

PERSPECTIVE

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Did China Eke out a Vaccine Diplomacy Victory in Southeast Asia?

*Khairulanwar Zaini**



A health worker checks the containers of Covid-19 vaccine produced by China's Sinovac, as they arrived in Surabaya on 13 January 2021, with the sprawling archipelago of nearly 270 million kicks off a mass inoculation drive in a bid to control soaring case rates. Photo: Juni Kriswanto/AFP.

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EXECUTIVE SUMMARY

- This Perspective examines the 2021 Covid-19 vaccine portfolios of five Southeast Asian (SEA5) countries—Cambodia, Indonesia, Laos, Myanmar and the Philippines—in terms of the different vaccine brands, their production provenance, and whether the vaccines were procured or donated.
- The most heavily reliant on China-made vaccines were Cambodia (88.5% of its portfolio) and Indonesia (68%), and the two countries secured their supplies mainly through procurements rather than donations.
- Laos was entirely dependent on vaccine donations and 55% of its portfolio were China-made.
- Western-made vaccines formed the bulk of the Philippines' vaccine inventory (68%).
- There was a 60:40 split between China-made and India-made vaccine supplies to Myanmar, which had to make do without any Western-made vaccine after the February coup.
- China's strategy of "flooding the zone" early with its vaccines has somewhat succeeded as Southeast Asian respondents in an elite opinion poll credited Beijing for providing the most vaccine support to the region, despite the predominantly commercial nature of China's vaccine supplies.
- For the SEA5, their primary consideration in vaccine acquisition in 2021 was availability. However, with the ramping up of production capacity of Western-made vaccines and the preference for mRNA vaccines for booster shots, a pivot to Western-made vaccines is expected to be a trend in Southeast Asia in 2022.

INTRODUCTION

This Perspective surveys the inflows of Covid-19 vaccines in 2021 to five Southeast Asian (SEA5) countries—Cambodia, Indonesia, Laos, Myanmar, and the Philippines. The SEA5 are neither meant to be illustrative nor representative of Southeast Asia as a whole; rather, they were chosen for the relative availability, accuracy and comprehensiveness of the data about their vaccine inflows.

What will follow is an examination of the SEA5's respective vaccine portfolios in terms of the different vaccine brands and the production provenance of these vaccines (i.e., the country in which the vaccine was developed and/or manufactured).¹ Except for Myanmar, most of the SEA5 primarily sourced for vaccines from China and the West, though some relied on India-made and Russia-made vaccines to supplement their inventory. This article also looks into the manner in which the five countries secured their vaccines, whether through donations or purchases.² These details contextualise how China's considerable vaccine deliveries to the region in early 2021 helped Beijing to edge out the United States in the vaccine diplomacy race, even though (i) most of China's vaccine supplies were commercially procured by the recipient countries, and (ii) the United States was the largest single donor of vaccines to the SEA5.

THE VACCINE PORTFOLIOS OF THE SEA5

Cambodia

Of the five countries, Cambodia was the most reliant on China-produced vaccines. Out of the 38.2 million doses of Covid-19 vaccines the country received in 2021, 28.4 million and 5.4 million were Sinovac and Sinopharm respectively. The two Chinese vaccines accounted for 88.5% of Cambodia's total vaccine supplies for the year (**Error! Reference source not found.**).

After Sinovac and Sinopharm, AstraZeneca had the third-largest vaccine presence in Cambodia (2 million doses, or 5.3%). It constituted roughly half of Cambodia's inventory of Western vaccines. The amount of mRNA vaccines in Cambodia was limited, with 783,000 doses of Pfizer (2.1%) and 188,160 doses of Moderna (1.1%).

To acquire its vaccine supplies, Cambodia relied more on procurement than on donations. Around 64.1% of Cambodia's vaccine supplies were procured on a commercial basis (Figure 2), with the bulk coming from its order of 23.5 million doses of Sinovac and one million doses of Sinopharm. Out of Cambodia's 33.8 million doses of China-made vaccines in 2021, only 8.9 million—or over a quarter—were donated.

However, China's bilateral donations to Cambodia still outstripped the contributions of other Western countries. China's gift of 8.9 million doses represented 23.3% of Cambodia's total supplies, in comparison to the West's donation of 3.5 million doses (9.3%). Meanwhile, the COVAX Facility provided Cambodia with around 1.3 million free doses, which collectively accounts for 3.3% of the country's vaccine supplies.

Figure 1. Cambodia’s vaccine portfolio in 2021

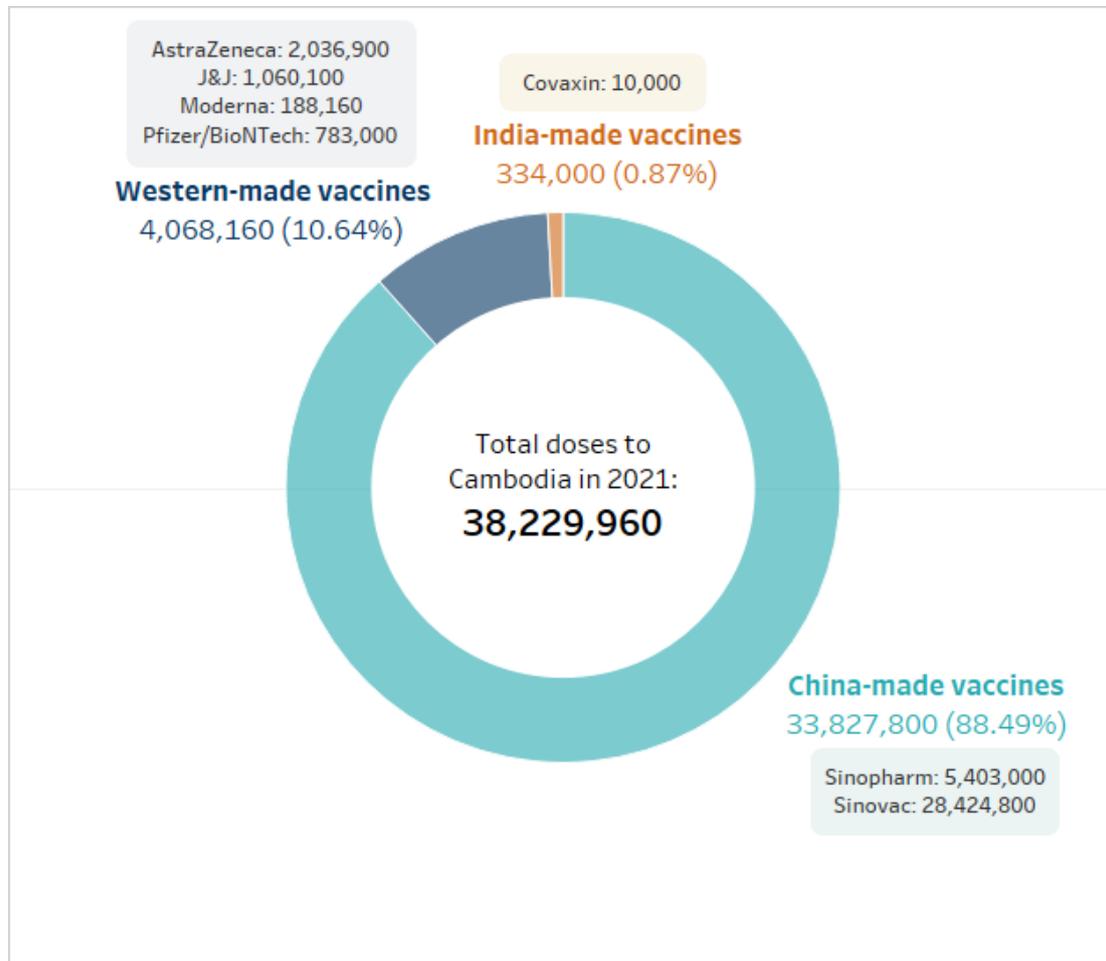
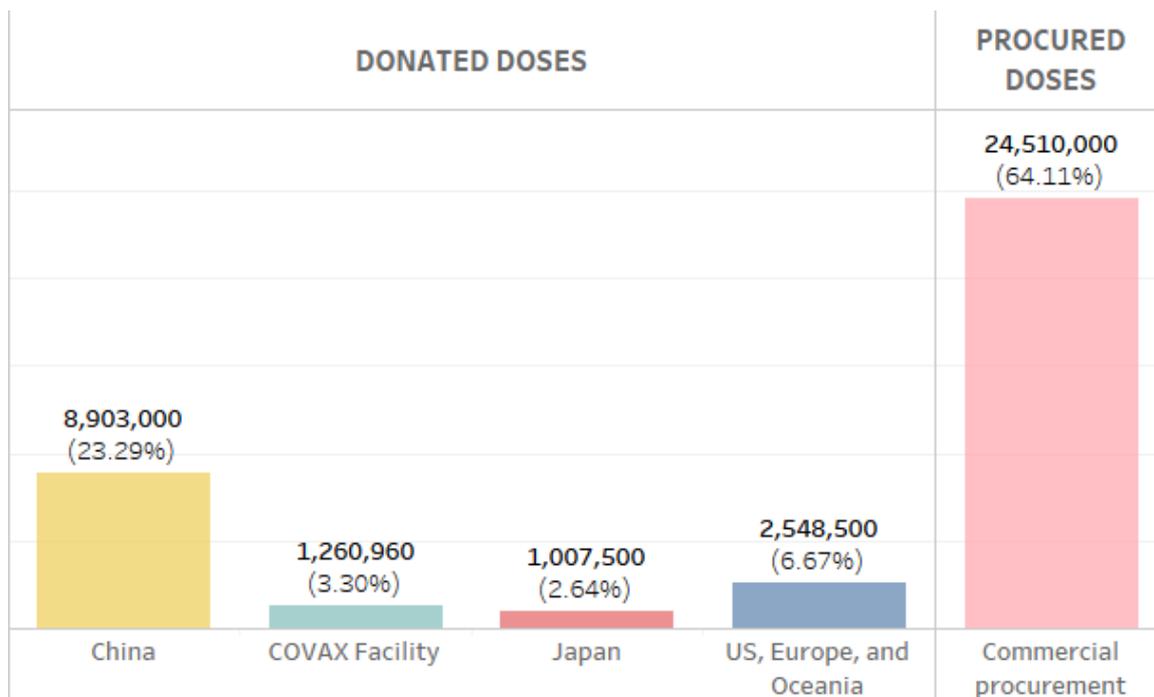


Figure 2. Cambodia’s vaccine portfolio by origin and mode of acquisition



Indonesia

China-made vaccines dominated Indonesia's vaccine supplies in 2021. The country received 210.5 million doses of Sinovac and 5.7 million doses of Sinopharm, which together accounted for 67.9% of Jakarta's vaccine portfolio. The bulk of the remainder were Western-produced vaccines, including 46.2 million AstraZeneca shots (14.5%), 25 million shots of Pfizer (7.9%) and 21 million shots of Moderna (6.6%) (

Laos

Slightly over half of Laos' 2021 supplies were China-made vaccines, with Sinopharm (5.8 million doses) and Sinovac (0.7 million doses) respectively forming 49.3% and 6% of the country's inventory of 11.7 million shots. After Sinopharm, AstraZeneca (3.2 million doses, or 27.2%) and J&J vaccines (1.7 million doses, or 15.5%) were the other two major vaccines in Laos (Figure 5).

The country was the only one among the SEA5 to use both India- and Russia-produced vaccines to supplement its stocks. (The other four countries generally sought either India- or Russia-made vaccines, but not both.) Laos had limited access to mRNA vaccines, having received only a tiny supply of 100,620 Pfizer doses from the COVAX Facility.

Laos was entirely reliant on donations for its vaccine supplies. China was the largest donor with 6.5 million shots, while the rest of Laos' inventory was donated by Western countries (3.3 million doses), Japan (938,820 doses), the COVAX Facility (887,820 doses), and Russia (60,000 doses). The United States was the second largest overall donor, with around one million J&J shots, followed by Japan with 938,000 doses of AstraZeneca (

Figure 6).

Figure 6

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Roughly three-quarters of Indonesia’s vaccine stocks in 2021 were procured. Most of Jakarta’s procurement budget was spent on 196.5 million doses of Sinovac (**Error! Reference source not found.**).

In terms of dose donations, Western countries were major benefactors and collectively provided Indonesia with 58.2 million free shots, which amounted to 19% of its total vaccine supplies in 2021. The United States, for instance, singularly accounted for 8% of Jakarta’s inventory with a donation of 9.5 million Moderna shots and 16 million Pfizer shots. In contrast, China donated 2 million doses of Sinovac and 200,000 doses of Sinopharm — fewer than Japan’s vaccine aid package of 2.4 million AstraZeneca doses.

Figure 3. Indonesia’s vaccine portfolio in 2021

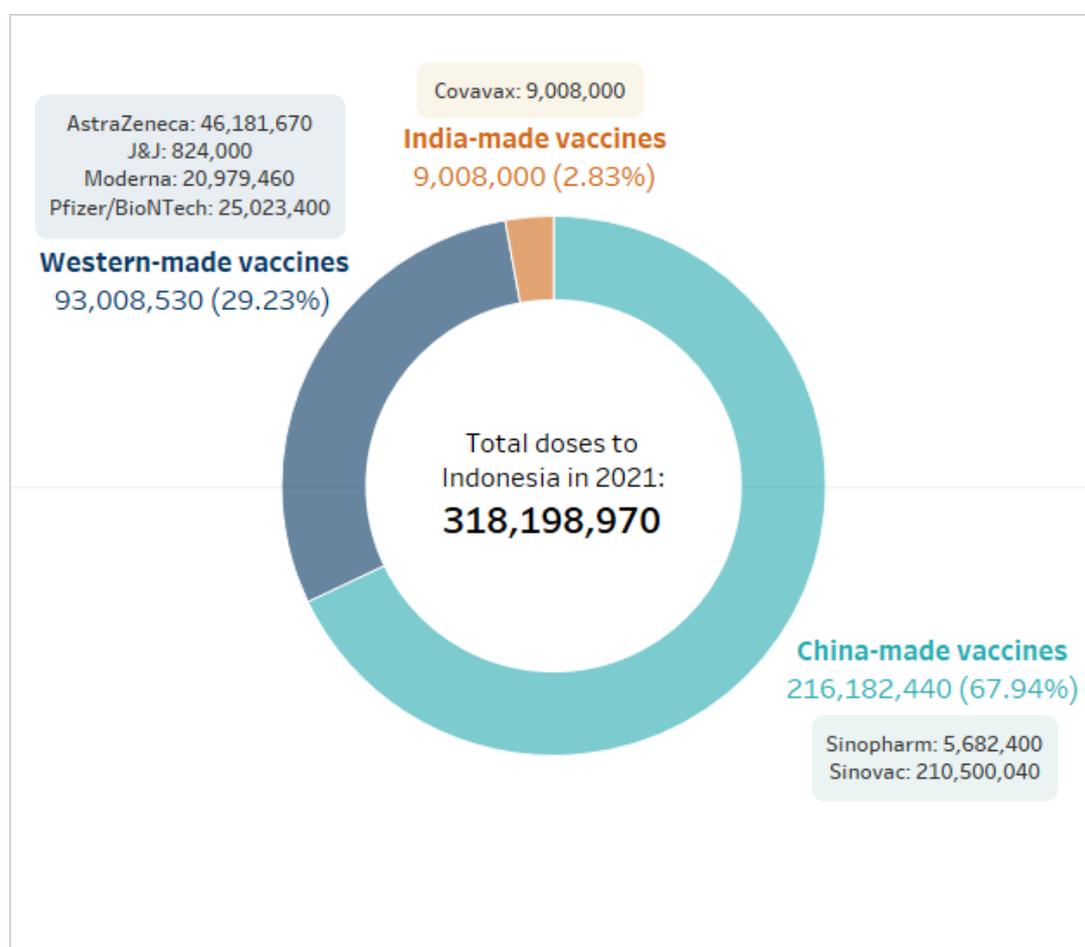
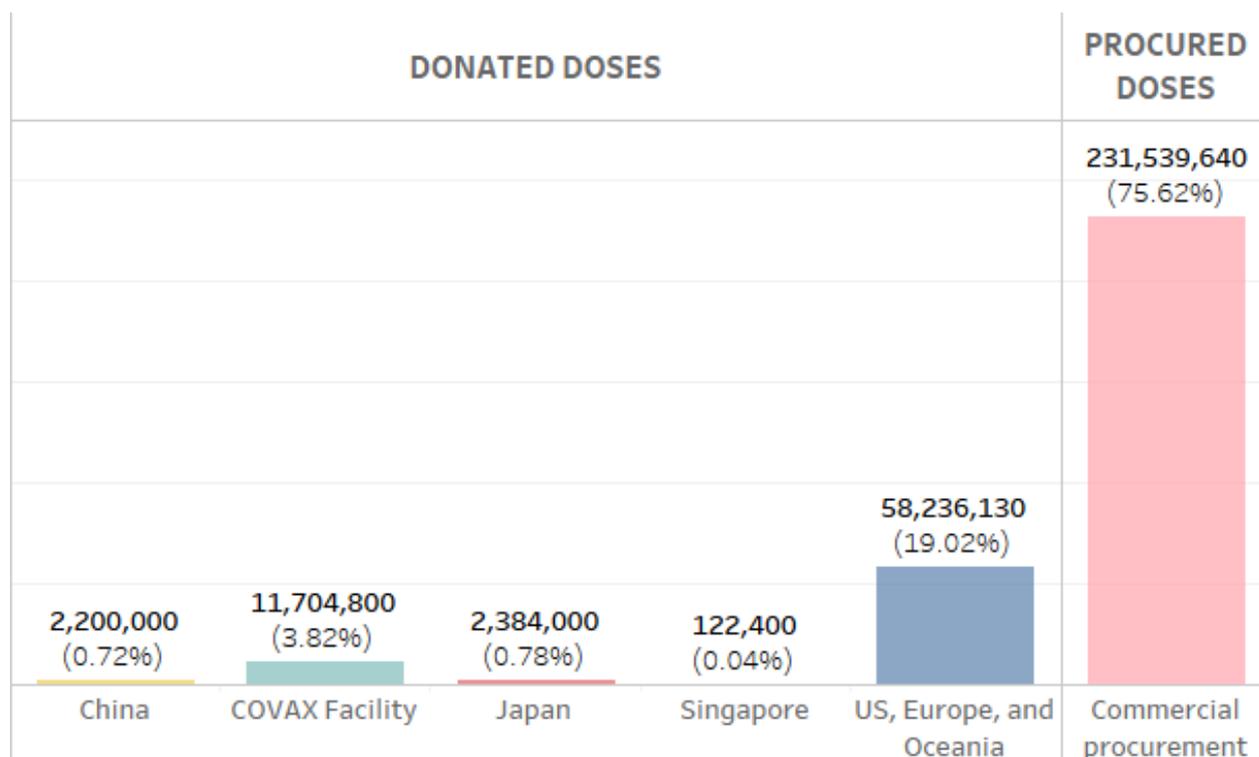


Figure 4. Indonesia’s vaccine portfolio by origin and mode of acquisition



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Figure 5. Laos' vaccine portfolio in 2021

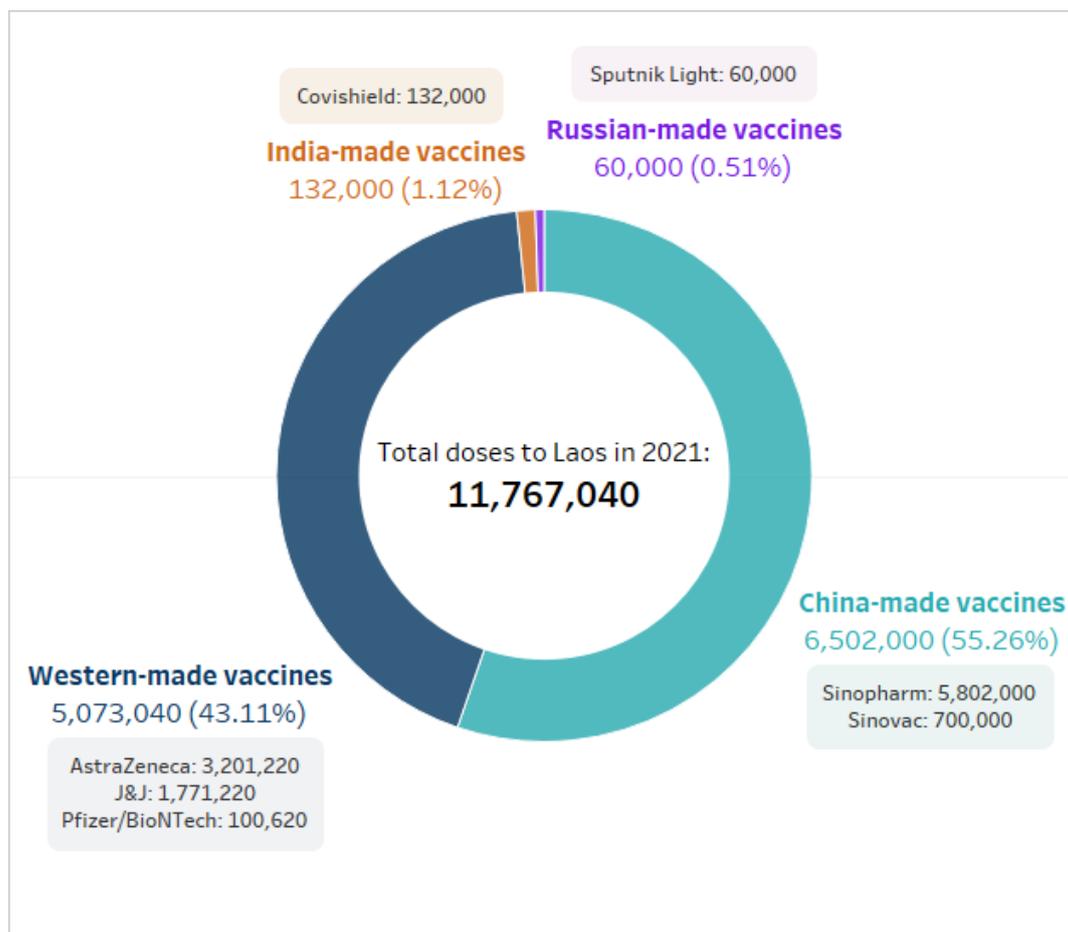
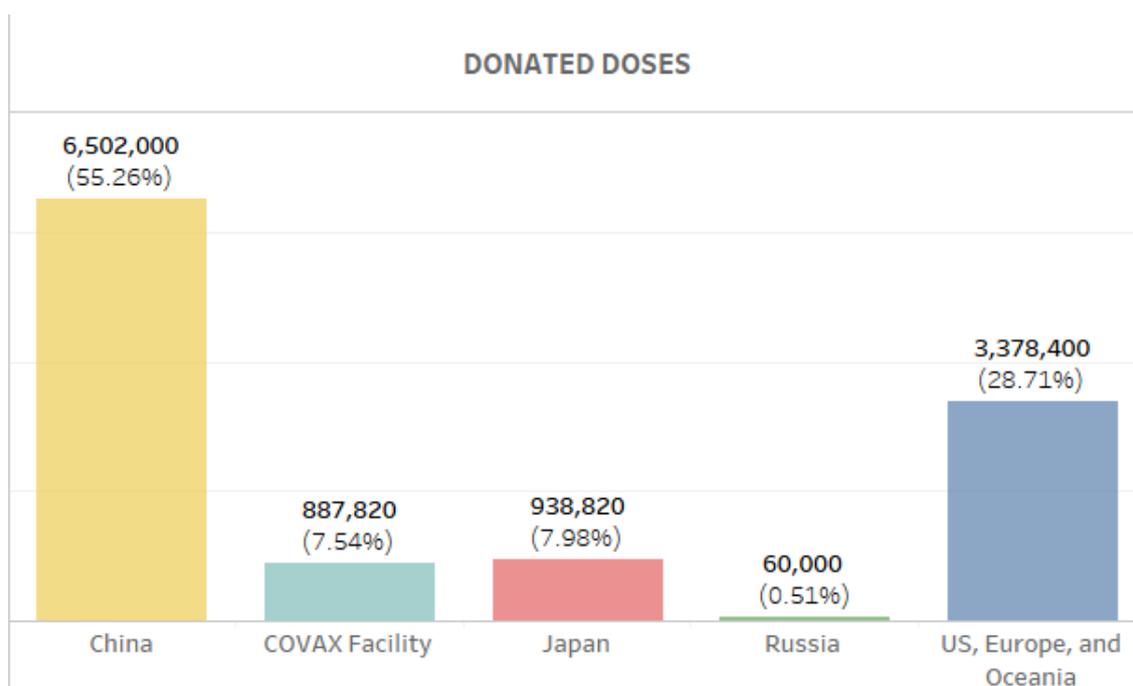


Figure 6. Laos' vaccine portfolio by origin and mode of acquisition



Myanmar

As a result of its diplomatic isolation after the February 2021 military coup, Myanmar could only secure China- and India-made vaccines. Out of the total reported supply of 48,436,000 shots in Myanmar's portfolio, China-made vaccines had a slight edge over India-made vaccines by a ratio of roughly 3:2 (

Figure 7).

73.3% of Myanmar's supplies were procured (Figure 8). The country bought 18 million and 2 million doses of Sinopharm and Sinovac respectively from China (41.3%), and 100,000 and 15.4 million doses of Covaxin and Covishield respectively from India (32%).

In terms of dose donations, China outpaced India by a factor of 2.5. Beijing offered Myanmar 2.2 million and 7 million doses of Sinopharm and Sinovac respectively at no cost (amounting to 19.7% of Myanmar's total vaccine supplies), while New Delhi provided 1.2 million and 2.5 million free Covaxin and Covishield shots respectively.³ In sum, around a third of China's vaccine supplies to Myanmar was donated, while less than a quarter of India's was donated.

Due to the post-coup political turbulence, no deliveries from the COVAX Facility were made in 2021 (even though Myanmar qualifies for free COVAX shots). Western countries and aid organisations were reticent about engaging the junta regime, not least to avoid lending the latter legitimacy, especially since Myanmar's parallel National Unity Government (NUG) was trying to conduct its own pilot vaccination programmes in the Mon, Karen, Karenni and Shan border zones in cooperation with the "Ethnic Health Organizations" operating in those areas.⁴ Worries also remained over whether any supplied shots would indeed reach those in need. An August 2021 investigative report revealed a thriving black market for non-Chinese vaccines in Myanmar. Doses were priced at "a mark-up of up to 25 times", with a vial of Covishield normally costing US\$49 being sold for US\$1,215.⁵

Figure 7. Myanmar's vaccine portfolio in 2021

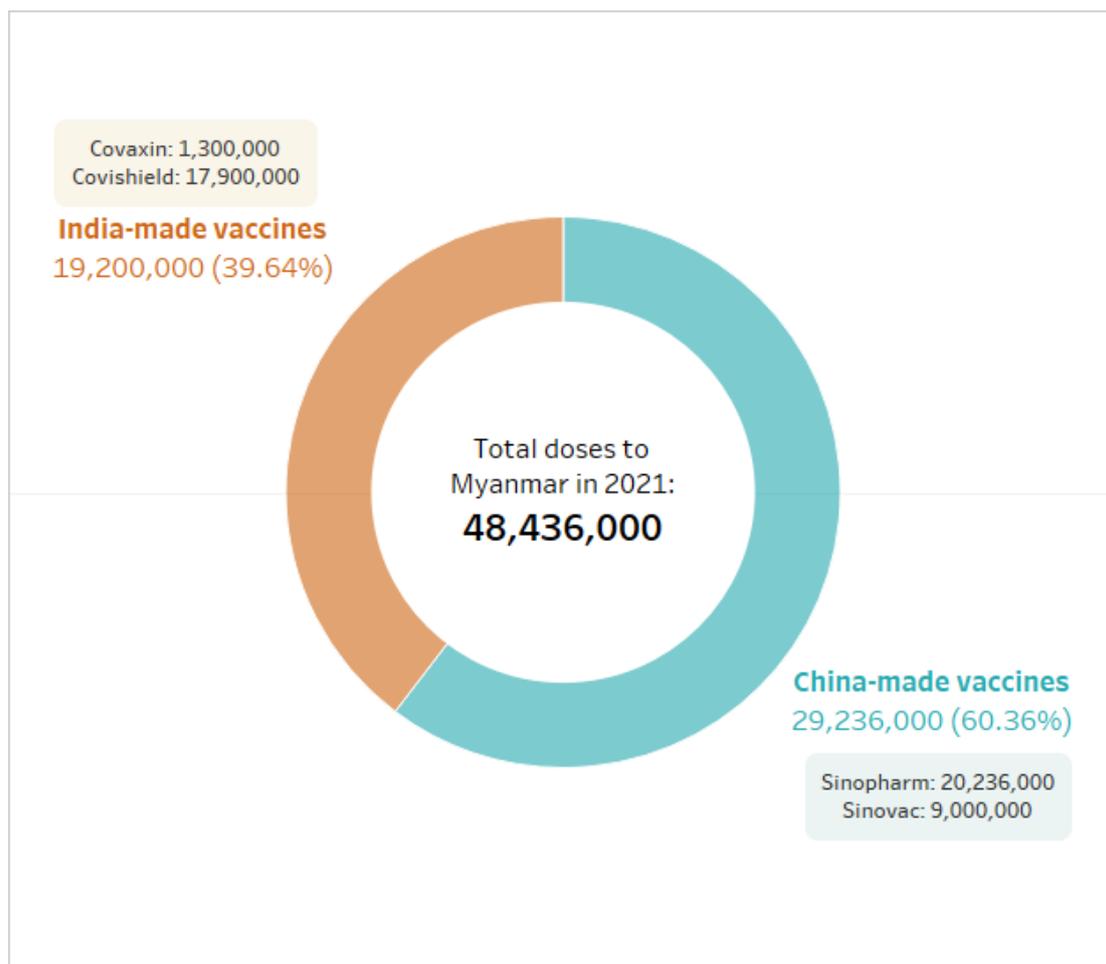
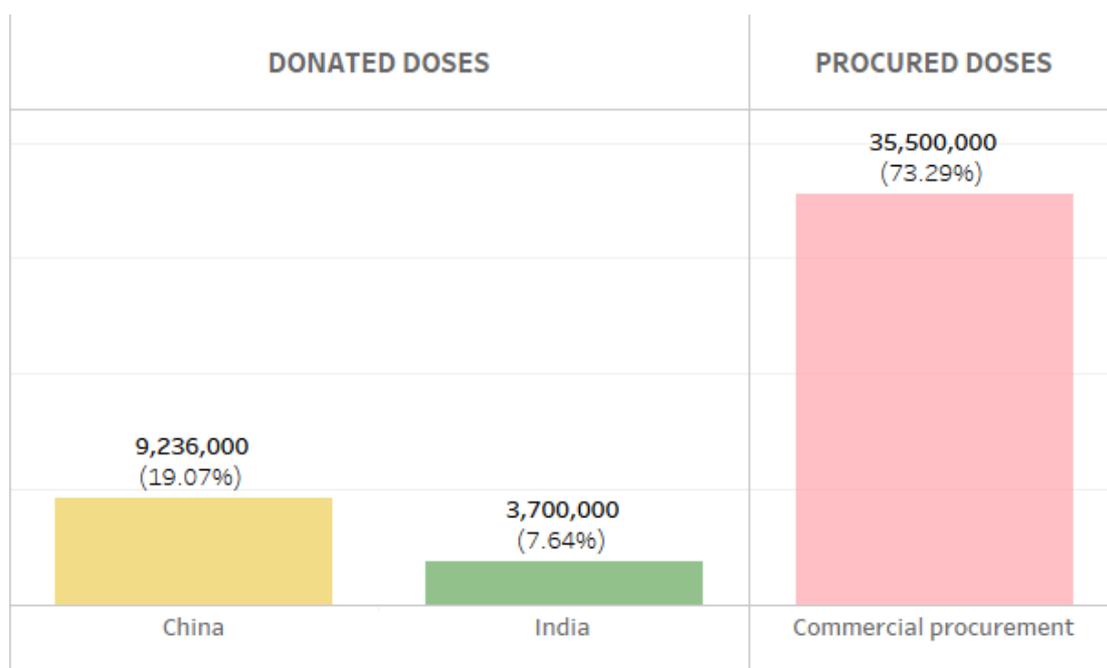


Figure 8. Myanmar’s vaccine portfolio by origin and mode of acquisition



The Philippines had the most diverse and evenly-balanced portfolio among the SEA5. It was also the only SEA5 country to rely on Western-made vaccines for the majority of its vaccination needs, with Pfizer, AstraZeneca, Moderna and J&J vaccines collectively making up 67.7% of its 2021 Covid-19 vaccine portfolio (Figure 9). China-made vaccines accounted for 27.4%, while Russia-made vaccines rounded up the remaining 4.9%. With 10 million Sputnik V and 195,000 Sputnik Light shots, the Philippines was the largest purveyor of Russian vaccines among the SEA5 and the wider Southeast Asian region. The fortunes of Russia-made vaccines in the Philippines did not appear to have improved since, with Manila reportedly mulling in early May 2022 whether to donate five million expiring Sputnik V doses to Myanmar.⁶

64.6% of the Philippines' vaccine supplies in 2021 were procured (Figure 10). The Philippines' vaccine portfolio by origin and mode of acquisition. Manila's three largest commercial orders were for Sinovac (52 million doses, making up 25% of its overall 2021 inventory), Pfizer (37.9 million doses, or 18.1%), and Moderna (20 million doses, or 9.6%).

The Philippines' strategic value to the United States was evident in the significant streams of dose donations to the country from the West. The United States and its allies in Europe and Oceania gifted over 56 million free shots for the Philippines (27%). The United States alone provided 10.5% of the Philippines' entire inventory with its donation of 22.2 million shots (including a bumper package of 16 million Pfizer shots). In comparison, China mustered a relatively paltry donation of 5.1 million doses (2.4%), which was fewer than the COVAX Facility's offering of 8.6 million doses (4.1%).

Figure 9. The Philippines' vaccine portfolio in 2021

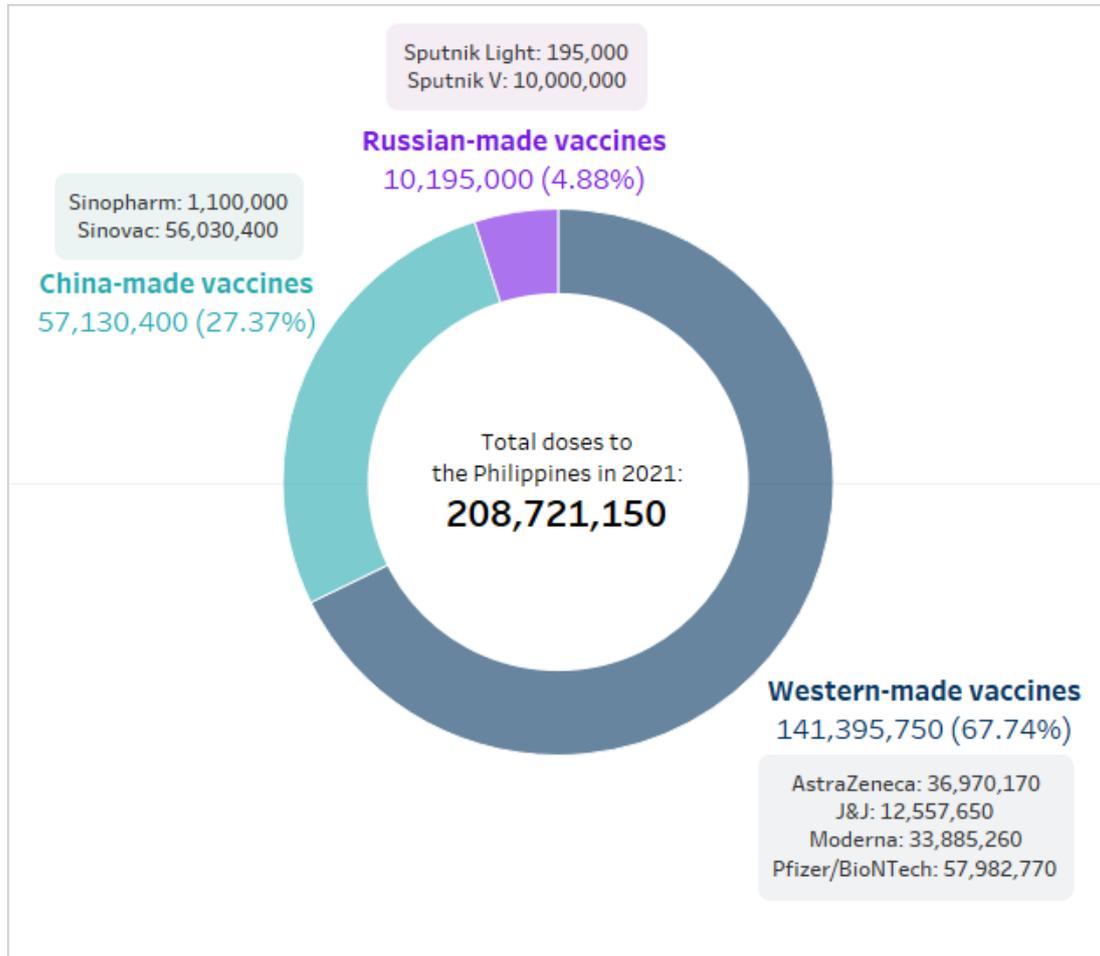
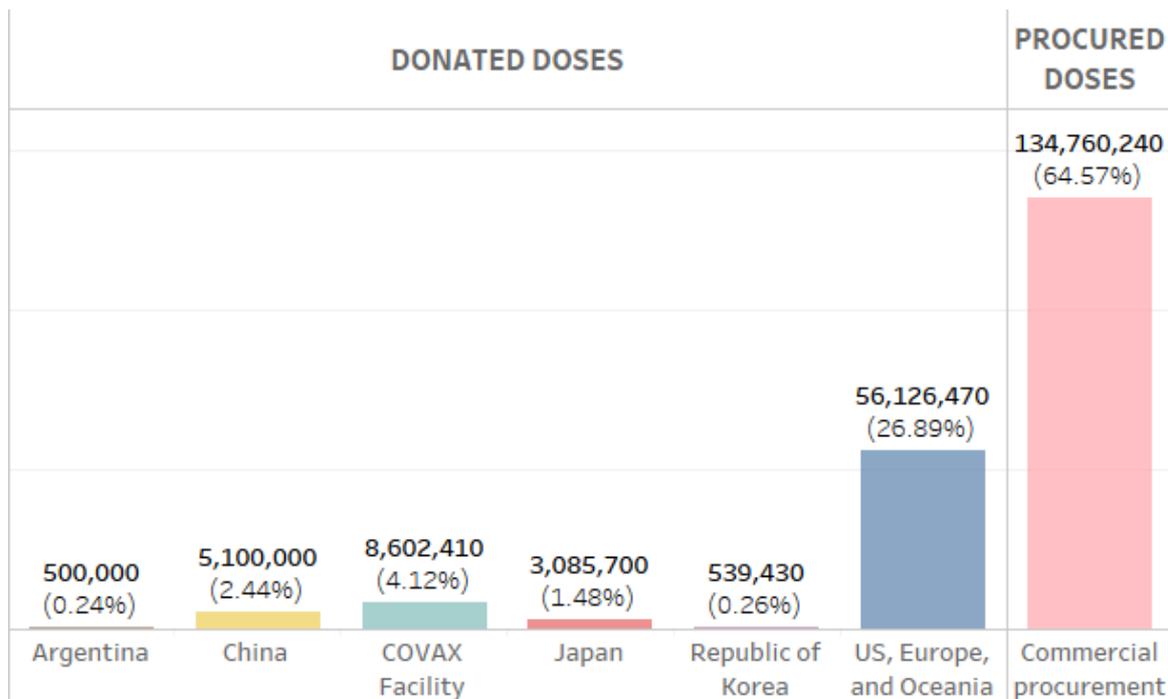


Figure 10. The Philippines' vaccine portfolio by origin and mode of acquisition⁷



THE VACCINE SOURCING TRENDS OF THE SEA5

The strong presence of China-made vaccines in the portfolios of the SEA5 primarily reflect China's ability and willingness to supply its vaccine (whether as commercial transactions or donations) in the first few months of 2021. The sheer volume of these early vaccine deliveries to Cambodia (Figure 11), Indonesia (Figure 12) and Laos (Figure 19) ensured that either Sinovac or Sinopharm was the predominant vaccine in these three countries.

There was a gradual uptick in the delivery of Western-made vaccines from June 2021 onwards as production capacity was ramped up and developed countries began releasing their excess supplies. It reached a point that the volume of Western-made vaccine deliveries to Cambodia, Indonesia and Laos eclipsed the size of China-made vaccine supplies in December 2021.⁸ Even in Myanmar, the volume of India-made vaccines significantly outstripped the number of Chinese doses in December 2021 (Figure 14).

The trend in the Philippines is slightly distinctive from the rest of the SEA5. From February to September 2021, the supplies of Western-made vaccines into the Philippines roughly kept pace with those of China-made vaccines. However, in the fourth quarter, the Western-made vaccine shipments overtook China-made vaccine supplies by a significant margin (Figure 15).

For the first three months of 2022, the available vaccine delivery statistics from three countries—Cambodia, Laos, and the Philippines—indicate broadly similar trajectories from the previous year.⁹ Continuing the trend of its reliance on China-made vaccines, Cambodia received 5 million doses of Sinovac, which was more than five times the size of the AstraZeneca dispatch in Q1 2022.

Meanwhile, Laos—whose dependence on China-made vaccines is not as acute compared to Cambodia's—was able to secure doses from a variety of sources in Q1 2022, reflecting its relatively-balanced vaccine portfolio in 2021. Along with a delivery of 1.5 million Sinopharm shots, Vientiane received 2.6 million Pfizer, 594,000 Covishield and 321,760 AstraZeneca doses. The predominance of Western-made vaccines in the Philippines also persisted. Eschewing China-made vaccines entirely, Manila obtained 28.5 million Pfizer doses in the first three months of 2022, while supplementing that inventory with a medley of 2.2 million shots of AstraZeneca, Moderna and J&J.

Figure 10. Monthly dose deliveries to Cambodia in 2021

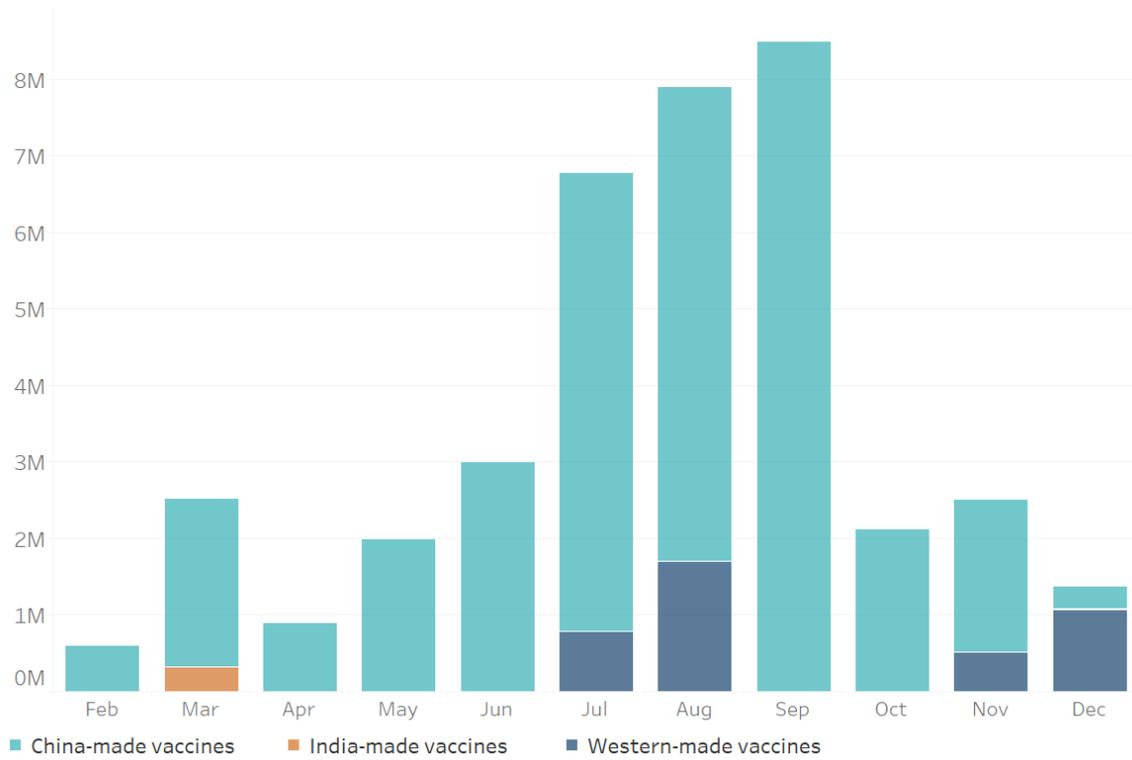


Figure 11. Monthly dose deliveries to Indonesia in 2021

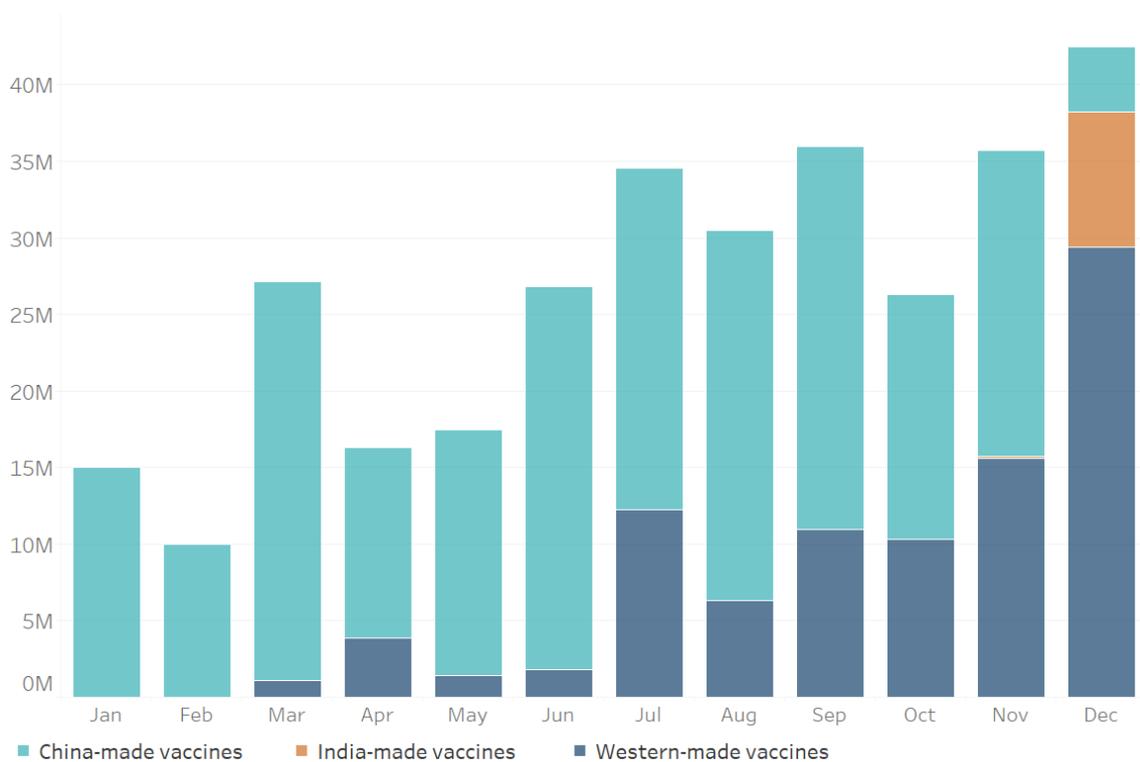


Figure 12. Monthly dose deliveries to Laos in 2021

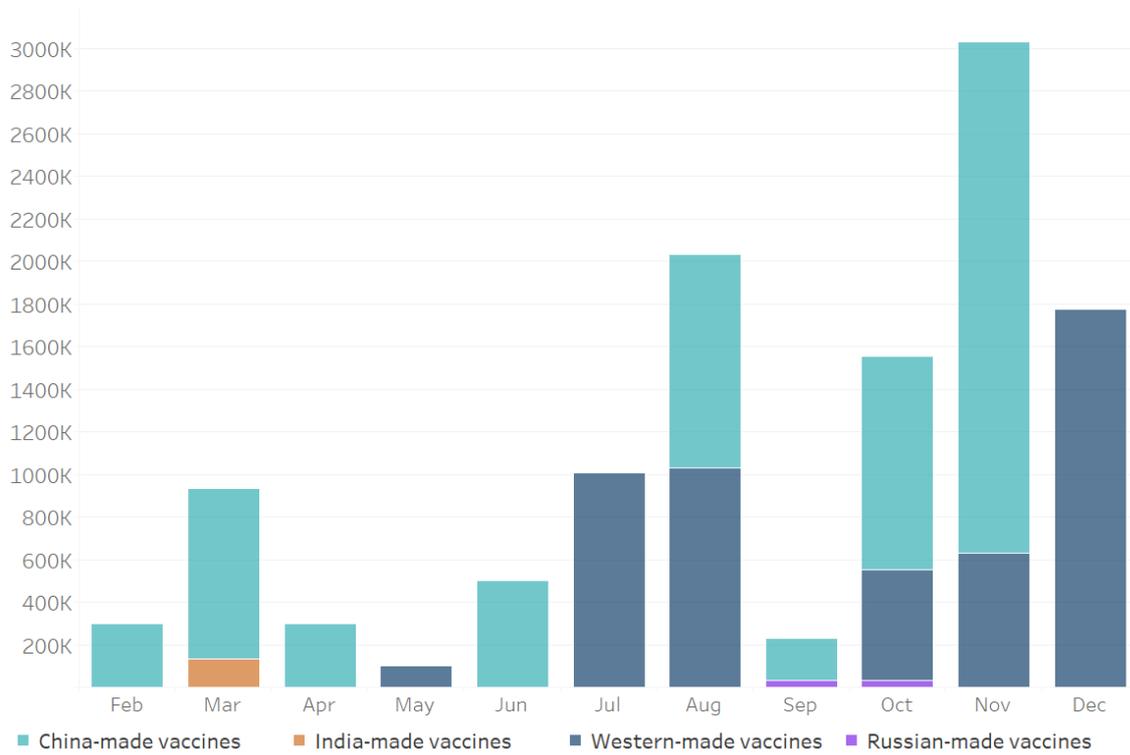


Figure 13. Monthly dose deliveries to Myanmar in 2021

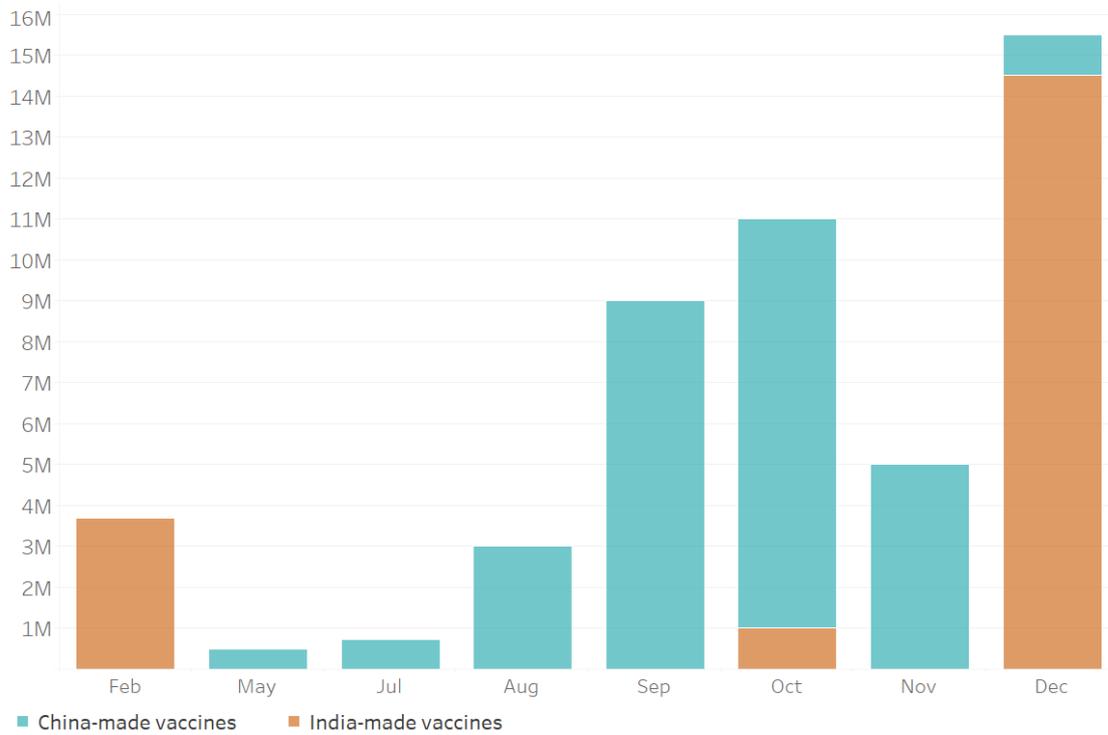
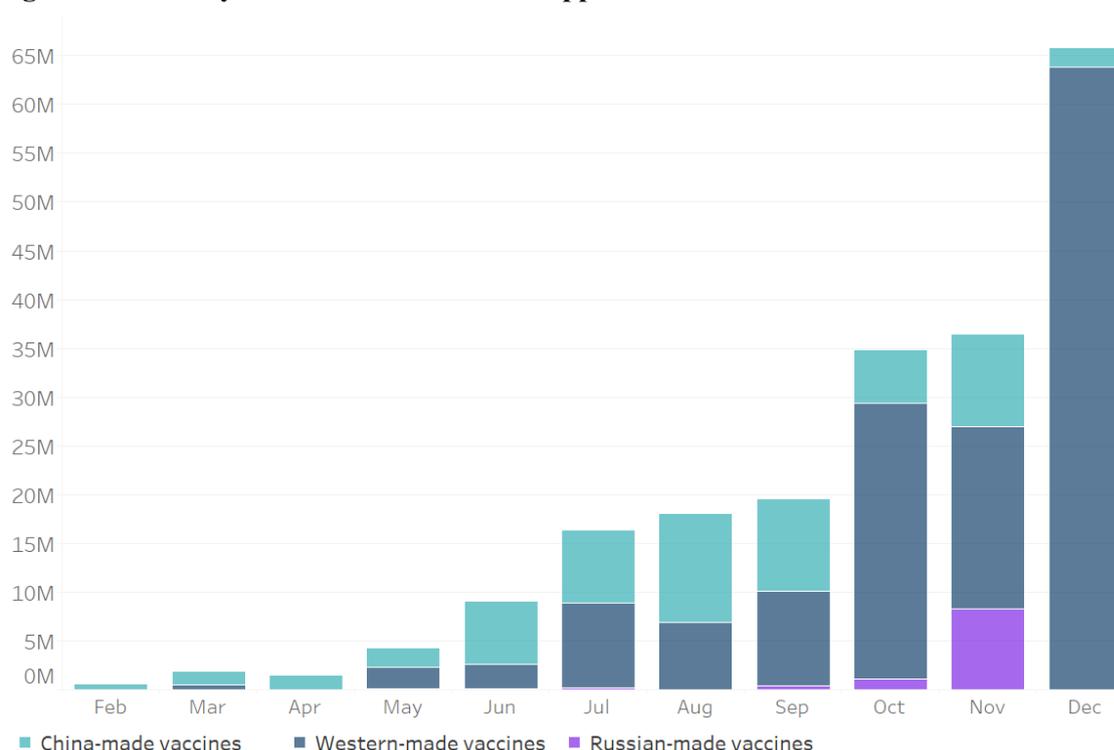


Figure 14. Monthly dose deliveries to the Philippines in 2021



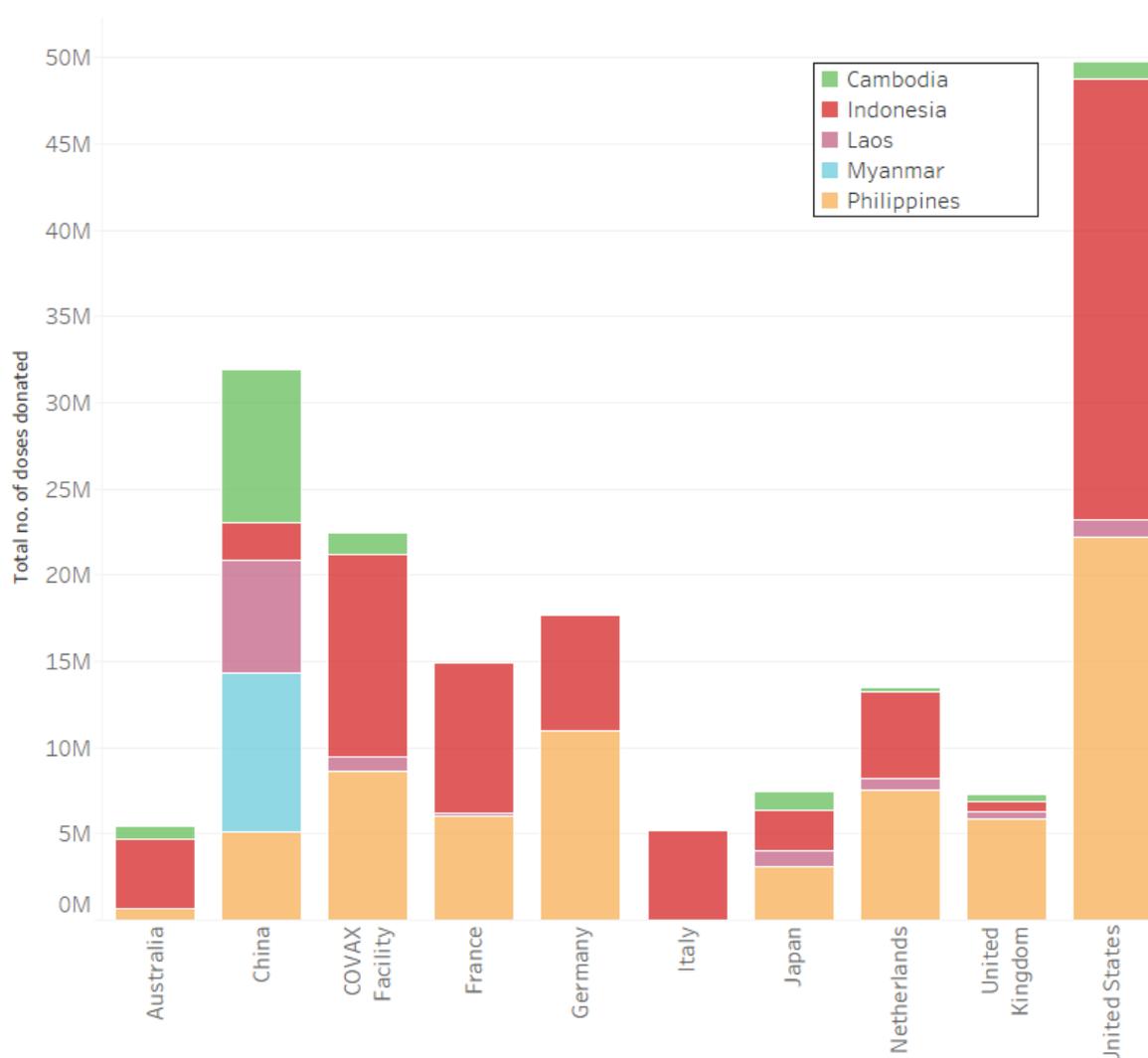
VACCINE DIPLOMACY: VICTORY TO BEIJING?

When vaccine supplies were relatively scarce in the first half of 2021, developed countries were criticised for prioritising doses for their own use. Meanwhile, with its successful Covid-19 containment at home, China committed itself to sending overseas “regular shipments of vaccines in sufficient quantities”, especially to Southeast Asia.¹⁰ This has prompted an observer to describe the pandemic as a “window of opportunity” for China to “boost its soft power”, identifying Cambodia and Laos as particularly “the most receptive to China’s assistance”.¹¹

However, a closer scrutiny of the delivery statistics suggests for a more nuanced reading of China’s assistance: while China was indeed the largest supplier of vaccines by far to the SEA5, it was not the biggest donor. Of the 330,441,840 doses that China delivered to the SEA5 countries in 2021, a whopping 90.3% were provided on a commercial basis. Commercial orders for Sinovac alone accounted for 274 million doses, at rates between US\$10 to US\$17 for each dose.¹² These vaccine sales to the SEA5 represent a hefty chunk of revenue for the Chinese vaccine manufacturer.

In terms of donations, China donated a total of 31.9 million doses to the SEA5. This is fewer than the 49.8 million shots donated by the United States, which holds the actual mantle of being the largest singular vaccine donor to the SEA5 in 2021 (Figure 16).

Figure 15. Volume of donated shots to the SEA5 from major donors in 2021



Note: This graph only includes donors that provided an aggregate of at least 5 million doses to the SEA5 countries in 2021.

Where the European Union is concerned, if we aggregate the vaccine donations by France (14,923,740 doses), Germany (17,686,100 doses), Netherlands (13,507,400 doses) and Italy (5,218,420 doses) to the SEA5, its total contributions of around 51.3 million free shots would exceed both that of the United States and of China.

Yet, findings from the ISEAS – Yusof Ishak Institute’s *State of Southeast Asia 2022* survey revealed that China was identified as the country that had provided the most vaccine support to the region (Table 1), suggesting that China’s strategy of “flooding the zone” early with their vaccines has somewhat succeeded.¹³ 57.8% of respondents chose China, while only 23.2% picked the United States in second place. It appeared that the predominantly commercial nature of China’s vaccine supplies to the region did not prevent respondents from crediting Beijing with substantial praise for its vaccine assistance.

Meanwhile, the European Union came in sixth at 2.6% – behind Australia in third (4.7%), Japan in fourth (4.1%) and India in fifth (3.6%) – despite the fact that Germany’s gift of 17.7 million doses alone was larger than the donations of the other three countries combined (16.6

million doses).¹⁴ To be fair, India’s strong performance in this survey question can be attributed to its vaccine support to Myanmar, which only received vaccines from India and China, and none from the European Union. More than a fifth of Myanmar respondents chose New Delhi—an outlier among the other Southeast Asian countries.¹⁵

Table 1. Answers to “Which ASEAN Dialogue Partner has provided the most COVID-19 vaccine support to the region?” by respondents’ nationality

	China	European Union	India	Japan	United States
ASEAN	57.8%	2.6%	3.6%	4.1%	23.2%
Cambodia	91.4%	1.4%	4.9%	1.2%	1.2%
Indonesia	68.7%	6.1%	0.8%	3.1%	13.7%
Laos	77.3%	0.0%	0.0%	2.3%	13.6%
Myanmar	40.0%	2.6%	22.6%	4.0%	25.4%
Philippines	46.5%	1.8%	0.0%	3.5%	40.8%

CONCLUSION

The foregoing data and analysis suggest that the primary consideration in vaccine acquisition for the SEA5 in 2021 was availability. Although all the countries avoided relying on a single source or brand of vaccine, China-made vaccines dominated supplies in four out of the five countries in 2021 due to the sizeable volume of deliveries in the earlier part of the year. However, the SEA5 started pivoting to Western-made vaccines (and in the case of Myanmar, India-made vaccines) once their availability improved in the second half of 2021, especially in the fourth quarter.

In May 2022, Nikkei reported that the exports of Chinese Covid-19 vaccines had plummeted by 97% from September 2021 due to concerns about their weaker efficacy, especially against newer variants.¹⁶ Thus, a sustained pivot to Western-made vaccines (particularly mRNA ones) is expected to be a trend in Southeast Asia in 2022, especially given the urgency of developing sufficient immunity in the population against new Covid-19 variants.

ENDNOTES

¹ The figures in this Perspective were drawn from the UNICEF Covid-19 Vaccine Market Dashboard and other publicly available data sources. Figures for the Philippines were corrected by cross-referencing with Rappler’s vaccine tracker (<https://www.rappler.com/newsbreak/data-documents/tracker-covid-19-vaccines-distribution-philippines/>), while figures for Myanmar were cross-checked with data from India’s Ministry of Foreign Affairs (<https://www.mea.gov.in/vaccine-supply.htm>).

² Two methodological points of clarification: first, the production provenance of a vaccine should not be equated with its origin. The presence of a China-made vaccine in a country’s portfolio is not necessarily due to a procurement from or donation by China; instead, there is a possibility that some of those doses were donated by the COVAX Facility. (All the SEA5 countries are eligible for free COVAX shots.) Second, this paper does not distinguish between dose donations from countries that were bequeathed bilaterally or routed through the COVAX delivery mechanism, since donor countries still retained the prerogative of determining (“earmarking”) where these dose donations were headed to. This paper does however treat the COVAX Facility as its own donor entity, since the Facility’s dose offerings were purchased with its own funds. For more details about bilateral and earmarked dose donations, and how COVAX works more generally, see Khairulanwar Zaini, “Building a Sailboat in a Storm”: *The Evolution of COVAX in 2021 and Its Impact on Supplies to Southeast Asia’s Six Lower-Income Economies*, Trends in Southeast Asia, no. 4/2022 (Singapore: ISEAS – Yusof Ishak Institute, 2022), pp. 15-18, 30-35.

³ This sum includes a bulk donation of one million Covishield doses to the Myanmar Red Cross Society in late December 2021, given during the visit of India’s Foreign Secretary Harsh Vardhan Shringla to the country—the first undertaken by a senior Indian official since the February 2021 coup. See Kallol Bhattacharjee, “India gives 1 million COVID-19 vaccine doses to Myanmar”, *The Hindu*, 22 December 2021, <https://www.thehindu.com/news/national/india-gives-1-million-covid-19-vaccine-doses-to-myanmar/article38015840.ece>.

⁴ “Statement on COVID-19 Vaccination Progress (20-11-2021)”, National Health Committee, 21 November 2021, <https://nhcmyanmar.org/statement-on-covid-19-vaccination-progress-20-11-2021/>. See also Htet Myat Aung, “Myanmar’s pandemic politics goes international”, *East Asia Forum*, 3 March 2022, <https://www.eastasiaforum.org/2022/03/03/myanmars-pandemic-politics-goes-international/>.

⁵ “Brokers sell Covishield vaccine on Myanmar’s black market for millions of kyat”, *Myanmar Now*, 21 August 2021, <https://www.myanmar-now.org/en/news/brokers-sell-covishield-vaccine-on-myanmars-black-market-for-millions-of-kyat>.

⁶ “Philippines planning to give Myanmar 5 million Sputnik V COVID-19 vaccines”, *Channel NewsAsia*, 2 May 2022, <https://www.channelnewsasia.com/asia/philippines-plan-give-myanmar-sputnik-v-covid-19-vaccines-2660676>.

⁷ Brunei’s donation of 2,000 doses and Russia’s donation of 5,000 doses are not reflected in the graph.

⁸ This could also be partly attributable to the smaller delivery packages of China-made vaccines across-the-board in December 2021.

⁹ The available figures for Indonesia and Myanmar were not reliable for any meaningful analysis. According to UNICEF Covid-19 Vaccine Market Dashboard, 64.6 million out of the estimated 91 million doses delivered to Indonesia in Q1 2022 were of “unknown” brand and origin. Similarly, for Myanmar, 9.4 million out of 13.1 million doses were marked as “unknown”.

¹⁰ Khairulanwar Zaini, “China’s Vaccine Diplomacy in Southeast Asia – A Mixed Record”, ISEAS Perspective, no. 2021/86, p. 4, https://www.iseas.edu.sg/wp-content/uploads/2021/06/ISEAS_Perspective_2021_86.pdf.

¹¹ Chheang Vannarith, “Fighting COVID-19: China’s Soft Power Opportunities in Mainland Southeast Asia”, ISEAS Perspective, no. 2021/67, p. 7, https://www.iseas.edu.sg/wp-content/uploads/2021/04/ISEAS_Perspective_2021_66.pdf

¹² These figures were sourced from the UNICEF Covid-19 Vaccine Market Dashboard. According to the database, the price per dose of Sinovac was US\$10 for Cambodia, between US\$13.60 and US\$17 for Indonesia, and US\$14.49 for the Philippines.

¹³ Sharon Seah et al., *The State of Southeast Asia: 2022* (Singapore: ISEAS – Yusof Ishak Institute, 2022), p. 13. The survey gathered elite opinion, and respondents were drawn from (i) academic and research institutions, (ii) finance and commerce, (iii) civil society, media and non-governmental organizations, (iv) government, and (v) regional or international organizations. Also, note that the particular wording of the questionnaire asked respondents for their assessments of the external powers’ vaccine assistance to the collective region, rather than to their own individual countries.

¹⁴ The survey results should also spell worries for the United Kingdom’s soft power in the region. Despite providing much more dose donations to the region than Australia, more respondents across the region identified Australia (4.7%) as providing stronger vaccine support than the United Kingdom (1.5%). Moreover, respondents in all Southeast Asian countries (with the exception of Malaysia, Laos and Myanmar) consistently ranked Australia above the United Kingdom. The United Kingdom also lagged behind Japan despite having offered around the same amount of vaccine donations.

¹⁵ The timing of the survey could perhaps be offered as another plausible reason for the European Union’s underperformance with respect to this particular question. The survey was conducted between 11 November and 31 December 2021, while the surge in European vaccine donations generally occurred in late December. As such, this uptick in donations might not have been reflected in the answers of respondents who took the survey early.

¹⁶ Shin Watanabe and Kentaro Takeda, “China’s vaccine diplomacy spoiled by omicron variant”, *Nikkei Asia*, 8 May 2022, <https://asia.nikkei.com/Spotlight/Coronavirus/COVID-vaccines/China-s-vaccine-diplomacy-spoiled-by-omicron-variant>.

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