

RIAPI International Workshop Series
(October 22, 2025, December 10, 2025, and February 22, 2026)
Decarbonization, Industrial-Structural Changes, and Responses of the Automotive Industry in Japan
and ASEAN

Workshop 3: Towards an ASEAN–Japan Next-Generation Vehicle Industry Masterplan

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Date: February 25, 2026 (Wed.) 14:00–17:00 (JST)

Venue: Room 316, 6th Floor, Building No. 19, Waseda University (Access:
<https://www.waseda.jp/fire/gsaps/en/access>)

Zoom Link: <https://list-waseda-jp.zoom.us/j/93273135671?pwd=iaLkE2adOdRlvS2LGdZ3sN1NLkrs5.1>

Meeting ID: 932 7313 5671

Passcode: 715310

Lecture in English / In-person or Online Participation
Open to Public / No Registration Required

ASEAN's automotive industry is entering a critical transition phase as electrification, digitalisation, and decarbonisation reshape global vehicle markets. While electric vehicle (EV) adoption is accelerating across ASEAN, the region faces structural challenges: policy uncertainty, prolonged market stagnation, and fragmented industrial competitiveness. At the same time, ASEAN remains a vital production base in the global automotive value chain, particularly for internal combustion engine (ICE) and hybrid electric vehicles (HEVs). This discussion draws on ERIA's ongoing work under the ASEAN–Japan Co-Creation Initiative and the proposed ASEAN–Japan Next-Generation Vehicle Industry Masterplan. It argues that ASEAN's transition should follow multiple, differentiated pathways rather than a single, linear electrification trajectory. A phased and diversified approach – combining ICE, HEV, xEV, sustainable fuels, and mobility services – is essential to preserve industrial competitiveness while advancing climate objectives. The brief outlines a strategic framework built around three pillars: (i) technology and market transition pathways; (ii) industrial transformation through decarbonisation, digitalisation, and servitisation; and (iii) strengthened regional and ASEAN–Japan collaboration. It concludes with policy recommendations to enhance policy predictability, mobilise investment, and position ASEAN as a resilient and competitive hub in the global next-generation vehicle ecosystem.



Alloysius Joko Purwanto is since 2018 an energy economist at the Economic Research Institute for ASEAN and East Asia (ERIA) based in Jakarta. He is working on the issues of energy transition in Southeast Asia region, not only in the matters of renewable energy penetration but also in energy security. Prior to joining ERIA he worked in Belgium for almost ten years as a consultant and researcher in a private company in energy, mobility, and transportation domains and between 2005 and 2008 he joined the European Commission's Joint Research Centre in Seville, Spain as a research grant holder in the energy unit. He obtained his master and doctoral degrees in transport economics in France and his civil engineering degree from University of Indonesia in Jakarta.

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