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From the Editor

The Ninth Issue of the ASEAN Economic Integration Brief (AEIB), or the first for this year, comes as the region is still grappling with the pandemic. Countries in the region have started respective vaccination programmes and economies are slowly and cautiously reopening, but resurgences in cases, vaccination delays, and the threat of new variants of the virus continue to pose uncertainties.

The Year 2021 also marks the start of the second phase of implementation of the ASEAN Economic Community (AEC) Blueprint 2025. The Mid-Term Review of the Blueprint has been completed and provides valuable lessons and recommendations to guide the next phase of the AEC.

In addition to providing the latest economic outlook of the region, as well as progress updates on ASEAN economic integration, the Ninth Issue of the AEIB also presents two special feature articles from H.E. Satvinder Singh, the Deputy Secretary-General of ASEAN for the AEC, who assumed office on 26 March 2021, succeeding Dr Aladdin Rillo, and the Honorable Siti Rozaimeryanty Dato Seri Lalila Jasa Haji Abdul Rahman, Chair of the ASEAN Business Advisory Council 2021.

H.E. Singh shared his perspectives on the risks and opportunities faced by the region in the post-COVID world, and his long term vision for the AEC.

Meanwhile, highlighting the ASEAN-BAC 2021 Chairmanship's theme, 'Recover, Together, Stronger, Sama-Sama', YB. Yanty Rahman calls for the deepening of partnership and greater contribution from the private sector to better manage and recover from the pandemic.

The present issue also includes the latest ASEAN COVID-19 and economic statistics.

ECONOMIC OUTLOOK

Whilst the pandemic is still ongoing, there have been early signs of recovery emerging across the region.

All ASEAN Member States (AMS) have started to roll out vaccination programmes¹, although some are experiencing resurgence in cases and continue to enforce quarantine measures. Accommodative fiscal and monetary policy measures likewise remain in place to support the still fragile recovery. In 2020, the ASEAN economy contracted by an estimated 3.3% as both domestic and foreign demand dropped. Across the region, performance was mixed although domestic production declined in most AMS (see Table). This year, recovery may drive growth in Southeast Asia closer to pre-pandemic levels, at 4.4%², and next year to 5.1%, although this is contingent on virus containment and vaccination progress.

On the other hand, employment may take longer to recover. The pandemic hit key sectors of the economy, particularly travel and tourism, transportation and logistics, retail trade and services, and manufacturing. Based on estimates, the number of hours a person worked per week declined across all AMS, on average by 7.75%³ or equivalent to 2.4 hours less per week per person. Moreover, there is the much broader social impact on poverty and human capital.

ASEAN's total trade value likewise decreased by 5.5% to US\$2.7 trillion, although a few key products saw increase in demand, particularly electronics and electrical machinery, and those which are needed for the production of medical supplies and in the pandemic response, such as rubber and products, as well as furniture and bedding materials.

Real GDP Growth and Vaccination Status, per ASEAN Member States

Country	Real GDP Growth, in %				Vaccination Status, in persons		
	2019	2020p	2021f	2022f	Total vaccinations	Persons vaccinated (at least 1 dose)	Persons vaccinated per 100 population
ASEAN	4.7	-3.3	4.4	5.1	63,595,757	41,627,010	6.3
Brunei Darussalam	3.9	1.2	2.5	3.0	61,225	49,763	11.4
Cambodia	7.1	-3.1	4.0	5.5	4,839,260	2,710,359	16.2
Indonesia	5.0	-2.1	4.5	5.0	32,603,744	20,904,723	7.6
Lao PDR	6.4	-0.4	4.0	4.5	1,100,013	714,092	9.8
Malaysia	4.4	-5.6	6.0	5.7	3,330,436	2,208,016	6.8
Myanmar	6.2	3.2	-9.8	-	2,994,900	1,772,177	3.3
Philippines	6.0	-9.5	4.5	5.5	6,624,417	4,820,604	4.4
Singapore	0.7	-5.4	6.0	4.1	4,392,067	2,503,814	42.8
Thailand	2.4	-6.1	3.0	4.5	6,188,124	4,531,914	6.5
Vietnam	7.0	2.9	6.7	7.0	1,461,571	1,411,548	1.5

Sources: ASEAN Secretariat (May 2021); Asian Development Bank (April 2021); <https://covid19.who.int/info>
Note: p – preliminary; f – forecast

¹ The ASEAN Biodiaspora Virtual Center (ABVC) provides regular updates on the status of vaccination programmes in the AMS; see ASEAN Health Sector Efforts in the Prevention, Detection and Response to Coronavirus Disease 2019 (COVID-19) (www.asean.org).

² Forecast for Southeast Asia from the ADB Asian Development Outlook (April 2021) includes Timor-Leste.

³ Computed as the simple mean of the percent change in the ratio of total weekly hours worked to population aged 15-64 from 2019 to 2020 for each AMS. The ratios are from the International Labour Organization database.

Uncertainties also dampened investor sentiments. Inflows of foreign direct investments (FDI) to ASEAN fell by 24.5% to US\$137.3 billion⁴. A few AMS nonetheless secured more investments although in smaller amounts, namely Brunei Darussalam, Lao PDR, and Myanmar.

Challenges and Way Forward

Various new variants of COVID19 continue to appear, further stressing the urgency of vaccination roll out and raising doubts on rapid recovery. The biggest challenge to vaccination roll outs is the supply of vaccines, which continue to be at risk of export restrictions imposed by producing countries, as well as vaccine distribution, administration, and take up among the population. These, on top of the pressure for governments to sustain stimulus measures.

Vaccinating the population remains an urgent priority, since this will contribute towards herd immunity and enable safe reopening of economies, including international travel.

For the long-term, the main concern is achieving sustainability and resilience, of economies and population; and inclusiveness by addressing the imbalance which was aggravated by the pandemic, and providing support for vulnerable sectors.

Regional cooperation plays a vital role in building resilience in dealing with uncertainties including future pandemics. Hence, ASEAN is intensifying efforts on enhancing value and supply chains, deepening engagement with stakeholders particularly the private sector, and building capacity for digital transformation and the fourth industrial revolution, with a view towards sustainable development.



UPDATES ON THE ASEAN ECONOMIC COMMUNITY

ASEAN continues to make significant progress in the implementation of the AEC Blueprint 2025 in spite of the challenges posed by the COVID-19 pandemic.

On the latest update, ASEAN virtually launched the Report of the Mid-Term Review (MTR) of the AEC Blueprint 2025 on 28 April 2021⁵.

The Report assessed the first phase of implementation of the Blueprint, including macro-overview, implementation analysis, outcomes/impact analysis, and recommendations. While the Report found that good progress has been made, more needs to be done, faster and better. Out of more than 1,700 action lines under 23 AEC sectoral work plans, 54% have been completed, and 34% are ongoing. Several key

performance indicators (KPIs) have improved over time across sectors, for example, in trade, ease of doing business, energy intensity reduction, digital connectivity, and financial inclusion.

The findings on the MTR and the effect of the COVID-19 pandemic yield important learning for the region towards 2025 and beyond. The Report informs ASEAN on improving collective actions and policy responses to build back better and foster greater economic resilience.

Priority Economic Deliverables under Brunei Darussalam's Chairmanship

With the theme “We Care, We Prepare, We Prosper”, Brunei Darussalam's Chairmanship in 2021 has 13 Priority Economic Deliverables (PEDs) across three strategic thrusts, namely (1) Recovery, (2) Digitalization, and (3) Sustainability.

⁴ ASEAN trade and FDI data are from ASEAN Secretariat, as of May 2021.

⁵ <https://asean.org/launched-asean-mid-term-review-aec-blueprint-2025/>

The development of the Non-tariff Measures (NTMs) Cost-Effectiveness Toolkit (NTM Toolkit) has been completed. The NTM Toolkit is designed to provide a framework to review the cost and effectiveness of existing NTMs in ASEAN.

The negotiation of the ninth ASEAN Framework Agreement on Services (AFAS) Protocol on Financial Services has been concluded in March 2021, and AMS is now undertaking a domestic internal process for signing the Protocol.

The ASEAN Framework to Support Food Agriculture and Forestry (FAF) Small Producers, Cooperative and MSMEs to Improve Product Quality to Meet Regional/International Standards and Ensure Competitiveness is expected to be adopted in October 2021.

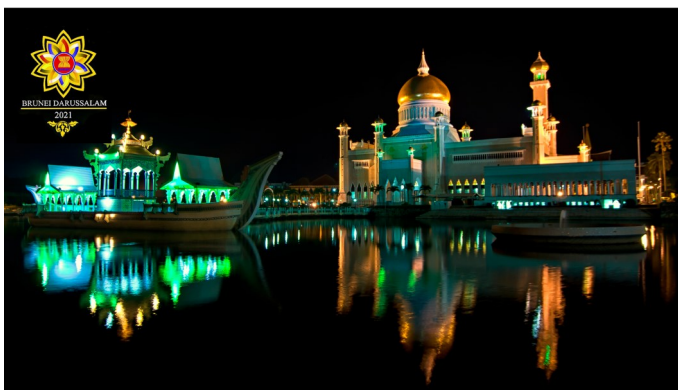


Photo Credit: ASEAN Secretariat/Okti Zendra

Tourism is one of the sectors that are affected hardest by the pandemic. The Post-COVID-19 Recovery Plan for ASEAN Tourism, is expected to be endorsed soon and will consist of a study on the impact of COVID-19 on the sector and policy and best practices recommendations.

Recognising the contribution of electronic commerce in keeping economic activities going during the pandemic and beyond, the ASEAN Work Plan on the Implementation of the ASEAN Agreement on E-commerce is being developed for adoption this year.

The Framework of Circular Economy is being developed in partnership with the Economic Research Institute for ASEAN and East Asia (ERIA) for adoption later this year. Circular economy will contribute to ASEAN's work towards sustainable recovery.

AEC Key Achievements

In addition to the PEDs, the following are some updates on the implementation of AEC.

On **trade in goods**, three outstanding cases of Non-Tariff Measures (NTMs) have been resolved as of March 2021, exceeding the target of resolving at least two cases this year.

On **trade facilitation**, the baseline report on Trade Transaction Costs (TTC) has been finalised. The study sets up the monitoring mechanism for the implementation of trade facilitation measures in the region to improve the competitiveness of ASEAN industries and businesses.

On **competition and consumer protection**, the ASEAN Regional Capacity Building Roadmap 2021-2025 is being updated. In addition, the development of Sustainable Consumption Toolkit, online interactive and distance learning tools, and the ASEAN Online Dispute Resolution (ODR) Guidelines are still in progress.

Among the main priorities on **intellectual property rights** are the establishment of a virtual platform for an ASEAN IP Academy, the Study on the Quality Management System (QMS), and the completion of ASEAN Common Guidelines on Patent Examination Deliverable.

On **transport**, ASEAN and EU have concluded the negotiations on the ASEAN-EU Comprehensive Air Transport Agreement (AE CATA). The AE CATA will become the world's first bloc-to-bloc air transport agreement.

On **ICT**, ASEAN Digital Masterplan 2025 was released in January 2021 to achieve the vision of ASEAN as a leading digital community and economic bloc, powered by secure and transformative digital services, technologies and ecosystem. In addition, the development of ASEAN Certification for Cross Border Data Flow and its Implementation Guidelines has been completed.

On **food, agriculture, and forestry**, the Five-Year Regional Plan of Action on Antimicrobial Resistance (AMR) in Aquaculture is expected to be adopted by October 2021, as well as the ASEAN Guidelines on the Utilisation of Digital Technologies for ASEAN Food and Agricultural Sector. The latter is one of the initiatives under the ASEAN Comprehensive Recovery Framework (ACRF).

On **tourism**, the MTR of the ASEAN Tourism Strategy Plan (ATSP) 2016-2025 has been finalised and endorsed. Two additional priorities have been completed, namely the ASEAN Tourism Investment Program Portfolio and the ASEAN Tourism Marketing Strategy.

On **MSMEs and public-private engagement**, the ASEAN Business Sentiment Study is being conducted to gain insight from ASEAN companies on their sentiments towards the AEC. The survey is expected to be completed by end 2021.

On **external economic relations**, all priorities are currently ongoing.

Economic Integration in a Post-COVID World: Relevance, Challenges, and Opportunities

H.E. SATVINDER SINGH



Deputy Secretary-General
of ASEAN for the ASEAN
Economic Community

When I assumed my post as Deputy Secretary-General of ASEAN for the ASEAN Economic Community (AEC) earlier this year, the region was in the middle of the pandemic, while completing its Mid-Term Review (MTR) of the AEC Blueprint 2025, and preparing for the implementation of its COVID-19 recovery strategy. There is little doubt that the coming years will be critical, challenging, yet exciting.

Five years into the implementation of the Blueprint, good progress has been achieved, with more than 50% of the 1,700 plus action lines completed and another 34% on-going. But efforts must be intensified and refocused on delivering high-impact economic integration initiatives, some are long-standing, and to accelerate the pace of implementation.

The second half of implementation of the Blueprint gives us an opportunity to address cross-cutting and new pressing issues that are critical to ASEAN economic integration agenda, such as digital transformation, geo-strategic competition, and climate change, which has been exacerbated by the pandemic.

The remaining five years towards AEC 2025 will take place in a different context. Moving forward, the AEC agenda will be advanced taking into consideration new risks and challenges.

First, notwithstanding vaccination rolled out, COVID-19 recovery is going to be neither fast nor easy. The region must be prepared for *uneven or differentiated recovery, across and within sectors, economies, and segments of the society*. The World Bank recently estimated that 32 million people in the East Asia and the Pacific region failed to escape poverty in 2020 alone, as uneven recovery drives growing inequality⁶. In ASEAN, as of the first quarter of 2021, while there have been early signs of recovery, only two⁷ countries registered positive growth. Left unaddressed, the expansive impact of COVID-19 may pose risk to peace and stability that the region has enjoyed in the past few decades.

Second, the pandemic has necessitated increase in fiscal spending. This has led to concern over *fiscal and debt sustainability*. While borrowing help countries finance important development programmes, and, in times of the pandemic, aid their spending needs to mitigate health and economic impacts of the crisis, excess debt can overwhelm countries' finances, and add to the tension between meeting important development goals and containing debt vulnerabilities⁸.

Third is the heightened *risk of global decoupling*. The trend has been visible not only in trade, but also investment, the internet, and technology. This is exacerbated by the pressure on multilateralism and global governance. Concern over supply chain resilience and sustainability may also lead some restructuring and regionalisation of supply chains. However, faced with a transboundary crisis, the pandemic has rejuvenated multilateral response and cooperation with countries realising the need to work together to overcome and recover from the crisis.

While the pandemic has given a breather to the environment, our planet is still expected to see a global temperature rise in excess of three degrees Celsius this century. The pandemic may appear to be the biggest global crisis we face, but, in truth, we are heading towards a much bigger crisis, the *climate change*. Currently, only 18.0% of announced global recovery spending going towards 'green investment'⁹. To avert a humanitarian and existential disaster, we need to do significantly more and faster. ASEAN will need to give climate change a much higher priority in its agenda moving forward.

⁶ World Bank (2021), 'Uneven Recovery Drives Growing Inequality across East Asia and the Pacific', Press Release, 25 March, retrieved at: <<https://www.worldbank.org/en/news/press-release/2021/03/25/uneven-recovery-drives-growing-inequality-across-east-asia-and-the-pacific>>.

⁷ Based on available data.

⁸ D. Hakura (2020), 'What is Debt Sustainability', IMF Finance and Development, Fall Issue, retrieved from: <<https://www.imf.org/external/pubs/ft/fandd/2020/09/what-is-debt-sustainability-basics.htm>>; ADB (2021), 'Financing a Green and Inclusive Recovery', ADB Outlook, April, retrieved from: <<https://www.adb.org/what-we-do/economic-forecasts/april-2021/theme-chapter>>.

⁹ UN News (2021), 'Commitment to Post-Pandemic 'Green' Recovery Falling Short, UN-Backed Study Finds', 10 March, retrieved from: <<https://news.un.org/en/story/2021/03/1086852>>.

Beyond the pandemic, ASEAN will need to start thinking about the long-term as it starts conversations on the post-2025 agenda. Although broad vision itself may require just some adjustments, a number of priorities will need to be reflected in this long-term agenda.

While much has been done to advance the digital transformation agenda, more efforts are needed, including at national level, to update the laws and regulations in support of digitalisation of trade along the entire value chains. Similarly, governments need to invest, in partnership with private sector, on digital skills and infrastructure, which are prerequisites for thriving economy and society in the digital age.

ASEAN must also take bold steps towards the low carbon economy, and set its ambitions and commitments, while embracing what would be the next largest economic revolution. With the right approach, the low carbon economy could help stimulate innovation, generate new employment, and reinvigorate economic strengths globally.

Lastly, ASEAN should also position itself to play greater global role post-2025. While upholding the principles enshrined in the ASEAN Charter, the core of this will be the well-being of our people. In the interconnected world, ASEAN people will only thrive and prosper in the world that is free, safe, peaceful, non-discriminatory, inclusive, and sustainable.

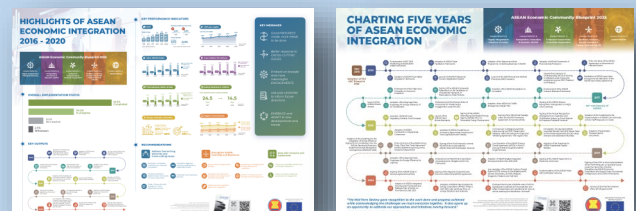
MID-TERM REVIEW OF THE ASEAN ECONOMIC COMMUNITY BLUEPRINT 2025

The year 2020 marks the midway of implementation of the ASEAN Economic Community (AEC) Blueprint 2025. To assess the progress of efforts to deepen ASEAN economic integration, ASEAN undertook a mid-term review (MTR) with a view to ensure effective implementation of the Blueprint and achievement of its goals in the face of emerging issues and trends.



Download the Report from <https://bit.ly/ReportAECMTR>

AEC Posters on Highlights of ASEAN Economic Integration 2016-2020 and Charting the Key Outputs.



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The Honorable FDr. Ar. Siti Rozaimerianty Dato Seri Laila Jasa Haji Abdul Rahman

Chair of the
ASEAN Business
Advisory Council 2021



As we crossed the midway mark of **ASEAN Economic Community (AEC) Blueprint 2025 Implementation last 2020** - a year that turned the global economic system upside down and triggered considerable loss to lives and livelihoods due to the COVID-19 pandemic - it is opportune to pause and acknowledge the advances made, despite the immense challenges, and reckon the opportunities missed in our AEC journey.

The launch and socialisation of the Mid-term Review of the AEC Blueprint 2025 early this year was a very useful and welcome process. We do need an honest assessment of where we are to know exactly where the significant gaps are so we can better manage the pandemic and get ourselves back on track towards growth and sustainability.

From ASEAN BAC, we believe there are four priorities that we – the government and the private sector – should work on together more effectively and intensely.

First is to better manage the pandemic – which we must learn to live with – through speedy, efficient and equitable roll out of the vaccines especially to the most vulnerable, such as MSMEs who are the true economic frontliners and engine of growth for ASEAN. Otherwise, no amount of fiscal and financial support, or magnificent recovery frameworks and action plans will work, unless our homes, schools, workplace, supply chains, and marketplace are made safe where confidence and trust in doing business can be immediately restored.

ASEAN is at a key juncture to act decisively as one and leverage on its collective strength NOW in undertaking the following, to name a few: bloc purchase of vaccines, setting

harmonised and enforceable contact tracing and mass testing standards and removing the barriers that hinder the free flow of essential goods and services, especially the access to medical devices and equipment. If we succeed, the economic wheels of development, business and travel can gradually churn towards full recovery for everyone. As they say, **NO ONE IS SAFE UNLESS EVERYONE IS SAFE.**

Second is to put the Digital Transformation machinery to work. Given the recently launched ASEAN Digital Governance Framework, all key players driving the digital landscape, which cuts across all sectors – from building the required digital infrastructures and connectivity to capacitating our workforce and creating jobs, must now converge and develop a well-coordinated and well-funded public-private action plan.

Third is to hasten the ratification of Regional Comprehensive Economic Partnership (RCEP) to make it operative sooner than later and help realize the promise of a huge market covering one third of the world's GDP. But we still have to do our urgent and pending homework in enhancing the ease of doing business at national and regional levels especially in eliminating non-tariff barriers and putting in the policy environment so we come out ready to meaningfully participate in RCEP. While we proceed with great enthusiasm, we need to be cautious and not lose sight of the key principle of ASEAN centrality for RCEP to be a win-win proposition.

Fourth is to start building for ASEAN's future in the critical area of Inclusive and Sustainability Recovery. This entails our responsibility and primordial duty to take care of our environment, the ethical way of running our businesses, and the overall welfare we provide for our peoples. Green recovery is the next battle cry that we all have to partake and win.

As the chair of ASEAN 2021, with the theme of “**We Care, We Prepare, We Prosper**”, the business sector is called upon to invest in our human resources and prepare our workforce to be digitally-ready and equipped with the right skills through digital mentoring, embracing digitalisation and innovations.

Therefore, the ASEAN BAC 2021 chairmanship's theme, “**Recover, Together, Stronger, Sama-Sama**”, prompted us to prioritise the promotion of entrepreneurship and human capital development through our legacy project Harnessing Impact for Resilient Employability Digitally (HIRED). We aim to build the ecosystem and engines that will drive digital mentorship, training of digital mentors, providing the platforms for private-public sector cooperation that address the supply and demand gaps of our business and industries under the current normality.

Finally, the ASEAN BAC and the Joint Business Councils and sector champions stand united and ready to work with the ASEAN Secretariat and ASEAN governments towards **a stronger, resilient and prosperous ASEAN. Sama-Sama.**

Selected ASEAN Covid-19 and Economic Indicators



COVID-19 IN ASEAN



Total Cases

4,579,698

World: 178,503,429
ASEAN share: 2.6%



Total Deaths

89,028

World: 3,872,457
ASEAN share: 2.3%



Vaccinated Persons

41,627,010

World: 983,259,343
ASEAN share: 4.2%

Total Vaccination per 100 persons

6.3

World: 12.6

Note: Vaccinated persons are those who had at least one dose of COVID-19 vaccination.

As of 23 June 2021
Sources: WHO, UN World Population Prospect, ASEAN Secretariat



GDP

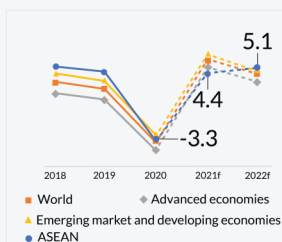
In 2020, ASEAN nominal GDP was **US\$3.0 trillion**.

ASEAN share to World GDP was **3.5%**.

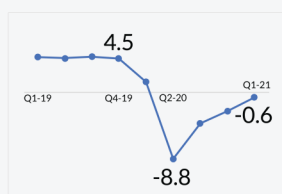


Note: Preliminary data, as of May 2021.

Real GDP Growth (%)



ASEAN Quarterly GDP Growth (%)

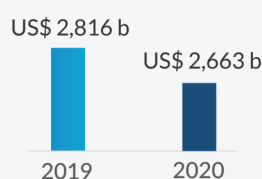


Sources: International Monetary Fund (April 2021); Asian Development Bank (April 2021); ASEAN Secretariat (May 2021)



TRADE

ASEAN trade in 2020 declined by **5.5%**, however, some commodities had positive growth.



Top 5 traded commodities with high value and positive growth,



Electrical machinery, sound recorders, television and its accessories: **US\$ 760.9 b**, 7.7% growth.



Natural and cultured pearls, precious stones and metals: **US\$ 94.9 b**, 10.0% growth.



Rubber and articles thereof: **US\$ 52.6 b**, 6.9% growth.



Fats and oils and their cleavage products of animal or vegetable: **US\$ 43.2 b**, 18.9% growth.



Furniture; bedding, mattresses, and stuffed furnishings; lamps and lighting fittings: **US\$ 52.6 b**, 11.5% growth.

Source: ASEAN Secretariat



MANUFACTURING

Purchasing Managers' Index (PMI) for manufacturing expanded in some ASEAN Member States (AMS). In other AMS, the rate of contraction has slowed.

Manufacturing PMI

	12 months ago	3 months ago	Latest
Indonesia	27.5	52.2	54.6 (April 2021)
Malaysia	45.6	47.7	51.3 (May 2021)
Myanmar	38.9	27.7	39.7 (May 2021)
Philippines	40.1	52.5	49.9 (May 2021)
Singapore	46.8	50.5	50.7 (May 2021)
Thailand	41.6	47.2	47.8 (May 2021)
Viet Nam	42.7	57.6	53.1 (May 2021)

Note: The indices vary between 0 and 100, with a reading above 50 indicating an overall increase compared to the previous month, and below 50 an overall decrease.

Source: TheGlobalEconomy.com

www.asean.org

The Association of Southeast Asian Nation (ASEAN) was established on 8 August 1967. The Member States are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam. The ASEAN Secretariat is based in Jakarta, Indonesia.

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