



CIPS
Center for Indonesian
Policy Studies

Annual Report

www.cips-indonesia.org

2021





**FOR A FREE
AND
PROSPEROUS
INDONESIA**



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ABOUT THE CENTER FOR INDONESIAN POLICY STUDIES

Center for Indonesian Policy Studies (CIPS) is a strictly non-partisan and non-profit think tank providing policy analysis and practical policy recommendations to decision-makers within Indonesia's legislative and executive branches of government.

CIPS promotes social and economic reforms that are based on the belief that only civil, political, and economic freedom allows Indonesia to prosper. We are financially supported by donors and philanthropists who appreciate the independence of our analysis.

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Foreword

As the chairwoman of the CIPS Board of Directors, I am proud to present the annual report 2021.

Food security, education policies, and economic opportunities provided by the digital economy, these were our topics, and they were much in demand during the pandemic.

We made the best out of these opportunities and, despite obstacles created by the pandemic, CIPS managed to present its research findings and reform suggestions to an increased audience of policymakers and the public. In 2021, more government agencies were seeking our advice, our papers were viewed online more than 100,000 times, and thousands attended our public events, including our flagship DigiWeek2021.

A public policy think tank like CIPS needs to do more than just offer research and analysis. We feel mandated to explain complex policy matters to a public that has little time and is often not familiar with specific policy details. We addressed this in Policy-In-3-Minutes videos, podcasts, and even comics explained why the focus of our research matters.

And we also continue training young people. Our annual 'Emerging Policy Leaders Program' attracted hundreds of applicants. Those selected went through a paid 6-month traineeship that usually leads to a research position in CIPS. Once here, they produce their own papers and speak at domestic and international events.

Sometimes they even give media interviews. This may not happen often but contributed to more than 1,400 media mentions for CIPS in 2021.

None of this would have been able without the support of our donors, who love our work and who respect the independence of our analysis. We are feeling deeply grateful for their trust in our work!

I hope you will enjoy reading the report and please get in touch if it inspires questions or comments.

Salam hangat,

Saidah Sakwan
Chair, Board of Directors
Center for Indonesian Policy Studies





Our Vision

A free and prosperous Indonesia.



Our Mission

Research, recommend, and advocate for public policies that empower Indonesians to lead prosperous and peaceful lives.



Our Principles

CIPS believes that Indonesia's social and economic development and greater economic prosperity of the Indonesian people depend on:

- Wider economic opportunities and access to open markets that allow Indonesians to create wealth and sustainable livelihoods.
- Access to wider educational choices based on the needs of the family.
- Security to live peacefully in an open and plural society.
- Strong local communities with sustainable income opportunities, secure property rights, and public health.



Major Policy Impacts

Key policy developments and changes where CIPS has played a part

Food Security and Agriculture

In late 2021, the government finally canceled its plan of imposing value-added tax (VAT) on staple foods such as rice, corn, beef, and vegetables and fruits. CIPS had been arguing against the policy since the plan was made public in the middle of the year. Such a tax would have put an unfair burden on low-income households, whose expenditure is dominated by staple foods. It would have also affected Indonesia's economy as it has a direct impact on basic consumption. The plan also came at a bad time as Indonesia was grappling with a pandemic-stricken economy.



Education:

The Education Ministry reintroduced ICT skills into the new national curriculum (*Kurikulum Merdeka*). CIPS has been stressing the importance of Digital Literacy, especially as students, teachers and parents faced challenges navigating distance learning amid the COVID-19 pandemic. With the rise of EdTech in Indonesia, users need to have digital competence to utilize the products and services reflectively and productively.





Economic Opportunities

The Ministry of Communication and Informatics found online contents to be prone to problematic misinterpretation and included the revision of the Electronic Information Technology (EIT) Law as one of the priorities in the national legislation program 2021. CIPS argued that online content moderation, i.e. government rules for anything posted online, is highly sensitive. It requires context-based assessment and due process. We requested the government to collaborate with online platform providers to find a middle ground between a safe internet and individual free speech.

Covid-19 Response

In 2021, CIPS embarked on a rapid response research project on Indonesia's vaccine distribution. The global vaccine inequity, combined with Indonesia's logistical constraints, created a challenge for Indonesia to vaccinate its population. CIPS promoted a shift in perspective. We called to abandon thinking of the vaccination program as a race. Instead, maintaining the vaccination program is a marathon that requires private sector participation and innovation. The Indonesian government has since conducted a vaccination booster program with greater private sector participation.



Endorsements and Testimonials Made in 2021



**Dr. Agus Gumiwang
Kartasasmita, M.Si**
Minister of Industry

My biggest congratulations and appreciation for the Center for Indonesian Policy Studies for their role in creating and developing a space for Indonesian citizens to advocate for policy reforms and change based on comprehensive information supported by analysis and informed policy research.



Danny Ardianto
Head of Government
Affairs & Public Policy at
YouTube

CIPS has grown to increase their expertise, network, influence, and impact across key stakeholders in Indonesia's digital economy. At a time when digital transformation happens at a breakneck speed resulting in a number of public policy challenges, CIPS has been at the forefront in creatively deploying tools and resources in order to move the most important policy agenda forward



**Muhammad Syarif
Hidayatullah**
Digital Economy Policy
Researcher & Practitioner

During this rapid development of innovation in digital technology followed by policy responses from the regulator, dialogue between stakeholders in the digital economy ecosystem is a must. For the past years, CIPS have proved that they are more than capable to be the bridge between those stakeholders. From their in-depth and robust research to their comprehensive policy dialogue paving a way forward for Indonesia to create a strong and inclusive digital economy ecosystem.

Research Highlights

CIPS published a total of 25 papers and 6 policy briefs across three focus areas.



Food Security and Agriculture

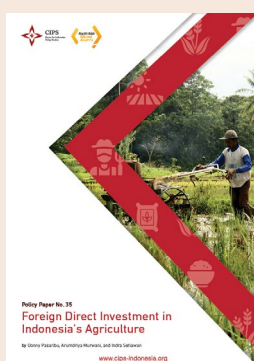
CIPS' research and advocacy aim to push for policy reforms to promote greater food security in Indonesia and facilitate access to affordable quality food for low-income Indonesians.

In the midst of a pandemic-induced global food value chain disruption, CIPS' research and advocacy promoted policies to increase Indonesia's food system resilience by facilitating trade and investment and improving Indonesia's domestic agriculture productivity through sustainable intensification.

Policy papers:



The Government's Role in the Indonesian Rice Supply Chain



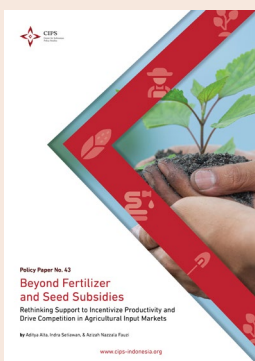
Foreign Direct Investment in Indonesia's Agriculture



The Cost of Non-Tariff Measures on Food and Agriculture in Indonesia



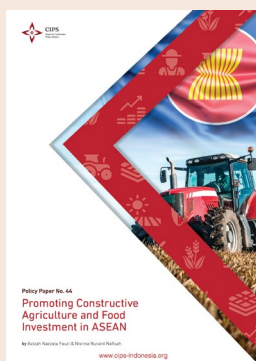
Food and Horticulture Crop Productivity in Indonesia



Beyond Fertilizer and Seed Subsidies: Rethinking Support to Incentivize Productivity and Drive Competition in Agricultural Input Markets



Improving Indonesia's Plantation Data Quality: Coffee, Sugar and Cocoa



Promoting Constructive Agriculture and Food Investment in ASEAN



Plantation Crop Productivity: Coffee, Sugarcane and Cocoa

Discussion paper:



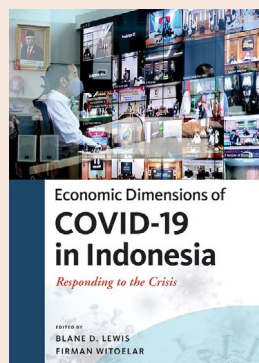
Negative Effects of Non-Tariff Trade Barriers on the Welfare of Indonesians

Policy brief:



The Effects of Pre-Shipment Inspection (PSI) on Food Trade in Indonesia. Case study for International Trade Barrier Index 2021.

Book and report chapters:



Covid-19 food security, and trade: the case of Indonesia, B. Lewis & F. Witoelar (Eds). *Economic dimensions of Covid-19 in Indonesia: Responding to the crisis*. ISEAS Publishing



ASEAN Integration toward Food Security: Opportunities and Challenges. *ASEAN Integration Report*. IDEAS.

Translation:

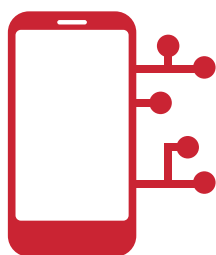


Building Food Security and Managing Risk in Southeast Asia (OECD publication)

Food Monitor reports:



3 Food Monitor reports on sugar, maize, and soybeans along with Statistics and Regulatory Databases



Economic Opportunities

CIPS' research and advocacy promote greater prosperity and livelihoods for low-income Indonesians through policies that facilitate their economic and income-generating opportunities.

In 2021, we strengthened our research on the digital economy given its growing significance for Indonesian livelihoods during the Covid-19 pandemic. CIPS proposed policies that create an enabling environment for the digital economy and mitigate risks through a co-regulatory approach with meaningful public and private participation in designing, implementing, and evaluating policies.

Policy papers:



Co-regulating the Indonesian Digital Economy



Indonesia-Australia Comprehensive Economic Partnership Agreement: Building the Powerhouse



Improving Consumer Protection for Low-Income Customers in P2P Lending



Impact of Indonesia's Content Moderation Regulation on Freedom of Expression



A Study on the Access of Ministries, Government Agencies, and Law Enforcement Authorities to Electronic System Organizers' Data and Systems



Policy Reforms for Safe Online Access to Alcoholic Beverages in Indonesia



Partnering to Push Back the Pandemic: Boosting Capacity to Deliver Covid-19 Vaccinations in Indonesia



Improving Data Governance and Personal Data Protection through ASEAN Digital Masterplan 2025

Discussion paper:



Implementing the Digital Economy Enabling Environment Guide: A Case Study from Indonesia

Policy briefs:



Data Privacy in the Indonesian Personal Data Protection Legislation



Who is Responsible for User-Generated Content on Digital Platforms in Indonesia?



Cybersecurity Protection in Indonesia



Digital Taxation in Indonesia

Others:



Impact Assessment Methodology for the Indonesia - Australia Comprehensive Economic Partnership Agreement (IA-CEPA)



Education

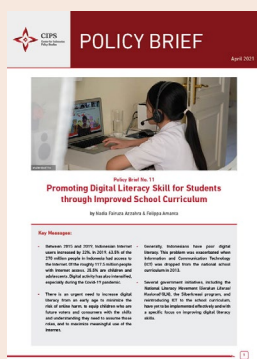
CIPS' work on education aims to improve access to education quality for low-income Indonesians through greater private sector participation and greater school autonomy. As schools closed down during the pandemic, CIPS focused on digital technology that supported education. CIPS' research looked at investments in the education sector in ASEAN as well as digital literacy skills in Indonesia.

Policy paper:



Promoting Investments
in Education in ASEAN:
Inclusive Education,
Cross-Border Education
Programs, and ICT
Capabilities

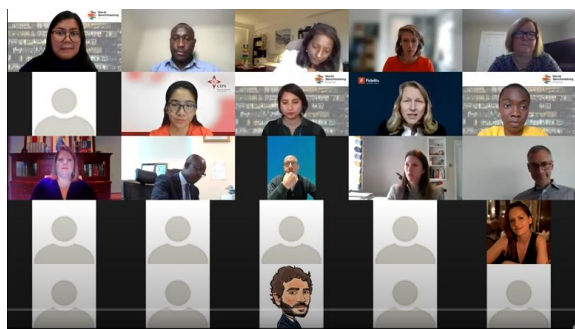
Policy brief:



Promoting Digital
Literacy Skill for Students
through Improved School
Curriculum

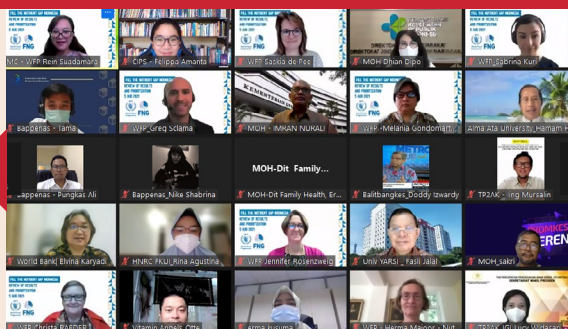
Engagement and Advocacy

CIPS team members shared our findings and analysis in many public speaking engagements and closed-door discussion in 2021. Some highlights include:



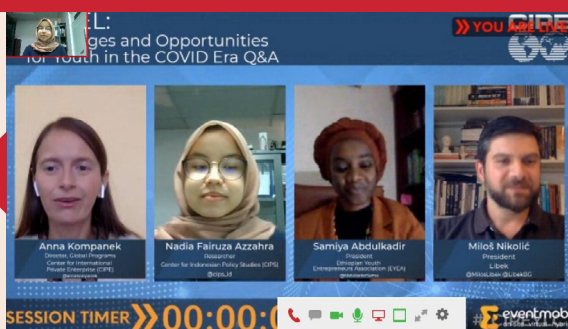
CIPS Head of Research Felippa Amanta spoke at an UN General Assembly side event on “Investing in Inclusive Digitalisation: A Government and Investor Roundtable”

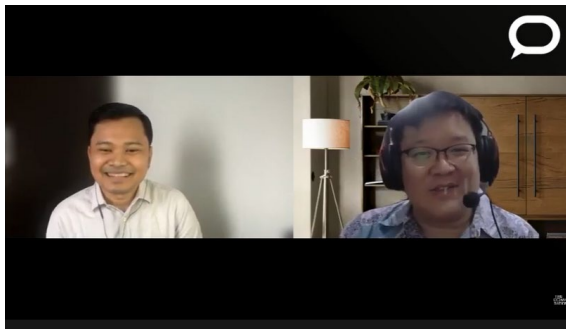
CIPS Head of Research Felippa Amanta provided input for the World Food Programme’s Fill the Nutrient Gap (FNG) Modeling project



CIPS was invited to be a part of Food Systems Summit Dialogue of the National Planning the Ministry of National Development Planning (Bappenas)

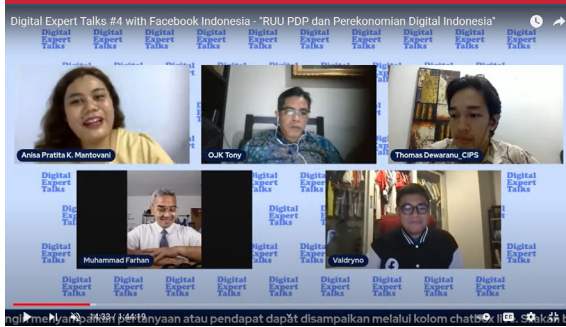
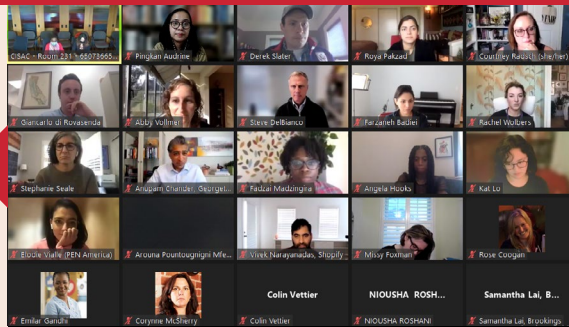
CIPS Researcher Nadia Fairuza Azzahra spoke at the Youth Leadership Conference of the Center for International Private Enterprise (CIPE)





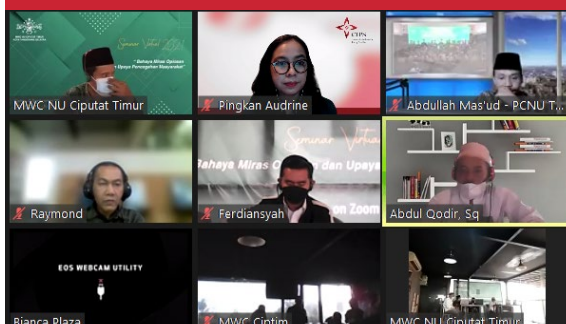
CIPS Associate Researcher, Andree Surianta, spoke at a podcast hosted by The Conversation Indonesia on Indonesia's vaccine distribution program

CIPS Researcher Pingkan Audrine attended Stanford University's Content Policy & Society Lab's workshop on content moderation

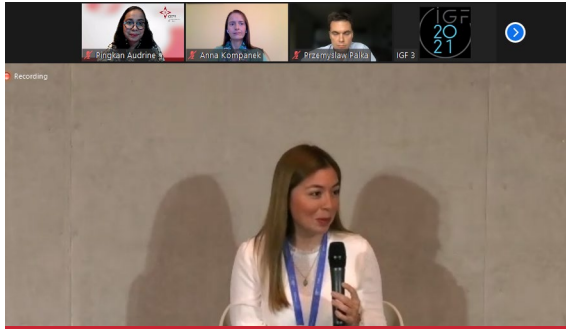


CIPS Researcher Thomas Dewaranu spoke about Indonesia's personal data protection bill at the Digital Expert Talks hosted by Universitas Gadjah Mada's Center for Digital Society

CIPS Researcher, Latasha Safira presented at the 4th National Symposium on English Language Assessment



CIPS Researcher Pingkan Audrine spoke at three Nahdlatul Ulama public events on combating illicit alcohol and the alcohol prohibition bill



CIPS Researcher Pingkan Audrine spoke at a UN Internet Governance Forum side event on digital consumer protection

CIPS Researcher Thomas Dewaranu spoke at the CIPE Democracy that Delivers podcast about co-regulating Indonesia's digital economy



DEMOCRACY THAT DELIVERS

Democracy That Delivers #278:
Co-regulating the Indonesian
Digital Economy with Thomas
Dewaranu, Researcher at the
Center for Indonesian Policy
Studies (CIPS)

CIPS Media Presence

CIPS maintained its media presence and was mentioned **1,438** times in media reports. **48%** of these mentions appeared in top tier media outlets.

27

op-eds by CIPS experts were published in 2021.

9

op-eds were published in 2020.



**Of the 27
op-eds in
2021**

14

covered our views
on food security and
agriculture

7

focused on the
digital economy and
e-commerce

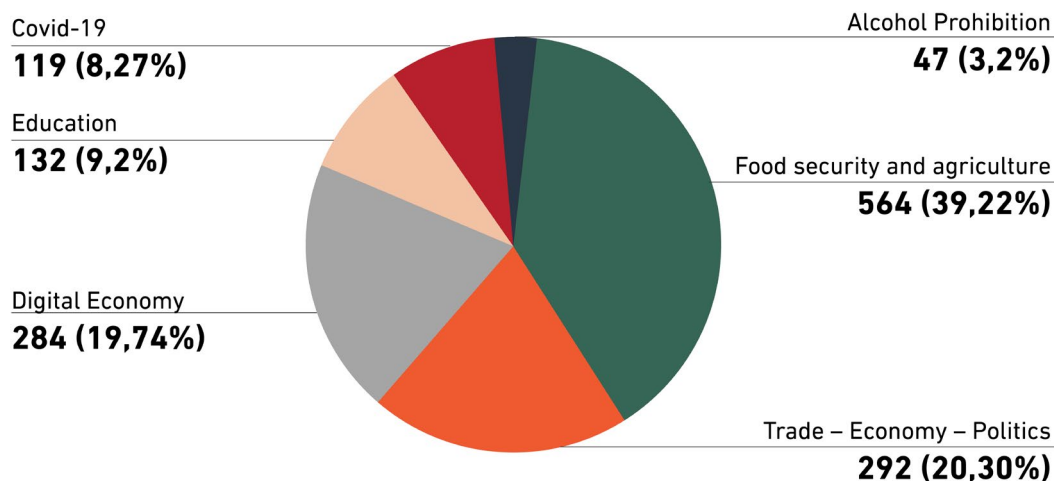
3

on the response to
Covid-19

3

on education.

Mentions per topic in percentages



Pengamat Usul Impor Jagung Demi Stabilkan Harga Pakan Ternak

CNN Indonesia

Haloho, 22 Sept 2021 09:44 WIB

Bagikan :



Pengamat CIPS menilai pemerintah perlu melonggarkan kebijakan impor jagung demi menstabilkan harga pakan ternak. (ANTARA FOTO/MS Syamsi)

Jakarta, CNN Indonesia -- Center for Indonesian Policy Studies (CIPS) mengusulkan agar pemerintah melonggarkan kebijakan **impor jagung** untuk menjaga kestabilan harga pakan ternak di dalam negeri. Pasalnya, tren **harga jagung** untuk pakan ternak tengah meningkat dan membebani peternak rakyat.



CNN Indonesia.com

CNN Indonesia carried CIPS policy reform recommendations to lower maize prices. The recommendations were based on CIPS' paper on 'Reforming Trade Policy to Lower Maize Prices in Indonesia'.

Perlindungan Data Pribadi Harus Libatkan Pemerintah, Pelaku Usaha, dan Civil Society

Minggu, 5 September 2021 | 19:08 WIB

Oleh : Hendro D Situmorang / JEM



(Ilustrasi pengamanan data. (Foto: iStockphoto))

Jakarta, Beritasatu.com - Perlindungan data pribadi dan konsumen merupakan dua aspek penting yang dapat mendukung pertumbuhan ekonomi digital. Tanpa adanya upaya untuk menjamin kedua hal tersebut, potensi ekonomi digital Indonesia terancam berjalan di tempat.

Berita Satu.com

CIPS joined the heated public debate on the introduced Personal Data Protection Bill. Top tier media outlet Berita Satu carried messages from our analysis in 'Protecting People: Promoting Digital Consumers' Rights'.

Persi: Perlu libatkan swasta atasi permasalahan distribusi vaksin

© Kamis, 2 September 2021 16:28 WIB



Sebelumnya, pakar kesehatan Indonesia dan Ketua Persiti Seluruh Indonesia (Persi) Lia G. Partakusuma dalam wawancara eksklusif akses vaksin "Pemerintah Mula-mula Keluarkan Terbatas, Berikutnya Sama Milikannya Pandemi" antara daring di Jakarta, Kamis (2/9/2021) ANTARA/Husniyati Ghazma Shanti

Jakarta (ANTARA) - Sekretaris Jenderal Perhimpunan Rumah Sakit Seluruh Indonesia (Persi) Lia G Partakusuma mengatakan saat ini perlu adanya keterlibatan pihak swasta untuk membantu

Antaranews.com

CIPS brought forward ideas of how COVID-19 vaccination programs can be expanded and accelerated with private sector participation. These ideas had been outlined in CIPS' policy paper 'Partnering to Push the Pandemic'.

Expert calls to evaluate Bulog's role in rice supply chain

© 14th August 2021



Illustration: A heap of rice grains, photo taken from internet source

Jakarta (ANTARA) - Centre of Indonesian Policy Studies (CIPS) researcher Indra Setiawan called to reassess State Logistics Agency's (Bulog's) role in the national rice supply chain to boost the agency's effectiveness and improve domestic rice market.

Antaranews.com

CIPS continued to disseminate policy messages and recommendations to improve Indonesia's rice supply chains. This is needed to ensure rice price stability and affordability for all Indonesians. State newswire agency Antara mentioned CIPS messages taken from our paper on 'The Government's role in The Indonesian Rice Supply Chain'.

Pemerintah Diminta Evaluasi Hambatan Nontarif Ekspor Impor

Hambatan nontarif disebut menambah biaya dan waktu karena tidak disertai dengan infrastruktur dan sistem yang memadai.

Imi Fathimah Temora - Bisnis.com
04 Agustus 2021 / 00:19 WIB



Sejumlah truk membawa muatan peti kemas di Terminal 2 Pelabuhan Tanjung Priuk, Jakarta, Senin (1/8/2020) - ANTARA / M. Rizkiyul Hidayat

Bisnis.com, JAKARTA - Pemerintah disarankan untuk meningkatkan efisiensi sistem ekspor

Bisnis.com

Business media outlet Bisnis Indonesia shared CIPS' explanations how non-tariff trade barriers impact consumer food prices. Statements were based on CIPS' paper on 'The Cost of Non-Tariff Measures on Food and Agriculture in Indonesia'.

Events and Partnerships



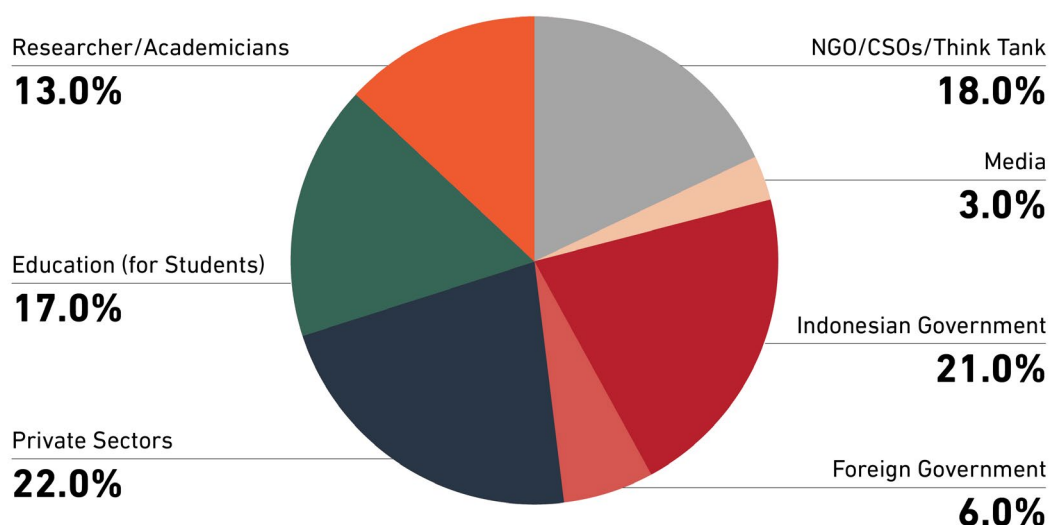
CIPS organized **50** virtual events in 2021 that attracted **3,534** attendees.



The events team chose interactive event formats to enable the engagement of the audiences with the speakers. This promoted a higher involvement of participants and speakers during virtual events.

Events also adopted dialogue style formats that gave stakeholders time and attention to share their views and concerns about policy issues.

Stakeholder Groups Attending CIPS Events in 2021



Some CIPS events were conducted in partnership with external organizations:

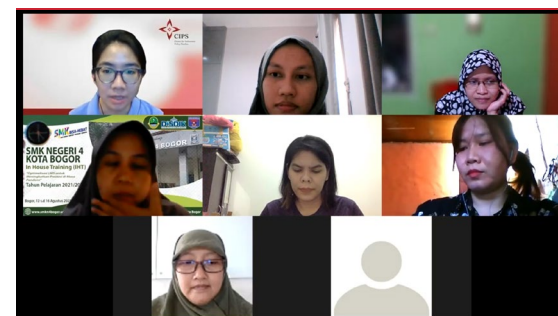
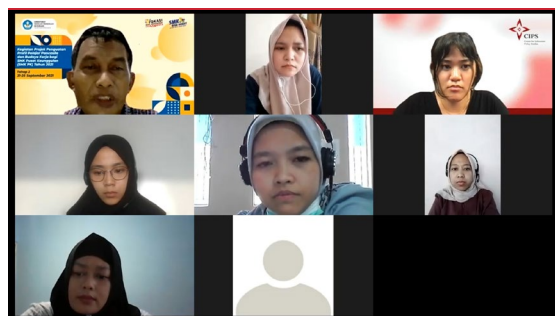
Indonesia Policy Dialogues with the Indonesia Project, Australian National University



YouTube Webinar on financial literacy challenges with fintech company Finansialku



Focus group discussions on the topic of English Language Competencies among Vocational School Teachers with British Council Indonesia

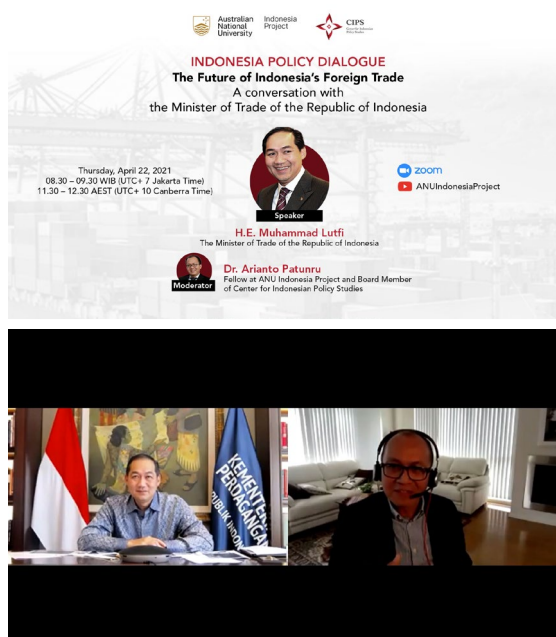


Notable events held in 2021

Indonesia Policy Dialogues

One-on-one conversation with high ranking officials and industry leaders.

The Future of Indonesia's Foreign Trade: A conversation with the Minister of Trade of the Republic of Indonesia
22 April 2021



A conversation with the Head of the Indonesian Chamber of Commerce and Industry
Mr. Arsjad Rasjid: The role of the private sector in economic recovery
13 August 2021



DigiWeek 2021

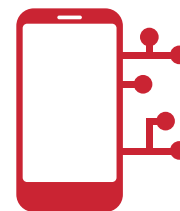
CIPS' second annual DigiWeek conference brought together 307 conference attendees and 24 speakers from Indonesian government, private sector, and CSOs to discuss 3 main issues in the digital economy:



Empowering Digital Rights: Improving Access and Consumer Protection



Online Content Governance



Equitable Access for An Inclusive Digital Economy

3 high level government representative provided keynote speeches on digital economy transformation and empowerment in Indonesia:



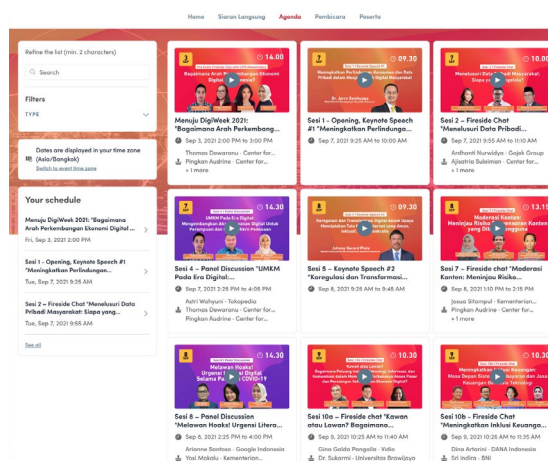
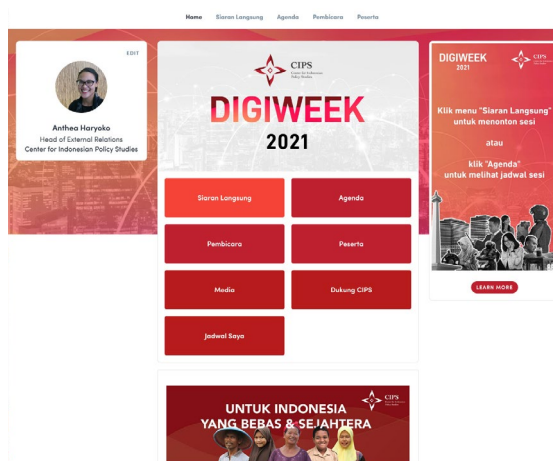
Johnny G. Plate
Minister of Communication and Informatics



Dr. Jerry Sambuaga
Vice Minister of Trade

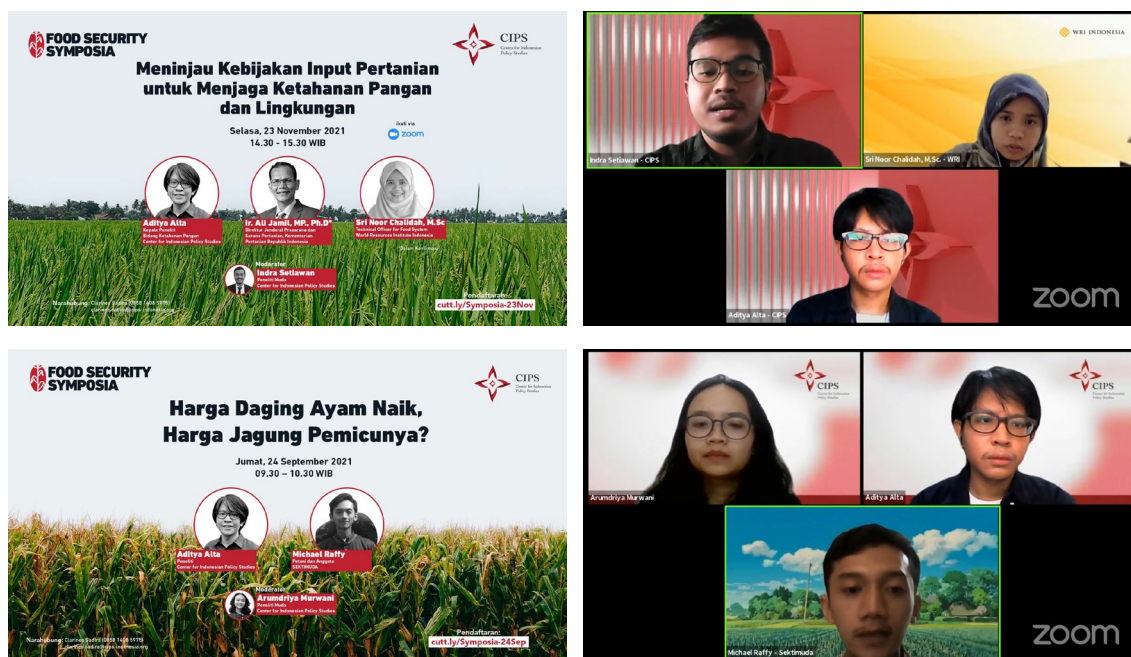


Prof. Ir. Nizam, M.Sc., DIC, Ph.D., IPU, Asean Eng
Directorate General of Higher Education, Ministry of Education, Culture, Research and Technology.



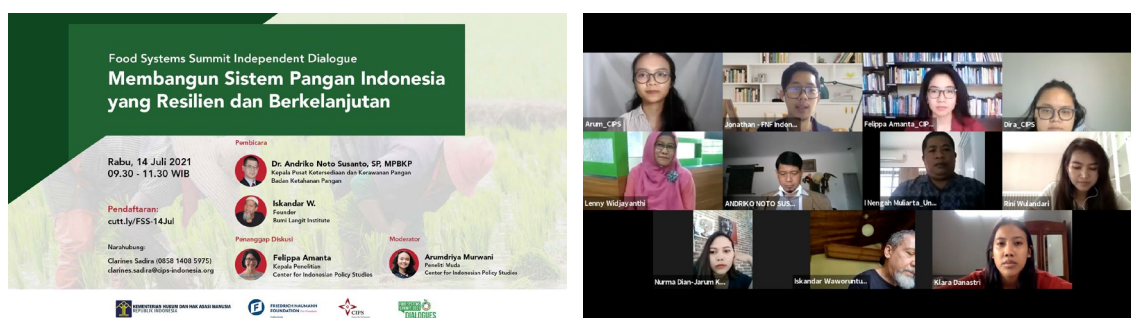
Food Security Symposia

A series of discussion events invited stakeholder perspectives on the challenges of attaining higher food security for Indonesia. The events also served to communicate CIPS policy recommendations.



UN Food Systems Summit Independent Dialogues

CIPS convened independent dialogues as part of the annual Food Systems Summit conducted by the United Nations. These Dialogues gathered Indonesian stakeholders to discuss how improved food systems can promote wider access and affordability of staple food in Indonesia.



CIPS Digital Presence

In 2021, CIPS increased its online presence on social media, with content relevant to our followers and reflecting on current news. Our followers on Instagram & LinkedIn increased by 69% and 74%, respectively, compared to 2020.

One social media highlight of the year was CIPS' tweet in response to President Jokowi's statements on garlic imports. It gained 80,000 impressions and inspired 2,000 engagements. This included re-tweets by prominent Indonesian economists.





Paper downloads and views:

2021	2020	2019
110,159	135,876	14,009

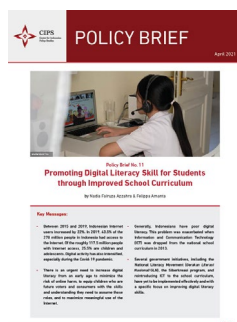
English language Publications Top Views & Downloads



Data Privacy in the Indonesian Personal Data Protection Legislation
3,254



Perlindungan Keamanan Siber (Cyber Security Protection in Indonesia)
5,484



Promoting Digital Literacy Skill for Students through Improved School Curriculum
3,190



Pengaturan Bersama Ekonomi Digital Indonesia (Co-regulating the Indonesian Digital Economy)
4,467



Cybersecurity Protection in Indonesia
2,832



Mengkaji Hambatan Pembelajaran Jarak Jauh di Indonesia di Masa Pandemi Covid-19 (Addressing Distance Learning Barriers in Indonesia Amid the Covid-19 Pandemic)
18,297



Website

Unique Website Visitors

in 2021

103,217

in 2020

62,341

in 2019

24,683



Newsletters

Total Subscribers:

18,919

Indonesian language
Mailing List Subscribers:

16,503

English language Mailing
List Subscribers:

2,416

2020: **18,131** subscribers



Social Media Audience Reach



Facebook
Followers

9,234



Twitter
Followers

2,797



Instagram
Followers

6,333



LinkedIn
Followers

5,879



Youtube
Subscribers

1,412

Total Social Media
Impressions:

in 2021

4,123,443

in 2020

1,902,792

in 2019

995,121

Special: Financial Literacy Game 'Monetary'



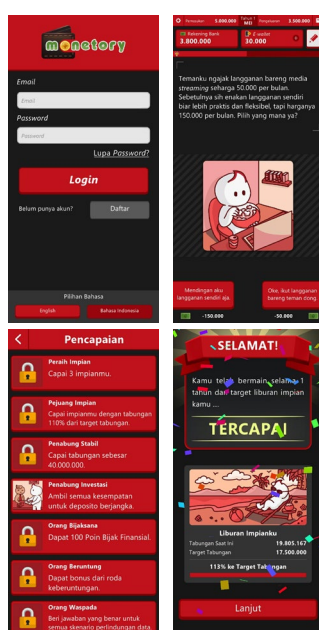
CIPS created Monetary, a financial education tool in the form of a mobile game running on Android devices. Monetary aims to improve the understanding and awareness of the importance of personal finance for young Indonesians in an increasingly digitized landscape.

Following the first iteration of Monetary 1.0 in 2020, in 2021 CIPS released Monetary 2.0 to elevate the learning experience of players.

Monetary 2.0 was developed together with Chocoarts, an experienced game developer based in Jakarta.



We received generous support from the Deutsche Gesellschaft fuer Internationale Zusammenarbeit (GIZ).



Key improvements of the Monetary 2.0 game included:

1. Updated visual design improving User Interface and User Experience of the game.
2. Modified game scenarios centered around common daily life challenges of young adults to make the game more relatable to the audience.
3. Updated and added new 'micro lessons' for players to learn the key foundations for personal finance management as they go through different game scenarios.

Emerging Policy Leaders Program



CIPS recruited four talented trainees to join the six-month Emerging Policy Leaders Program in 2021. The trainees came from various academic and professional backgrounds ranging from international political economy, international relations, and development economics and policy.



Nisrina Nafisah
EPLP Trainee



Azizah Fauzi
EPLP Trainee



Fatharani Nadhira
EPLP Trainee



Sri Handayani
EPLP Trainee

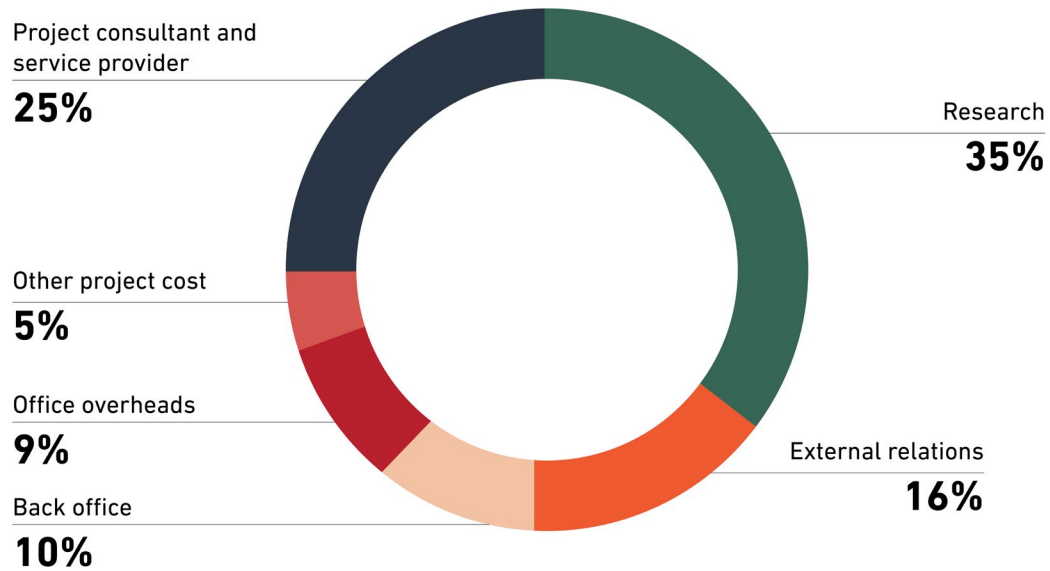
In partnership with external training operators CIPS provided capacity building programs on public policy. In total, trainees attended 16 training sessions developing specific skills required to be a policy researcher and advocate.

The EPLP trainees supported CIPS research and led their own research projects. They produced three policy papers on constructive foreign investments in the digital economy, agriculture, and education of the ASEAN nations. The report on 'Promoting Constructive Agriculture and Food Investment in ASEAN' was listed as recommended reading by the ASEAN office of the European Parliament.

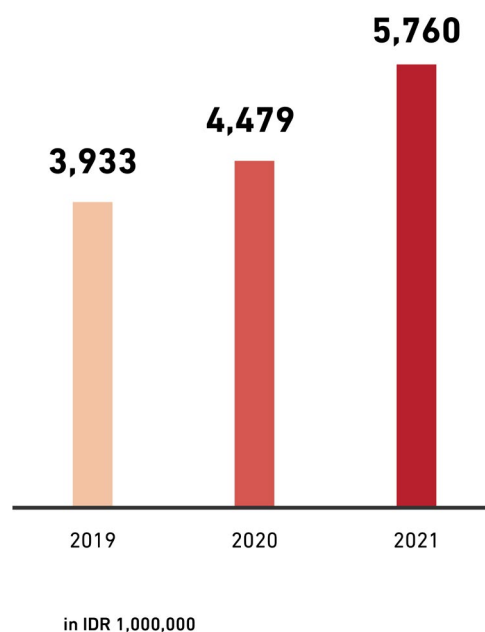
All four trainees were recruited as full-time staff at the end of the program.

Financial Statement

2021 Expenditure Breakdown



Yearly Expenditure



The CIPS Team in 2021

In 2021, CIPS welcomed a new Treasurer to the Board of Directors. Dr. Donna Gultom had been a CIPS Senior Fellow and became the successor of CIPS' former Treasurer, Dr Rofah Mudzakir.

CIPS also welcomed three new Senior Fellows and two new Associate Researchers. They have considerably expanded our expertise and outreach in topics such as school education, trade and investment, food statistics and the digital economy.

CIPS daily operations were carried out by 31 employees across all departments. We created, for example, the crucial position of a Strategy, *Monitoring and Evaluation Officer*. Our new colleague is responsible for ensuring that CIPS monitors the fulfillment of its deliverables and regularly evaluates the achievement of our strategic objectives.

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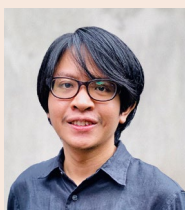


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Aditya Alta
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Research



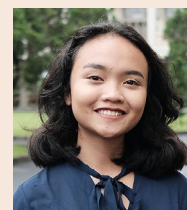
Aicha Grade Rebecca
Research Trainee



**Ancella Christy
Andhani**
Project Leader



Anthea Haryoko
Head of External
Relations



Arumdriya Murwani
Junior Researcher



Azizah Nazzala Fauzi
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Harahap**
Head of Research
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**Nadia Fairuza
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Digital Communications
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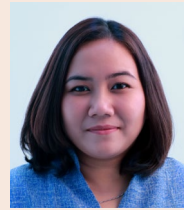
**Nisrina Nuraini
Nafisah**
Research Assistant



Noor Halimah Anjani
Junior Researcher



Pingkan Audrine
Researcher



**Sara Christianti
Sihalo**
HRGA Executive



Siti Alifah Dina
Researcher



**Sri Handayani
Nasution**
Research Assistant



**Thomas Aquinas
Dewaranu
Widyatmanto**
Head of Research Unit



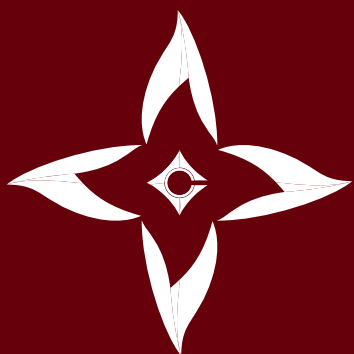
Vera Erwaty Ismainy
Media Relations
Manager



**Virza Khazmi
Prasetyo**
Graphic Designer



Windi Nathiya
Chief Operating
Officer



CIPS

Center for Indonesian
Policy Studies



ADDRESS

Jalan Terogong Raya No. 6B
Cilandak, Jakarta Selatan 12430
Indonesia



EMAIL

contact@cips-indonesia.org



WEBSITE

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