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FROM ECONOMIC RECOVERY  
TO RESILIENCE?

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Asia Pacific  
Pathways to Progress  
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# The COVID-19 Pandemic and ASEAN: From Economic Recovery to Resilience?

Elaine Tolentino\*

## Introduction

In November 2020, the Asia Pacific Pathways to Progress Foundation Inc. (APPPFI) and the Konrad Adenauer Stiftung hosted a Track Two Observer (TTO) webinar to examine the prospects of Southeast Asia's economic recovery while reeling from the recession brought about by the COVID-19 pandemic. Participants from government agencies, the academe, and other non-government institutions came together and discussed the effects of COVID-19 on ASEAN regional economic cooperation and the efforts being carried out to mitigate and help in the region's economic recovery.

Of particular interest is how ASEAN member states (AMS) can jumpstart their economies and societies and those of their neighbors, as well as the Philippines' readiness and expected benefits in a post-pandemic regional economic situation. Some of the key issues that were discussed in the webinar include:

1. A review of the status of AMS' economic connectivity efforts, including other related connectivity efforts such as China's Belt and Road Initiative and the Regional Comprehensive Economic Partnership, as well as the effects of COVID-19 on their progress and implementation,

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2. An assessment of regionwide measures and initiatives being implemented as part of economic recovery efforts, and
3. An examination of the impact of the pandemic on the Philippines' economic interests and readiness in regional cooperative activities and economic integration.

This paper highlights ASEAN's efforts to promote economic connectivity and to jumpstart the economic recovery of the region, and provides recommendations considering the region-wide economic recovery initiatives and measures that are being carried out within and outside the region and the prospects of post-pandemic resilient economies.

## **The COVID-19 Pandemic and Its Impact on ASEAN**

The COVID-19 pandemic and its impact has been unprecedented. At the time of writing, the total number of cases worldwide has reached more than 72 million with more than 1.6 million deaths.<sup>1</sup> In the Southeast Asian region, while the number of confirmed cases and deaths related to COVID-19 have been considerably lower as compared to other geographic regions, the spread of the virus remains unstable.<sup>2</sup> The success in dealing with the virus has been mixed—Vietnam, Thailand, and Singapore able to flatten the curve, Cambodia, Laos, and Brunei have fewer cases and no reported deaths, while the Philippines and Indonesia continue to top the list in terms of the number of cases recorded.<sup>3</sup>

Southeast Asian governments on average took more rapid response measures to contain the virus. For instance, when the World Health Organization (WHO) first released an official report from China regarding an unfamiliar cases of pneumonia in late December 2019, Vietnam was swift to respond in January 2020 through extensive contact tracing, group isolation and quarantining all the way to third-tier contacts, and the use of public and military facilities proved not only to be cost-efficient but also highly effective.<sup>4</sup> In general, governments in Southeast Asia followed stringent containment responses: declaring a state of emergency, imposing lockdowns, border closures, and travel bans. Mass testing and contact tracing were also implemented with varying levels of national capacity to

test. Mass testing in the Philippines only began in the middle of April 2020 after the government received test kits from foreign donors and the University of the Philippines' SARS-2-COV-2 produced test kits widely became available. Meanwhile, the cases of Vietnam, Thailand, and Singapore (with its sound policy through pre-emptive planning, effective contact tracing, and stimulus packages for the local economy) proved that the spread of the virus could be effectively controlled. However, since COVID-19 infections are very unpredictable, it also deters Southeast Asian governments from opening their economies and borders at a faster rate.

Given the current state, the economic impact of the pandemic on Southeast Asian economies is expected to go below minus growth based on the 2020 economic forecasts of the Asian Development Bank (ADB), the International Monetary Fund, and the World Bank. The ADB in its June 2020 forecast predicted a 2.7% contraction, the IMF predicted in June 2020 a -2% growth for the ASEAN-5, and the World Bank in April 2020 forecasted a negative growth to range between -0.5% to -5%.<sup>5</sup> Economic channels that are hit hardest by the pandemic are trade, tourism, and domestic demand.

First, the World Trade Organization expects that global trade will shrink between 13% and 32% this year due to the pandemic's disruptions in economic activity around the world, and the decline is also expected to exceed that of the 2008-09 global financial crisis.<sup>6</sup> ASEAN economies are highly dependent on intra-ASEAN trade and investments and with other major economies including the United States, China, and the European Union. The imposition of lockdowns, including business shutdown, have disrupted the flow of tradeable goods in many parts of the world and is expected to affect Southeast Asian economies and their key trading partners negatively. Vietnam is the only ASEAN country that escaped the recession. Singapore is expected to be hit hardest as it depends the most on trade.

Second, border closures and travel bans have brought tourism to a halt, and countries such as Thailand and the Philippines bear the brunt of the crisis. According to the United Nations World Tourism Organization (UNWTO), a specialized agency, world tourism numbers in 2020 could plummet by as much as 80%.<sup>7</sup> A UNWTO May 2020 report also revealed that the Asia-Pacific region saw the "highest impact" both in absolute and

relative terms in the first quarter of this year (drop in visitor arrivals estimated to be at 33 million).

Third, the stringent and lengthy lockdowns combined with high unemployment rates will take a toll on domestic demand. It is expected that the Philippines will be hit harder as it has not only implemented the longest lockdown among Southeast Asian states but also has been less successful in containing the outbreak. At the same time, the ADB expects that cash remittances from overseas workers will drop by 20.2% as overseas Filipino workers are forced to return in mass back home.<sup>8</sup> Remittances from abroad account for about 10% of the country's GDP. The plunge in overseas remittances will not only induce the country further into recession but also place at risk of sinking into poverty individuals and family households who are highly dependent on these cash transfers.

## **ASEAN Connectivity Efforts**

Prior to the pandemic, the AMS have been engaged with the implementation of the Masterplan on ASEAN Connectivity (MPAC) 2025, which aims “to foster a seamless and comprehensive ASEAN connectivity and integration to enhance the region's competitiveness, inclusiveness, and promote a greater sense of ASEAN Community.”<sup>9</sup> By increasing ASEAN's connectivity and integration, MPAC aspires to narrow the development gap among AMS. The three main elements of MPAC are

1. Physical (transport, digitalization, and energy)
2. Institutional (trade, investments, and services), and
3. People-to-people linkages (culture, education, and tourism)

These elements are anchored in five pillars:<sup>10</sup>

1. Sustainable infrastructure
2. Digital innovation
3. Seamless logistics
4. Regulatory excellence
5. People-to-people mobility

The implementation of MPAC is significant given the rise of people's incomes in ASEAN, as people's movement from rural to urban areas increase, and the upgrading of education and skills.

In the 2016 World Bank Report, which aimed to assess ASEAN's progress on connectivity using quantitative indicators and economic models associated with the 19 strategies, the indicators and models note ASEAN's significant progress in some areas, including transnational trade and people mobility.<sup>11</sup> Other areas, however, still have large windows of opportunity for improvement. MPAC's progress is discussed below based on the three elements.

The physical connectivity element aims to improve and expand the physical connections among the region's markets and societies to reduce transaction costs of intra-regional trade and mobility, and to also improve access to communications, technology, and energy resources. Projects include the ASEAN Highway Network (AHN), the Trans-ASEAN Gas Pipeline, the ASEAN Power Grid (APG), Singapore-Kunming Rail Link (SKLR), the development of inland waterways, maritime network, ICT, and the development of an integrated multi-modal network. The implementation of the AHN, for instance, designated as the flagship program due to the inland transit of goods, overland transportation, and people's mobility in ASEAN, has expanded and upgraded albeit identified missing links in Myanmar. The Trans-ASEAN Gas Pipeline and the ASEAN Power Grid (APG) have also seen significant progress related to the construction of interconnections with half of the 16 APG projects projected to commercially operate between the years 2015 and 2020. Progress in the other projects, including the SKLR, inland waterways, maritime network, however, remains lagging. In area of ICT, the study has shown significant increases in internet use growth rates and is especially apparent in the Philippines and Cambodia. The pace of growth, however, is noted to be similar prior to the implementation of MPAC.

For institutional connectivity, increased regional trade integration is more noticeable, which suggests that trade facilitation measures and border management have had significant effects on trade, particularly in reducing cross-border transaction costs. ASEAN members have also seen an



appreciation on indices related to trade and logistics. Furthermore, land crossings among Cambodia, Laos, and Thailand have experienced significant improvements.

People-to-people linkages, which aim to promote deeper socio-cultural understanding in ASEAN and foster greater mobility, is the most challenging element to measure. The international exchange program in the tertiary level among ASEAN members is a key indicator but remains underutilized in building people-to-people connectivity.

## **Measures Taken to Jumpstart the Region's Economy**

The economic backlash caused by the COVID-19 pandemic has caused ASEAN governments to further appreciate the unparalleled need to fast-track ASEAN connectivity for the economic survival of the region. Several initiatives and measures have been adopted to ensure the continued implementation of MPAC 2025 even as the pandemic is still widespread. Most of these initiatives are in line with the goal of helping to jumpstart the economy of the ASEAN region. Among these initiatives and measures, which will be further discussed in detail, are the following: Hanoi Plan of Action 2020, the Regional Reserve of Medical Supplies, the ASEAN Comprehensive Recovery Framework, sub-regional cooperation among the Brunei Darussalam Indonesia Malaysia Philippines East ASEAN Growth Area (BIMP-EAGA) and the Greater Mekong sub-region, the ASEAN Plus Three Cooperation, and China's "health diplomacy" in the Southeast Asian region through the Belt and Road Initiative (BRI).

The Hanoi Plan of Action 2020, which was adopted by the ASEAN Heads of State in a Special ASEAN Summit on 14 April 2020 aims to strengthen the region's resiliency and economic response to the COVID-19 outbreak and to find ways to sustain the connectivity of supply chain amidst the pandemic.<sup>12</sup> The Plan of Action is one of the first decisive attempts of ASEAN to commit to the openness of the markets and to make certain the continuity of supply chain for essential goods. It seeks to identify and find solutions to trade bottlenecks related to the flow of essential goods,

including food, medicines, medical supplies, and other essential supplies. To achieve the Plan of Action, the AMS identified seven areas of cooperation:

1. The prohibition of unnecessary non-tariff barriers during the pandemic
2. The call for promptly informing AMS through the Secretariat of any trade-related measure
3. The enhancement of AMS cooperation to make certain the flow and transit of essential goods
4. The promotion of sharing information related to best practices on how to deal with the pandemic
5. To facilitate the uninterrupted flow of essential goods at land entry points, sea, and airports
6. To encourage dialogue among the local government units of AMS sharing borders in relation to customs clearance of essential goods
7. Accelerate the release of essential goods

The extent and multifaceted effects of the pandemic has also pushed ASEAN to adopt initiatives that emphasize a “whole-of-ASEAN community approach.”<sup>13</sup> The ASEAN Coordinating Council Working Group on Public Health Emergencies (ACCWG-PHE) was thus created to support the ASEAN Coordinating Council (ACC) in managing ASEAN’s coordinated responses. In addition, ASEAN has proactively coordinated and cooperated with non-member states, international organizations, and with the international business community to ensure the provision of essential medical supplies and information sharing, including information on medical advances, best practices in handling the pandemic, and strategies that aim to develop economic resilience.

Other measures taken by ASEAN to soften the impact of the pandemic the creation of the COVID-19 ASEAN Response Fund; the advancement of the ASEAN Regional Reserve of Medical Supplies for Public Health Emergencies and the ASEAN Strategic Framework for Public Health

Emergencies, both of which aim to enhance the region's capacity to respond to future pandemics and health emergencies. The most critical initiative that ASEAN has advanced so far is the establishment of a comprehensive framework that defines the region's strategies through the various stages of economic recovery (i.e., from re-opening to recovery to resilience) and promotes the region's resilience in the long run.

The ASEAN Comprehensive Recovery Framework (ACRF or Recovery Framework) is part of the region's collective efforts to combat the scale and depth of the pandemic's economic and societal impacts. The ACRF is the most comprehensive yet among ASEAN initiatives as it emphasizes strong coordination and cooperation among AMS, its stakeholders and partners outside the region. The main objective of the Recovery Framework is to arrange a coordinated exit strategy from the pandemic that also builds on the region's resilience. The Recovery Framework has five broad strategies, which are the following:

1. Enhancing health systems – aims to build and sustain current health gains and measures, including the strengthening of vaccine security and enhancing health human resources' capacity
2. Strengthening human security – aims to ensure social protection and welfare, including food safety and security
3. Maximizing the potential of Intra-ASEAN Market and broader economic integration – aims to ensure that markets are open to trade and investments, and that supply chain connectivity is strengthened
4. Accelerating inclusive digital transformation – aims to prepare both governments and the private business sector for the digital economy, including to promote the MSME's digital upskilling and provide access to digital technology
5. Advancing towards a more sustainable and resilient future – aims to promote sustainable development, with particular focus on green technology.

Apart from the abovementioned initiatives advanced by ASEAN, its sub-regional groupings—BIMP-EAGA and Mekong Subregion—are actively

pursuing ways to help each other's economic recovery from the pandemic by selectively opening their borders to tourists and other visitors in areas with low or no recent coronavirus incidents.<sup>14</sup> The easing of travel restrictions is also called a travel bubble or green lane (zone) and even suggesting the opening of an ASEAN travel corridor.<sup>15</sup>

In addition, the ASEAN Plus Three in August 2020 reaffirmed their commitment to help each other mitigate the effects of COVID-19 through the ASEAN Plus Three Plan of Action, which has similarly echoed measures to keep the markets open for trade and investments and to strengthen the economic resiliency of the region. They also asserted the need to strengthen health infrastructure, creation of reserve medical supplies, and increase support to micro and small medium enterprises (MSMEs). Furthermore, the ASEAN Plus Three has also affirmed their commitment to sign the Regional Comprehensive Economic Partnership (RCEP) Agreement in 2020, a regionwide free trade area that aims to enhance the region's economic integration and cooperation.

Lastly, because of the pandemic outbreak, China has recently launched the "Health Silk Road" (HSR) initiative as another component of its BRI.<sup>16</sup> Under the BRI's "People-to-People Exchanges" areas of cooperation, the HSR aims to increase infrastructure and socioeconomic development through a strengthened health, scientific, and educational research cooperation between China and BRI countries. Like the BRI, the HSR is also criticized for being ill-defined, but it also highlights China's emerging influence in regional and global health governance, including its enlarged role in the production of essential medical supplies and equipment.

## **Challenges to Policy Implementation and Recommendations**

Given the plethora of plans and initiatives crafted by ASEAN and ASEAN Plus Three Dialogue partners, their expected benefits will greatly depend on the ASEAN governments' capacity to implement them on the ground. Daunting challenges lie ahead for many ASEAN governments as

they strive for economic rebound while still wrestling to control the spread of the pandemic. Limited financial resources can also stifle governments' ability to achieve the expected outcomes of these various initiatives. ASEAN governments should therefore be more realistic in their approach and should always bear in mind that a holistic approach to recovery and resilience is necessary. This paper provides the following recommendations:

1. A **strong policy coordination** among AMS is a must to reach complete economic recovery. A comprehensive approach should be undertaken by AMS considering the goal of an inclusive and resilient ASEAN region. In crafting domestic policies, individual governments should always make efforts to coordinate their policies with other countries. And governments should also make sure that their policies are in line with efforts being done in the regional level.
2. Maximize the **pooling and sharing of resources** is another key to aid each other's recovery endeavors. This includes bringing together each country's experts to come up with more sustainable solutions to future pandemics and health crisis. The creation of the COVID-19 ASEAN Response Fund is a novel initiative to help governments "deal with the scarcity of medical supplies and equipment for frontliners" and to aid in prevention efforts in AMS.<sup>17</sup>
3. **Inclusion of other partners and stakeholders** in the implementation phase will greatly assist efforts on the ground. Stakeholders such as academics, the private sector, non-government organizations, and think-tanks should be involved in the crafting of policies that are in line with the region's recovery efforts. One particular issue that these various stakeholders can focus on is to craft policies that will assist and 'link' vulnerable MSME sectors in the global economy, especially prior to the full implementation of RCEP. A key issue for these MSMEs is competitiveness. Without a comprehensive package that will ensure their ability to compete in the region, AMS economies and the private sectors will never fully reap the benefits of RCEP.
4. AMS governments need to step up to **gain the public's confidence** with the ongoing insecurities brought about by the pandemic.

Governments need to ensure the delivery of comprehensive services (e.g., financial aid, health, etc.) especially to the most vulnerable sectors. A critical issue for governments now is gain the trust of the public in relation to latest advancements on COVID-19 vaccines. AMS governments need to ensure the public of the delivery of safe and effective COVID-19 vaccines. Other stakeholders such as NGOs can be tapped for additional support.

## Conclusion

The COVID-19 pandemic has altered the socioeconomic landscape of the ASEAN region in many ways unimaginable. The breadth and depth of its impact in the region and across continents have forced ASEAN governments to respond quickly to further prevent losses of lives and contractions of the economy, and to come up with goals and corresponding strategies to help one another recover and rebuild the region's economy that is resilient to a future pandemic and health crisis. And only through concerted and coordinated efforts among AMS and its partners and other stakeholders will help pull the region through a post-pandemic situation.

## Notes

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Established in 2014, Asia Pacific Pathways to Progress Foundation, Inc. (APPPFI) is an independent policy think tank that aims to promote peace, development, and cultural understanding for peoples of the Philippines and the Asia Pacific through research, international dialogue, and cooperation. It is the Philippine member of the regional network ASEAN Institutes for Strategic and International Studies.

The organization's work focuses on the implications of international and regional developments for the Philippines and its foreign relations. It has dedicated programs which cover international security developments, maritime affairs, connectivity and integration, and China.

Principally, APPFI undertakes three major activities. First, it conducts and publishes policy-oriented research, disseminates the same to relevant stakeholders, and provides quarterly analyses of regional developments. Second, it organizes roundtable discussions and national as well as international conferences, solely or in partnership with other institutions. Third, it hosts exchanges and develops issue-based partnerships with governmental and non-governmental organizations, academic institutions, and the private sector in the Philippines and the Asia Pacific.



## RESEARCH PROGRAMS

- CHINA PROGRAM

APPROF's original flagship program focuses on China and Philippines-China relations. The China Program stands on two pillars: (1) promoting better understanding among Philippine stakeholders of the implications of China's emerging role in East Asia and the world, and (2) strengthening linkages and engaging in Track Two diplomacy between these two neighboring countries.

- MARITIME DEVELOPMENT & SECURITY PROGRAM (MDSP)

This multidisciplinary program explores how the Philippines can enhance advantages and minimize threats and risks arising from its maritime strategic environment, looking toward both the internal and external dimensions. MDSP aims to generate timely discussions and appropriate recommendations regarding the strategic implications of Philippine maritime security, marine economic resources, and coastal development.

- REGIONAL INTEGRATION & CONNECTIVITY PROGRAM (RICP)

The RICP promotes a critical understanding of the political economy of regional development, and of economic trends and issues that affect Philippine national and regional interests. It seeks to generate insights and research that will enable the Philippines to strategically navigate through its international economic engagements, and interact beneficially with regional states and multilateral institutions.

- REGIONAL SECURITY ARCHITECTURE PROGRAM (RSAP)

The RSAP examines the evolving security environment, the role of multilateral and other forms of security associations, and institutional developments that affect Philippine and regional security. RSAP will be a hub producing research, intelligent commentary, and policy briefs from leading experts and specialists in the Philippines and the wider Asia-Pacific region.





Closely linked to, but independent from the Christian Democratic Union of Germany, Konrad Adenauer Stiftung (KAS) Philippines is a German political foundation. Established in 1964, KAS Philippines was the first ever KAS office in Asia. Ever since its inception, KAS has been actively working in the Philippines under the principles of freedom, justice, and solidarity.

With the main purpose of developing programs that boost the country's democratic institutions and processes, KAS strongly believes that human dignity and human rights are at the very heart of their work. Thus, KAS regards people as the starting point of its initiatives towards social justice, democratic freedom, and sustainable economic activity. KAS Philippines creates, develops, and sustains networks within the political and economic arenas by bringing people together who take their mandates seriously in society.

Given that KAS provides, not just research, but also robust and dynamic activities, the foundation considers itself not just as a think tank, but a think-and-do tank that works along socially equitable, economically efficient, and ecologically sustainable lines. KAS Philippines' country foci are institutional and political reform, the social market economy, and peace and development in Mindanao. The foundation works with civil society organizations, the academe, governmental institutions, political parties, think-tanks, the media, and decision-makers, creating strong partnerships along the way. Particularly, KAS Philippines aims to increase political cooperation in development cooperation at the national and international levels.

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