

# ASEAN ECONOMIC INTEGRATION BRIEF



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## From the Editor

The seventh issue of the ASEAN Economic Integration Brief (AEIB) comes at a time when ASEAN is facing unprecedented challenges from the Coronavirus Disease 2019 (COVID-19) pandemic. Two featured articles in the present AEIB focus on the pandemic, looking at how the COVID-19 reshapes the global economy and ASEAN's responses to the pandemic, respectively. Special feature infographics on the impact of COVID-19 on ASEAN are also included.

The first article features an interview with Victoria Kwakwa, the World Bank's Vice President for East Asia and the Pacific. She underscores that despite the blow to the global economy, COVID-19 presents ASEAN with the opportunity to improve the quality and reach of critical services, as well as implement reforms to support the region's long-term growth prospects.

The second article presents the latest updates on the COVID-19 situation in ASEAN and highlights ASEAN's responses to the crisis to date.

As in the case with the previous AEIB, the present issue also includes analysis of regional economic outlook and the latest updates on the AEC.

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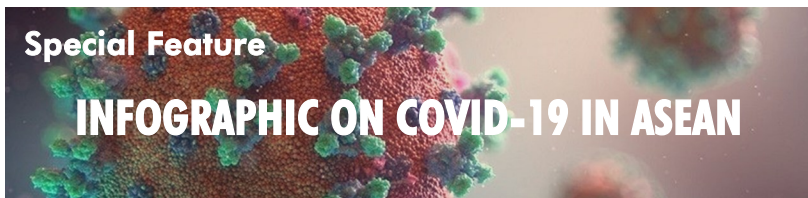
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### Special Feature

## INFOGRAPHIC ON COVID-19 IN ASEAN



## HOW CAN ASEAN PLAY A ROLE IN THE POST-PANDEMIC GLOBAL RESTRUCTURING

**VICTORIA KWAKWA**

*The World Bank's Vice President for East Asia and the Pacific*



**T**he COVID-19 pandemic is **re-shaping the global economy**. What are the key lessons to be learned by the region and how can ASEAN play a role in the post-pandemic global restructuring?

**COVID-19 has dealt a profound blow to the world economy and the ASEAN region**, exacting a terrible human cost and disrupting billions of lives and livelihoods. The dynamics of the pandemic - particularly its highly uneven impact - is now re-shaping the world around us.

The first lessons to be drawn are from countries like Singapore and Viet Nam that have succeeded in containing the disease with relatively low human and economic cost. What set them apart was their **preparedness and decisive, evidence-based action**, as well as **high-quality public health communications** and **a relationship of trust between the people and the government**. These are important lessons not just for battling this pandemic or other shocks but more broadly for development policy and action, especially in a world where countries must also increasingly cope with technological and policy shocks.

Even in ASEAN, which has suffered less than other parts of the world, we cannot take the transition to a post-pandemic stage for granted in either health and economic terms. To make that transition, a second important lesson is that **we must not treat containment of the disease and mitigation of the economic pain as separate goals** to be achieved with separate instruments. Instead, we need to take an integrated view of policy where health and economic authorities work together to help preserve both lives and livelihoods.

ASEAN can play a meaningful role by first **strengthening its own relief efforts, creating the basis for recovery, and then reviving growth**. The crisis presents an opportunity not just to improve the quality and reach of critical services in health care and social protection, but also to implement reforms that buttress long-term growth prospects.

Beyond that, ASEAN can be a model for the rest of the world by demonstrating how international coordination and cooperation can help fight the disease, reap the benefits from freer trade and investment, and stimulate economic growth.

**L**ike other regions, ASEAN is also adversely affected by the pandemic. What is your general assessment of **ASEAN economic response and intervention** during the COVID-19 pandemic?

**The economic response has been comprehensive, even taking into account fiscal and administrative constraints**. All the major economies in the region have put in place large macroeconomic policy support packages to mitigate the economic impact of the outbreak, including by providing direct assistance to firms and households. That has certainly helped mitigate some of the adverse fall-out. At the same time it has exposed areas that need to be strengthened.

In some countries social safety nets were stronger than in others, but even where they provided meaningful support to the poor, they did less to alleviate the economic distress of the lower middle-class. Similarly, even where formal firms received support, informal firms were often left to their own devices. But we must recognise that this is a once-in-a-lifetime crisis and governments cannot work miracles.

**C**ountries around the world are cautiously re-starting the economy, including in ASEAN, what strategies/policies are needed to **help those most affected by the pandemic** (micro, small, and medium enterprises, laid-off workers) **to restart**?

The most important preparation for re-starting economic activity is **to help firms and vital economic relationships survive the crisis**. The smarter the containment measures and the more evidence-based the re-opening, the less the risk of economic disruption and policy reversal.

As bankruptcies and unemployment can dampen economic activity over the long term, it is critical to protect workers and firm relationships, including through cash grants that help SMEs survive and wage subsidies that can speed up firms' recovery.



As countries bring the pandemic under control and start re-opening their economies, the priority must be to facilitate restructuring, debt resolution and recapitalisation of firms and financial institutions. Support for innovation in anticipation of the post-COVID-19 economy, for example by increasing the digital capacity of firms, could also be valuable.

IT IS VITAL FOR COUNTRIES TO INVEST  
IN HUMAN CAPITAL AND STRENGTHEN  
SOCIAL PROTECTION

**T**he pandemic has disrupted **supply chain connectivity**, which is critical to ASEAN's growth and integration. What, in your view, is needed to restore rapid supply chain and trade recovery, and how can the private sector play a role?

**Trade and global value chains are profoundly important for countries in the region, and the COVID-19 shock has hurt both.** By March the shock had hit hardest the 17 economies that account for 70 percent of world trade and are the key hubs in the network of global production. The worry is that this disruption will durably affect the structure of world trade and supply chains.

It is important first of all **to ensure that we do no harm through trade restrictions on imports or exports.** Inducing relocation of chains through subsidies and other incentives could distort the pattern of production away from that dictated by comparative advantage.

The economic recovery is expected to revive trade and resuscitate supply chains to some extent, and large private firms – especially lead firms in global value chains – are already helping to support their suppliers in developing countries. More generally, the beneficiaries of the economic revival will be those countries that are open to trade and foreign direct investment, are well connected to global markets, and have a predictable environment for doing business.

As the world economy recovers, ASEAN could support stronger international rules to restrain both protection and incentives to ensure that the world continues to reap the efficiency benefits of trade and global value chains.

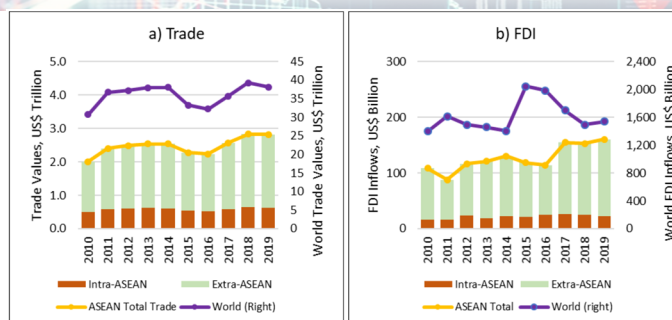
**A**SEAN is preparing for a **post-pandemic economic recovery**. In your opinion, what are the priorities for ASEAN to ensure an inclusive, sustainable and resilient recovery?

The post-pandemic recovery will offer **new opportunities to build a more sustainable, inclusive and resilient future** in a world transformed by the pandemic. For inclusivity, it is vital for countries to invest in human capital and strengthen social protection. Sustainability requires stronger environmental action and continuing efforts to decarbonise economies at both the national and international levels. For resilience, countries need to improve their disaster preparedness and rebuild economic buffers depleted by the COVID-19 shock.

The priorities are to step up economic reforms that improve competitiveness and support projects and programs which contribute to green growth. In parallel, **investments in human capital will be essential** to allow citizens to share the full benefits of the recovery and help them move to more innovative and productive livelihoods. ●



**FIGURE 1: Trade in goods and foreign direct investments**



Sources: World Trade Organization, ASEAN Secretariat, United Nations Conference on Trade and Development

**Given the global slowdown, ASEAN's trade and investments are likely to weaken.** Merchandise trade amounted to US\$ 2,815.2 billion in 2019, 0.3% lower than the US\$ 2,824.9 billion in 2018, when trade grew by 9.9% (Figure 1). Intra-ASEAN accounted for 22.5% of ASEAN's total trade, followed by China (18.0%), the US (10.5%), and the EU28 (10.0%)<sup>3</sup>.

In contrast, inflows of foreign direct investments (FDI) bucked the slowdown and rebounded by 4.9% in 2019 (compared to a drop of 1.2% in 2018) to stand at US\$ 160.6 billion. Among external partners, the US contributed the largest inflow with 15.2% of the total, followed by Japan (12.7%) and the EU28 (10.1%)<sup>4</sup>, while intra-ASEAN accounted for 13.9%. With the COVID-19 pandemic this year, both trade and investments are expected to manifest the adverse effects.

The economic impact of the COVID-19 pandemic has prompted governments **to issue more debt than ever before**. Majority of COVID-related stimulus financing comes from increased government borrowings.

The AMS have cast aside fiscal targets this year, giving priority to accommodative monetary and fiscal policies that would mitigate the pandemic's damage on the economy and on people's lives. Nevertheless, although the AMS' fiscal balances have been modest in recent years with fiscal deficits staying on or below 5% of GDP, fiscal space is still tight in view of the extent of the crisis. Similarly, while external debt and reserves ratios have been broadly stable, there are disparities in some AMS which could further strain policy space. This may lead to some governments resorting to foreign denominated loans.

**The pandemic is liable to have a prolonged impact on the macroeconomy.** A well thought out recovery plan to restore in particular fiscal discipline in the AMS would be vital in the post-pandemic period. ●

**T**he COVID-19 pandemic has put the global economy on a standstill. From a 2.9% growth in 2019, the global economy is expected to shrink by 4.9% this year, followed by a 5.4% recovery next year<sup>1</sup>. As well, protracted trade tensions have dominated the global environment in the past two years, adding to heightened economic uncertainties and volatilities in financial markets.

In spite of this, the ASEAN economy grew 4.6% in 2019, remaining close to the average growth of 5% over 2015-2018. However, the impact of COVID-19 on the ASEAN economy has likewise been substantial. For 2020, the region's economy is expected to contract by 2.7%<sup>2</sup>. Nevertheless, a quick recovery of 5.2% growth is expected in 2021.

**TABLE 1: Real gross domestic product, year-on-year growth (%)**

Country Group Name	2018	2019p	2020f	2021f
<b>World</b>	3.6	2.9	-4.9	5.4
<b>Advanced economies</b>	2.2	1.7	-8.0	4.8
<b>Emerging markets and developing economies</b>	4.5	3.7	-3.0	5.9
<b>ASEAN</b>	5.2	4.6	-2.7	5.2
Brunei Darussalam	0.1	3.9	1.4	3.0
Cambodia	7.5	7.1	-5.5	5.9
Indonesia	5.2	5.0	-1.0	5.3
Lao PDR	6.3	6.4	-0.5	4.5
Malaysia	4.7	4.4	-4.0	6.5
Myanmar	6.8	6.2	1.8	6.0
Philippines	6.3	6.0	-3.8	6.5
Singapore	3.5	0.7	-6.0	3.2
Thailand	4.2	2.4	-6.5	3.5
Viet Nam	7.1	7.0	4.1	6.8

Sources: International Monetary Fund WEO Update, Asian Development Bank ADOS, ASEAN Statistics (July 2020)  
Note: f - forecast

Since the outbreak, and as lockdowns and quarantines were enforced in many ASEAN Member States (AMS), job losses and business closures have mounted. This led to a **sharp fall in productive economic activities** particularly in hardest hit sectors such as tourism, aviation, manufacturing, as well as the vulnerable groups. Across the region, the AMS' performance in this pandemic varies (Table 1). Viet Nam, which has successfully contained the spread of the virus, is expecting a 4.1% growth this year. Likewise, Brunei Darussalam and Myanmar, which saw relatively small number of cases, may grow by 1.4% and 1.8%, respectively. For the rest of the AMS, contractions are likely, particularly for Singapore (-6.0%) and Thailand (-6.5%).

<sup>1</sup> International Monetary Fund, June 2020  
<sup>2</sup> Asian Development Bank, June 2020

<sup>3</sup> The share of EU27 (excluding the United Kingdom) is 8.7%  
<sup>4</sup> The share of EU27 (excluding the United Kingdom) is 5.3%

# UPDATES ON THE ASEAN ECONOMIC COMMUNITY

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

Under Viet Nam's Chairmanship in 2020 inspired by the theme "Cohesive and Responsive" ASEAN remains steadfast to deliver on its priorities for 2020 and resolute to mitigate the impact of the pandemic on the AEC.



## Under Viet Nam's Priority Economic Deliverables

This year, **13 priority economic deliverables** (PEDs) are pursued under **three main priorities**: to promote intra-ASEAN economic integration and connectivity, to deepen ASEAN engagement with the global community for peace and sustainable development, and to enhance the responsiveness and institutional capacity of ASEAN.

The ASEAN Digital Integration Index has been finalised and expected to be endorsed this year.

The development of the ASEAN Plan of Action for Energy Cooperation 2021-2025 is on-going, which will address transition towards sustainable energy, and is on track for endorsement this year.

The Baseline Report of ASEAN SDG Indicators is currently being developed and the online database portal will be launched in October 2020.

The development of a Roadmap and Action Plan to promote smart manufacturing development in ASEAN is on-going, as well as a timeline of planned activities.

To promote regional payment connectivity, the Implementing Policy Guidelines of the ASEAN Payments Policy Framework and Annex on Use Cases are ready for endorsement this year.

The ASEAN Guidelines for 5G Ecosystem Development in ASEAN and the multi-year proposal to promote affordable access to international mobile roaming services via a phased approach are being discussed.

The Regional Comprehensive Economic Partnership (RCEP) is at the final stage of preparing the agreement for signing in November 2020, as mandated by the Leaders.

The AEC Blueprint Mid-Term Review is underway with the preliminary report expected to be submitted to the AEC Council in November 2020.

The Roadmap on Combating Illegal, Unreported and Unregulated Fishing in the ASEAN Region (2020-2025) is being developed and is expected to contribute to sustainable fisheries in the region.

The Report on Promoting Sustainable Financing in ASEAN has been finalised for intersessional approval.

The concept note for Connecting Innovation Centres in ASEAN was approved in February 2020, discussion is underway on the Terms of Reference of the Centres.

The draft ASEAN Integrated Food Security Framework and Strategic Action Plan on ASEAN Food Security (2021-2025) has been finalised.

## AEC Key Achievement

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

On **trade in goods**, all the Tariff Rate Quotas (TRQ) in ASEAN have now been fully eliminated.

On the ASEAN Single Window (ASW), all 10 ASEAN Member States (AMS) have joined the Live Operation to exchange the ATIGA e-Form D through the ASW environment since December 2019.

On **standard**, the negotiations on the Mutual Recognition Arrangement on Type Approval for Automotive Products have been concluded and signing is targeted within the year.

On **finance**, the Guidance Notes on Developing a Monitoring and Evaluation Framework for Financial Inclusion was endorsed in early 2020.

The principle-based ASEAN Payments Policy Framework for Cross-Border Real-Time Payments and the Guidelines on ASEAN Local Currency Settlement Cooperation Framework have likewise been completed.

On **competition**, ASEAN recently developed the ASEAN Peer Review Guidance Document to facilitate the review of competition regimes in the region. In addition, the Toolkit for Formulating National Enforcement Strategies was also completed to guide AMS in devising national competition strategies.

On **tourism**, ASEAN adopted the Gender and Development Framework and its Work Plan 2020-2030; and the White Paper to implement facilitation of intra-ASEAN and international travel.

ASEAN also adopted the action agenda to promote digitalisation on **micro, small and medium enterprises**.

On **external economic relations**, the First Protocol to Amend the ASEAN-Japan Comprehensive Economic Partnership (AJCEP) Agreement to incorporate the AJCEP Trade in Services, Movement of Natural Persons, and Investment Chapters into the AJCEP Agreement will enter into force on 1 August 2020 for Japan, Lao PDR, Singapore, Thailand, and Myanmar. ●

## IMPACT OF COVID-19 & ASEAN RESPONSES

**L**arge-scale social restrictions to contain the spread of the COVID-19 has stifled the global economy. Border controls have disrupted movements of people and goods, while quarantines have put people's lives and economic activities on hold.

Recognising the unprecedented impact of the COVID-19 pandemic, **the AMS have rolled out various policy measures and stimulus packages to mitigate the damage on the economy**, particularly the vulnerable sectors. These measures fall into three broad categories: i) fiscal stimulus packages; ii) monetary policy and financial measures; and iii) sector-specific measures and interventions<sup>5</sup>. Nonetheless, the effectiveness of these measures also depends on the extent of the pandemic and on the effectiveness of government response.

Data from the first quarter of the year indicate that **the onset of the pandemic had considerable impact on economies across the region**, with substantial downside risk remaining (Table 2). Based on available data, the largest was a contraction of 1.8% in Thailand, followed by a 0.7% drop in Singapore. On the other hand, Viet Nam was able to post a growth of 3.8%, albeit still well below its usual

**TABLE 2: Real GDP growth in the AMS amid COVID-19**

AMS	AMS 2020Q1 <sup>p</sup>	ADB growth projections for 2020		
		April forecast	June forecast	Change (in percentage points)
ASEAN	na	1.0	-2.7	-3.7
Brunei Darussalam	2.4	2.0	1.4	-0.6
Cambodia	na	2.3	-5.5	-7.8
Indonesia	3.0	2.5	-1.0	-3.5
Lao PDR	na	3.5	-0.5	-4.0
Malaysia	0.7	0.5	-4.0	-4.5
Myanmar	na	4.2	1.8	-2.4
Philippines	-0.2	2.0	-3.8	-5.8
Singapore	-0.7	0.2	-6.0	-6.2
Thailand	-1.8	-4.8	-6.5	-1.7
Viet Nam	3.8	4.8	4.1	-0.7

Sources: AMS National Statistical Offices; Asian Development Bank (June 2020)  
Note: p – preliminary

growth performance. Indonesia and Brunei Darussalam also posted economic expansions in the first quarter.

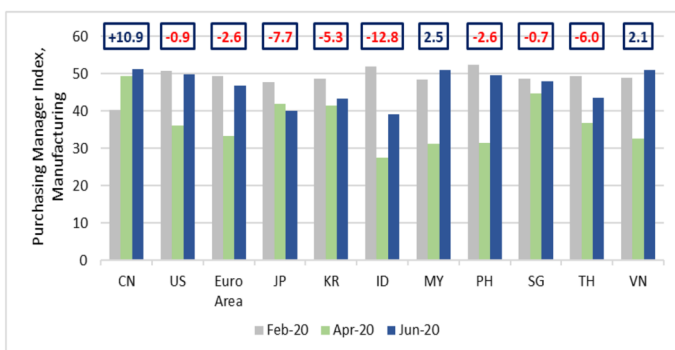
For the whole of 2020, sizeable downward revisions have been made to growth forecasts from April figures<sup>6</sup> as estimates take into account the impact of more prolonged spread of COVID-19 and lockdowns in the second quarter.

<sup>5</sup> Detailed analysis can be found in the ASEAN Policy Brief No. 2 on Assessing ASEAN Economic Policy Responses in a Pandemic.

<sup>6</sup> Asian Development Outlook 2020 Supplement: Lockdown, Loosening and Asia's Growth Prospects, June 2020, Asian Development Bank.

On the upside, the **Manufacturing Purchasing Managers Index (PMI)**, an indicator of economic activities, show encouraging signs of an upturn from a slump in April (Figure 2). Business conditions show an expansion in China, Malaysia, and Viet Nam, while for the other economies, sentiments remain pessimistic compared to that in February. Overall, operating conditions in the ASEAN manufacturing sector remain challenging for the coming months.

**FIGURE 2: Manufacturing PMI, selected economies**



Source: theglobaleconomy.com (June 2020); Labels in boxes refer to changes from February 2020 to June 2020

Note: A PMI above 50 indicates an expansion, below 50 indicates a contraction. CN – China; US – United States; JP – Japan; KR – Republic of Korea; ID – Indonesia; MY – Malaysia; MM – Myanmar; PH – Philippines; SG – Singapore; TH – Thailand; VN – Viet Nam

As the COVID-19 pandemic continued, **countries, including in ASEAN also introduced various liberalising as well as restrictive trade-related measures**<sup>7</sup>. Majority were liberalising measures, such as tariff or import duties reduction and trade facilitation, particularly the temporary elimination of import duties and sales tax, such as those imposed on medical and PPE, or temporary elimination of import taxes on medical and certain PPE used in the fight against the COVID-19.

On the other hand, the restrictive trade-related measures were mainly temporary export restrictions, which were intended to secure domestic supply of medical products such as personal protection equipment (PPE) (e.g. masks, gloves), pharma products, and hand sanitiser. While many of these restrictions appear to have waned over time, there is a need to ensure they are temporary, proportionate, and transparent. While many of these restrictions appear to have waned over time, there is a need to ensure they are temporary, proportionate, and transparent.

At the regional level, **ASEAN Leaders and Ministers have issued various statements affirming their commitments to work together** to respond to and mitigate the socio-economic impact of the pandemic.

The region is committed to share timely information and best practices on COVID-19 responses; keep markets open for trade and investment; enhance cooperation with the private sector and external partners; ensure supply chain connectivity; and to leverage on digital technology to support businesses amidst the COVID-19 outbreak.

Together with Dialogue Partners, ASEAN also committed to ensure the continued flow of trade in goods and services, particularly those which are essential, especially within the region.

More recently, the ASEAN Economic Ministers, at their Special Meeting on 4 June 2020, adopted the Ha Noi Plan of Action on Strengthening ASEAN Economic Cooperation and Supply Chain Connectivity in Response to the COVID-19 Pandemic, which reiterates ASEAN's resolve to ensure the smooth flow of essential goods, including food, medicines, and medical and other essential supplies and maintain open markets.

At the 36<sup>th</sup> ASEAN Summit on 26 June 2020, the Leaders also announced the establishment of the ASEAN COVID-19 Response Fund, the work towards the establishment of the ASEAN Regional Reserve of Medical Supplies and the Standard Operating Procedures for Public Health Emergencies Responses; as well as the commencement of the development of an ASEAN comprehensive recovery framework.

The Leaders also commended the efforts of the ASEAN Coordinating Council Working Group on Public Health Emergencies (ACCWG-PHE) and the ASEAN Health Sector. ●

NEW PUBLICATION

**ASEAN Policy Brief**  
No. 03 / July 2020

**Trade Measures in the Time of COVID-19: The Case of ASEAN**

Alexander C. Chando  
Irfan Mubliat  
Ruth K. Malaysia\*

**KEY POINTS**

- The COVID-19 pandemic has resulted in demand shock for selected products, prompting countries to introduce trade measures, particularly export restrictions and removal of tariffs to ensure the flow of essential goods. Whilst temporary, there is a risk of restrictive trade measures becoming trade barriers.
- ASEAN has also seen the relaxation of trade measures during the pandemic, although not completely. This is particularly evident in the region. This comes as a result of ASEAN's commitment to ensure the flow of essential goods. ASEAN has also seen the relaxation of trade measures during the pandemic, although not completely. This is particularly evident in the region. This comes as a result of ASEAN's commitment to ensure the flow of essential goods.
- In addition to ensuring supply chain connectivity, ASEAN will need to ensure the role of trade, in a post-pandemic economic recovery, through digital technologies to boost trade, take a more proactive role in the reform of the global trading system, and support the role of the private sector and other stakeholders in ensuring resilience in the post-pandemic world.

At the start of the crisis, many countries introduced trade restrictions, particularly exports to prioritise meeting the domestic demand. The measures were mostly accompanied by loosening of import restrictions of the goods in high demand, such as medicines, medical supplies, and food. The WTO reported that up to 80 countries and separate customs territories introduced export prohibitions or restrictions to date.<sup>7</sup> Whilst most of these measures are temporary and are intended mainly to reduce the spread of the virus, they also undermine the longer-term health and food security protection as countries lose access to essential goods to fight the pandemic,<sup>8</sup> particularly those smaller and import-dependent countries with no domestic production capacity. But the risks are also high if temporary trade policy changes enacted during pandemic are used as permanent trade barriers.

ASEAN Policy Brief (APB) is a product of the ASEAN Integration Monitoring Directorate at the ASEAN Secretariat. The APB will address important trade and economic issues of ASEAN and its Member States.

\*Assistant Director, Senior Officer, and Officer of the ASEAN and Monitoring on Trade, Industry and Emerging Issues Division, respectively, of the ASEAN Secretariat.

<sup>7</sup> Detailed analysis can be found in the ASEAN Policy Brief No. 3 on *Trade Measures in the Time of COVID-19: The Case of ASEAN*.

# COVID-19 and the Impact on ASEAN Economy

## COVID-19 Cases



### TOTAL CASES

World : 14,765,256  
 ASEAN: 222,242  
 Share : 1.5%



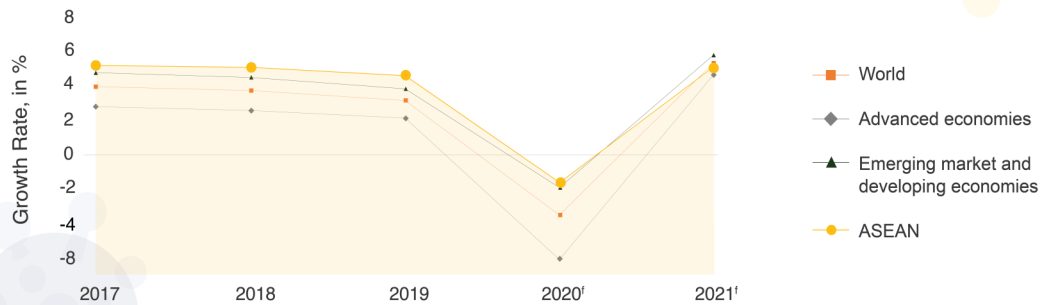
### TOTAL DEATHS

World : 612,054  
 ASEAN: 6,374  
 Share : 1.0%

Source: WHO as of 22 July.

## GDP Growth

After growing by **4.6%** in 2019, ASEAN economic is expected to contract by **2.7%** this year, before rebounding to **5.2%** growth in 2021.

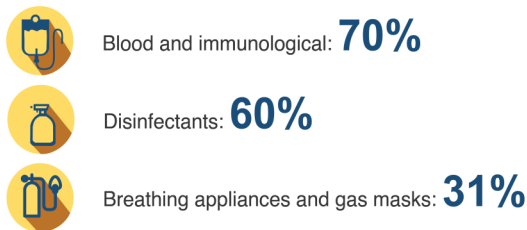


Source: ASEAN Secretariat; IMF WEO and ADB as of June 2020.

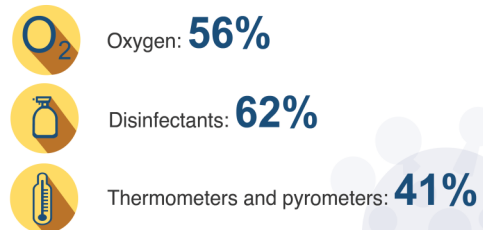
## Trade

ASEAN trade in health-related products is experiencing high growth.

### Growth of exports, Q1 2020:



### Growth of imports, Q1 2020:



Source: ASEAN Secretariat.

## Aviation

ASEAN aviation industry has been severely affected by COVID-19.

Change in Passenger Demand  
2020 VS 2019



-45 to -52  
in percent

Passenger Demand Impact  
(Origin-Destination Volumes)  
2020 VS 2019



-605 to -59,756  
in thousand

Revenue Impact  
2020 VS 2019



-114 to -8,289  
in US\$ million

Potential Jobs Impact  
2020 VS 2019



-8.5 to -2,167  
in thousand

Data represents the lowest and the highest figures in 10 AMS; Source: IATA.

[www.asean.org](http://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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1. ASEAN – Economic integration – Comprehensive summary  
 2. Economic community – Regional developments

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