

# PERSPECTIVE

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## **Tackling COVID-19 in ASEAN: Sustain an Open Trade Policy on Personal Protective Equipment**

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### **EXECUTIVE SUMMARY**

- Demand for personal protective equipment (PPE) products in ASEAN member states has increased in response to the rapid spread of COVID-19, but even those countries that can produce PPE risk facing shortages since containment measures have disrupted the production process.
- Trade serves as a powerful low-cost tool to improve access to personal protective equipment needed by healthcare workers.
- Policies to improve the effectiveness of government interventions during the COVID-19 pandemic should aim at stimulating domestic production and facilitating international trade of PPE products, rather than restricting them.
- Streamlining non-tariff measures in ASEAN member states can reduce the time required and costs for importing PPE products. Eliminating tariffs can lower the costs of imports from extra-regional import sources such as the United States and countries from the European Union.

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## **INTRODUCTION**

While China has been successful in bringing the coronavirus disease 2019 (COVID-19) pandemic under control, member states of the Association of Southeast Asian Nations (ASEAN) are being ravaged by the virus, albeit to different degrees. These countries are implementing measures such as social distancing to reduce social contact, curtailing work and schooling, with some implementing community lockdown measures (i.e., Malaysia, the Philippines, Singapore) in the hope of controlling transmissions and limiting the outbreak. COVID-19 continues to spread, however, and with no signs of abatement as yet.

In the attempt to improve access to personal protective equipment (PPE) and other medical supplies that are needed to control the pandemic in the region, smoothening trade patterns and expanding trade policy space can be part of the solution. In this article, I argue the shortage of PPE can be minimized by enhancing trade flows within ASEAN, and between ASEAN and the rest of the world. The PPE products considered here include five groups, namely gloves, hair covers, face masks, goggles, and gowns.

## **RISING DEMAND FOR PPE PRODUCTS**

Healthcare workers rely on PPE to protect themselves and their patients from being infected and infecting others, and as the COVID-19 pandemic accelerates, health care systems are overwhelmed as the number of potentially infected patients seeking testing and care increases. Over a period of 10 days,<sup>1</sup> the total number of confirmed cases in ASEAN rose by 59 percent from 16,749 on 10 April 2020 to 26,631 on 19 April 2020, while the total number of deaths rose by 75 percent from 620 to 1,084. Indonesia, the Philippines, Singapore, Malaysia and Thailand together accounted for 98 percent of total confirmed cases and 99 percent of total deaths in ASEAN. Confirmed cases in Cambodia, Laos and Viet Nam have also been rising, but these countries have not yet reported any death in this period.

As the demand for PPE products rises, ASEAN developing economies have had to source from overseas and/or boost domestic production. In early April, Thailand imported 400,000 N95 masks and 400,000 sets of PPE from China.<sup>2</sup> In Indonesia, textile manufacturers have switched from producing fashion items to making PPE; with their combined productive capacity being estimated at around 17 million pieces per month.<sup>3</sup>

The World Health Organization (WHO) has provided PPE supplies to four ASEAN countries, namely Cambodia, Laos, Myanmar and the Philippines.<sup>4</sup> China,<sup>5</sup> the United States<sup>6</sup> and Viet Nam,<sup>7</sup> among others, have also donated PPE supplies to Laos. But with the number of confirmed cases in ASEAN increasing, bilateral assistance from international organizations and other countries is unlikely to meet the increasing demand for PPE products. An alternative is to source for PPE further afield overseas and to increase domestic production.

## **LIMITED SUPPLIES OF PPE PRODUCTS**

In the pre-COVID-19 period, ASEAN countries not only produced PPE products to trade regionally, but also exported them to the rest of the world (Table 1). At least one ASEAN

Member State (AMS) was listed among the top five global exporters of each relevant product of PPE in 2018. This includes Viet Nam for gowns, hair covers, masks and gloves; and Malaysia and Thailand for gloves.

The identification of PPE products is based on an indicative list of medical supplies<sup>8</sup> published by the World Customs Organization (WCO) as items for use during the pandemic. Each relevant product and its associated HS code for PPE have been placed by the WCO into one of five groups, namely gloves, face masks, hair covers, goggles, and gowns. Table 1 summarizes the PPE products exported globally by the top five countries in 2018. The total value of global export in PPE products was US\$47.5 billion in 2018, with the majority of them being gloves, masks, and gowns. More than 60 percent of these exports were accounted for by the top five exporters.

Table 1: Key Global Exporters of COVID-19 Personal Protective Equipment

No.	Category name	Number of HS 2017 codes	Total value of global exports in 2018 in these HS codes, US\$ billion	Top 5 exporters	% of global exports accounted by top 5 exporters
1.	Gloves	5	15.6	China, Malaysia, Thailand, Viet Nam, Belgium	76%
2.	Goggles	1	3.4	China, Hong Kong, Italy, USA, Germany	66%
3.	Gowns	5	9.6	China, Viet Nam, Italy, Belgium, Germany	69%
4.	Hair covers	1	5.2	China, Viet Nam, Germany, Netherlands, Italy	73%
5.	Masks	2	13.6	China, Germany, USA, Viet Nam, Mexico	63%
<b>Total</b>			<b>47.5</b>		

*Note:* PPE product groups are classified from HS 6-digit codes. Gloves include 392620, 401511, 401519, 611610, and 621600. Goggles include 900490. Gowns include 621010, 621020, 621030, 621040, and 621050. Hair covers include 650500. Masks include 630790 and 902000.

*Source:* United Nations Commodity Trade Statistics Database (UN Comtrade), accessed 4<sup>th</sup> April 2020, available at: <https://comtrade.un.org/db/>.

The global export of gloves was recorded to be worth US\$15.6 billion, 76 percent of which came from China, Malaysia, Thailand, Viet Nam, and Belgium. The global export of masks (i.e. textile masks and gas masks) was worth US\$13.6 billion, 63 percent of which from China, Germany, the United States, Viet Nam, and Mexico. The global export of gowns came up to US\$9.6 billion, 69 percent of which was accounted for by China, Viet Nam, Italy, Belgium, and Germany. China was also the top-ranked global exporter of other PPE products.

However, not every AMS produces all the PPE products needed by its healthcare workers (Table 2). Thailand and Viet Nam were net exporters of gloves, goggles, gowns and hair covers, but were net importers of masks. Cambodia and Indonesia were net exporters of

gloves, gowns and hair covers, while being net importers of goggles and masks. Malaysia was a net exporter of gloves and goggles. Myanmar was a net exporter of gowns and hair covers. Other AMSs were small net exporters of one PPE product, such as Brunei for goggles, Laos for gowns, the Philippines for hair covers, and Singapore for masks.

Table 2: Exports, Imports and Net Exports of PPE products in ASEAN, 2018, US\$ million

Country	Gloves	Goggles	Gowns	Hair covers	Masks	Total
<b>Total exports</b>	<b>6,763.8</b>	<b>155.7</b>	<b>1,090.4</b>	<b>390.5</b>	<b>63.4</b>	<b>8,463.9</b>
Brunei	0.0	2.2	0.1	0.0	0.1	2.4
Cambodia	21.7	0.0	37.9	14.2	0.0	73.8
Indonesia	360.9	0.1	77.6	35.4	0.5	474.5
Laos	0.0	0.0	0.6	0.1	0.0	0.7
Malaysia	4,557.8	14.6	8.1	4.9	5.9	4,591.3
Myanmar	2.5	0.0	59.5	11.2	0.0	73.1
Philippines	21.3	0.0	7.4	8.7	6.8	44.2
Singapore	16.0	7.4	14.5	11.7	47.3	96.9
Thailand	1,192.6	112.3	79.8	20.5	2.3	1,407.5
Viet Nam	591.1	19.1	805.0	283.8	0.4	1,699.4
<b>Total imports</b>	<b>633.2</b>	<b>67.9</b>	<b>105.7</b>	<b>76.8</b>	<b>104.7</b>	<b>988.3</b>
Brunei	1.5	1.1	1.0	0.3	0.7	4.5
Cambodia	3.8	0.2	5.0	0.2	0.8	9.9
Indonesia	105.7	22.7	5.9	15.2	17.2	166.7
Laos	1.5	0.2	0.3	0.1	0.1	2.1
Malaysia	95.0	5.4	31.5	17.7	10.7	160.3
Myanmar	12.5	1.2	0.2	0.4	0.2	14.5
Philippines	47.2	7.6	24.5	7.6	13.2	100.3
Singapore	66.7	7.6	22.4	20.2	42.3	159.1
Thailand	68.1	17.2	9.3	12.4	8.3	115.3
Viet Nam	231.1	4.6	5.7	2.8	11.4	255.5
<b>Net exports (exports - imports)</b>	<b>6,130.6</b>	<b>87.9</b>	<b>984.7</b>	<b>313.7</b>	<b>-41.2</b>	<b>7,475.6</b>
Brunei	-1.5	1.0	-0.9	-0.2	-0.6	-2.2
Cambodia	17.8	-0.2	32.9	14.1	-0.8	63.9
Indonesia	255.3	-22.6	71.7	20.2	-16.7	307.9
Laos	-1.5	-0.2	0.3	0.0	-0.1	-1.4
Malaysia	4,462.8	9.2	-23.4	-12.8	-4.8	4,431.1
Myanmar	-10.0	-1.2	59.2	10.7	-0.2	58.6
Philippines	-25.9	-7.6	-17.1	1.0	-6.4	-56.0
Singapore	-50.7	-0.2	-7.9	-8.4	5.1	-62.2
Thailand	1,124.4	95.1	70.5	8.1	-6.0	1,292.2
Viet Nam	359.9	14.5	799.4	281.0	-10.9	1,443.8

Note: HS code “630790” is replaced by AHTN code “63079040”, which provides more accurate data on surgical masks in ASEAN.

Source: ASEAN Secretariat’s online database, “ASEAN Statistics”, accessed 6<sup>th</sup> April 2020, available at: <https://data.aseanstats.org/trade-annually>.

Findings on net exporters of certain PPE products for ASEAN countries indicate that no individual country can produce all the needed PPE products and hence tend to rely on sources from within and outside the region. For example, total imports of face masks to ASEAN reached US\$104 million in 2018, 91 percent of which was sourced from non-ASEAN countries. At the same time, the share of imported face masks from non-ASEAN countries in total imported masks varies across countries, ranging from only 9.8 percent in Laos, to 54 percent for Brunei, 63 percent for Cambodia and more than 80 percent in Indonesia, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Viet Nam. Major suppliers of masks within ASEAN are Malaysia, Singapore, Thailand and Viet Nam while suppliers of the same item from outside ASEAN include China, the Republic of Korea, Japan, European Union, Taiwan and the United States.

During the COVID-19 period, however, sourcing PPE products from overseas have become increasingly challenging for ASEAN countries. Some AMS that have the capacity to produce PPE still face shortages due to the fact that the containment measures prevent factories from producing. The widespread work-from-home directives mean that many tasks can be done remotely, but most production of goods such as COVID-19 PPE requires social proximity, not social distancing. These measures have therefore reduced inputs and thus lowered the outputs of COVID-19 PPE. Non-ASEAN exporters have also limited their PPE exports. For example, on 12 March 2020,<sup>9</sup> Germany — one of the top five global exporters of PPE products — imposed an export licensing requirement on certain PPE products due to anticipated shortages in the country. To be sure, it relaxed its export curb on 20 March 2020.<sup>10</sup>

## **IMPORT RESTRICTIONS ON PPE TRADE**

Sourcing for PPE from within ASEAN faces tariffs and non-tariff measures (NTMs). Since ASEAN governments tax the import of PPE products or impede importation through NTMs, trade policy reforms concerning those measures could deliver health benefits.

Table 3 summarizes tariffs on import of PPE products in terms of the mean, minimum and maximum in ASEAN countries. It shows the average rates of two types of tariffs—most-favored-nations (MFN)<sup>11</sup> and preferential tariffs.<sup>12</sup> The preferential tariff rate applies to trading partners that have free trade agreements (FTA) with ASEAN countries, as exemplified by the ASEAN Trade in Goods Agreement (ATIGA) and ASEAN-People's Republic of China Comprehensive Economic Cooperation Agreement (ACFTA). ATIGA applies preferential tariffs on imports among ASEAN countries. ACFTA applies preferential tariffs on imports among ASEAN countries and China. For each country, the average tariff rate is calculated by averaging tariff rates (14 tariff lines) imposed on PPE products.

Table 3: Import Values and Top-five Import Sources of Masks for ASEAN countries, 2018

	<b>Total import (US\$ million)</b>	<b>% of intra-ASEAN's import in total import</b>	<b>% of extra-ASEAN's import in total import</b>	<b>Top 5 import sources</b>	<b>% of import accounted by top 5 import sources</b>
Brunei	0.7	46.4	53.6	Malaysia, EU, Singapore, China, USA	97.9
Cambodia	0.8	36.7	63.3	China, Viet Nam, USA, Malaysia, Japan	99.7
Indonesia	17.2	17.6	82.4	China, Rep. Korea, Singapore, USA, EU	90.1
Laos	0.1	90.2	9.8	Thailand, China, Japan, Australia	100.0
Malaysia	10.7	15.6	84.4	USA, EU, Singapore, China, Rep. Korea	82.4
Myanmar	0.2	16.9	83.1	China, EU, Thailand, Rep. Korea	89.3
Philippines	13.2	12.5	87.5	USA, Rep. Korea, China, Singapore, Japan	87.2
Singapore	42.3	2.7	97.3	USA, EU, Taiwan, China	92.2
Thailand	8.3	1.5	98.5	EU, USA, China	88.3
Viet Nam	11.4	8.0	92.0	EU, China, Korea, USA	81.9
<b>Total (ASEAN)</b>	<b>104.7</b>	<b>8.8</b>	<b>91.2</b>		

*Note:* AHTN codes for masks include 63079040 and 902000. EU refers to European Union; USA for the United States of America.

*Source:* ASEAN Secretariat's online database, "ASEAN Statistics", accessed 6<sup>th</sup> April 2020, available at: <https://data.aseanstats.org/trade-annually>.

Table 3 reveals that tariffs in ASEAN countries have an insignificant impact on imported PPE products under ATIGA and ACFTA. A low tariff barrier eases trade flows for ASEAN countries sourcing for PPE products from each other and from China. Given the uncertainty

of COVID-19 pandemic in the future, ASEAN countries should seek to diversify their import sources.

Most ASEAN countries tax heavily imports of PPE products from non-FTA partners. Seven out of 10 ASEAN countries charge an average MFN tariff rate of 9 percent or more on PPE products (Table 4). These include Thailand (17.1 percent), Viet Nam (15.3 percent), Myanmar (13.1 percent), Cambodia (12.3 percent), Indonesia (11.4 percent), the Philippines (11.4 percent), and Laos (9.6 percent). Brunei and Malaysia tax imports of PPE products at less than 3 percent, while Singapore has eliminated all tariffs on such products.

Table 4: Preferential and MFN Tariffs on Imports of PPE Products in ASEAN

Country	MFN tariff rate (%)			ATIGA: Tariff rate (%)			ACFTA: Tariff rate (%)		
	Mean	Min	Max	Mean	Min	Max	Mean	Min	Max
Brunei	0.71	0.00	10.00	0.00	0.00	0.00	0.00	0.00	0.00
Cambodia	12.33	7.00	15.00	0.00	0.00	0.00	1.79	0.00	5.00
Indonesia	11.43	5.00	15.00	0.00	0.00	0.00	0.00	0.00	0.00
Laos	9.64	5.00	20.00	0.00	0.00	0.00	0.00	0.00	0.00
Malaysia	2.86	0.00	20.00	0.00	0.00	0.00	0.00	0.00	0.00
Myanmar	13.08	1.50	20.00	0.00	0.00	0.00	0.36	0.00	5.00
Philippines	11.36	1.00	15.00	0.00	0.00	0.00	0.00	0.00	0.00
Singapore	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Thailand	17.10	1.00	30.00	0.00	0.00	0.00	0.00	0.00	0.00
Viet Nam	15.30	0.00	25.00	0.00	0.00	0.00	0.00	0.00	0.00

Source: ASEAN Secretariat's online database, "ASEAN Tariff Finder", accessed 9<sup>th</sup> April 2020, available at: <http://tariff-finder.asean.org/index.php?page=search2>.

The MFN tariffs in ASEAN vary across products and countries. Among 14 tariff lines of PPE products, Thailand records a minimum tariff rate of 1 percent for gas masks and a maximum tariff rate of 30 percent for gloves. Viet Nam has eliminated the tariff (tariff rate at 0 percent) on gas masks, but has imposed a tariff rate of 25 percent for hair covers. Furthermore, ASEAN countries also apply different tariff rates on different PPE products. The MFN tariff rate on surgical masks, for example, is 5 percent in Viet Nam, 7 percent in Cambodia, 10 percent in Indonesia, Laos, and Thailand, 15 percent in Myanmar and the Philippines, and 20 percent in Malaysia (Table 4). Reducing MFN tariffs is essential if ASEAN wishes to import any PPE product from the United States and the European Union, which are among the top five import sources for ASEAN countries.

Another type of trade barrier is NTM. Businesses have long complained that NTMs affect their ability to trade, and trading in PPE products is no exception. The number of NTMs imposed on imported gas masks varies among ASEAN countries, ranging from 3 in Cambodia, 6 in Laos and in Myanmar, to 16 in Malaysia. These measures include technical barriers to import (i.e. import testing and certification procedures), price control measures (i.e. minimum or maximum import price) and quantity control measures (i.e. import quota) (Table 5).

Table 5: NTMs on Imports of Gas Masks (HS code: 902000) in ASEAN

Country	Technical barriers to trade	Price control measures	Quantity control measures	Total
Cambodia	2	0	1	3
Indonesia	5	0	2	7
Laos	2	3	1	6
Malaysia	11	3	2	16
Myanmar	2	3	1	6
Philippines	4	7	2	13
Singapore	9	2	2	13
Thailand	6	4	4	14
Viet Nam	3	2	3	8

Source: UNTAD’s online database on NTMs, “Trade Analysis and Information System (TRAINS)”, accessed 9<sup>th</sup> April 2020, available at: <https://trains.unctad.org/Forms/TableView.aspx?mode=search>.

However, a greater number of NTMs does not necessarily bring higher trade-distortive effect. Much depends on how they are designed and managed. Import quotas can limit the quantity of imported masks, while complex certification procedures will increase transaction time and costs for fulfilling all the regulatory requirements. Together, NTMs can translate into higher prices for imported masks, and increase the public expenditure involved in healthcare interventions. The same NTM impact on imports applies to other PPE products as well.

## IMPLICATIONS FOR TRADE POLICY IN ASEAN

The main finding of this study is that the demand for PPE products is rising, while its supply is declining. The shortage in PPE products leaves doctors, nurses and other frontline workers dangerously ill-equipped. The key implication for ASEAN is that any policy to improve the effectiveness of public health interventions should stimulate domestic production and facilitate international trade of PPE products rather than restrict these processes.

Enhancing international trade in PPE products is particularly important because no ASEAN country can produce all the PPE products needed by their healthcare workers. The PPE products complement each other, and are not substitutes for each other. On the contrary, any form of export restrictions in one country can jeopardize cooperation with other ASEAN governments, which leads to the erosion of trust, which may then result in retaliation in some form. Export restrictions also discourage local firms from investing in new capacity. The end result is a loss-loss situation for all parties involved.

In addition to promoting domestic production and exports, ASEAN countries should enhance the importation of PPE products by streamlining NTMs and eliminating tariffs on PPE products imported from non-ASEAN countries. These reforms will quickly improve access to PPE products in ASEAN countries.

There is a need for a collective response to the spread of COVID-19 which seeks to keep ASEAN’s markets open for trade, one of the commitments from the Special ASEAN

Summit on 14 April 2020.<sup>13</sup> Working together, ASEAN governments can quickly and cheaply sweep away the tariff and non-tariff barriers that impede trade flows of PPE products to where they are desperately needed. This is not a call for a regional negotiation. Governments are free to act unilaterally or in groups, with some AMS joining later even, as the momentum builds up. Trade reform requires a bottom-up as well as top-down initiative if ASEAN is to respond to the COVID-19 outbreak in an effectively sustained manner.

Another promising initiative from the Special ASEAN Summit is the proposed COVID-19 ASEAN Response Fund.<sup>14</sup> This fund can be used for the purchase of medical supplies during a future contagion. However, chances for the fund to be implemented in the near term are low; its details (i.e. source of funding and participating countries) are still being worked out.<sup>15</sup>

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<sup>1</sup> <https://www.who.int/emergencies/diseases/novel-coronavirus-2019/situation-reports>

<sup>2</sup> [http://www.xinhuanet.com/english/2020-04/03/c\\_138945238.htm](http://www.xinhuanet.com/english/2020-04/03/c_138945238.htm)

<sup>3</sup> <https://www.thejakartapost.com/news/2020/04/04/indonesia-to-have-enough-ppe-as-manufacturers-agree-to-produce-17-million-units-govt.html>

<sup>4</sup> <https://www.who.int/news-room/detail/03-03-2020-shortage-of-personal-protective-equipment-endangering-health-workers-worldwide>

<sup>5</sup> <http://global.chinadaily.com.cn/a/202003/29/WS5e802a69a310128217282c58.html>

<sup>6</sup> <https://la.usembassy.gov/u-s-provides-personal-protective-equipment-to-lao-pdr-in-response-to-coronavirus-outbreak/>

<sup>7</sup> <https://www.thestar.com.my/news/regional/2020/04/04/vietnam-assists-laos-to-fight-covid-19-with-medical-supplies>

<sup>8</sup> [http://www.wcoomd.org/en/media/newsroom/2020/april/joint-wco-who-hs-classification-list-for-covid\\_19-medical-supplies-issued.aspx](http://www.wcoomd.org/en/media/newsroom/2020/april/joint-wco-who-hs-classification-list-for-covid_19-medical-supplies-issued.aspx)

<sup>9</sup> <https://www.globaltradealert.org/state-act/43488/germany-introduction-of-export-licensing-requirement-on-certain-personal-protective-equipment-in-response-to-covid-19-and-subsequent-termination>

<sup>10</sup> <https://www.globaltradealert.org/state-act/43506/eu-exports-of-certain-personal-protective-equipment-to-efsa-countries-and-other-territories-exempted-from-licensing-requirements>

<sup>11</sup> An MFN tariff refers to a tariff rate that a member country of the World Trade Organization (WTO) promises to impose on all its trading partners that are also WTO members.

<sup>12</sup> A preferential tariff is a tariff rate that a member of a free trade agreement (FTA) levies at a lower rate on imports from other FTA partners than on imports from non-FTA trading partners.

<sup>13</sup> <https://asean.org/storage/2020/04/FINAL-Declaration-of-the-Special-ASEAN-Summit-on-COVID-19.pdf>

<sup>14</sup> <https://www.scmp.com/week-asia/politics/article/3079899/asean-holds-special-coronavirus-summit-will-blocs-plans-come>

<sup>15</sup> <https://www.scmp.com/week-asia/politics/article/3079899/asean-holds-special-coronavirus-summit-will-blocs-plans-come>

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