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Moving the AEC Beyond 2015

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Moving the AEC Beyond 2015

MANAGING DOMESTIC CONSENSUS
FOR COMMUNITY-BUILDING

EDITED BY

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FOREWORD

As we draw to the end of 2015 and the date of completion of the ASEAN Economic Community (AEC), there is a lot of analysis regarding what happens post 2015. Most analysis involve a review of the achievements and progress measured against the AEC Blueprint and then make recommendations on the way forward. Most of the recommendations are made up of completing the unfinished business of AEC 2015 and then go on to outline how to widen and deepen AEC 2015 so ASEAN can be an integrated production base and market. Only a few try to understand the root causes of the slower than desired progress towards this end goal. This book fills the gap by exploring how domestic conflicts at the level of each ASEAN country have impacted on each country's AEC commitments.

Therefore, the editors of this volume and ISEAS–Yusof Ishak Institute should be congratulated on choosing such a topic in a timely way. This publication is a very welcome publication because it attempts to get at the root causes of domestic constraints on the commitments that each ASEAN economy can make. Despite the acceptance of the vision at the very top level and the long-term process of development in ASEAN, it is a fact that the lack of appreciation for the ASEAN process in a country and that the benefits are not directly felt in the country, means that there has been lack of support domestically. Furthermore, despite the fact that the AEC has four pillars including an equitable ASEAN, there is not much in terms of commitments and concrete actions in this pillar. Most of the AEC commitments and actions have been in the first pillar of a single production base and market, which involves liberalization and facilitation.

In 2011 when Indonesia was the Chair of ASEAN, it was recognized that without strengthening of the equitable pillar it would be hard to have the confidence to progress on the first pillar and other pillars related to a competitive ASEAN and the way ASEAN engages externally. Without addressing the inequitable development due to economic integration

within and between ASEAN countries, it was difficult to get more support to speed up opening up and integration. At the time it was thought that part of the answer to addressing the imbalances within and between countries was infrastructure, and the ASEAN Infrastructure Fund came about, as well as attempts to address the financial inclusion agenda. However, concrete actions have not really come through on this count with the exception of attempts to create funding for infrastructure such as the ASEAN Infrastructure Fund, whose effectiveness is still to be tested.

Given the more recent developments with the push back against globalization playing out in many countries, not just in ASEAN, the reality is that without domestic support and buy in, it would be difficult to move forward on greater opening up. More importantly, the situation has changed in most of the ASEAN countries with democracy and greater transparency, so that as one of the themes emphasized in the book, state-led economic integration with limited ownership of domestic stakeholders can no longer be the norm.

The papers in this volume will help us better understand the domestic issues faced by each country and will hopefully be useful as to how to best ensure that the AEC vision beyond 2015 will be able to be delivered with greater ownership by the people of ASEAN. As indicated in the papers in this volume, this is not an easy task but we should not be discouraged. Greater understanding of the issues is still better than pretending that we can go on with the task of greater regional integration without more collective domestic support.

The papers show that the nature and type of domestic conflicts vary between the ASEAN countries depending on the economic structure of the country, the degree of openness and its long-term development goals. The nature of the conflicts also range from the broad macro level to the micro level of firm level and public perceptions of the net benefits or costs of economic integration.

The various types of domestic conflicts, which emerge from these country studies, are not surprising. The various conflicts include firstly sectoral vested interests and interests of sectors dominated by certain state-owned companies. There is also the expected conflict between losers and gainers from any opening up and economic integration.

Secondly “water” in the commitments or that unilateral liberalization policy is much more open than the offered regional AEC commitments

is the reality of negotiation processes. Negotiators are not going to give too much away in terms of binding commitments if they are negotiating bilaterally and multilaterally. In a way this is a good example of the importance of making progress on multilateral commitments to frame and ensure progress on commitments under preferential agreements. The Agreement on the Framework on Services is basically GATS plus which is based on the Uruguay Round of negotiations, which ended in 1994. With no movement on services negotiations multilaterally, WTO plus still means GATS plus and not much more binding commitments are forthcoming.

Thirdly is the lack of internal consultation process with all stakeholders. While this varies between countries, the reasons for lack of wide consultations often have to do with the limitations on the number and representation of stakeholders, and lack of transparency in the consultancy process. There is also a seemingly glaring outcome that the low utilization of the lower tariff under CEPT in surveys, show that firms and the wider public do not have a good understanding of the benefits of the AEC.

The findings of the chapters of this book are not new, but should make us ponder about what needs to be done to ensure there is confidence to move forward with the AEC beyond 2015. This book also provides recommendations to address these domestic sources of conflict such as aligning domestic policies with liberalization commitments, broaden stakeholder consultations, better public education and dissemination, and assistance/training programmes to mitigate any negative impact from liberalization.

In conclusion, I hope that many policymakers and the wider public will read this book and find it useful to explore how the recommendations can be enacted upon in each ASEAN country. Because without addressing these domestic conflicts, there will be no confidence to realize the current AEC 2015 Blueprint, let alone think of AEC 2015 and beyond.

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PREFACE

As ASEAN reached its milestone of December 2015, there is immense debate on the state of regional integration. While member countries have made commitments to the regional goals and targets of an ASEAN Economic Community (AEC), they continue to face hurdles in the effective implementation of their commitments in their respective domestic economies. This slows down the entire process of ASEAN Community-Building, thereby limiting the realization of the full potential of the ASEAN Leaders' vision, envisaged in 1997, of "a stable, prosperous and highly competitive ASEAN economic region in which there is a free flow of goods, services, investment and freer flow of capital, equitable economic development and reduced poverty and socioeconomic disparities".

Given this scenario, we thought it is important and useful to undertake a study that can illuminate the academics, policymakers and ordinary citizens on implementation issues in member countries. Our reading of the literature and discussions with fellow researchers and domestic stakeholders in different countries led us to conjecture that domestic conflict may be an important source of implementation problems. We found that these domestic conflicts can take several forms in ASEAN countries ranging from macro-level policy-making to firm-level perception of winners and losers from the establishment of AEC. As ASEAN members are very different from each other, the nature of domestic conflicts also varies depending on the economic structure of the country, its stage of development, degree of openness to the global economy and its development goals and priorities. It is important to understand the nature of conflict and identify the winners and losers so that the member economies can formulate appropriate domestic policies for deeper economic integration in ASEAN beyond 2015.

In order to meet the objective of the study, we gathered Southeast Asian experts to discuss about six selected countries of ASEAN — Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam. We also thought it is important to incorporate some discussions at the regional level to foster an understanding of the overall perspective and how it is determined as this will provide a backdrop to the country studies.

It should be noted that part of this book volume is already published as a journal issue — *Journal of Southeast Asian Economies* (JSEAE), vol. 32, no. 2. Special Focus on “Moving the AEC Beyond 2015: Managing Domestic Consensus for Community-Building” — in August 2015. The articles of the journal issue and a few more constitute this volume’s chapters. It begins with an overview chapter that covers the literature on regionalism, an evaluation on the state of AEC and summarizes important observations from the subsequent chapters. The chapter concludes with a summary of the recommendations made in the regional and country chapters of the book. The introductory chapter is followed by a regional chapter and six country chapters by experts both on regional integration and country economic studies.

We hope this book will help ASEAN stakeholders and other interested public members in understanding the current state of AEC and domestic conflicts arising out of it. We hope that the policy recommendations can provide food for thought for policymakers in the region.

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LIST OF ABBREVIATIONS

AA	ASEAN Architects
AAF	ASEAN Automotive Federation
ACCP	ASEAN Committee on Consumer Protection
ACD	ASEAN Cosmetics Directive
ACIA	ASEAN Comprehensive Investment Agreement
ACTLN	ASEAN Cosmetic Testing Laboratory Network
ACTR	ASEAN Common Technical Requirements
ADB	Asian Development Bank
ADBI	Asian Development Bank Institute
AEC	ASEAN Economic Community
AEM	ASEAN Economic Ministers
AEMM	ASEAN Economic Ministers Meeting
AEO	Authorized Economic Operators
AFAFGIT	ASEAN Framework Agreement on the Facilitation of Goods in Transit
AFAFIST	ASEAN Framework Agreement on the Facilitation of Inter-State Transport
AFAMT	ASEAN Framework Agreement on Multimodal Transport
AFAS	ASEAN Free Trade Agreement on Services
AFC	Asian Financial Crisis
AFMM+3	ASEAN Plus Three Finance Ministers Meeting
AFTA	ASEAN Free Trade Area
AHEEERR	ASEAN Harmonized Electrical and Electronic Equipment Regulatory Regime
AHTN	ASEAN Harmonized Tariff Nomenclature
AIA	ASEAN Investment Area
AIF	ASEAN Infrastructure Fund

AIGA	ASEAN Investment Guarantee Agreement
AIIB	Asian Infrastructure Investment Bank
AIJV	ASEAN Industrial Joint Venture
AIP	ASEAN Industrial Projects
AJCEP	ASEAN-Japan Comprehensive Economic Partnership Agreement
AKFTA	ASEAN-Korea FTA
AMDD	ASEAN Medical Device Directive
AMM	ASEAN Ministerial Meeting
AMRO	ASEAN+3 Macroeconomic Research Office
APEC	Asia Pacific Economic Cooperation
APSC	ASEAN Political-Security Community
ARTNeT	Asia-Pacific Research and Training Network
ASC	ASEAN Security Community
ASCC	ASEAN Socio-cultural Community
ASEAN	Association of Southeast Asian Nations
ASEAN OS/SAM	ASEAN Open Skies/Single Aviation Market
ASPs	Application Services Providers
ASW	ASEAN Single Window
ATIGA	ASEAN Trade in Goods Agreement
ATISA	ASEAN Trade in Services Agreement
ATR	ASEAN Trade Repository
BAI	Bureau of Animal Industry
BCIC	Bumiputera Commercial and Industrial Community
BFAR	Bureau of Fisheries and Aquatic Resources
BIR	Bureau of Internal Revenue
BIS	Bureau of Import Service
BKPM	Badan Koordinasi Penanaman Modal (Investment Coordinating Board)
BOC	Bureau of Customs
BOI	Board of Investment
BOQ	Bureau of Quarantine
BOT	Build-Operate-Transfer
BPI	Bureau of Plant Industry
BPOM	Badan Pengawas Obat dan Makanan (Food and Drug Control Agency)
BPS	Bureau of Product Standards

BSN	Badan Standardisasi Nasional (National Standardization Agency)
CAAP	Civil Aviation Authority of the Philippines
CABs	Conformity Assessment Bodies
CARS	Comprehensive Automotive Resurgence Strategy
CBU	Completely Built-Up
CDC	Clark Development Cooperation
CDP	Car Development Programme
CEISA	Customs-Excise Information System and Automation
CEP	Comprehensive Economic Partnership
CEPA	Comprehensive Economic Partnership Agreement
CEPEA	Comprehensive Economic Partnership for East Asia
CEPT	Common Effective Preferential Tariffs
CGN	Chula Global Network
CITS	Centre for International Trade Studies
CLMV	Cambodia, Laos, Myanmar, Vietnam
CMI	Chiang Mai Initiative
CMIM	Chiang Mai Initiative Multi-lateralization
CVDP	Commercial Vehicle Development Programme
DB	Designating Body
DDB	Dangerous Drugs Board
DOH	Department of Health
DTI	Department of Trade and Industry
DTN	Department of Trade Negotiation
EAFTA	East Asia Free Trade Area
EEE	Electrical and Electronic Equipment
EMB	Environment Management Bureau
EPAs	Economic Partnership Agreements
EPU	Economic Planning Unit
EU	European Union
FDA	Food and Drug Administration
FDI	Foreign Direct Investment
FEO	Firearms Explosives Office
FIC	Foreign Investment Committee
FMS	Forest Management Service
FPA	Fertilizer and Pesticides Authority
FTA	Free Trade Agreement

FTAAP	Free Trade Agreement for the Asia-Pacific
GATS	General Agreement on Trade in Services
GCC	Gulf Cooperation Council
GCI	Global Competitiveness Index
GDP	Gross Domestic Product
GFC	Global Financial Crisis
GLCs	Government-linked Companies
GLIC	Government-linked Investment Companies
GMS	Greater Mekong Subregion
GVCs	Global Value Chains
HDI	Human Development Index
HDMF	Home Development Mutual Fund
HKTDC	Hong Kong Trade Development Council
HO	Heckscher-Ohlin
HS	Harmonized System
IAI	Initiative for ASEAN Integration
IC	Integrated Circuit
ICT	Information and Communication Technology
IECPS	Integrated Enhanced Customs Processing System
IGA	Investment Guarantee Agreement
IMF	International Monetary Fund
IMP	Industrial Master Plan
IMP3	Third Industrial Master Plan
IMT-GT	Indonesia-Malaysia-Thailand Growth Triangle
INSW	Indonesia National Single Window
INTR	Indonesia's National Trade Repository
IPRs	Intellectual Property Rights
ITA	Information Technology Agreement
ITD	Institute for Trade and Development
KAN	Komite Akreditasi Nasional (National Accreditation Committee)
LPI	Logistics Performance Index
LSPs	Logistic Service Providers
MAAS	Multilateral Agreement on Air Services
MAFLPAS	Multilateral Agreement for the Full Liberalization of Passenger Air Services
MALIAT	Multilateral Agreement for the Liberalization of Air Transport
MARINA	Maritime Industry Authority

MCMC	Malaysian Communications and Multimedia Commission
MCMCA	Malaysian Communications and Multimedia Act
MDTCC	Ministry of Domestic Trade, Cooperatives and Consumerism
MERCOSUR	Mercado Común del Sur (Common Market of the South)
MIDA	Malaysian Industrial Authority
MITI	Ministry of International Trade and Industry
MNCs	Multinational Companies
MNP	Movement of Natural Persons
MoA	Ministry of Agriculture
MoI	Ministry of Industry
MoT	Ministry of Trade
MPAC	Master Plan on ASEAN Connectivity
MRA	Mutual Recognition Agreement
MSC	Multimedia Super Corridor
NDG	Narrowing the Development Gap
NDP	National Development Policy
NEP	New Economic Policy
NFA	National Food Authority
NGOs	Non-Governmental Organizations
NMIS	National Meat Inspection Service
NSWs	National Single Windows
NTBs	Non-Tariff Barriers
NTC	National Telecommunications Commission
NTMs	Non-Tariff Measures
NTR	National Trade Repository
NTT	New Trade Theory
OECD	Organization for Economic Co-operation and Development
OEM	Original Equipment Manufacturers
OMB	Optical Media Board
OSS	One Stop Service
P4	Brunei Darussalam, Chile, New Zealand and Singapore
PBR	Philippine Business Registry
PC	Personal Computers

PCA	Post Clearance Audit
PCA	Philippine Coconut Authority
PCG	Putrajaya Committee on GLC High Performance
PCMP	Progressive Car Manufacturing Program
PCP	People's Car Program
PDEA	Philippine Drug Enforcement Agency
PEZA	Philippine Economic Zone Authority
PEZA	The Philippine Export Processing Zone Authority
PhilHealth	Philippine Health Insurance Cooperation
PMET	Professionals, Managers, Engineers and Technicians
PNPS	National Programme for Standard Development
PNRI	Philippine Nuclear Research Institute
PNSW	Philippine National Single Window
PSCC	Philippine Standard Commodity Classification
PTA	Preferential Trade Arrangement
PTMP	Progressive Truck Manufacturing Programme
QAB	Qualified ASEAN Banks
R&D	Research and Development
RA	Republic Act
RCEP	Regional Comprehensive Economic Partnership
RIATS	Roadmap for Integration of Air Travel Sector
ROK	Republic of Korea
ROOs	Rules of Origin
RTAs	Regional Trading Arrangements
SBMA	Subic Bay Metropolitan Authority
SCP	Singapore Cooperation Programme
SEC	Securities and Exchange Commission
SET	Stock Exchange of Thailand
SFM	Specific Factors Model
SIA	Singapore Airlines
SMEs	Small and Medium Enterprises
SNI	Standard National Indonesia (Indonesian National Standards)
SRA	Sugar Regulatory Administration
SSS	Social Security System
TCs	Technical Committees
TEL	Temporary Exclusion List

TM	Telekom Malaysia
TPA	Trade Promotion Authority
TPP	Trans-Pacific Partnership
WCO	World Customs Union
WTO	World Trade Organization

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