provides more lenient requirements at

point of entry but ambitious goals with measures such as capacity building to reach those standards over a committed time. Vietnam's decision to join TPP is influenced by the access to the US garment and textile industry which is large for Vietnam. Vietnam is also trying to reform their SOEs and will have to do so within the framework of the TPP. The calculation for China is different from that of Vietnam and the reform of China's SOEs driven by an external process such as TPP and mandated by US Congress will be very difficult. An ambitious RCEP with strong commitments by members will help to create an external environment that is congenial to pursuing domestic structural reform.

Moderator:

Vietnam is known for textile and garment industry. However, within TPP, there is an issue about intellectual property right. The intellectual property law could brought significant impact to the drugs industry. Under intellectual protection, drugs' price could soar due to the lack of the competition. This would jeopardize competition within the drugs industry.

Under the TPP, there will be several beneficiaries such as the textile and e-commerce. These sectors would gain under the current TPP arrangements. However, would it be the right step for Vietnam?

Dr. Vo Tri Thanh:

Vietnam, within the negotiation, acquired some space to address the requirements of TPP. There will be some compromises and challenges under the TPP but Vietnam believes that this is a necessary thing to do, particularly the intellectual property right issues. Vietnam admits that there will be some strict measure within the drugs industry. However, Vietnam believe that this loss would be compensated in other industries, particularly exports of garments and textile.

Moderator:

Regarding the issue of AEC, it is wise for ASEAN to strengthen the single market and production base. How do you proceed with the AEC?

There are indications that ASEAN is not ready for AEC. Conflict of interest is still evident within the local government which obstruct the progress of AEC to move forward. There were some issues within the blueprints of the AEC that need to be addressed.

Dr. Somkiat Tangkitvanich:

If AEC doesn't show any significant progress, ASEAN should consider other alternatives such as TPP. Vietnam, Malaysia and Brunei have made their decision to join TPP. Meanwhile, Indonesia and Thailand still have to decide their position. RCEP will not move forward if AEC doesn't succeed. ASEAN need to liberalize themselves, or if not, they should choose other FTA's. Agreements such as TPP could give external pressure to the ASEAN community, to deepen the integration within the region.

Moderator:

Countries that are interested in TPP include Indonesia, Philippines, Thailand and Myanmar. These countries are problematic, due to low rate of liberalization, but they are willing to join the TPP. Even Philippines, for example, is still struggling in the manufacturing sector. AEC is a very ambitious plan for deeper integration. Could TPP be beneficial for ASEAN integration? Does ASEAN really needs external pressure to deepen the integration within the region?

Dr. Vo Tri Thanh:

TPP could be a facilitator to enhance the integration within the region. Vietnam is willing to share their experience, regarding the implementation of the reform, to other ASEAN countries. TPP could serve as a complement to other partnership agreements.

Moderator:

Who will drive the process of integration in ASEAN? Will it be Indonesia? If it is so, then Indonesia has to embrace their position and decide whether integration would be useful for their country. Does Indonesia play a significant role in ensuring AEC in 2016?

Soy Pardede:

There are doubts regarding Indonesia's role as the leader of ASEAN integration. The concept of AEC, which focused on inclusive on economic integration, is not really familiar within value of Indonesian. Indonesian people believe in the principal of togetherness, thus, they will be reluctant to assert themselves as the leader of ASEAN countries.

Moderator:

Based on the argument of Mr. Soy Pardede, Indonesia is reluctant to take its position as the leader of ASEAN countries. Why Indonesia decide to pick such condition?

Soy Pardede:

The understanding of Indonesian on AEC is inclusivity rather than exclusivity.

Moderator:

Indonesia was a leader of ASEAN integration before, based on historical evidence. Could someone give any comments regarding Indonesia's position?

Dr. Yose Rizal Damuri:

There are several figures which assert Indonesia's position in the ASEAN. Indonesia counts for 50% of ASEAN's GDP which made them the biggest contributor within the region. Based on this fact, Indonesia has capacity to step forward as the leader of ASEAN, especially in economic integration. Unfortunately, the general perception from most Indonesia's stakeholders, including business, government officials, and policy makers, may not be as favourable. The regional integration is

perceived to make Indonesia as a market only and Indonesia would become a “victim”, rather than getting benefits of greater economic integration.

There is a tendency that Indonesia is trying focus on domestic issues rather than external integration. And this is not unusual for big countries like Indonesia. China has experience success with outward-looking focus but the achievement is considered as an exception to other developing countries.

However, Indonesia should take more active role in defining economic integration in ASEAN. With that Indonesia may be able to obtain greater benefits of integration by shaping it to reflect its economic interest, instead of just follow the process. If Indonesia doesn't take any initiative to be the leader, the concern that Indonesia could be left out as a market for other ASEAN countries might be realized.

Moderator:

Indonesia has to take the issue of the integration seriously. Indonesia accounts for almost 50% of ASEAN's GDP. If Indonesia is not interested in enhancing ASEAN integration, then the AEC will be doomed to fail. There are potentials within the ASEAN region. It is essential for Indonesia to change their mindset regarding the ASEAN community.

Dr. Somkiat Tangkitvanich:

If Indonesia doesn't want to be the leader for ASEAN integration, Thailand, which is smaller in size, has to look for other alternatives such as the TPP. Other ASEAN countries have to look for some insurance in TPP or other FTA's. The issue could lead ASEAN to crumble and jeopardize the progress of RCEP.

Moderator:

Based on the discussion, it is important for participants to read the blue print of the AEC, which will officially begin in 2016. The blue print of AEC doesn't only contain a concept for a single market cooperation but a deeper regional cooperation.

Dr. Vo Tri Thanh:

It is possible for ASEAN countries to enjoy the benefits of TPP while maintain progress of integration within the region.

Panel Session 3 : Regional Economic Integration: Can the New Economic Institutions like RCEP, TPP, and AIIB Deepen the East Asian Economic Integration?

Moderated by Dr. Yose Rizal Damuri, Head, Department of Economics, CSIS, Jakarta

New regional engagements, which emphasize deeper economic integration among EA countries and have greater focus on building a more integrated region, are taking place (TPP, RCEP, AIIB) that will

significantly influence economic developments in the EA region. With TPP and RCEP negotiations scheduled to conclude soon, how can we realize the potential and opportunities of these mega-regionals? How can AIIB be an instrument of sustainable and inclusive growth in the region?

TPP, RCEP, FTAAP & AIIB: Hit or Miss? By Dr. Man-Jung Mignonne Chan, Founder and CEO, Out-of-the-Box Consultancy, Chinese Taipei

Dr. Chan's presentation outlines the new development for FTAAP, challenges for TPP and RCEP, the One Belt One Road (OBOR) initiative, the Asian Infrastructure Investment Bank (AIIB), and game changers for OBOR & AIIB.

To address next generation trade and investment issues (NGeTI), Dr. Chan briefed on APEC's current state of play as ways forward for the FTAAP, including a collective strategic study that includes a stocktaking of regional RTAs/FTAs and an analysis of the various possible pathways towards the eventual FTAAP, including an assessment of the impacts of the "spaghetti bowl" phenomenon, treatment of "Spaghetti Bowl" Effects, and sustaining APEC growth strategy and capacity building.

In her assessment, challenges ahead for the TPP includes signs of strategic anxiety (who should make the rules of world trade?), time-exerting for domestic approvals, and the implementation of the platinum standard. Challenges that lie ahead for RCEP includes differentiated liberalization in trade-in-goods (as some have not been keeping in pace in terms of offering the width and depth of liberalization), modality for gradual reduction, and bridging towards an upgraded FTA in due course since some ASEAN member states are unwilling to admit that they are not up to gear.

Dr. Chan also introduced the OBOR initiative as a development-based grand plan, and the AIIB as a new financial scheme. She declared that game changers for OBOR & AIIB will be China's rise (whether peaceful or in conflict and the impact of the "New Normal"), participation in rule-making (can the Standard of Project Evaluation be met? Will there be economic benefits for all parties concerned?), and Peace and Prosperity, taking into account geo-political dynamics and the geo-economic landscape.

Dr. Shankaran Nambiar, Senior Research Fellow, Malaysian Institute of Economic Research, Malaysia

ASEAN is one of the most vibrant economies in the world. The region has a rising consuming class, increasing opportunities in infrastructure, large potential for participation in global production networks, and tremendous space for trade and investment.

The AEC, which advocates liberalization and institutional reform, is a significant step in the right direction because it allows ASEAN to harness its capabilities to take advantage of global trends and

the emerging opportunities that they present. However, liberalization by itself is not sufficient and needs to be supported by the right rules and regulatory frameworks. In this context, RCEP is important and a necessary step towards achieving ASEAN centrality.

However, RCEP faces the additional challenge of securing the agreement of ASEAN's dialogue partners. As such, Dr. Nambiar hopes that RCEP will not have to submit to the lowest common denominator, and will strive to adopt moderate standards with the aim of progressively raising them. There are three elements that can be expected to receive due attention within the RCEP: a) attention to SMEs, b) narrowing development gaps, and c) economic cooperation. These issues cannot be ignored.

The TPP will have considerable impact on EA. Countries that are members of the TPP will derive benefits from trade and investment, disadvantaging non-TPP members in ASEAN and ASEAN's dialogue partners. This might encourage some of the countries in ASEAN to consider participating in the TPP at a later stage.

Nevertheless, with the increasing growth and development in ASEAN there will be many infrastructure projects. China has planned an ambitious network of connectivity projects that will span the region. India, too, has initiated many projects that will improve connectivity in the region. The increasing energy demand in the region will also require better infrastructure and investment. This is where the AIIB will have a positive role to play. It will offer a range of opportunities that goes beyond the World Bank and ADB.

Prof. Shujiro Urata, Professor of Economics, Graduate School of Asia-Pacific Studies, Waseda University, Japan

New regional arrangements such as the TPP, RCEP, and AIIB are likely to contribute to deepening regional economic integration in East Asia, although the extent and the depth of their contributions differ among them.

The TPP is likely to have important impacts in East Asia, as it establishes a business friendly environment where free flow of goods, services, capital, and information is promoted with high level of trade and investment liberalization and a comprehensive and ambitious set of rules on economic activities. The agreed measures will promote trade and investment among TPP member countries possibly at the cost of trade and investment for the non-TPP member countries, giving them an incentive to join the TPP in order to avoid discriminatory and negative impacts.

RCEP is likely to take some time to be concluded and enacted, considering the progress in negotiations that has been made so far. Judging from media reports, compared to the TPP, the RCEP will not be as high level in terms of liberalization or comprehensive and ambitious in terms of rules.

One important element in RCEP, which is not given much priority in the TPP, is economic cooperation. Indeed, there are several members that can benefit significantly from economic cooperation to be extended by other RCEP members.

The establishment of the AIIB has positive impacts on infrastructure building as it prompted other organizations such as the ADB and other donor countries including Japan to increase financial assistance for building infrastructure in Asia. AIIB should cooperate with other international organizations including the ADB and the World Bank to build infrastructure, which would benefit the region.

Prof. Gary Hawke, Emeritus Professor, Victoria University of Wellington, New Zealand

Professor Hawke claims that RCEP, TPP, and AIIB can deepen EA economic integration. But the bigger question is will they? He sees the TPP as a set of linked bilateral rather than a regional agreement, a modest enhancement of market access, a conventional and traditional approach to sectors and international rules, and claims that the TPP makes no contact with the Region's agenda for inclusive, innovative growth.

RCEP brings about three main questions: Will there be more market access schedules or internationalization of AEC? Can RCEP achieve both a high level of ambition and sufficient flexibility for a highly-varied membership? And can RCEP provide for existing and future international production networks covering both goods and services? The AIIB still come across constraints when it comes to improving infrastructure and connectivity. Professor Hawke claims that these constraints are more often due to the design of projects, including alignment of costs and benefits, rather than lack of finance.

If the FTAAP is an even bigger wrangle over market access than TPP it cannot be expected to be more successful than Doha. The FTAAP should be used to avoid incompatibilities between TPP and RCEP, facilitate development of the WTO, foster the wider integration agenda (including AIIB and development banks), and to build support for innovative, inclusive growth throughout the region.

Institutions for Deepening Asian Regional Economic Integration by Dr. Shiro Armstrong, Co-Director, Australia Japan Research Center, Australian National University, Australia

Dr. Armstrong argues that the impact of bilateral trade agreements have been minimal and often exaggerated. There is a lack of evidence of trade creation and diversion. The reasons are because of low utilization, and many exclusions (of politically sensitive issues). There are already low barriers from unilateral liberalization in Asia.

The TPP has the potential to change that and really affect trade and investment flows. One positive outcome was the limits on strengthening intellectual property rights (IPR) which are difficult for

developing countries and some developed countries like Australia. There are also problems of bilaterals within the TPP as it makes accession harder for new entrants and does not simplify commerce and supply chains. Furthermore, the TPP is designed to hurt non-members with trade diversion as the incentive to join. Dr. Armstrong sees RCEP as a binding Asian cooperation. At best, it would strengthen and expand the AEC. RCEP holds ambitious targets and capacity building, not high hurdles to membership and punishment like the TPP does. It holds the potential to negate diversionary impacts of TPP if an ambitious outcome is reached. The challenge for RCEP and TPP is in expanding its membership.

Dr. Armstrong argues that development cannot be negotiated. Trade and investment liberalization alone won't deliver deeper economic integration. Binding rules help governments from going backwards but won't deliver investment or development. For that, capacity building and frameworks for cooperation is required. He concludes that newer initiatives should be embraced and has the potential to be shaped to benefit the region. The AIIB as China's provision of a regional public good, OBOR as a potential to connect, and enfolded that into the ASEAN+6 agenda in order to gain from Asian regional cooperation in a way that embraces and furthers new initiatives.

Questions and Answers in Panel Session 3

Dr. Wang started the session by directing a question to Dr. Chan, Prof. Urata and Dr. Armstrong. He asked if the TPP will prevail. Will it have more members in the future? And will it set the next generation global standard for rules?

Dr. Armstrong replied by adding that the TPP standards are set by the mass economies, namely the US. This is in contrast to how it's been done in Asia before, where the setting of rules and standards are by consensus. As such, there is a worry of big countries setting the rules in the absence of strong justification. Hence, he doesn't think that the TPP will become the global standard for rules, and other countries might not be willing to join otherwise.

Prof. Urata explains that his response is somewhat different from Dr. Armstrong's. He believes that the TPP will eventually become the global framework, based on the amount of countries that are interested in joining the TPP. He claims that once the TPP is enacted, countries such as Malaysia and Vietnam will benefit greatly, and this in turn will attract non-member countries to join the TPP in order to avoid being on the losing side. He also believes that China will benefit a lot from being a part of TPP, and also that being a larger global investor will be a main motivator for China to join the TPP as it will help avoid discriminatory treatment.

Dr. Chan is not sure if the TPP would be the global standard, but she provides 4 observations:

- 1) TPP is very much stricter in regulations compared to TTIP

- 2) Were it not for the fact that TPP accommodated RCEP's concept (with some overlapping members of TPP and RCEP), TPP would not have been finished this year.
- 3) In terms of the next generation issue we have to face, other than the at-, across-, and behind-the-border supply chain issues, the most challenging next generation issues are behind-the-border ones (legal framework and so on). Because of this, she has faith in RCEP in the sense that the three pillars (political, cultural, and economic) of the ASEAN Community have a valuable presence there, which may ease future tension by accommodating the legal framework that each member has to face.
- 4) In the case of China, China is about to sign the US-China Investment Treaty, which is not necessarily below some of the standards set by certain chapters of the TPP, as she understands it. China also has individual FTAs with other TPP members. As the second largest economy in the world, it is quite doubtful that China has any plan to join TPP. In any case, at the current state of play, TPP is aspired to be the standard of global trade and investment.

Mr. Soy Pardede, former Head of the Trade Committee in KADIN, invited the speakers to discuss the need for competition policy. He noted that in terms of multilateral trade arrangements, several (negative) impacts need to be addressed: 1) excessive exploitation of natural resources; 2) fate of local industries, particularly those who are still in its infant status in developing countries; 3) fate of SMEs; 4) labor/employment issues; and 5) agriculture. To cope with the negative impacts of all this trade liberalization and development goals, competition policy is what needs to be, but hasn't been, addressed. What is the role of the regulators in providing sound competition policy that can address the impact?

Dr. Armstrong believes that competition policy cannot be mandated. The TPP might have that, but there's a lack of capacity implemented in a lot of these countries.

Prof. Hawke reminds the audience that RCEP is linked to AEC as well, and not just to the TPP. Although RCEP is less developed, it certainly has the potential to do better than TPP in a number of areas, including competition policy. Furthermore, if the interest is in things like non-discriminatory treatment, national treatment of firms, then you can provide any number of agreements (e.g. China-NZ FTA) without necessarily joining the TPP.

Dr. Armstrong also provided the audience with a thought provoking question by asking if Indonesia really wants to join the TPP. Is it just a political ploy to please other global leaders, or is there real intent for Indonesia to join?

Dr. Damuri also commented on Dr. Armstrong's presentation on the minimal impact of FTAs. He mentioned that CSIS previously conducted a study that attempted to evaluate the impact of Indonesian FTAs, and found that utilization of FTAs are quite low in Indonesia. One of the problems, perhaps, is what people call the "Spaghetti Bowl" effect: where there are too many trade agreements,

that people lose track of which can be used for their business, especially within the business sector. Now, not only bilateral agreements, but also mega-regional agreements are underway or concluded. How will this development affect the spaghetti bowl effect?

Prof. Urata mentioned that there are 2 kinds of studies when it comes to evaluating the usage of FTAs: 1) questions and survey of companies (asking whether they use FTAs or not); and 2) use of trade statistics to compute the value of import coming via FTA divided by total import value. In both cases, the numbers tend to be quite low. But there you have to be careful. The first method should take into account that some companies might not need to use FTAs at all, while the second method should consider that many imports also don't need to use FTAs. As such, you must choose the method of study carefully as numbers could be very different.

Prof. Hawke raised the point of looking at the reverse of trade in countries with which you have FTA, compared to countries with which you don't have FTA. It is almost inevitable that the growth is much higher in countries with which you do have FTAs.

Dr. Armstrong mentioned that studies have found very little evidence of FTAs making positive impact on trade and investment. Australia just completed FTA with China, ratified in Australia this month, and big part is gain market access to services in China. However, although the door has been opened, how do you take advantage of these opportunities, what are the opportunities? It is important to turn these agreements into ongoing processes instead of one-shot games so that you can account for recent events.

Dr. Nambiar states that in some ways, RCEP is an extension of or builds upon the AEC. There are some features of RCEP that one is not likely to see in the TPP, for instance that of cooperation or narrowing the development gap. . He also mentioned that certain countries, such as Thailand and the Philippines, might, in time, show an interest in joining the TPP, if only to close the competitive gap between themselves and Malaysia. As such, Malaysia sees it in its advantage to participate in the TPP now, while the rules of the TPP are still under negotiation, rather than later when they are set in stone.

7. 発表資料

公開フォーラムの発表資料(パワーポイントスライド、トーキングポイント)

Panel Session 1: A Decade of East Asia Summit and Economic Regionalism: how can we pursue our growth strategy and achieve structural reform?

- ① Murray McLean AO
- ② Zhenyu Wang
- ③ Choong-Yong Ahn
- ④ Sachin Chaturvedi

Panel Session 2: ASEAN Economic Community as Driver of Regional Integration in East Asia: Challenges and Opportunities

- ⑤ Vo Tri Thanh
- ⑥ Somkiat Tangkitvanich
- ⑦ Josef T Yap
- ⑧ Poltak Hotradero
- ⑨ Cho Cho Thein

Panel Session 3: Regional Economic Integration: Can the New Economic Institutions like RCEP, TPP and AIIB Deepen the East Asian Economic Integration?

- ⑩ Man-Jung Mignonne Chan
- ⑪ Shankaran Nambiar
- ⑫ Shujiro Urata
- ⑬ Gary Hawke
- ⑭ Shiro Armstrong

Asia-Pacific Forum 2015

“ASEAN Community Building and Regional Economic Integration in East Asia: Looking beyond 2015”

26-27 November 2015

Panel comments: Murray McLean

Panel Session 1: A Decade of EAS and Economic Regionalism: How can we pursue our growth strategy and achieve structural reform

We all know that the region of which we are all part is leading the pace globally in economic growth

- **And 2015 is a significant milestone in the ongoing progress being made towards regional economic integration and growth and increasing the region’s prosperity**
 - marks the 10th anniversary of EAS
 - establishment of the ASEAN Economic Community (AEC)
 - conclusion of the TPP negotiations
 - progress in the RCEP negotiations
 - further bilateral agreements reached and note that Australia and Indonesia are re-engaging on bilateral CEPA on top of other recently concluded bilateral agreements with other regional countries

In short significant progress is being made in economic integration. This is an encouraging picture. But how is it possible? It does not happen in isolation.

Regional security environment is fundamentally linked to these achievements. Why?

First - Because the best environment for the region is one which promotes strategic stability, open societies and economies, and economic integration.

Secondly - Because of the strategic importance of ASEAN’s role as an institution. ASEAN plays a key role in consolidating the strategic stability of SE Asia as well as expanding its economic reach. Apart from the two well-established groupings in our region - ASEAN and APEC - ASEAN-centred institutions including the EAS and the ADMM plus play important roles in building trust and habits of cooperation amongst countries in the region.

Thirdly - Because the strong and consistent US presence in the region has been and will continue to be important in providing confidence in the region’s changing strategic landscape

BUT there are many **multi-faceted and evolving security risks and challenges** that must not be allowed to adversely affect the environment that is necessary to continuing strong economic growth, deeper economic integration and prosperity of the region

- Traditional security disputes relating to trust, maritime and territorial disputes and changing power dynamics in the greater Indo-Pacific region,

- Non-traditional security threats posed by terrorism, extremism including by foreign terrorists, natural disasters, human pandemics, and transnational crime, including cybersecurity

So how do we minimize these risks that impact on the region's stability and prosperity?

In addition to the factors just mentioned above (ie ASEAN's strategic role and the US presence in the region)

- **Constructive and forward-looking bilateral relationships**, particularly among the region's major powers, are fundamental to addressing these challenges and play a crucial complementary role in promoting a stable and resilient regional order
- All regional countries need to work together and put energy into helping build institutions and norms of behavior in the region. These structures and habits can help manage strategic tensions and can act as an anchor at a time of transition in the region.
- **EAS** is unique as the regional institution which has the membership composition to be able to play a constructive and positive role in helping underpin ongoing economic growth and prosperity as well as in helping ensure regional security
 - EAS can complement the work of APEC and the G20 in fostering greater economic and financial cooperation.
 - But EAS can play an additional role in nurturing habits of consultation across the region including on transnational issues. Consultation might not always resolve problems but it can make the search for solutions easier and diminish the risk of miscommunication and miscalculation
 - Welcome the commitments by the EAS leaders at their recent meeting to strengthen the EAS as an institution, e.g. in its statement of regional maritime cooperation, on cyber issues and on measures to help combat extremist terrorism

All of the points I have mentioned just now are important to laying the basis for achieving further progress in regional economic integration

- The establishment of the AEC offers new pathways for business from other EAS member countries to engage with ASEAN
- The conclusion of the TPP and progress on RCEP is full of potential benefit for economies involved in these partnerships. TPP and RCEP are complementary and are viable pathways for the ultimate realization of a free trade area in the Indo-Pacific
- Australia through the ASEAN-ANZ FTA and through our development cooperation programs is committed to supporting ASEAN's efforts to advance regional integration. Indeed regional integration is a project that needs even greater effort in each SE Asian country as well as by ASEAN as an institution

- Ongoing regional trade liberalisation is important. Such efforts can drive further significant growth within SE Asia especially in the services sector, in hitherto relatively untapped areas such as transport, infrastructure, education and investment.
- One particular example consistent with this growing trend to open up our economies is the very recent commitment by Australia's Prime Minister and Indonesia's President to re-engage actively in order to conclude a Comprehensive Economic Partnership Agreement. This comes directly after President Widodo publically expressed to US President Obama his keen interest in joining TPP.
- Bilateral agreements, alongside the TPP and potentially the RCEP are helpful in opening up regional economies and contributing to further economic growth. This means reducing the tariff and behind-the-border barriers to services trade to gain the efficiencies and benefit from increased.
- Indeed such structural and regulatory reform within the countries of ASEAN and of EAS as a whole must be undertaken on a continuous basis. Without this ongoing reform the potential will not be realized and that would be to the detriment of the whole regional economy.

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Session 1: A Decade of East Asia Summit and Economic
Regionalism: how can we pursue our growth strategy and
achieve structural reform?

Wang Zhenyu

China National Committee for Pacific Economic Cooperation

Great Achievements of EAS and EA regionalism: stocktaking

- AEC and RCEP
 - Connectivity initiatives
 - Functional Cooperation Initiatives in Priority Areas
 - US and Russia's accession to EAS: greater economic group
 - East Asia fared well in the GFC and remains the global economic engine and contributed to multilateral trade process and global development agenda
- moving closer to an economic community

Great Achievements of EAS and EA regionalism: reasons

- ASEAN Centrality
- avoiding leadership competition
- open regionalism
- confluence of various processes (ASEAN + mechanisms)
- gradual development of mechanisms
- top-down commitments to meet the bottom-up needs of market integration
- Intellectual support
- capacity building
- comprehensiveness

Looking beyond 2015: Opportunities and Challenges

- Opportunities:
 - great progress in TPP/RCEP/AEC and bilaterals: more efforts can be diverted to RCEP
 - positive progress in climate change, ITA expansion, UN Sustainable Development Goals
 - regional industrial transformation
- Challenges
 - uncertainty of global economy
 - rising of anti-liberalization and anti-globalization forces
 - geo-political and security concerns
 - lack of political will
 - lack of capacity

Looking beyond 2015: dialogue and cooperation

- EAS is one of the channels to promote dialogue and cooperation, where ASEAN retains centrality.
- The gene of the channels should be the ASEAN way .
- The mission should be community building through collaboration and cooperation promotion rather than through quarrelling and dispute.
- The EAS should be a venue to promote the New Model of Major-Country Relations, featuring "no conflict or confrontation", "mutual respect" and "win-win cooperation".
- Functional cooperation remains a convenient tool for community building.

Looking Beyond 2015: Structural Reform to Promote Growth

- Structural Reform as an essential part of regional economic integration.
 - TPP members of EAS will have to practice structural reform as stipulated by the rules.
 - RCEP should encompass elements of structural reform as a comprehensive, high-standard, and modern RTA.
- structural reform as an essential part of connectivity: institutional connectivity
- Structural reform as a necessary request of physical connectivity initiatives

Looking Beyond 2015: Structural Reform to Promote Growth

- oriented to enhancing the East Asia production network, supply chains and value chains
- unilateral actions complemented with collective actions
- synergy with APEC efforts: to avoid duplications and serve as a role-model
- capacity building: special attention and resources to be diverted to non-APEC members
- long-range goals with gradualism
- combined with current initiatives as they dictate

Thank you!

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Asia-Pacific Forum 2015

Panel Session 1: A Decade of the East Asia Summit and Economic Regionalism: How Can We Pursue Our Growth Strategy and Achieve Structural Reform?

Talking Points by Choong Yong Ahn,

Chairman, Korea Commission for Corporate Partnership / Distinguished Professor of Economics, Chung-Ang University

East Asian Miracle and Asian Paradox

1. In the past three decades under the GATT led by the U.S. and WTO, East Asia (ASEAN plus CJK), especially the four dragon economies, achieved the *East Asian economic miracle* (The World Bank 1993) by adopting an export-oriented development strategy. They enjoyed “unlimited” access to the U.S. market first after WWII and later took advantage of their own geographical proximity to become more functionally interdependent.
2. Since the Asian financial crisis in 1998, East Asian economies have developed a sense of an “East Asian Identity.” Self-help mechanisms among East Asian economies, such as the CMI and ABMI, have been launched to avoid the recurrence of the financial contagion triggered by extra-regional shocks.
3. Despite being immediate neighbors, the leaders of China, Japan and Korea (CJK) met for the first time in history after the Asian financial crisis in 1998. The memories of devastating wars fought against each other, colonial occupation, ideological confrontations during the Cold War and subsequent accumulated mistrust are vivid for all three countries.
4. As China’s PPP-based GDP overtook that of the U.S. in 2015, according to the IMF, the regional hegemonic leadership competition between China’s “Chinese Dream” and the U.S.’ “Pivot to Asia” policy appears to increasingly be on a collision course, causing a new wave of nationalism and heightened hegemonic rivalry, including maritime territorial disputes. Indeed, this phenomenon caused the “Asian Paradox,” asserting the discrepancy between growing intra-regional economic interdependence on the one hand and backward political and security cooperation on the other.

TPP, AIIB, RCEP, and Domestic Reform as Regional Integration Tools

5. Recently, two great institutional mechanisms have been established to alter the economic and diplomatic landscape of the Asia-Pacific rim. One is the U.S.-anchored TPP and the other

is the China-anchored AIIB. Will they counterbalance each other for hegemonic leadership in the Asia-Pacific region?

6. The TPP without China has benchmarked, in many respects, the degree and scope of liberalization contained in the already effective KORUS FTA but upgraded or added some additional trade rules, such as TRIP protection, labor standards, environmental protection, and management of state-owned companies.

7. On the intra-regional trade side, East Asia, as a global manufacturing powerhouse, has not fully used its inborn regional supply chain potential compared to other regional integration efforts observed in the EU.

8. Another mega-economic bloc, RCEP without the U.S., has also been in negotiations by China and the ASEAN leadership. Although less liberalized than the TPP, RCEP nearly equals the GDP and trade volume of the TPP. Both mega deals are viewed as check and balance acts between the U.S. and China.

9. Given the ongoing slow growth, underemployment as the “new normal” and rising economic interdependence between the U.S. and China, both the TPP and RCEP need to be converged down the road as a building bloc toward the early realization of the Free Trade Area of the Asia-Pacific (FTAAP) through trade and investment.

10. China rolled out the AIIB to link the countries that were on the ancient Silk Road routes – those based on land and ocean – through transportation and infrastructure networks. Again, is this initiative also intended to counterbalance the U.S.-led IMF, World Bank, and Japan-led ADB? The AIIB reflects China’s newfound international clout by having 57 prospective members. The UN has addressed the launch of the AIIB as “scaling up for sustainable development” for the concern of Global Economic Governance. For the AIIB to foster economic connectivity and a new-type of industrialization in Asia, the AIIB should meet global best practices with high standards, particularly related to governance, and environmental and social safeguards.

11. A variety of free trade deals and multilateral funding schemes in Asia requires each country to upgrade its economic system to meet high global standards. Membership for free trade deals and related financing schemes serve as effective external pressure for a country to carry out economic reforms toward more open, competitive, and transparent systems.

12. Korea has concluded the Korea-China FTA, awaiting the National Assembly’s approval for effectuation. It is China’s first FTA with an OECD economy. Even in the medium term, many experts claim that a TPP without China is half-baked given the increasingly interdependent economic linkages between the U.S. and China. In this context, Korea’s joining the TPP is likely to contribute to bringing the TPP and RCEP together. In this regard, Korea needs to carry out another round of comprehensive reforms in the labor sector, finance,

education and public enterprises, as it did during the Asian financial crisis to draw the IMF's standby credit under stringent conditions.

13. Though very slow to make progress, negotiations for the China-Japan-Korea FTA need to be accelerated to provide new momentum for Asia-Pacific economic integration. East Asia needs to pursue open regionalism for sustainable global growth.

14. ASEAN is strategically significant because of its size and dynamism, and for being in the Asian economic and security architectures. South Korea, as the fourth largest economy in Asia, is located in the middle of four global powers. ASEAN and Korea together can play a critical role in combining the TPP and RCEP down the road and in mitigating ongoing political tensions among big powers.

14. Given the complexity and time-consuming process of formulating a formal top-down integration architecture, stronger and effective measures for trade facilitation, such as e-customs services, rule of origin verification, IPR protection, SPS and port-centric management, effective aftercare services for FDI must be pursued at APEC or other multi-lateral fora.

15. The promotion of intra-regional tourism, including student exchanges, could be very effective for job creation and enhancing mutual understanding and cultural exchange. The increasingly prosperous East Asian population should be viewed as a good source for regional tourism development. An early version of an open-sky agreement for low-cost carriers needs to be explored.

16. An intra-regional coordinated mechanism needs to be developed to prevent natural disasters and to handle them once they have occurred due to weather anomalies. East Asian economies should begin more effective collaborations on non-traditional security issues, including nuclear safety, energy security and cyberspace.

Asian Values and a Bottom-Up Approach to Build Mutual Trust

17. Respect for elders and neighbors, harmony in community life, and mutual learning has been at the core of Asian values and prevailed throughout the long history of Confucian cultures in East Asia.

18. Mutual trust cultivated in the Confucian culture in East Asia is a valuable cornerstone for cooperation and public infrastructure and indispensable for peace. The trust-building process requires a consistent approach and the objective recognition of accurate history so that the next generation can move forward. Major regional powers need to be non-aggressive, non-assertive and non-coercive to deepen mutual trust.

A Decade of East Asia Summit and Economic Regionalism

by

Professor Sachin Chaturvedi
Director General
Research and Information System for Developing Countries
New Delhi, India

With the world looking for Asian Century to provide trade impetus to the global growth process, completion of the decade of the East Asia Summit (EAS) is being viewed as a major milestone in economic regionalism in Asia. The RCEP has emerged as a pivot for regional growth in world's fastest growing region, where macroeconomic variables like trade, foreign exchange reserves, savings and investments have expanded at phenomenally high pace. And this probably is the reason why Trans-Pacific Partnership (TPP) and other Mega regionals are finding attractive to partner with RCEP members.

It is evidently clear that without the RCEP members, TPP would not have its desired outcome. It global foothold critically depends on RCEP members. This provides lessons for the other RCEP members for working towards finalizing the Agreement by 2016.

With tariff rates coming down, the NTMs/standards have gone up across different regions and groupings. Pragmatism from RCEP members for evolving rigorous NTMs/standards for facilitating trade seems to be a pre-requisite for driving the mega-regional. However, at the same time measures for adequately compensating industries and firms affected by these NTMs/standards also would have to be considered. There has to be adequate recognition of the fact that members are at different stages of economic development and without regulatory structures pertaining to NTMs/standards, the members would be affected differently. Therefore, implementation of comprehensive and harmonized NTMs/standards would be the key issue before RCEP.

The question is where to begin the process of instilling confidence among the members. In my view three clearly defined steps may help: a) liberalizing at domestic level; b) more

space for laggard countries, so that they may catch up in due course of time; and c) sectoral cooperation for promoting Regional Value Chains, which is equally important for converging sector specific standards and protect designs. The emergence of value chain in specific sectors would facilitate this process.

The region is known for inward and outward FDI. Harmonized approach for investment both for promoting infrastructure and for regional integration would help in allowing IFDI in desired sectors with quality of investment, while providing due attention to evolve and build institutional architecture for supporting the process of adoption.

The role of financial institutions in the Asian region is also crucial. As the regional economies are growing fast over the years, several new opportunities are surfacing in terms of viable projects. At the same time, the region is surplus with investable funds. New role for institutions like ADB for strengthening regional institutions is extremely important. There are competing institutions coming up which may also play an important role. However, the next decade is significant for rediscovering ADB and other institutions.

RCEP has the potential to lead the global economy as it has the economic potential. It has emerged as a soft global power and this lead role of the regional caucus should be maintained to ensure Asia's pivotal role in the world economy.

Three Tracks of Regional Economic Integration & The Risks for ASEAN Centrality (?)

Vo Tri Thanh (CIEM)

Presentation at the APF 2015

**“ASEAN Community Building and Regional Economic Integration in East Asia:
Looking Beyond 2015”**

Jakarta, 26-27 November 2015

“Centric Circle Strategy” for East Asian integration (ASEAN integration & AEC, ASEAN +1 FTA and RCEP)

- ❑ RCEP should be designed well to have “significant improvements over the existing ASEAN+1 FTAs”. RCEP should be based on AEC (with widely scoped liberalization, various dev’t agenda, and a philosophy of community-building through deepening economic integration and narrowing dev’t gaps (ERIA 2014))
- ❑ There are some concerns about RCEP negotiation progress (So far, liberalization levels of AEC in terms of trade in goods and services as well as investment are higher than that of most ASEAN +1 FTAs)
- ❑ Also about the implementation mechanism in RCEP (DSM; review; committees/secretariat) and role of ASEAN Sec)?

Trans-Pacific Partnership (TPP) Track

- ❑ TPP is driven by US (and in line with US foreign policy objective of pivot toward Asia). TPP tends to be a high quality FTA addressing several next generation issues.
- ❑ Not all ASEAN members are of TPP → The confidence in having ASEAN “common voice” & ASEAN unity?
- ❑ There is also investment and trade diversion effects (particularly for CLM) → How to minimize disadvantages for non-TPP members?

Connectivity for a more effective integration

- ❑ Major programs: (i) MPAC (to enhance ASEAN physical connectivity, institutional connectivity, and people-to-people connectivity); (ii) APEC Connectivity; and (iii) China’s Silk Road Strategy
- ❑ Goals of MPAC are ambitious but there are major issues: ASEAN needs external resources and private sector engagement.
- ❑ ASEAN voice hard to be “strong” enough in many relevant international institutions (WB; ADB; AIIB,...). *At the same time*
 - Many ongoing cooperation programs remain overlapped and have not been implemented yet; they may lead to the dispersion of efforts and resources.
 - Some initiatives/programs with ASEAN cooperation are not all incorporated into the framework of MPAC. There may be also a problem of conflict of interests. Coordination between all stakeholders and ASEAN lacks effective mechanisms

Concluding Remarks

- ❑ The EA and Asia Pacific integration can succeed only with the strengthening of ASEAN integration. Also ASEAN integration could not succeed if development gap in ASEAN would be widening. ASEAN centrality and the successful formation of AEC are very essential.
- ❑ Market forces and new requirements for Asia Pacific economic integration for meeting next generation trade issues and sustainable development are being strengthened. But risks for conflict of interests (geo-political problems; possible unequal distributed benefits) cannot be underestimated. The adverse side effects should be managed with thoughtful policy responses (Dialogues and role of ASEAN!)
- ❑ To ensure (especially after 2015) that the commitments in the AEC and RCEP are as deep, to implement unilateral liberalization and domestic reforms, and to support less developed countries in capacity building are all very critical.

Thanks!

**THAILAND DEVELOPMENT
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AEC AS A DRIVER FOR REGIONAL INTEGRATION: CHALLENGES AND OPPORTUNITIES

Somkiat Tangkitvanich

Asia-Pacific Forum 2015

TDRI THAILAND
DEVELOPMENT
RESEARCH
INSTITUTE

A PLATFORM FOR INTEGRATION



GDP (US\$ billion)



Thailand
345



Asean
1,851

5 Times



Asean+3
13,973

40 Times



Asean+6 (RCEP)
16,761

48 Times



Population (million)



64

9
Times

598

33
Times

2,116

52
Times

3,358

FICTIONS AND FACTS

FICTION : In 2015, ASEAN will change significantly as a result of the AEC coming into full force.

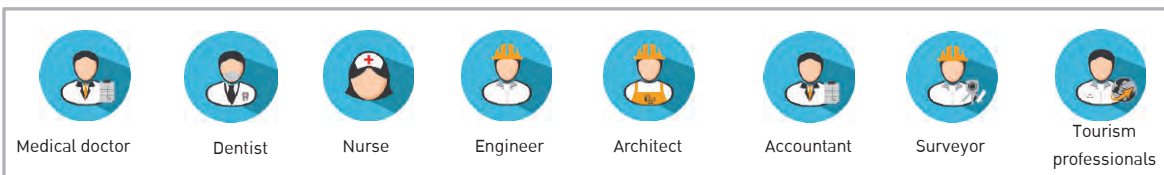
FACTS: No significant changes for most ASEAN countries in 2015.

- Under AFTA, original ASEAN members have reduced their tariff rates since 1993 and the planned tariff reduction is almost finished.
- There will be little progress in eliminating non-tariff barriers and liberalizing trade in services and investment by 2015.
- Only 8 professional services are subject to 'mutual recognition arrangements' (MRAs), the implementation of which remains extremely slow.
- The only major change is that CLMV will have to cut their tariff for other ASEAN members.
- Problems arise not only from the slow speed of implementation but also from the lack of strong commitments among ASEAN countries.

FICTIONS AND FACTS

FICTION : All labors will be able to move freely.

FACT: Only 8 professional services are under mutual recognition arrangements (MRAs)



Professional	Thailand's current regulations
nurse, dentist, medical doctor	Foreign professionals must pass written exams in Thai.
engineer	Foreign professionals are allowed to jointly work with Thai professionals. To conduct an independent practice, they must pass the assessment to prove that they fully understand the codes of practice and laws written in Thai language.
architect	
accountant	Foreign accountants must prepare reports in Thai language and understand Thai accounting and tax codes. Auditors must be able to audit accounts prepared in Thai language.

- Conditions for professional operation are completely subject to domestic regulations.
- Negligible impact is expected after 2015.

OPPORTUNITIES

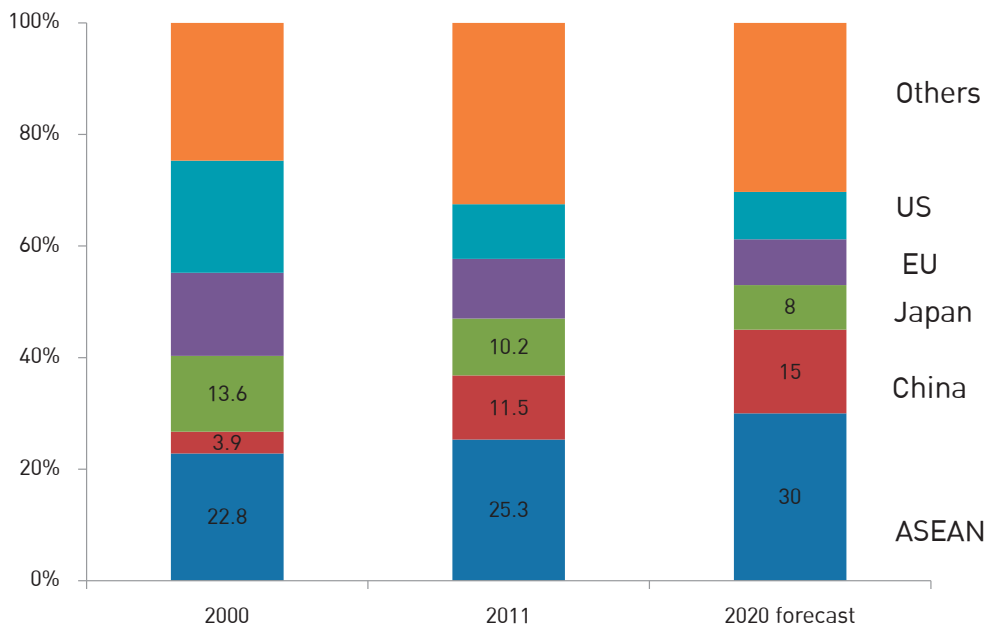
Connecting ASEAN power grids



- ASEAN has undergone *de facto* economic integration well before 2015.
- Intra-regional trade and direct investment in ASEAN continues to increase.
- ASEAN is becoming physically connected and a single production base.
- Millions of ASEAN people are working in other ASEAN countries.

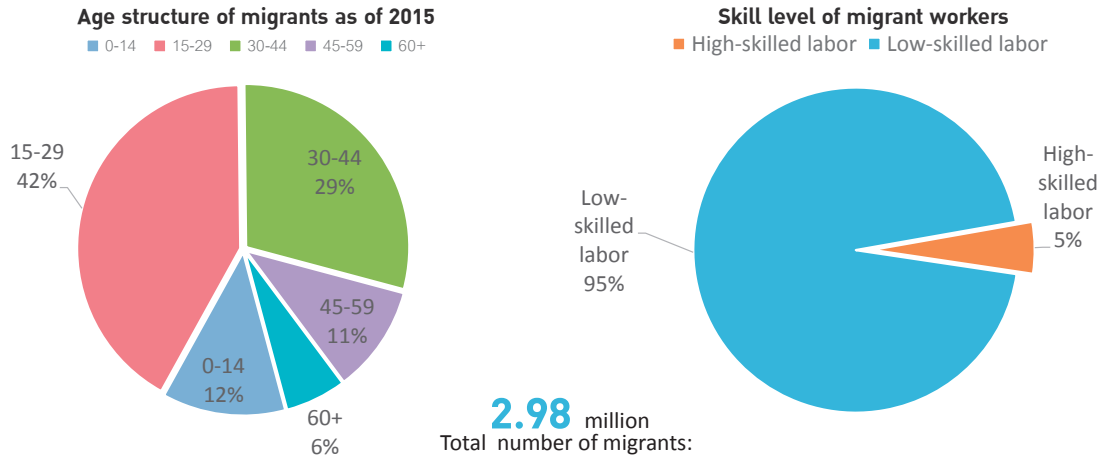
GROWING INTRA-REGIONAL TRADE

Destination of export from ASEAN (%)



LABOR MARKET INTEGRATION

- There are currently approximately 3 million registered migrant workers in Thailand, 95% of which are low skilled.



Source: TDRI's estimation from Ministry of Interior's data Source: TDRI's estimation from Ministry of Labor's data

CHALLENGES



- Strengthening AEC integration
 - Reducing NTBs
 - Liberalizing service sectors, esp. business services
 - Bridging missing transportation links
 - Facilitating free flow of goods and high skilled workers
- Speeding RCEP negotiation

Major Challenges to Economic Growth and ASEAN's Programs

Josef T. Yap

26 November 2015

Endogenous Growth Framework

Economic growth depends on the quantity
as well as quality of inputs

Note: Some of the ideas were culled from the 7th
Meeting of the International Policy Advisory Group of
the Asian Development Bank.

Categories of Major Challenges

- Factors of Production
- Macroeconomic Stability
- Sustainability

Factors of Production

- **Investment in physical infrastructure**
 - Developing Asia: USD8 trillion requirement between 2010 and 2020
 - Chronic fiscal crisis, especially advanced economies
 - Public private partnerships
 - Will AIIB provide a significant boost?

Factors of Production

- **Innovation**

- Main long-term driver of economic growth
- Need to balance IPR protection and access for developing countries

- **Skills upgrading**

- Job-skills mismatch
- Closer coordination among academe, government, and private sector
- Promote TVET

- **Quality of Education**

- Nurturing innovative thinkers and managers who can address complex issues and develop creative solutions.

Macroeconomic Stability

- **Financial Sector stability**

- Disruptive asset price shifts in financial markets
- Volatile capital flows
- Tendency for boom-bust cycles
- Further strengthen financial regulation and supervision
- Clearer role for capital account regulations
- Sovereign debt workout mechanisms
- Promote regional cooperation, e.g. CMIM

Macroeconomic Stability

- **Narrow fiscal space**
 - Impact of ageing populations
 - Need to maintain macroeconomic stability
 - Lack of public goods (e.g. undercapitalization of World Bank)
- **Policy Coordination**
 - Global macroeconomic imbalances
 - Reduce reliance on accumulation of foreign exchange reserves
 - Address financial sector instability

Sustainability

- **Environmental Management**
 - Climate change: mitigation and adaptation
- **Inequality and Social Cohesion**
 - Inclusive growth

Sustainability

- **Rebalancing and product diversification**
 - Leads to new sources of economic growth. E.g. Philippines → modest shift towards investment and manufacturing
- **Demographic winter in many countries**
 - Migration policy

ASEAN Programs

- Master Plan for ASEAN connectivity
 - ASEAN Highway Network
 - Integrated and Competitive Maritime Transport in ASEAN
 - ASEAN Single Aviation Market
- Cooperation in education - ASEAN Quality Assurance Network, ASEAN Universities Network
- Intra-regional migration - ASEAN Declaration on the Protection and Promotion of the Rights of Migrant Workers; 8 MRAs have been concluded

ASEAN Programs

- **Financial Cooperation**
 - CMIM, AMRO
 - Roadmap for Monetary and Financial Integration of ASEAN
 - ASEAN Financial Integration Framework
- **SME development** (rebalancing and inclusiveness)
 - Strategic Action Plan for ASEAN SME Development 2010-2015
 - ASEAN Benchmark for SME Credit Rating
 - Methodology, the SME Service Centre, the ASEAN SME Policy Index and the ASEAN
 - Common Curriculum for Entrepreneurship.

ASEAN Programs

- Environment – ASEAN Environmental Cooperation in 10 priority areas
- Overall goal of AEC: (a) a single market and production base, (b) a highly competitive economic region, (c) a region of equitable economic development, and (d) a region fully integrated into the global economy.

감사합니다

Maraming Salamat!!!

Terima Kasih

ขอบคุณครับ

ありがとう

Cảm ơn rất nhiều

ຂອບໃຈຫລາຍໆ

謝謝你。

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ကျေးဇူးတင်ပါတယ်။

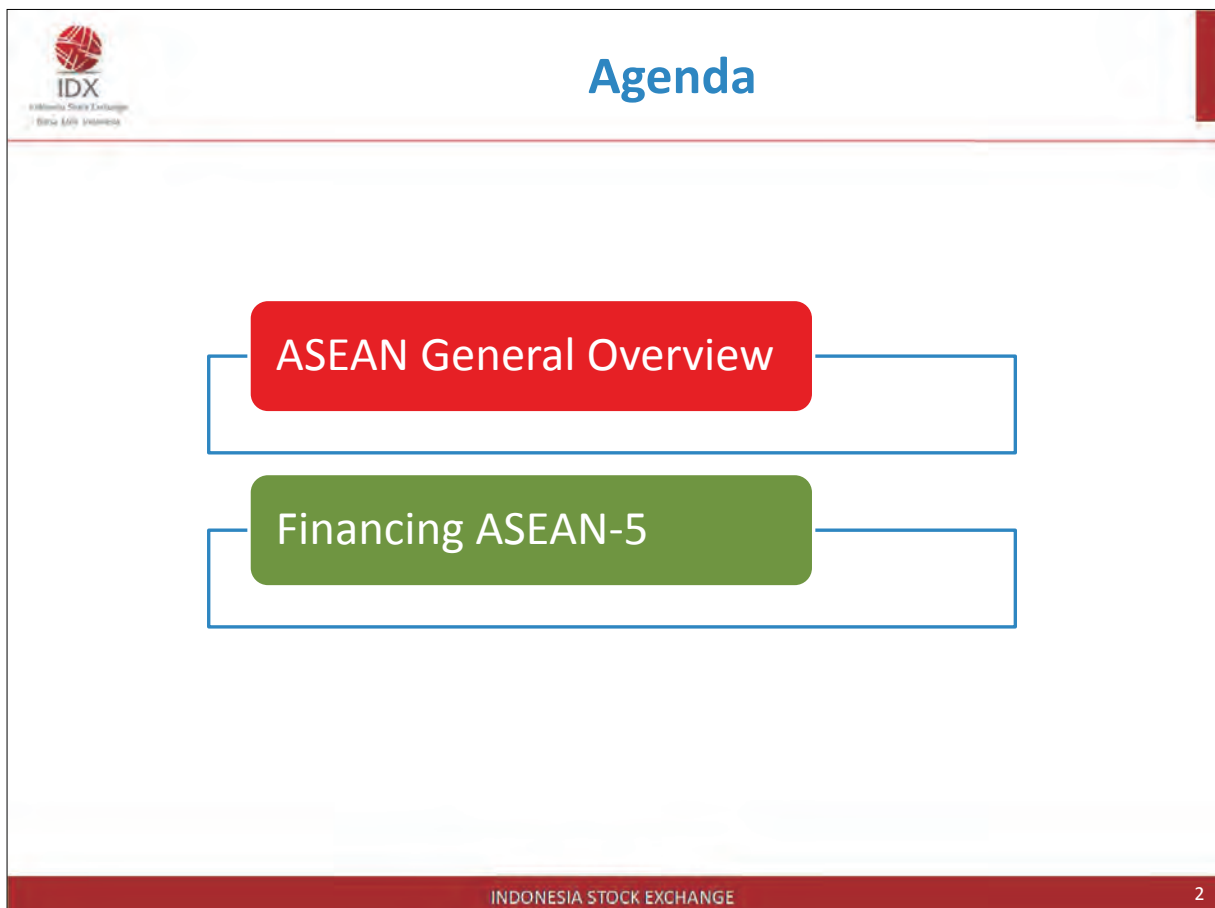
THANK YOU !!!



**ASEAN Economic Community:
Financing Growth**

Poltak Hotradero
Head of Research and Development

The slide features the IDX logo (Indonesia Stock Exchange / Bursa Efek Indonesia) in the top left. The main title is in large red font. Below the title is a horizontal collage of financial images: stacks of coins, a pen on a document, hands shaking over money, a stock market board with numbers, and a hand holding a stack of cash. The bottom half of the slide has a dark red background with the speaker's name and title in yellow and white text.



Agenda

- ASEAN General Overview
- Financing ASEAN-5

INDONESIA STOCK EXCHANGE 2

The slide is titled 'Agenda' in blue font. It contains two items in a list, each in a colored rounded rectangle (red for the first, green for the second) with a blue line extending to the right. The footer includes the IDX logo and the text 'INDONESIA STOCK EXCHANGE' and the number '2'.



IDX

Indonesia Stock Exchange
Bursa Efek Indonesia



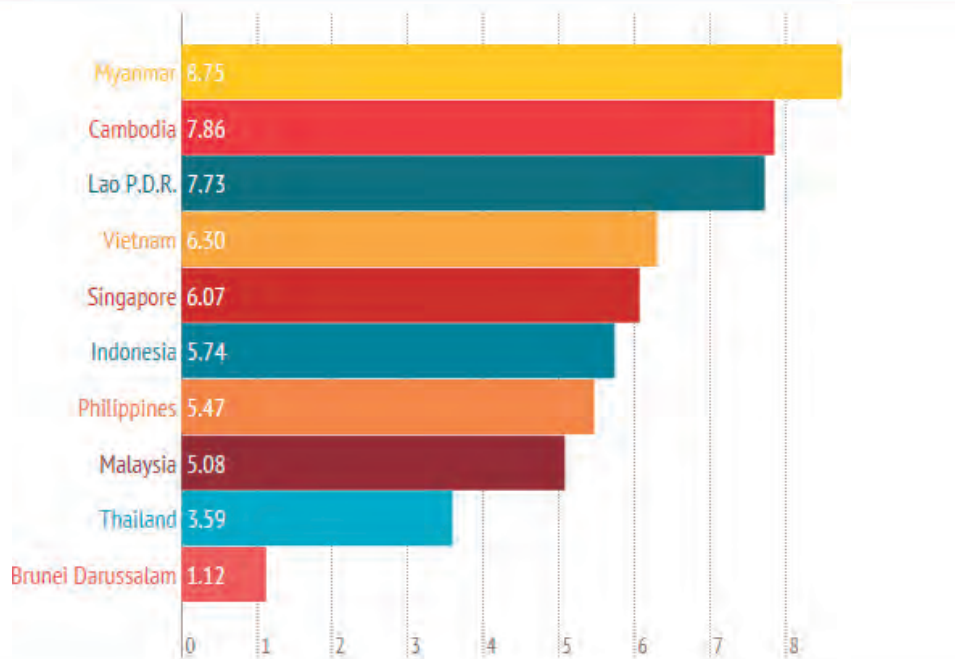
ASEAN Overview



IDX
Indonesia Stock Exchange
Bursa Efek Indonesia

ASEAN Countries Real Economic Growth

Average Growth 2004-2014



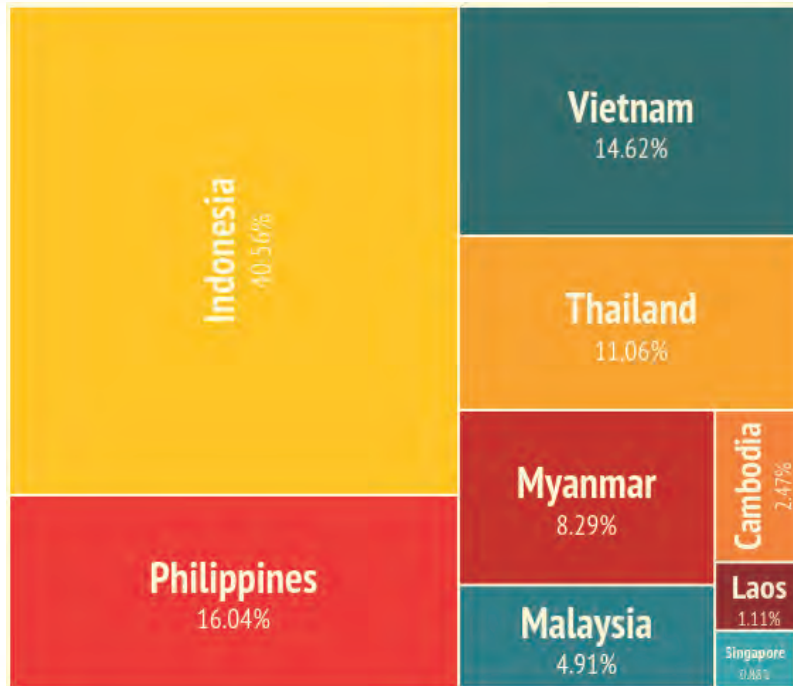
(Source: World Economic Outlook Database 2015 IMF)



Indonesia Stock Exchange
Bursa Efek Indonesia

ASEAN Countries in Population

ASEAN Population: 620 Million people (2014)



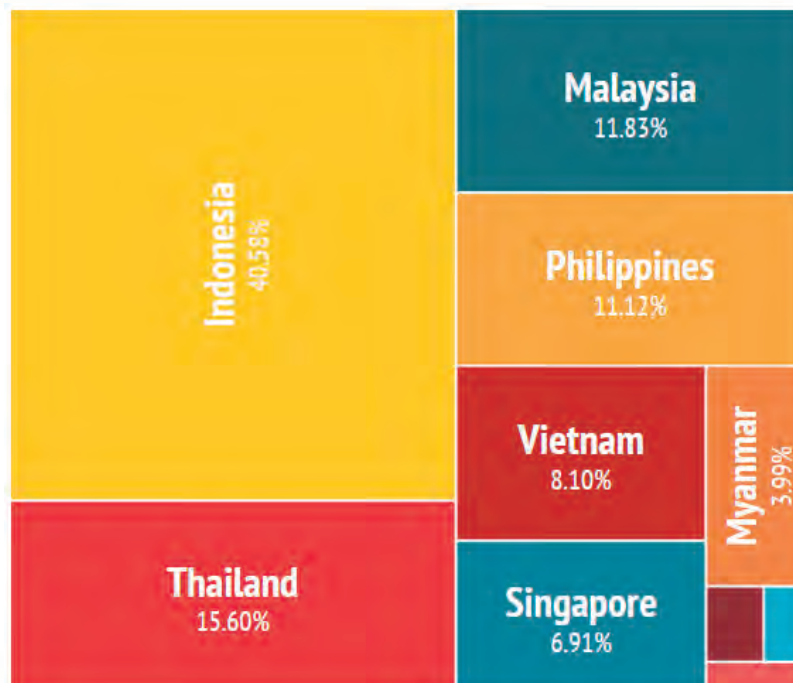
(Source: World Economic Outlook Database 2015 IMF)



Indonesia Stock Exchange
Bursa Efek Indonesia

ASEAN Countries in GDP

ASEAN GDP: \$ 6762 Billion in PPP (2014)



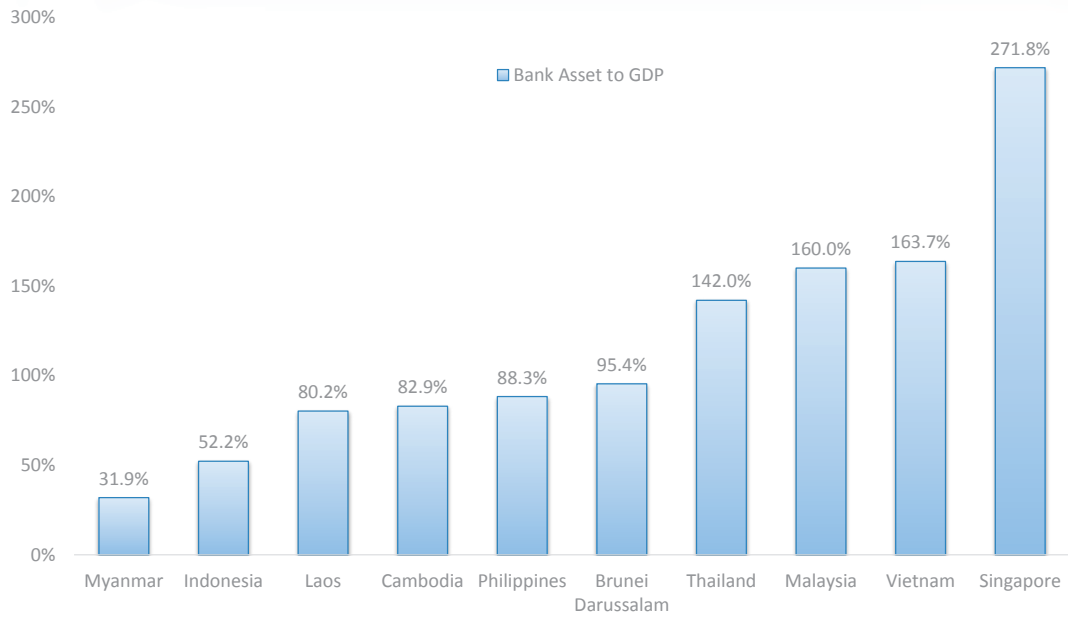
(Source: World Economic Outlook Database 2015 IMF)



Indonesia Stock Exchange
Bursa Efek Indonesia

Bank Asset to GDP

Mainstream Financing



(Source: Local Currency Bond and Infrastructure Finance in ASEAN+3, ADB, 2015)

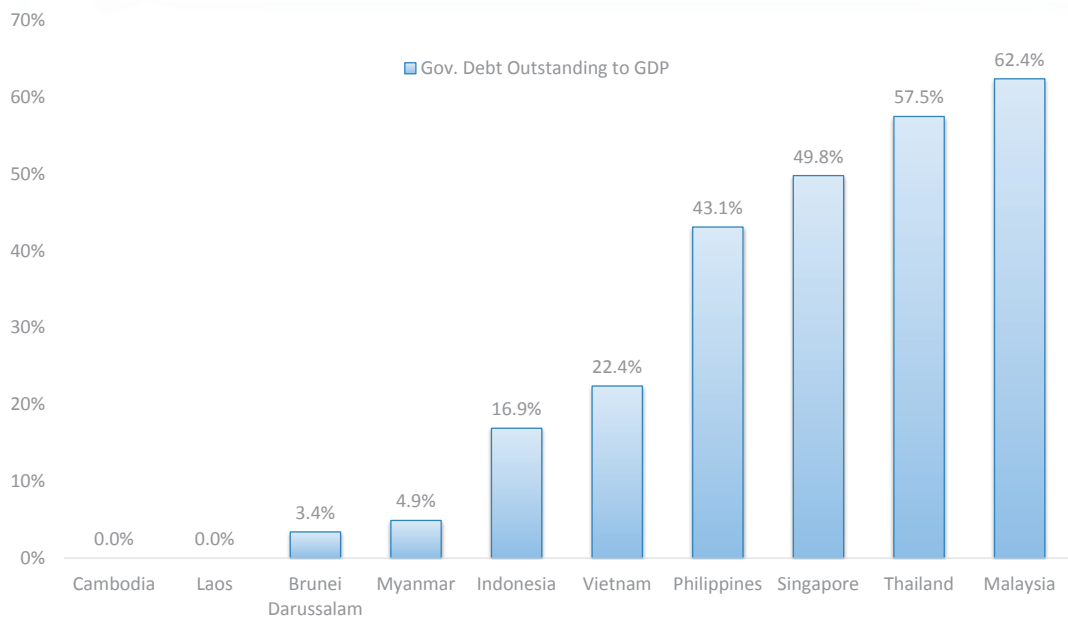
INDONESIA STOCK EXCHANGE



Indonesia Stock Exchange
Bursa Efek Indonesia

Government Bond Outstanding to GDP

Sovereign Financing



(Source: Local Currency Bond and Infrastructure Finance in ASEAN+3, ADB, 2015)

INDONESIA STOCK EXCHANGE



IDX

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Bursa Efek Indonesia

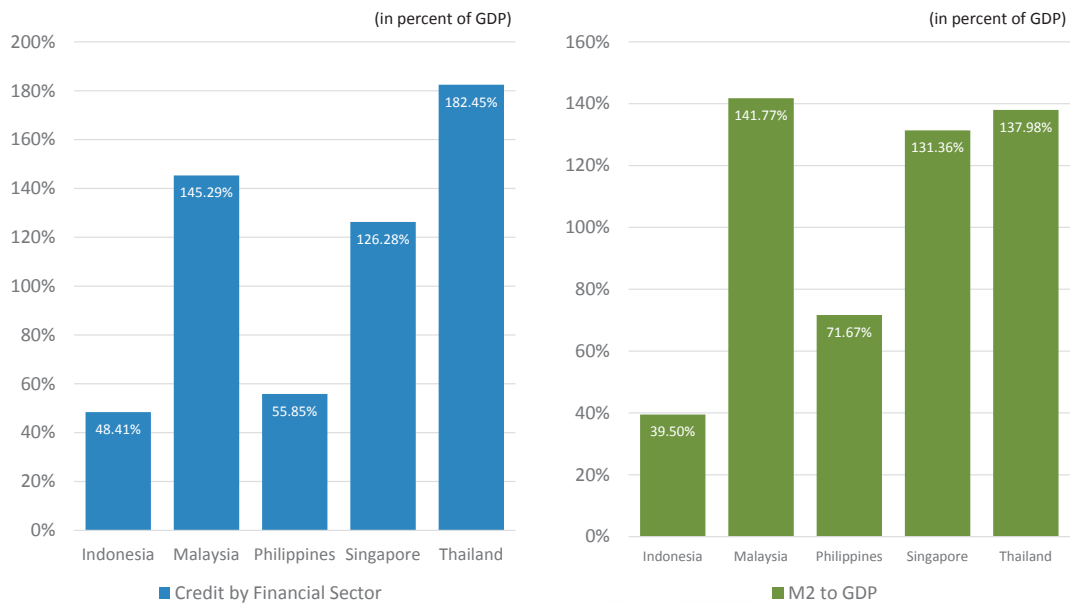


Financing ASEAN-5



Credit to Private Sector and M2/GDP

ASEAN-5 Differences



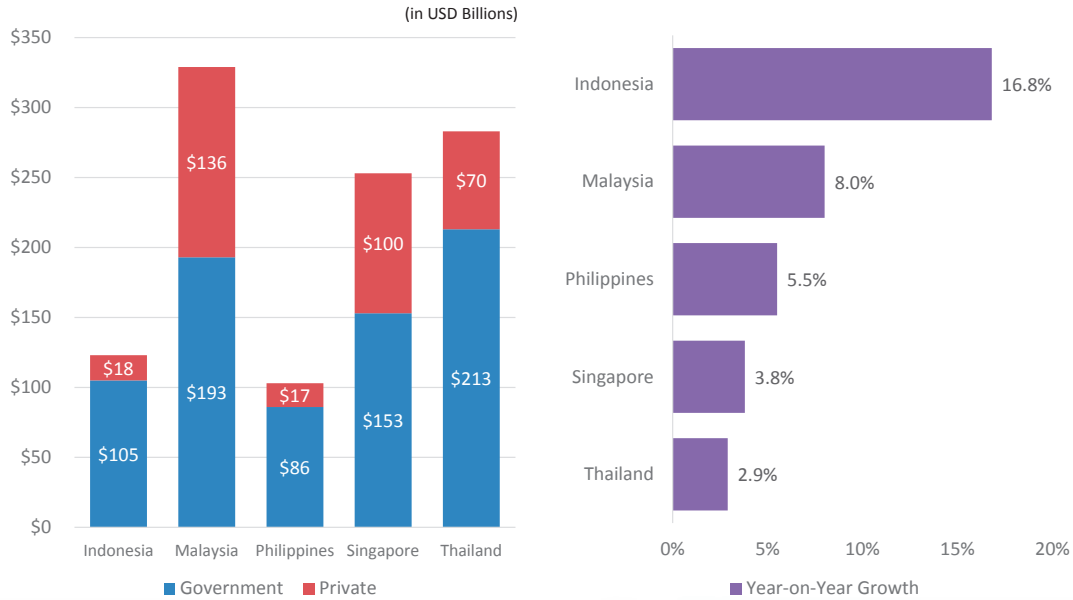
(Source: World Development Indicator, World Bank 2015)



Indonesia Stock Exchange
Bursa Efek Indonesia

ASEAN-5 Bond Market Volume

End of 2014 Position



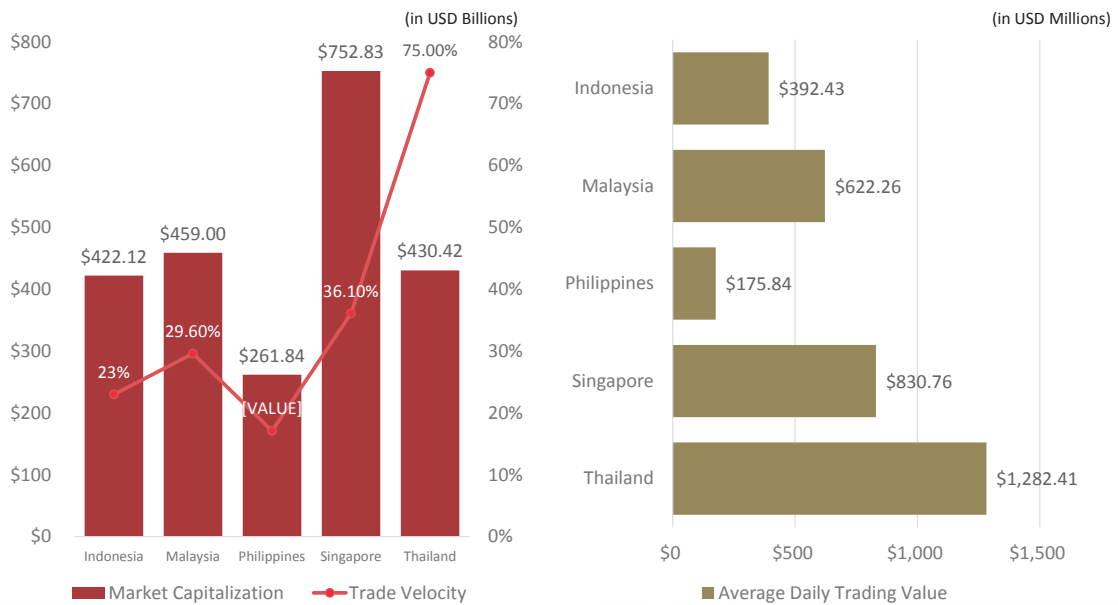
(Source: asianbondsonline.adb.org)



Indonesia Stock Exchange
Bursa Efek Indonesia

ASEAN-5 Equity Market

End of 2014 Position



(Source: World Federation of Exchanges Statistics)



Indonesia Stock Exchange
Bursa Efek Indonesia

Mutual Fund Assets in Comparison

End of 2010 Position, By Country

Region	Population (Millions)	GDP (\$ Billion)	Assets (\$ Billion)	Asset per Capita (\$)	Assets as share of GDP (%)
China	1,355.2	5,708	347.6	256.5	6.1
Indonesia	232.8	707	18.7	80.3	2.6
South Korea	48.9	1,028	300.2	6,139.1	29.2
Malaysia	28.0	248	73.1	2,610.7	29.5
Philippines	93.8	200	5.7	60.8	2.9
Singapore	4.8	223	44.9	9,354.2	20.1
Thailand	68.2	319	87.7	1,285.9	27.5
United States	310.2	14,490	11,820.7	38,106.7	81.6
Japan	127.0	5,485	785.5	6,185.0	14.3

(Source: Asian Development Bank, 2013)

INDONESIA STOCK EXCHANGE

13



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Blue Chip Stock Performance Among ASEAN-5



(Source: Thomson-Reuters, MSCI)

INDONESIA STOCK EXCHANGE

14



Global Equity Asset Allocation Among Emerging Market Countries

Country	MSCI Emerging Market	MSCI AC Asia ex Japan	Country	MSCI Emerging Market	MSCI AC Asia ex Japan
China	17.7%	25.0%	Chile	1.5%	
Brazil	16.0%		Turkey	1.3%	
Korea	13.5%	19.1%	Colombia	0.8%	
Taiwan	11.5%	16.3%	Peru	0.6%	
South Africa	7.4%		Philippines	0.5%	0.7%
India	7.4%	10.4%	Hungary	0.4%	
Russia	7.3%		Egypt	0.4%	
Mexico	4.5%		Czech Republic	0.4%	
Malaysia	2.9%	4.1%	Morocco	0.2%	
Indonesia	2.3%	3.3%	Hong Kong		11.8%
Thailand	1.7%	2.4%	Singapore		6.9%
Poland	1.7%		TOTAL	100%	100%

(Source: MSCI, 2014)



poltak.hottradero@idx.co.id

THANK YOU

Asia-Pacific Forum 2015

"ASEAN Community Building and regional Integration in East Asia: Looking Beyond 2015"

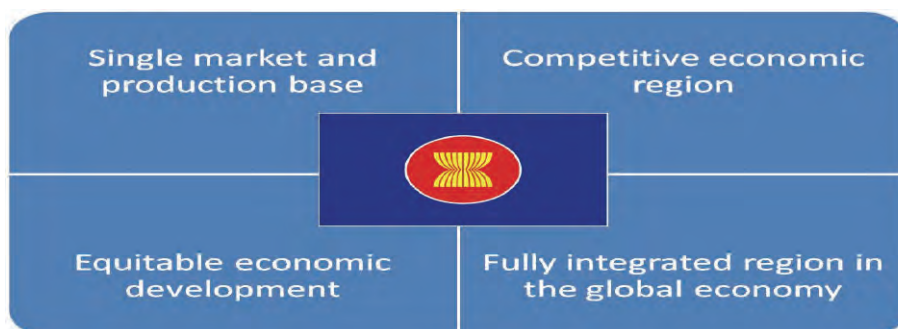
A Conference by: JEF, ERIA and CSIS
(26-27, November, 2015)

Panel Session II: ASEAN Economic Community as a driver of Regional Integration in East Asia: Challenges and Opportunities

Talking Points¹:

As ASEAN is in moving forward to a peaceful and prosperous community, ASEAN Economic Community will soon be realized at the end of December in 2015 by comprising to three mutually reinforcing and closely intertwined pillars of Political-Security, Economic and Socio-culture community. It is very closed to target date. In fact, ASEAN Economic Community (AEC) is the goal of regional economic integration by 2020 according to the (Bali Concord II) ASEAN vision 2020. ASEAN Community's Post 2015 Vision is aimed to promote ASEAN as a rules-based community bound by shared principles, values and norms.

It has been transforming into a Rules-based and People centered organization by integrating Southeast Asia's diverse economies. The AEC is defined by four pillars as mentioned in following Figure

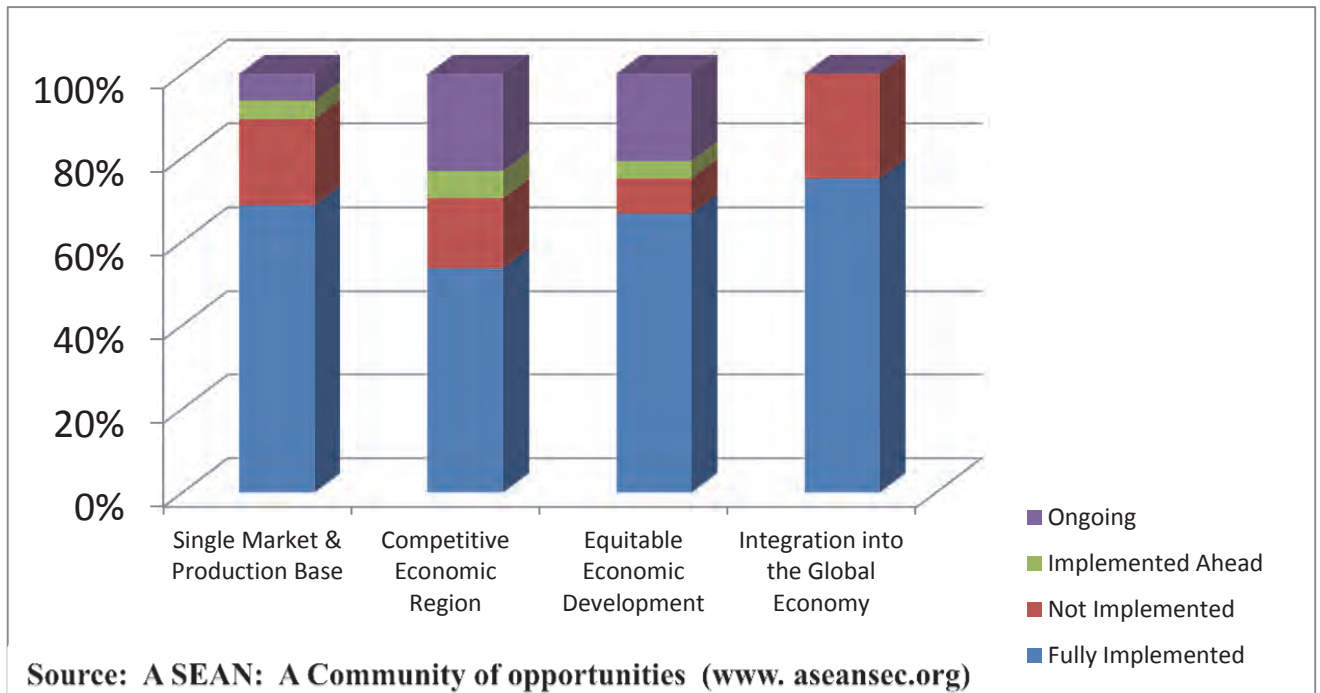


Source: ASEAN: A Community of Opportunities (www.aseansec.org)

¹ Cho Cho Thein (Ph.D) Professor, Department of Applied Economics, Yangon University of Economics, Yangon, Myanmar

As far as it is concerned with the implementation of AEC, it can be seen the AEC Scorecard that AMSs' implementation had completed over 80%.

Implementation of AEC Scorecards



When the AEC happens in reality, some countries will see many new opportunities presented to them and the reverse for others. Therefore ASEAN has also been confronted with challenges and exploited opportunities. There are many challenges we have to face beyond 2015.

There are some of the key points that need to be addressed beyond 2015. They are as follows:

- To attain the concrete achievement of AEC goal, we have to first of all, ensure to create the Single Market and production based (first pillar of AEC). After reducing the tariffs among AMSs in line with the CEPT scheme, tariffs are coming down very fast and are practically zero for the ASEAN-6. Now non-tariff measures (NTMs) have become particularly salient as a potential barrier to smoother trade linkages among AMSs.

- For trade facilitation, we need to establish the National Single Window (NSW) in AMSs for materialize the ASEAN Single Window (ASW). The ASEAN Single Window (ASW) is not yet operative. To reach the AEC goal ASW, National Single Windows are not yet fully operational in most AMSs; and indeed, for three AMSs (CLM), they have yet to be put in place. The implementation of NTM in Myanmar is also underway.
- In addition, it is the need for the full operationalisation of both national and regional trade repositories, which are needed to enhance transparency on trade related policies, rules and regulations in the region for the benefit of firms and people transacting business in the region.
- Despite some progress on standards and conformance as well as on MRAs on professional services, so much more is needed to ensure greater regulatory convergence on standards and technical regulations, greater confidence on conformance assessments and certifications, and greater mobility of skilled professionals within the region.

As a whole of the implementation ASEAN Economic Community Post 2015,

- Narrowing development gaps is also one of the main challenges to be tackled at national as well as at regional level.
- There are the limitations in capacity in terms of infrastructure, institutions, human resources, technology, and finance.
- Among of them, Infrastructure connectivity within AEC is also a challenge to drive the growth of region (*As far As Myanmar is concerned, the connectivity will be the best strategy associated with economic corridors: East-west economic corridor*)
- Lack of awareness among different stakeholder is one of the immediate challenges that AEC faces
- lack of engagements with private sector can pose a big challenge for a successful implementation of AEC (*i.e. SMEs in less developed countries like Myanmar are not yet ready for AEC, unable to take advantage of the benefits and opportunities from the AEC, if they are not able to collaborate with foreign companies to acquire new*

technology and knowhow due to the lack of finance, technical know-how, international exposure and capacity)

- legal and regulatory challenges.. Different levels of legal framework development and lack of institutional capacity in AMSs hindered their effective and timely implementation of regional commitments

Way forward

- ▶ ASEAN will continue to implement the remaining Blueprint's action lines and measures that are not yet implemented and their implementation will continue to be deepened and expanded in scope in terms of policy actions beyond 2015.
 - ▶ ASEAN should also strengthen the implementation of the three community Blueprints in a mutually reinforcing manner
 - ▶ Furthermore, raising awareness on ASEAN should remain the top priority for greater participation of people in the building of people-centered community through among other, active engagement with all relevant stakeholders.
 - ▶ Owing to the cross -cutting nature of development gap between ASEAN-6 and CLMV countries and its significance to the ASEAN integration process, we reaffirm to support for the implementation of the IAI in post-2015.
 - ▶ The challenge for ASEAN is to maintain, and better still, strengthen the momentum post 2015 moving forward towards an integrated, highly contestable, competitive, dynamic, inclusive, resilient and sustainable region that is deeply engaged with the rest of East Asia and the world.
-
-

TPP, RCEP, FTAAP & AIIB: Hit or Miss?

Dr. Mignonne M.J. Chan
Chair & CEO, Out-of-the-Box Consultancy
2015.11.26.

Contents

- FTAAP:
 - Make or Break for NGeTI Issues?
 - Integration or Fragmentation?
- Challenges for TPP
- Challenges for RCEP
- One Belt, One Road (OBOR) Initiative
- Asian Infrastructural Investment Bank (AIIB)
- Game Changers for OBOR & AIIB

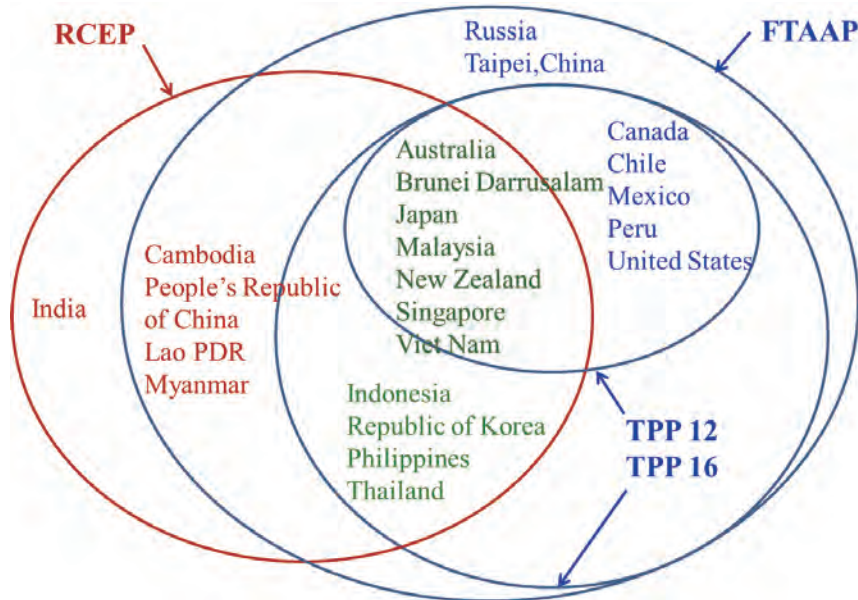
FTAAP: to Address NGeTI Issues



FTAAP: Ways Forward

- *Terms of Reference of the Collective Strategic Study on FTAAP (TOR)* ;
- Collective Strategic Study: to be drafted by 2016.01.15; including:
 - a stocktaking of regional RTAs/FTAs,
 - an analysis of the various possible pathways towards the eventual FTAAP, including an assessment of the impacts of the “spaghetti bowl” phenomenon.
- Treatment of “Spaghetti Bowl” Effects
- Sustaining APEC Growth Strategy & Capacity Building

Integration or Fragmentation ?



Source: Asian Development Bank

Challenges for TPP

- Sign of a Strategic Anxiety
 - Who should make the rules of world trade?
 - Some TPP Members: May bow out if a specific target is to be excluded.
- Time-Consuming for Domestic Approvals
 - U.S. Oppositions: Democrats on Labor, Republic on Pharmaceutical, etc.
 - Members' Domestic Legislative Process
- Implementation of the Platinum Standard
 - Structural Reform
 - Effectiveness of Adjustment or Consolidation

Challenges for RCEP

- Differentiated Liberalization in Trade-in-Goods: Some have not yet been keeping in pace in terms of offering the width and depth of liberalization.
- Modality for Gradual Reduction:
 - 5 Categories of Immediate, 5-year, 10-year, 15-year, and 20-year span
- Bridging towards an Upgraded FTA in due Course

One Belt, One Road (OBOR) Initiative: Development-based Grand Plan



Asian Infrastructure Investment Bank (AIIB): New Financial Scheme



Game Changers for OBOR & AIIB

- **China's Rise:**
 - peaceful rise vs. Inevitability of Conflict?
 - Impacts of the “New Normal”
- **Participation in Rule-Making**
 - Standard of Project Evaluation
 - Economic Benefits for All Parties Concerned
- **Peace & Prosperity**
 - Geo-political Dynamics
 - Geo-economic Landscape

謝謝！ Thank you!

詹滿容

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Out-of-the-Box
Consultancy

Talking points: Shankaran Nambiar

ASEAN is one of the most vibrant economies in the world. While growth in many parts of the world is stagnant or cooling, this is not the case with ASEAN. The region has a rising consuming class, opportunities in infrastructure are increasing, there is huge potential for participation in global production networks, and tremendous space for trade and investment.

The AEC is a significant step in the right direction because it allows ASEAN to harness its capabilities to take advantage of global trends and the emerging opportunities that they present. Two themes underlie the AEC: liberalisation and institutional reform. Liberalisation by itself is not sufficient; it has to be supported by the right rules and regulatory frameworks and these have to be developed so as to take advantage of a more liberal trade and investment environment.

Indeed, the RCEP and the TPP demand liberalisation and institutional reform. Both agreements are different in their structure and emphasis. RCEP is a necessary step towards achieving ASEAN centrality, centrality being conceived as creating a regional entity that can be an attractor of trade and investment, a hub for global production networks, and as a counter-weight to other regional groupings. Obviously, achieving the goals of AEC (as enshrined in the four pillars) is a pre-condition for constituting RCEP. But RCEP faces the additional challenge of securing the agreement of ASEAN's dialogue partners, too. Hopefully, RCEP will not have to submit to the lowest common denominator. While it may not want to set itself the standards that prevail for the TPP, or accept all the issues that are contained within the TPP, it would not be helpful for negotiations to slip to the lowest level permissible. It might make sense to adopt moderate standards but with the aim of progressively raising them.

There are three elements that can be expected to receive due attention within the RCEP: a) attention to SMEs, b) narrowing development gaps, and c) economic cooperation. While the gains from any agreement can be easily harvested by big corporations, the same is not the case for SMEs. Similarly, the varying levels of development in ASEAN cannot be ignored, and ASEAN, if it is to be effective, must, indeed, direct attention to this issue. RCEP can be expected to enhance trade and

investment in the region, but beyond that it will also be an instrument for domestic regulatory reform. The RCEP can be expected to favour developmental goals and cooperation.

The TPP, when implemented, will have considerable impact on this part of the world. Those countries that are members of the TPP will derive benefits from trade and investment. But this will disadvantage those non-TPP members in ASEAN and ASEAN's dialogue partners. This might encourage some of the countries in ASEAN to consider participating in the TPP at a later stage, with all that it entails. But there will be ASEAN member states who might not be equipped to join the TPP at this stage and who might not see it in their interests to do so for some more time to come.

Nevertheless, with the increasing growth and development in ASEAN there will be many infrastructure projects. China has planned an ambitious network of connectivity projects that will span the region. India, too, has initiated many projects that will improve connectivity in the region. The increasing energy demand in the region will also require better infrastructure and investment. This is where the AIIB will have a positive role to play. It will offer a range of opportunities that will add to what the IMF, World Bank and ADB are doing.

Talking points: Shujiro Urata

New regional arrangements such as the TPP, RCEP, and AIIB are likely to contribute to deepening regional economic integration in East Asia, although the extent and the depth of their contributions differ among them,

TPP negotiations reached an agreement on October 5, 2015. It may take some time for the TPP to be enacted because of possible domestic political problems in some TPP member countries. The TPP is likely to have important impacts in East Asia, as it establishes a business friendly environment where free flow of goods, services, capital, and information is promoted with high level of trade and investment liberalization and a comprehensive and ambitious set of rules on economic activities. Specifically, as for trade in goods, almost 100 percent of tariff protection will be eliminated, while in services and investment foreign firms will be treated equally with domestic firms. These agreed measures will promote trade and investment among TPP member countries possibly at the cost of trade and investment for the non-TPP member countries. Non-members have an incentive to join the TPP, in order to avoid discriminatory and negative impacts. Indeed, there are several countries including Indonesia, Korea, and the Philippines that have indicated an intention to join the TPP.

RCEP is likely to take some time to be concluded and enacted, considering the progress in negotiations that has been made so far. Judging from the media reports, compared to the TPP, the RCEP is not going to be as high level in terms of liberalization or comprehensive and ambitious in terms of rules. RCEP members should try to make RCEP high quality in terms of liberalization and rules, in order for RCEP to have positive impacts on its members. One realistic and practical approach that RCEP members may take is to begin with relatively medium quality and to improve its quality over time, a la ASEAN way. One important element in RCEP, which is not given much priority in the TPP, is economic cooperation. Indeed, there are several members that can benefit significantly from economic cooperation to be extended by other RCEP members.

AIIB can play an important role in promoting economic integration in East Asia by increasing connectivity through infrastructure building. AIIB should cooperate with other international organizations including the ADB and the World Bank to build infrastructure, which would benefit the region as a whole, efficiently. The establishment of the AIIB has positive impacts on infrastructure building as it prompted other organizations such as the ADB and other countries including Japan to increase financial assistance for building infrastructure.

Asia-Pacific Forum 2015

Panel Session 3

Regional Economic Integration: Can the New Economic Institutions like RCEP, TPP and AIIB Deepen the East Asian Economic Integration?

Gary Hawke

Victoria University of Wellington &
N.Z. Institute of Economic Research

They Can

- But will they?

TPP

- What happened to “high standards”, “platinum” “21st century” agreement?
- A set of linked bilaterals rather than a regional agreement
- Modest enhancement of market access
- Conventional and traditional approach to sectors and international rules although some openings towards the future
- No effective mechanism for growth

RCEP

- More market access schedules or internationalisation of AEC?
- Can RCEP achieve both a high level of ambition and sufficient flexibility for a highly-varied membership?
- Can RCEP provide for existing and future international production networks covering both goods and services?

AIIB

- Infrastructure and connectivity
- constraints are more often design of projects, including alignment of costs and benefits, than lack of finance

FTAAP

- An even bigger wrangle over market access cannot be expected to be more successful than Doha
- Use FTAAP to avoid incompatibilities between TPP and RCEP which matter
- Facilitating development of WTO
- Fostering integration of integration agenda, including AIIB and Development Banks.
- Building support for innovative, inclusive growth throughout region

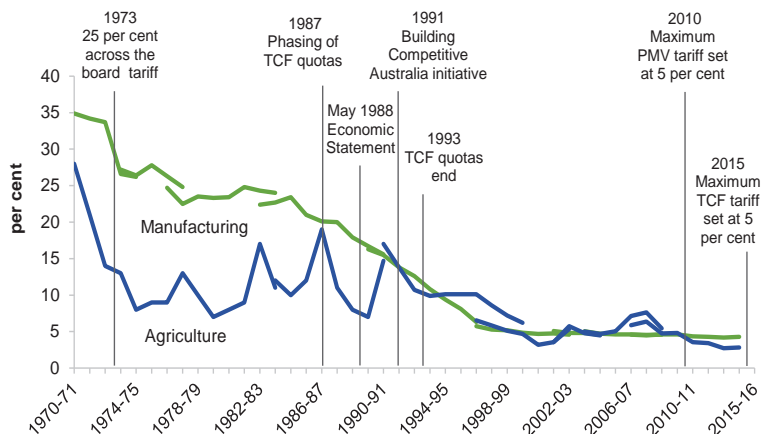
Institutions for Deepening Asian Regional Economic Integration

Shiro Armstrong
Crawford School of Public Policy
Australian National University

Asia-Pacific Forum 2015
JEF-ERIA-CSIS
Jakarta, 26 November

Bilateral FTAs have had minimal impact

- Lack of evidence of trade creation and diversion
- Low utilization and lots of exclusions
- Already low barriers from unilateral liberalization in Asia
- Australia:



Game changer: TPP

- Completion but domestic ratification hurdles
- Limits on strengthening IPR: zero or negative sum of wealth transfers to IP producers and inhibits innovation
- Problems of bilaterals within TPP
 - Makes accession harder
 - Does not simplify commerce and supply chains
- Designed to hurt non-members (eg yarn forward) as incentive to join
- Questions around accession of new members: China, India and Indonesia

3

Potential for RCEP

- Binding Asian cooperation
- At best strengthening *and* expanding AEC
- Ambitious targets and capacity building, not hurdles and punishment
- Potential to negate diversionary impacts of TPP
- Challenge of expanding membership

4

Can't negotiate development

- Trade and investment liberalization alone won't deliver deeper economic integration
- Binding rules help governments from going backwards but won't deliver investment or development
 - Institution building, human capital development
 - Physical and institutional connectivity
- Need capacity building and frameworks for cooperation

5

Embracing and shaping new initiatives

- AIIB: China's provision of a regional public good
 - Unilateral options still open; inviting participation
 - Interest of region to see AIIB succeed; also to shape it
- OBOR: Potential to connect
 - Want to ensure trade costs lowered, not just transit trade
 - Cooperation through positive sum economic interests
- Enfold in ASEAN +6 agenda: gains from Asian regional cooperation that embraces and furthers new initiatives
 - That strengthen institutional and physical connectivity

6

8. 若手研究者の参加報告

当財団では、平成25年度からの試みとして、若手研究者を対象に、各国有識者等との交流を通じ将来に向けた見識の向上に役立つ場を提供している。今次フォーラム事業においては、セッション3のパネリストである早稲田大学大学院アジア太平洋研究科の浦田秀次郎教授のご推薦により、(公)日本国際問題研究所研究員の柳田健介様にオブザーバーとしてご参加いただいた。その成果の一部として、略歴並びに感想文を掲載する。

(略歴)



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関心分野

開発経済学、アジア太平洋地域の国際経済問題、国際労働移動

職歴

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学歴

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After receiving his BA of Economics from Soka University in Japan, Mr. Yanagida worked in the Metropolitan Bank and Trust Company Tokyo Branch in 2007. He earned his post graduate diploma (2010) in development studies from the Institute of Developing Economy Advanced School (IDEAS) in the Japan External Trade Organization (JETRO) and MA (2012) from the National University of Singapore. Mr. Yanagida worked as a research associate in the Asian Development Bank Institute from 2012 to 2014. He is a co-author of "Prospects for Southeast Asia's Long Term Economic Development: What Roles for Central Banks?" Session 5 in Finding Asia's New Sustainable Growth Model Post GFC: The Role of the Central Banks (Proceedings of high-level conference), pp127-178. Kuala Lumpur: The SEACEN Centre.

(感想文)

日本国際問題研究所 研究員
柳田健介

1. はじめに

平成 27 年度日アジア太平洋フォーラム「ASEAN Community Building and Regional Economic Integration in East Asia: Looking Beyond 2015 (ASEAN 共同体構築と東アジアの地域経済統合：2015 年を越えて)」(11 月 26～27 日、於ジャカルタ) に、若手研究者派遣プログラムの枠で、オブザーバーとして参加をさせて頂いた。

本会議は、2003 年に開始されて以来、「アジアの地域連携強化」をテーマに、同地域における地域経済統合や各国・地域の国内経済・政治の課題について、議論を通じて相互の理解を深め、政策立案者へフィードバックを返すことを目的に、毎年開催されている。会議の開催は、参加メンバーが持ち回りでホスト役を務めており、本年は東アジア・アセアン経済研究センター(ERIA、於ジャカルタ)との共催の下、14 カ国・地域からの専門家の参加を得て、ASEAN と東アジア経済統合に焦点を置いて議論が交わされた。

1990 年代以降、アジア太平洋地域の地域経済統合は「実質面の統合」と「制度面の統合」の両面において、隔世の感を覚えるほど急速に進んできた。「実質面の統合」では、国際的な生産プロセスの分割化によって形成された、国際生産ネットワークが飛躍的な発展を遂げ、中国を筆頭に、東アジアが「世界の工場」として台頭した。域内経済の相互依存関係はますます深くなっていると同時に、各国国内の経済構造も以前より早いスピードで変化している。「制度面の統合」では、ASEAN 自由貿易地域(AFTA)、アジア太平洋経済協力会議(APEC)、世界貿易機構(WTO)、二国間自由貿易協定(FTA)、そして近年では環太平洋パートナーシップ(TPP)、東アジア地域包括的経済連携(RCEP)等の広域 FTA によって、重層的なアプローチが築かれ、域内における貿易の自由化、コスト削減、円滑化、ルール統一等が着実に進められてきた。また、国際金融においても、1997 - 98 年のアジア通貨危機や 2007 - 09 年の世界金融危機を経験したことから、「チェンマイ・イニシアティブ」や「ASEAN+3 Macroeconomic Research Office (AMRO)」等の地域的な制度や枠組みが作られてきたことも特筆すべきだろう。

2015 年は、TPP の大筋合意、ASEAN 経済共同体の設立、中国経済の減速、AIIB の設立等、アジア太平洋地域の地域統合が大きな転換点を迎えていることを象徴する様な出来事が数多く起こった。こうした重要な進展が、今後の同地域の地域統合の流れを決めていく上で、重大な影響を与えることは間違いない。こうした背景の中、「日アジア太平洋フォーラム」では、14 カ国・地域から集まった専門家を中心に、タイムリーな 이슈について活発な議論が行われた。

以下に、会議内容についての報告を行いたい。

2. 会議レポート

※登壇者については、会議プログラムを参照されたい。

本会議レポートでは、11月26日の公開シンポジウムの内容に加えて、27日に行われた非公開ラウンドテーブルで議論された内容と合わせて、要旨をまとめた。非公開ラウンドテーブルは、チャタムハウスルールの下開催されたため、会議レポート全体を通して発言者の名前は明らかにしていない。

開会の辞では、本年の会議テーマの意義についてスピーチがあった。2015年は、約5年半に亘ったTPP交渉が10月に大筋合意に達し、また本年末にはASEAN共同体(AC)の柱である、ASEAN経済共同体(AEC)が正式に発足するなど、アジア太平洋地域の経済統合プロセスにとって重要な年であった。2015年以降は、新しい局面を迎えることが予想される。制度面では、TPPの発効に向けて、各国議会で批准手続きが円滑に進むか、また今後参加国が拡大していくかが注目される。RCEPは、交渉参加国にアジア新興国を多く含んでおり、2016年末までの交渉妥結が重要である。こうした取り組みは、将来のアジア太平洋自由貿易圏(FTAAP)の構築へと繋がっていく。他方、国内経済に目を向けると、多くの東アジア諸国は経済構造の変化に直面しており、とりわけ貿易・投資自由化を梃にした、構造改革への取り組みが極めて重要である。本フォーラムにおいて、ASEAN、東アジア諸国が今後どのような課題に取り組むべきなのか、活発に議論されることを期待したい。

基調講演では、地域経済統合におけるASEANのこれまでの貢献と、2015年以降の展望について講演があった。本年は、東アジア首脳会議(EAS)設立から10周年、年末にはAECが発足するなど、節目の年であり、着実に成果を上げてきた事を評価したい。振り返ると、1967年の設立以来、ASEANが積極的に果たしてきた地域経済統合への貢献は大きく、長年に亘る貿易・投資自由化の取り組みは、今日のASEAN+1 FTAやRCEPの枠組み等として実を結んでいる。次の10年に向けて、「ASEAN共同体ビジョン2025」に、達成すべき統合目標をまとめて、次のステップに向けてビジョンを共有している。当面の目標として、ASEAN+1 FTAの見直し交渉を進めるとともに、RCEP交渉については2016年末までの合意を目指したい。AECの次のステップとして、サービス分野における統合、そして民間セクターとの連携強化が重要である。他にも、地域統合への取り組みとして、インフラ開発、エネルギー、気候変動等、様々な分野が重要であるが、こうした中で、中国のアジアインフラ投資銀行(AIIB)の参入は新しい動きである。ASEAN共同体にとって、経済成長は引き続き重要なアジェンダであるが、持続可能で包括的な成長の実現を目指した地域経済統合の取り組みが最重要の課題である。

第1セッションでは、「東アジア首脳会議(EAS)設立から10年間と地域統合の進展：どのように成長戦略と構造改革を推進出来るか？」をテーマにパネルディスカッションが行われた。本年のEASでは、安全保障に関する議題に多くの時間が割かれ、経済問題に関する議論は僅かであった。近年、東アジアにおける安全保障環境は大きく変化しており、とりわけ、米中関係を巡

るパワーバランスの変化は、経済統合のプロセスにも影響を及ぼすと考えられる。安全保障と経済統合を結ぶリンクは、関係国同士が信頼を築けているかという点である。APEC や ASEAN には、閣僚会合や行政官レベルの作業部会等の体制が敷かれているが、EAS には、そうした仕組みは用意されていない。EAS において、経済統合のプロセスを推進するには、ASEAN 経済担当相や関連作業部会を関与させることが有効かもしれない。いずれにせよ、EAS の重要な役割とは、安全保障と経済問題の橋渡しが出来ることだ。米中関係には、競争的な面だけでなく、協力的な面もある。大国関係で緊張が高まる事は、ある意味避けようがないことで、ASEAN は、そうした大国関係の緊張を緩衝する役割を果たす事が出来るだろう。その際、ASEAN は成果重視で機能的かつ合理的な役割を果たすことも重要だと考えられる。

近年、中国の台頭は、対外経済政策や国際協力の分野でも活発になっており、AIIB、一帯一路、FTAAP の推進等に力を入れている。中国が優先順位を置いている分野は、地域のコネクティビティ、アジア太平洋地域の包括的な経済連携である。国際通商枠組みに関して、TPP と RCEP が並立しているが、中国として現時点では RCEP に優先順位を置きたい。しかし、長期的には TPP 参加の可能性を排除するわけではなく、取り組むべき国内構造改革と TPP のアジェンダは整合的であると考えている。また、TPP や RCEP は、将来的には FTAAP 構築へと繋げていくべきである。他方、こうした中国の動きに対して、国際秩序形成の主導権を握るための挑戦だと警戒する見方もある。しかし、経済協力を安全保障戦略の一部として利用すべきではない。例えば、TPP は中国を抑え込むための手段だと言われることがあるが、あくまでも、貿易投資を促進するための実用的な制度として捉えられるべきだ。

成長戦略と構造改革について、東アジア諸国は先進国、新興国ともに成長力を高めるために国内構造改革に取り組む必要がある。FTA は、競争的な環境を導入し、構造改革を促進するのに有効な手段であり、成長戦略の柱となり得る。深い統合を目指すことにより、「国境措置 On-the-border-issue」だけではなく、「国内措置 Behind-the-border-issue」に対処することも可能である。他方、包括的な成長を実現するための取り組みも必要だ。一つは、東アジアでは、域内の経済発展レベルの格差が大きく、特に発展途上国にとっては高い水準の自由化や包括的なルール分野の導入が困難である。統合プロセスから遅れている途上国には、自由化スケジュールでの配慮、経済協力、包括的な枠組み構築等の支援が必要である。二つめは、国内経済、雇用で大きなシェアを占めている中小企業の支援である。市場を自由化したときに、中小企業がチャンスを生かせるよう支援が必要だ。例えば、中小企業は資金、人材等のリソースが不足しているので、それを補うような政策が有効だろう。留意しないとイケないのは、こうした支援が実質的な保護主義となってしまうのは本末転倒であり、あくまでビジネスを促進するための政策を検討すべきである。

第2セッションでは、「東アジアの地域経済統合の推進力としての ASEAN 経済共同体(AEC)：課題と挑戦」をテーマにパネルディスカッションが行われた。近年の地域経済統合の動きに対し

て、「ASEAN の中心性(Centrality)」をどのように維持・強化していくが議論の焦点となった。AEC に関しては、一定の成果が上がったことは評価できるが、非関税障壁の撤廃やサービス貿易自由化など、2015 年以降に持ち越される課題も多く残っており、今後も継続した取り組みが必要である。また AEC は、対象分野が広く輸送分野の協力、エネルギー協力、域内格差是正などの項目を含んでいるが、こうした協力分野を広域経済連携の枠組みにも反映させていく働きかけが重要である。RCEP に関しては、TPP 交渉が合意したことの影響も受けて、ASEAN+1 FTA を超える魅力的な内容、かつ交渉スケジュールについても、早期妥結を目指す必要がある。他方、TPP が与える ASEAN 中心性への影響は大きいと見られる。TPP がもたらす貿易・投資転換効果により、ASEAN の域内格差（特に、CLM:カンボジア、ラオス、ミャンマー）が広がるだろう。ASEAN 諸国で TPP に参加している 4 カ国（シンガポール、ブルネイ、マレーシア、ベトナム）に加えて、フィリピン、インドネシア、タイが TPP 参加への興味を示している。もし、AEC や RCEP の進捗が停滞するならば、TPP の求心力はますます高まっていくだろう。

「ASEAN の中心性」を強化・維持するには、政治的なリーダーシップが不可欠である。ASEAN の中では、伝統的にインドネシアが指導力を発揮してきたが、総じて国内経済は内向きであり、AEC や RCEP 交渉の中では遅れをとっている。それ以外の ASEAN 諸国は、単独で主導権を握るには力不足である。従って、集団的なリーダーシップを強化することや、「ASEAN の声」を地域統合プロセスに効果的に反映させるためのメカニズム構築などのアイデアを考えなくてはならない。また、中国、日本、オーストラリアなど、外部からの働きかけも必要なのかもしれない。

東アジアの地域経済統合を推進するためには、ASEAN の統合が不可欠である。その際、域内格差を広げないように、包括的な成長を実現する必要がある。ASEAN 諸国には、地域統合のビジョンが共有されており、「共同体構築(Community Building)」を目指す政治的な意思がある。経済自由化による競争的な側面を促進すると同時に、包括的な経済成長の実現を目指す取り組みが不可欠である。

第 3 セッションでは、「地域経済統合: TPP、RCEP、AIIB は地域経済統合を推進役となれるか」をテーマにパネルディスカッションが行われた。TPP 交渉は本年 10 月に合意に達したが、各国議会で批准をして、実際に発効するまでしばらく時間がかかるだろう。TPP は、世界の GDP の約 40% を占める広域 FTA であり、高水準の市場自由化、サービス・投資自由化の他に、競争政策、知的所有権、国有企業の規律など幅広いルール分野を含んでいる。現在は 12 カ国が参加をしているが、将来参加国が増えていく可能性が高い。TPP は、Pacific-4(P4)からの拡大交渉を経て、当初目指していたよりも、水準が下がっており、例外を認める項目も多い。経済的には最も途上国として位置づけられる、ベトナムが、今後どのような対応を進めていくかは、他の非参加国にとっても重要な示唆を与えるだろう。RCEP は、2016 年末までの交渉妥結を目指しているが、協定発効のプロセスまでを見据えると、かなり時間を要することが予想される。それでも、TPP と RCEP はそれぞれの特徴が異なるため、競争的な関係ではなく、お互いを補完すること

が出来るはずである。「ステージアプローチ」と呼んでいるが、TPP の水準を満たすことが困難な発展途上国等は、まず RCEP への参加を足掛かりにして、統合プロセスに参加していくことを勧めたい。その意味では、RCEP 交渉は、従来の「ASEAN Way」に従って、柔軟性を許容するスタイルでも良いだろう。RCEP を完成させることにより、TPP による貿易・投資転換効果を和らげることも出来る。さらには、抜本的に発想を転換させて、RCEP 独自の付加価値を追求することにより、魅力的な枠組みへと発展させる「アイデア勝負」という方向性も検討されるべきだろう。

将来の FTAAP 構築に関して、中国の参加を巡って、TPP が拡大するシナリオを支持する見方と、別の枠組みでの交渉が必要だという見方が提示された。一つは、TPP は原則的に APEC 参加国に対して門戸を開いており、中国が APEC や世界貿易機関(WTO)に加盟することが出来たように、もし TPP への参加を希望すれば原則として拒否されることはないという見方と、もう一つは、TPP に参加するには、既存参加国による承認が必要であり、場合によっては難しい状況に陥る可能性も排除できず、別の枠組みでの交渉が必要になるという見方が示めされた。台湾の TPP 参加に関しては、政治的なハードルが予想される見解が示された。

中国の一带一路、AIIB に関しては、東アジアの巨大なインフラ需要を満たすために、重要な役割を担うという認識が示された。既存の国際金融機関に対する挑戦だと捉えられる見方もあるが、前述のとおり、アジア新興国でのインフラ需要は巨大であり、地域の経済発展に貢献することを第一目的として、その役割を果たすことが期待される。AIIB も既存の国際・国内援助機関も含めて、被援助国と「共に学ぶ(Learning Together)」という姿勢を持つことが重要だ。また、AIIB は世界銀行やアジア開発銀行との協調融資等を通じて協力することにより、融資能力向上や効率的な資源配分を達成することが出来るだろう。

3. 結びに

今回の「日アジア太平洋フォーラム」に参加させて頂き、多くを学ぶことが出来た。特に、アジアの多数の国・地域から集った専門家による議論は非常にダイナミックであったし、各スピーカーの報告や発言からは、それぞれの出身国・地域の地域経済統合に対する見方の微妙なニュアンスの違いを垣間見ることが出来て大変興味深かった。会議参加を通じて、自身の専門領域における基礎知識の拡充と、新しい視座の獲得、また人脈を広げることが出来たのは今後の研究活動を進めていく上での貴重な財産となった。今回、このような貴重な機会を与えて頂いた、主催者である一般財団法人国際経済交流財団の日下一正会長、原岡直幸専務理事をはじめ、職員・スタッフの皆様にご心より御礼を申し上げます。

9. 参考資料

9-1. インドネシア新聞 (インドネシア語)

Arah ASEAN Tak Jelas

Asia Jadi Ajang Perebutan Pengaruh

JAKARTA, KOMPAS – Persiapan ASEAN menuju Masyarakat Ekonomi ASEAN pada awal 2016 tidak memadai. Ke depan, arah dan kepemimpinan di ASEAN juga tidak jelas. Sehubungan dengan itu, ada potensi ASEAN akan pecah secara alamiah dan memilih kelompok yang dianggap paling pas.

Demikian antara lain terungkap dari seminar di Jakarta, Kamis (26/11), yang diselenggarakan Japan Economic Foundation (JEF), Economic Research Institute for ASEAN and East Asia (ERIA), dan Center for Strategic and International Studies (CSIS).

Seminar bertema "ASEAN Community Building and Regional Economic Integration in East Asia: Looking Beyond 2015" itu menampilkan para akademisi Asia, India, dan Australia. Momentumnya pas menjelang permulaan Masyarakat Ekonomi ASEAN.

Namun, seminar membahas tema yang memperlihatkan Asia telah menjadi ajang perebutan pengaruh oleh kekuatan global. "Perebutan pengaruh antara Tiongkok dan Amerika Serikat sangat jelas di kawasan," kata Dr Choong-Yong Ahn, Ketua Korea Commission for Corporate Partnership.

Tiongkok muncul dengan pembentukan Bank Investasi In-

frastruktur Asia (AIIB). Tiongkok pun sudah menguat lewat The Regional Comprehensive Economic Partnership (RCEP), beranggotakan 10 negara ASEAN plus Tiongkok, Jepang, Korea Selatan, India, Selandia Baru, dan Australia.

Ini bagian dari perebutan pengaruh, sebagaimana diakui Prof Simon SC Tray, Chairman Singapore Institute of International Affairs, Singapura. Perebutan ini bahkan dengan fasilitas uang. Ini tidak efektif dan merupakan pemborosan.

Amerika Serikat muncul menandingi Tiongkok dengan membajak Kemitraan Trans-Pasifik (TPP), sebagaimana dikatakan Prof Dr Emil Salim yang hadir sebagai pendengar.

Choong-Yong melihat potensi bahaya. TPP dan RCEP mengarah pada benturan. Lebih bahaya lagi, kata Choong-Yong, ada gejala AS akan memanfaatkan TPP sebagai ajang untuk menyeret negara-negara anggota terlibat persaingan geo-ekonomi

dan geo-politik menghadapi Tiongkok di Asia.

"Bahkan, lebih parah, ada gejala TPP akan dibawa ke ranah keamanan. Solusinya adalah TPP relatif baik jika tetap fokus ke masalah kerja sama ekonomi walaupun ini tetap tidak menyenangkan bagi Asia sepanjang TPP dan RCEP terpisah," kata Choong-Yong. Ini karena tidak baik AS ada di TPP dan Tiongkok ada di RCEP. Dua kekuatan ini sebaiknya bersatu untuk kebaikan Asia.

Dr Zhenyu Wang, Direktur China National Committee for Pacific Economic Cooperation, juga menegaskan perebutan pengaruh itu. Dia mengatakan, AS sangat gemar memakai forum untuk perebutan pengaruh dan memasuki isu keamanan.

Sentralitas penting

Zhenyu Wang mengatakan, cara terbaik adalah menjadikan ASEAN sebagai sentral dari sebuah kerja sama di kawasan, termasuk di RCEP. Netralitas dan karakter forum bermisi ekonomi dan misi saling mendukung menjadi penting. "Dan, peran ASEAN diandalkan untuk itu," katanya.

Akan tetapi, masalah terjadi. ASEAN kehilangan figur pemimpin. Bukan hanya itu, dalam hal terobosan kerja sama ekonomi, ASEAN juga nyatanya sangat lemah, sebagaimana dikatakan

Dr Somkiat Tangkitvanich, Presiden Thailand Development Research.

Kelemahan ASEAN dalam kemajuan kerja sama ekonomi juga dinyatakan Prof Dr Cho Co Thein dari Fakultas Ekonomi Terapan Yangon University of Economics, Myanmar.

Somkiat berharap Indonesia adalah pemimpin ASEAN karena Thailand dan negara-negara ASEAN lainnya tidak cukup besar untuk itu. Akan tetapi, Indonesia tidak cukup matang disiapkan sebagai pemimpin sebagaimana dikatakan Presiden Association of Honorary Consuls to Indonesia yang juga mantan pengurus Kadin Indonesia, Soy Martua Pardede.

"Jika Indonesia tidak mampu, ASEAN akan pecah dan mencari forum regional yang paling pas untuk dirinya," kata Somkiat. Dengan kata lain, jika ASEAN tidak bisa bersatu karena tidak ada pemimpin, setiap anggota ASEAN akan mencari format forum regional yang paling mengena. Bukan itu saja, akan ada perebutan pengaruh dengan unsur uang atau kesempatan bisnis sebagai pemanis.

Dr Vo Tri Thanh, Wakil Presiden Central Institute for Economic Management Vietnam, mengatakan, memang sejak bergabung ke TPP, ekspor Vietnam ke AS melesit pesat. (MON)

(仮訳)

ASEAN の方向性、はっきりせずアジア、影響力の争奪戦の舞台に

ジャカルタ、コンパス紙—ASEAN の 2016 年初頭における経済共同体への準備はまだ十分ではなく、今後の ASEAN の方向性やその指導力も明らかになっていない。このため ASEAN は自然分裂し、各国がもっとも適していると思われるグループを各自選択していく可能性がある。

11 月 26 日 (木)、日本の国際経済交流財団 (JEF)、東アジア・アセアン経済研究センター (ERIA) 及び戦略国際問題研究所 (CSIS) の主催でジャカルタで開かれたセミナーにおいて、以下のようなことが話題となった。

「ASEAN 共同体の構築と東アジアの地域経済の統一：2015 年の先を見据えて」というテーマで行われたこのセミナーでは、アジア、インド、そしてオーストラリアの研究者らが発表を行った。ちょうど ASEAN 経済共同体の発足への気運が高まっていた時期である。

ところがセミナーでは、アジアがもうすでに国際勢力の影響力の争奪戦の舞台となっていることを示すテーマについての討議が行われた。「中国と米国との間の影響力の争奪戦は、この地域において非常に明確です」と韓国企業連携委員会・委員長の Choong-Yong Ahn 博士は語った。

中国は、アジアインフラ投資銀行 (AIIB) の設立により参戦した。さらに中国は、ASEAN 加盟国 10 ヶ国に加えて中国、日本、韓国、インド、ニュージーランド、オーストラリアが加盟する東アジア地域包括的経済連携 (RCEP) を通じて強大となった。

シンガポール国際問題研究所・会長の Simon SC Tay 教授が認めるとおり、これは影響力の争奪戦の一部である。それどころか、この争奪戦は金銭供与の便宜の形も取っている。これは非効率的であり、無駄なことである。

聴講者として参加した Emil Salim 博士によると、「米国は、環太平洋経済連携協定 (TPP) を進めることにより、中国に対抗しているように見えた」と述べている。

Choong-Yong 博士は、TPP と RCEP の衝突という危険な事態が起こる可能性を予想しており、「米国はアジアにおける対中国の地理経済・地政学的競争に加盟国を引き込むための舞台として、TPP を利用しようとする動きがある」とみている。

「さらに憂慮すべきことは、TPP が安全問題の領域に持ち込まれる兆候があることです。これを避けるためには、TPP はこのまま経済協力の問題に集中することが相対的に望ましいのです。TPP と RCEP が分裂しているのは、アジアにとっては依然として好ましくない事態なのですが」と Choong-Yong 博士は述べた。「米国は TPP、中国は RCEP」となることは良いことではない。この 2 つの勢力はアジアのために一つにまとまるのが望ましい。

太平洋経済協力中国国家委員会・理事の Zhenyu Wang 博士もまた、この影響力の争奪戦について「米国は影響力を争奪するためのフォーラムに参加して、安全問題に立ち入ることを強く望んでいます」と述べている。

中央集権化の重要性

Zhenyu Wang 博士は、最善の方法は ASEAN を RCEP も含めた地域における協力関係の 1 つの中心とすることである、と述べている。その中立性および経済と相互支援の使命を担うフォーラムの特性は重要なものであり「ASEAN の役割はそれにかかっているのです」と、同博士は語った。

一方で、問題もある。ASEAN は指導者を失っているばかりでなく、画期的な経済協力という観点からは ASEAN も実際にはとても脆弱なものであると、タイ開発研究所・所長の Somkiat Tangkitvanich 博士は述べている。

経済協力の進展における ASEAN の脆弱性については、ミャンマーのヤンゴン経済大学応用経済学部教授の Cho Co Thein 博士も指摘している。

Somkiat 博士は、インドネシアが ASEAN のリーダーになることを望んでいる。なぜならタイやその他の ASEAN 諸国は、リーダーにふさわしい大国ではないからである。しかし元インドネシア商工会議所役員で、インドネシア名誉領事協会の Soy Martua Pardede 会長によると、インドネシアはリーダーとなる準備がまだ整っていない、としている。

「もしインドネシアの力が及ばなかった場合には ASEAN は分裂し、自国に対して最も適切な地域フォーラムを選択することになるでしょう」と、Somkiat 博士は述べた。言い換えれば、リーダーの不在により ASEAN が一つにまとまることできない場合には、ASEAN の各加盟国は自国にちょうど良い地域フォーラムの形を探すことになる。そればかりでなく、お金やビジネスチャンスの甘言を駆使した影響力の争奪戦が起きるだろう。

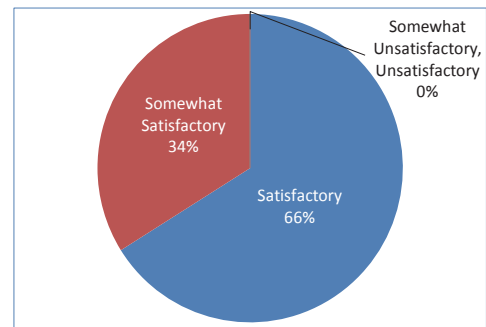
ベトナムの中央経済管理研究所・副所長の Vo Tri Thanh 博士は、「確かに TPP に参加して以来、ベトナムの米国向け輸出は急激に伸びています」と語った。(MON)

9-2. 公開フォーラム来場者アンケート集計

Questionnaire Survey of APF2015

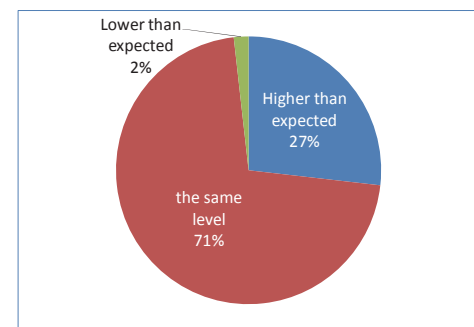
1. Overall Evaluation of the Forum

Satisfactory	Somewhat Satisfactory	Somewhat Unsatisfactory	Unsatisfactory	out of
37	19	0	0	56



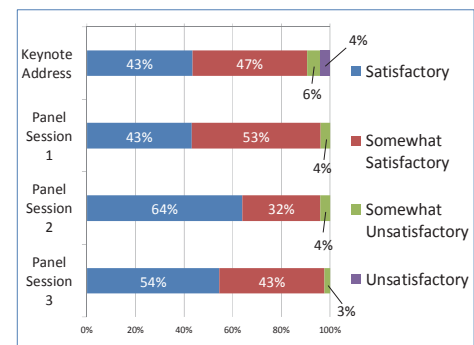
2. Evaluation of the Quality of the Forum as compared with your expectation

Higher than expected	the same level	Lower than expected	out of
15	40	1	56



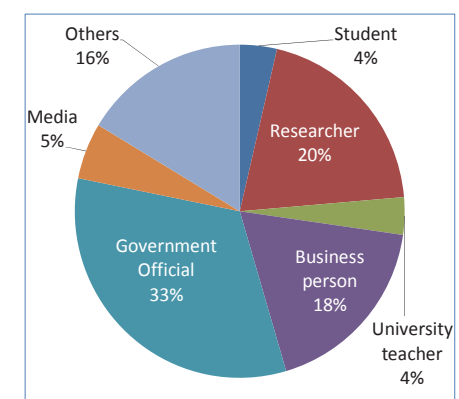
3. Session by Session Evaluation

Question	Satisfactory	Somewhat Satisfactory	Somewhat Unsatisfactory	Unsatisfactory	out of
Keynote Address	23	25	3	2	53
Panel Session 1	22	27	2	0	51
Panel Session 2	32	16	2	0	50
Panel Session 3	24	19	1	0	44



You are...

Student	Researcher	University teacher	Business person	Government official	Media	Others	out of
2	11	2	10	18	3	9	55



10. 成果

今回のフォーラムは、インドネシアのジャカルタに於いて ERIA と CSIS と共催で、公開フォーラム（26 日午後 於：ファエアモントジャカルタ・ホテル）と非公開ラウンドテーブル・ディスカッション（27 日午前 於：ERIA）を実施した。共催機関である ERIA 及び CSIS の代表者などインドネシアからの参加に加えて、当財団が招聘した 13 の国・地域（日本、豪州、ニュージーランド、中国、韓国、フィリピン、マレーシア、シンガポール、タイ、ベトナム、ミャンマー、インド、台湾）から計 24 人の専門家・有識者が参加した。

このうち公開フォーラムは、「ASEAN Community Building and Regional Economic Integration in East Asia: Looking Beyond 2015（ASEAN 共同体構築と東アジアにおける地域経済統合：2015 年以降を見据えて）」のテーマの下、次の 3 つのセッションを設けた。

パネルセッション 1：A Decade of East Asia Summit and Economic Regionalism: How can we pursue our growth strategy and achieve structural reform?（東アジアサミットと経済的リージョナリズムの 10 年間：成長戦略を追求し、構造改革を実現するのはどうすればよいか?）。セッション 1 では、東アジアのリージョナリズム、経済統合は、東アジアサミットやアセアン経済共同体（AEC）発足に見られるように進展しているものの、経済統合には未だ多くの課題があり、また、AEC が真の一体化市場となり経済成長の恩恵をえるためには、アセアン加盟各国が人、物の自由な移動などを可能にする非関税障壁の撤廃などを含む国内の構造改革を進める必要がある。こうした国内改革は、特に自由化後発のカンボジア、ラオス、ミャンマーを始め各国で困難を伴うものであるが、順次実現することが必要とのコメントがあった。その中で、ベトナムが、自国の制度面にとってはハードルの高い TPP に敢えて参加することを梃子に、国内の構造改革に取り組んでいる状況も紹介され、聴衆の関心をひいた。

パネルセッション 2：ASEAN Economic Community as Driver of Regional Integration in East Asia: Challenges and Opportunities（東アジア地域統合の牽引力としての ASEAN 経済共同体：課題と機会）。セッション 2 では、AEC には東アジアの地域経済統合に向けての推進役が期待されているが、期待に副えるのか？どの国が特にその役をはたすのか？が中心的に議論された。人口、経済規模の最も大きいインドネシアにその期待が掛けられるが、現時点ではインドネシア政府にそこまでの熱意は見られていないとの意見が多く出され、RCEP の実現にも影響しているとのコメントがあった。仮に、RCEP が前に進まなければ、アセアンの TPP 未参加国は TPP に参加しようとするだろうというのがパネリストのほぼ一致した意見だった。

パネルセッション 3：Regional Economic Integration: Can the New Economic Institutions like RCEP, TPP, and AIIB Deepen the East Asian Economic Integration?（地域経済統合：RCEP、TPP、AIIB などの新たな経済体制は東アジアの経済統合を深化させ

られるか?)。セッション3では、RCEP、TPP、AIIBといった東アジアで生まれた新たな体制について、パネリストによりメリット・デメリットの意見が分かれて、それぞれの見方に基づき活発に議論された。印象的だったのはニュージーランドのホーク教授のコメントで、「RCEP、TPP、AIIBが東アジアの経済統合を深化させることは可能 (can deepen) だが、より大きな疑問は深化させようとするのか? (Will they deepen?)」。やはり、政治的意思が必要ということであろうか。

今回の成果としては、以下が挙げられる。

- 1) 26日(木)の公開フォーラムは、約140名もの聴衆が参加し、多くの質問が聴衆から出されただけでなく、ほとんどが終了まで参加した。これは、内容的に聴衆の関心に沿ったものであり、質的にも高かったものであると解釈できる。その証左として、当財団が聴衆を対象に満足度のアンケート調査(満足度4段階方式)を行ったところ、回答者56名中、総合満足度で最上位が66%、第2位34%となり、不満との回答が全く無かったことがあげられる。特に、最上位が66%と第2位の倍となっており、かつ、事前の期待に比べて、実際のフォーラムが期待以下との回答が56人中1名は如何に内容がよかったかを物語っている(期待以上27%、期待通り71%)。
- 2) 参加国の面では、当財団が招聘を意図した国・地域から全ての参加者(出席者)を得た。アセアン(もともと招聘していないブルネイ、カンボジアおよびラオスを除く7カ国)については、昨年からのベトナム、ミャンマーからの参加を得ているが、加えてしばらく参加の無かったタイからも今回は参加を得た。その意味では、RCEPを構成する16カ国のほとんどから参加を得て、議論できたことは成果として挙げられよう。
- 3) 各セッションで講演やパネルに参加した、これら国・地域からの招聘者およびインドネシア地元からの登壇者(出席者)に対して、当財団が実施した満足度調査(満足度4段階方式)では、総合満足度で、回答18名中、最上位16名(89%)、第2位2名(11%)、不満はゼロであった。また、事前の期待との比較では、期待以上が9名(50%)、期待通り9名(50%)、期待以下ゼロであった。
- 4) セッションの運営では、1時間15分の長さのそれぞれのセッションに5~6名の講演者がいることから、プレゼンテーション一人5分についてタイムキーパーをおいて徹底した結果、パネリスト同士、会場とパネリストとのインターアクションの時間がとれたことも上記満足度につながったのではないかと。
- 5) インドネシアの発行部数最大の日刊紙KOMPAS(インドネシア語)にフォーラムでの議論が「ASEANの方向性、はっきりせず。アジア、影響力の争奪戦の舞台に」と題する記事となり掲載されたことも内容の注目度が高かったことによるものであり、成果としてあげられよう。また、共催相手のERIAも今後もこうした公開フォーラムを共催したいとの要望が寄せられたことも今回のフォーラムが評価されたことによるものである。
- 6) また、日本の若手研究者にもオブザーバーとして参加してもらい、アジア・太平洋地域

から集まった専門家によるダイナミックな議論に接していただいた。若手研究者からは、「各スピーカーの報告や発言からは、それぞれの出身国・地域の経済統合に対する見方の微妙なニュアンスの違いを垣間見ることが出来て大変興味深かった。会議を通じて、自身の専門領域における基礎知識の拡充と、新しい視座の獲得、また、人脈を広げることが出来たのは今後の研究活動を進める上での貴重な財産となった。」との感謝のコメントを得ている。

- 7) これらの議論の詳細は、当財団のホームページに掲載されており、実際にフォーラムに参加した方々に加えて、今後多くの方に見ていただくことにより、波及効果が期待される。

11. 共催団体紹介



JEF

Japan Economic Foundation

The Japan Economic Foundation (JEF) was established in July 1981 to deepen understanding between Japan and other countries through activities aimed at promoting economic and technological exchange. With this goal in mind, JEF engages in a broad range of activities such as providing information about Japan and arranging venues for the exchange of ideas among opinion leaders from many countries in such fields as industry, government, academia and politics in order to build bridges for international communication and to break down the barriers that make mutual understanding difficult.

URL: <http://www.jef.or.jp>



ERIA

Economic Research Institute for ASEAN and East Asia

The Economic Research Institute for ASEAN and East Asia (ERIA) is an international organisation established by a formal agreement among 16 heads of government at the Third East Asia Summit in Singapore on 21 November 2007. It works closely with the ASEAN Secretariat, researchers, and research institutes from East Asia to provide intellectual and analytical research and policy recommendations.

The objectives of ERIA are:

- to facilitate the building of the ASEAN Economic Community,
- to contribute to the narrowing of development gaps in the region, and
- to support ASEAN's role as driver of the deepening of economic integration in East Asia.

URL: www.eria.org



CSIS

Center for Strategic and International Studies

Founded in 1971, the Centre for Strategic and International Studies (CSIS) has won recognition as an important research and policy institution both within Indonesia and internationally. Its development over more than three decades is entwined with the history of Indonesia itself.

The origins of CSIS lie in discussions and activities in the 1960s undertaken independently by two groups of Indonesian scholars, which comprise of a number of Indonesian graduate students studying abroad and a group of activists within Indonesia. Given the turmoil in Indonesia at that time, both were convinced that insufficient attention was being given to strategic and international studies within Indonesia.

CSIS was established on 1 September 1971. It had the support of the late Ali Moertopo and Soedjono Hoemardani, then personal assistants to the newly elected President Soeharto, and a corporate body, Yayasan Proklamasi (Proclamation Foundation), established to raise the necessary funding. The fledgling organisation numbered six academic staff members and a number of supporting staff.

With rapid expansion in its staff and activities, CSIS quickly outgrew its initial accommodation. Its present building was constructed in 1973 and extended in 1983. In addition to its core studies in domestic economic and political developments, CSIS has also progressively developed a more international orientation. Bilateral conferences have been organised with a wide range of countries including Japan, the United States, India, France, Soviet Union, South Korea, New Zealand, and Australia.

These have provided the opportunity for dialogue and cooperation in research with individuals in parallel institutions (including government officials in a private capacity) as well as for providing input to foreign policy development within Indonesia. Since the 1980s CSIS has also increasingly contributed to multilateral regional institutions. These include the ASEAN Institutes of Strategic and International Studies (ISIS), the Pacific Economic Cooperation Council (PECC) and the Council for Security Cooperation in Asia Pacific (CSCAP). All of these multilateral regional institutions aimed at enhancing cooperation in the Asia-Pacific region. Cooperative links with institutions in a number of countries have been a priority.

Since its establishment, CSIS has seen its basic mission in terms of being a vehicle for new and independent ideas particularly within Indonesia. In an era of centralised policy making in the early Soeharto years, this meant (apart from general public education) more of a focus on providing policy advice and ideas direct to government.

With changing developments within Indonesia, CSIS audiences have become steadily more diverse, particularly through the growth in influence of NGOs, civil society groups and the media during the 1980s and after.

Many CSIS staff members also share their knowledge and experience through participation in a range of civil society organizations, including on gender, pluralism, democracy, and governance, and by devoting some of their time to teaching at local universities.

12. 事務局

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平成 28 年 3 月

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JAPAN ECONOMIC FOUNDATION (JEF)

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