Research Article

Addressing the Timber Trade Crisis Amidst the Pandemic: ASEAN Strategy Within the ASEAN Comprehensive Recovery Framework (ACRF) From a Regime Transformation Perspective

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Abstract

This article aims to explore how the ASEAN Comprehensive Recovery Framework (ACRF) is employed by member countries as an exit strategy to address the COVID-19-induced crisis, particularly focusing on the timber trade. The creation of ACRF, specifically in tackling the timber sector crisis, becomes intriguing due to the distinct impact of the COVID-19 pandemic on timber trade between VPA and non-VPA countries. This study delves into elucidating how the ACRF functions as a solution to the timber trade crisis among ASEAN member states. Utilizing a qualitative explanatory research method, the analysis reveals that VPA countries leverage the ACRF as a collaborative framework to rejuvenate the timber industry, considering it an essential tool to enhance their dominance in the ASEAN timber sector. The ACRF, deployed to address the timber trade crisis amid the pandemic, represents a strategic shift in ASEAN's regime transformation. Specifically, ACRF Strategy 3, focusing on Maximizing Intra-ASEAN Market Potential and Wider Economic Integration, particularly point 3.d, eliminating Non-Tariff Barriers (NTBs) and reducing market-distorting policies is intricately linked to the ASEAN Trade in Goods Agreement (ATIGA).

Keywords: ASEAN; ACRF; Regime Transformation; Liberal Intergovernmentalism

Introduction

This article aims to discuss how the Association of Southeast Asian Nations (ASEAN) Comprehensive Recovery Framework (ACRF) is utilized by ASEAN member countries as an exit strategy focused on addressing the pandemic crisis caused by COVID-19, especially the timber trade crisis. The pandemic has had a profound impact on the difficulty of supply chains due to the consequences of widespread border closures during the COVID-19 pandemic, affecting global trade, restricting the mobility of labor, imposing travel bans, and slowing economic activities (Yu et al., 2021). Border closures have led to limited access to labor, production stagnation, raw material shortages, and transportation constraints affecting economic activities (Yu et al., 2021). Transportation has emerged as a significant barrier to supply chains due to restrictions on international logistics routes by sea, air, and land, causing delays and cancellations due to widespread travel restrictions and border closures, as well as tightened controls on logistics systems. This is also attributed to several countries' policies focusing more on the demand for health-supporting goods and reducing demand in other areas. This is evident in the surge in demand for health-related goods such as drugs and medicine, personal protective equipment, and ventilators during the COVID-19 period, while the textile, apparel, and retailing sectors experienced declines (Xu et al., n.d). One of the sectors significantly impacted is the timber trade in the ASEAN region.

The timber trade industry holds paramount importance for ASEAN member countries, as evidenced by the active engagement of the ASEAN organization in developing policies related to forests. Member countries of ASEAN actively align their positions in international negotiations. The timber trade industry brings numerous benefits to each country in the Southeast Asian region, particularly in enhancing the well-being of their populations and promoting economic development through the trade of valuable resources among ASEAN members. The timber market in ASEAN shows promising potential and can compete in the international market, as demonstrated by the sufficient quality of ASEAN timber that meets international legality requirements for timber trade, leading to certification by the European Union for several ASEAN countries (Giessen & Sahide, 2017). The European Union has implemented the Voluntary Partnership Agreement (VPA) program to assist partner countries in meeting the EU's set requirements for timber trade, facilitating timber exports from partner countries to the European Union.

Several ASEAN countries, such as Indonesia, Laos, Thailand, and Vietnam, have obtained Voluntary Partnership Agreement (VPA) certifications, enabling them to export timber products to the European Union. Consequently, despite the challenges posed by the COVID-19 pandemic, VPA-certified countries have maintained a stable market for their timber exports, while non-VPA countries have faced the need to seek alternative markets during the pandemic. VPA-certified countries have demonstrated varying trends in their timber export activities during the pandemic. In 2021, Indonesia experienced a significant 30% increase in forestry exports, Laos rebounded from a decline in 2019-2020 with a remarkable 289% growth in exports in 2021, and Thailand recovered from a 4% decrease in 2019-2020 with a 33% increase in timber exports in 2021. Vietnam also experienced a 16% growth in timber exports in 2020, followed by a 20% increase in 2021 and a further 7% rise in 2022. Despite facing a temporary setback during a lockdown in July 2021, Vietnam recovered by October.

Conversely, non-VPA countries experienced varying trajectories in their timber export activities. Brunei Darussalam encountered a significant 99% decline in timber product exports. Cambodia experienced a modest 2% increase in timber product exports. Malaysia faced a 2% decline in timber exports, leading to losses in the timber sector. Myanmar experienced a cessation of timber exports from April to June 2020. The Philippines encountered a 35% decline in timber exports in 2019 but saw a notable 38% increase in 2021. Singapore initially faced a 20% decline in timber exports, but subsequently experienced a 10% increase in 2021 (European Forest Institute, 2022).

The decrease in timber export figures by several countries can be comprehended as a repercussion of the COVID-19 pandemic. The challenges faced by producer countries in becoming international suppliers, stemming from transportation constraints and territorial boundaries imposed during the pandemic, compelled nations to implement specific economic strategies to endure the crisis. The pandemic has also driven fundamental changes in economic activities, exemplified by the emergence of a new economic trend known as supply chain shortening. This trend emphasizes the importance for nations to regionalize or localize their supply chains. From a micro perspective, disruptions in global trade have compelled companies to reassess their strategies, emphasizing the need for regionalization and supply chain diversification to mitigate escalating risks (Wang & Sun, 2020). This analysis recognizes the profound impact of the COVID-19 pandemic on the global trade landscape, prompting nations and businesses to adapt and implement innovative economic strategies. The imperative for regionalization and diversification in supply chains is highlighted as a pivotal response to the challenges posed by the pandemic.

As a response to the escalating risks of economic downturn, ASEAN initiated regional cooperation during the 37th ASEAN Summit in June 2020, resulting in the establishment of the ACRF. This framework serves as a collaborative structure with a primary focus on coordinating efforts for the overall economic recovery of the ASEAN region in the aftermath of the COVID-19 impact. The ACRF underscores the interconnectedness of ASEAN economies and advocates for a collective approach among member states to address the ramifications of the pandemic. Key principles emphasized by the ACRF include the importance of coordination, flexibility, and inclusivity in executing recovery initiatives. The framework also stresses the need for a recovery approach that is targeted, balanced, and inclusive. These principles aim to prioritize impactful strategies and priorities for recovery while ensuring that no entity is left behind. Furthermore, the ACRF highlights the necessity of mobilizing sustainable resources to address the pandemic's impact and support the regional recovery process. In short, the ACRF provides a comprehensive and strategic approach to addressing the multidimensional impacts of the COVID-19 pandemic in the ASEAN region. Its primary focus is on preserving lives, sustaining livelihoods, and building resilience for the future, emphasizing the collaborative efforts needed to navigate the challenges posed by the pandemic (ASEAN Main Portal, n.d).

However, the creation of ACRF, particularly in addressing the crisis in the timber sector, is somewhat interesting to discuss. An examination of the effects of the COVID-19 pandemic reveals significant differences in the impact on timber trade between VPA and non-VPA countries. While some VPA-certified nations initially experienced a decline in timber exports during the pandemic, they demonstrated remarkable resilience, with rapid recovery times. In contrast, non-VPA countries generally encountered declines in timber exports and suffered financial losses. The observed disparities underscore the effectiveness of VPA certification in conferring a degree of robustness to timber trade during unprecedented global challenges like the COVID-19 pandemic. This intriguing fact regarding different experiences faced by ASEAN member states in the pandemic era, but still, every member agrees to create ACRF, is interesting to analyze. The creation of ACRF can be understood as a regime transformation in the International Relations context, and the author believes this transformation is mostly influenced by variative states' preferences. Therefore, this article seeks to explain how global crises such as pandemics, influence the transformation of trade regimes in regional settings within the framework of the ASEAN Comprehensive Recovery Framework (ACRF) using the Regime Transformation perspective.

Literature Review

The global trade literature is indeed extensive, but there is a significant gap in scientific research that specifically discusses the COVID-19 pandemic that has impacted the timber trade crisis and how ASEAN member countries' strategies have responded to it through the ACRF reviewed using the regime transformation. Although many studies have explored the impact of the COVID-19 pandemic on the economic crisis, such as supply chain vulnerabilities and changes in trade policies, analysis that focuses on how these factors have affected the dynamics of timber trade in ASEAN countries is still lacking. This gap underscores the need for further research to understand the long-term implications of the pandemic on the sustainability of timber trade and the regulatory framework governing the timber industry in the region.

In the article entitled "Impact of COVID-19 on ASEAN Member States' Timber Trade" (EU FLEGT ASIA, 2022) by EU FLEGT Asia, the focus is on the impact of the COVID-19 pandemic on the timber trade sector in ASEAN from January 2020 to June 2022. Different impacts are felt by ASEAN member countries; some experienced a drastic decline in the timber trade sector, while several others managed to survive or recover quickly. While the article mentions ASEAN countries, the author specifically focuses on four VPA member countries active in the ASEAN region, namely Indonesia, Laos, Thailand, and Vietnam. From this article Indonesia exceeded its forest and timber product export target in 2020. Similarly, Vietnam experienced an increase in timber exports during the pandemic. In contrast, Laos faced a decline in the forestry sector in 2020, with exports of timber, pulp, paper, and furniture falling by 27 percent between 2019 and 2020. Thailand also experienced a decline in timber exports during the Covid-19 pandemic in 2020.

However, despite the varying experiences of decline or increase in timber exports during the Covid-19 pandemic among the four VPA countries, their timber sectors were able to recover after the pandemic by joining the VPA. The work of EU FLEGT Asia is used in this paper to support data on timber trade in ASEAN during the COVID-19 pandemic and provide insight into how each ASEAN countries are responding to the timber crisis. In response to the impact of the COVID-19 pandemic, ASEAN took the initiative to form the ACRF. However, the EU FLEGT Asia article does not delve into how the ACRF can help ASEAN member countries overcome the timber crisis in more depth. Although it briefly mentions ACRF, it only provides general information about it. Therefore, the authors add another literature to provide more debate as the baseline of this article.

The paper makes a clear statement of novelty by identifying gaps in the existing literature, stating that “Given the challenges posed by the pandemic to the timber sector globally, there is little analysis available on the impact of COVID-19 on the timber sector in ASEAN.” The statement effectively highlights the study’s role in addressing certain gaps in current research. In terms of contribution to knowledge, the paper provides a comprehensive assessment of the impact of COVID-19 on trade in timber and wood products in ASEAN Member States (AMS). It addresses under-explored areas of the literature, such as supporting data and country-specific examples from Indonesia, Lao People’s Democratic Republic, Thailand, and Vietnam.

The second literature review used in this article is from Joshua Michael Pryor (2005), entitled ‘State Preferences and Institution Evolution: From Security to Economic Interests’. Pryor's article focuses on discussing the regime transformation of a region, especially in the case of the European Union (EU) and ASEAN. ASEAN itself has been a significant regional organization in Southeast Asia, playing a crucial role in promoting regional stability, economic growth, and cooperation among its member states. The transformation of the ASEAN regime has had a profound impact on the cooperation among ASEAN countries. This literature review aims to explore the factors that contribute to the transformation of the regime, the importance of the regime, and how this transformation has influenced ASEAN cooperation. Additionally, the review will examine the role of state preferences and the application of Liberal Intergovernmentalism in explaining the transformation of the regime.

The regime in ASEAN has evolved over time, initially focusing on security concerns in the region. The establishment of ASEAN in 1967 was primarily driven by the need to address security issues and promote regional stability in the aftermath of the Cold War. The ASEAN Regional Forum (ARF) and the Treaty of Amity and Cooperation in Southeast Asia (TAC) are examples of security-focused initiatives within ASEAN (Acharya, 2009). However, over the years, the regime has gradually shifted towards an economic focus, with the establishment of the ASEAN Free Trade Area (AFTA) and the ASEAN Economic Community (AEC) as key milestones in this transformation (Ravenhill, 2014).

The regime in ASEAN is important for several reasons. Firstly, it provides a platform for member states to address common security threats and challenges, such as territorial disputes, transnational crime, and non-traditional security issues like pandemics and natural disasters. Secondly, the economic dimension of the regime promotes trade, investment, and economic integration among ASEAN member states, contributing to regional development and prosperity. Lastly, the regime serves as a mechanism for fostering cooperation, dialogue, and consensus-building among diverse and sometimes conflicting states in Southeast Asia (Acharya, 2009).

The transformation of the ASEAN regime can be attributed to the existence of state preferences, which reflect the varying priorities and interests of member states. State preferences are influenced by domestic politics, economic considerations, security concerns, and external pressures. Liberal Intergovernmentalism, as a theoretical framework, provides insights into how state preferences shape the decision-making process within regional organizations like ASEAN. According to Moravcsik (1993), states pursue their national interests and engage in bargaining and negotiation to achieve their objectives within intergovernmental institutions.

In sum, the transformation of the ASEAN regime has had a profound impact on ASEAN cooperation. The regime's evolution reflects the interconnectedness of security and economic issues, highlighting the importance of addressing both dimensions for regional stability and prosperity. State preferences play a crucial role in driving the transformation of the regime, and Liberal Intergovernmentalism provides a theoretical lens through which to understand the dynamics of state interactions within ASEAN. Moving forward, it is essential for ASEAN to continue adapting its regime to effectively address the evolving challenges in the region and promote sustainable cooperation among its member states, this article will be focusing on the transformation that based on a situation that never occurred before which is the pandemic era caused by COVID-19, which eventually lead to the creation of ASEAN Comprehensive Recovery Framework (ACRF).

Regime Transformation Theory

Regime Transformation Theory, based on the work of Oran R. Young, focuses on the idea that international regimes, such as regional economic agreements or environmental treaties, can undergo transformative changes over time. These changes are triggered by internal contradictions within the regime, underlying power structures, and exogenous forces that disrupt or challenge the functioning of the regime.

Regime Transformation Theory argues that these triggers create a window of opportunity for actors within the regime to reevaluate its goals, norms, and institutions, leading to a process of regime transformation. During this process, the regime may experience challenges and tensions as different actors negotiate and redefine their interests and preferences. Through this process, new norms and rules may emerge, existing norms and rules may be revised or discarded, and the overall institutional framework of the regime may be restructured to better address the changing needs and dynamics of the international system. In the context of ASEAN, regime transformation theory can be applied to understand the evolution of the ASEAN regime from a primarily political-security-focused organization to economy.

This theory posits that regime transformation occurs as a result of external shocks or internal contradictions that challenge the existing regime and necessitate adaptation or reform. These shocks or contradictions can include exogenous factors such as changes in international economic conditions or political shifts, as well as internal tensions within the regime itself. Within the context of ASEAN, regime transformation theory suggests that external shocks and internal contradictions have played a role in shaping the evolution of ASEAN's regional economic integration and cooperation. These factors have prompted ASEAN to continuously reassess and adapt its policies and strategies in order to address emerging challenges, maximize opportunities, and stay relevant in the changing global landscape.

Liberal Intergovernmentalism

In examining regionalism in the ASEAN context, it is evident that ASEAN possesses an outward-oriented foreign policy orientation driven by governance and institutions aiming for global regionalism success. As a regional organization, ASEAN has made significant strides in economic development and maintaining regional security among its member states. In analyzing this issue, the Liberal Intergovernmentalism theory is relevant, particularly in explaining the performance of the ASEAN Comprehensive Recovery Framework (ACRF) in the timber trade within ASEAN. Liberal Intergovernmentalism bases its analysis on two fundamental assumptions: first, that states are the primary actors in international politics, and second, that states act rationally. The necessity for collective agreements within a regional framework, the integration of collective interests, and the aggregation of political interests become crucial efforts to maximize gains within the regionalism framework (Jayant Menon, 2021).

When analyzing this issue, Liberal Intergovernmentalism suggests that policy tendencies formed with economic interests of domestic interest groups will experience a system of international interdependence. The collaboration among international institutions is expected to create national interests for each country with its bargaining power based on individual capabilities. In this context, Liberal Intergovernmentalism seeks to comprehensively explain the phenomenon of regional government collaboration while still prioritizing national interests (Schimmelfennig, 2010). Therefore, based on the aforementioned fundamental assumptions, in addressing the timber trade crisis amid the pandemic, ASEAN, as a regionalist entity, adopts a strategy to facilitate recovery through the establishment of the ACRF. In conducting this research analysis, the integration of timber sales in the ASEAN region can be observed through the economic conditions of each member state with supporting factors from collaborative relationships among member countries.

Methods

This study employs a qualitative research methodology to analyze the role of the ASEAN Comprehensive Recovery Framework (ACRF) in addressing the timber trade crisis during the COVID-19 pandemic. A qualitative approach is chosen because it enables an in-depth exploration of institutional transformations, policy responses, and state preferences within ASEAN. According to Creswell (2014), qualitative methods are particularly effective for examining complex social phenomena that involve multiple actors and institutional dynamics. This approach is suitable for analyzing the transformation of trade regimes, as it allows for a detailed understanding of how ASEAN member states have adapted their policies in response to external shocks.

The research utilizes document analysis as the primary data collection method. Data is derived from secondary sources, including official ASEAN reports, policy documents, academic journal articles, and reports from international organizations such as the European Forest Institute and the International Tropical Timber Organization (ITTO). Bowen (2009) highlights that document analysis is a systematic procedure for reviewing and evaluating printed and electronic materials, making it a valuable tool for policy analysis and institutional research. By employing this method, the study ensures a comprehensive examination of ASEAN's policy responses and their implications for the timber trade sector.

To operationalize the methodology, this research is structured within the conceptual framework of Regime Transformation Theory and Liberal Intergovernmentalism. Oran R. Young's (1982) Regime Transformation

Theory provides the foundation for understanding how ASEAN's trade regime has evolved in response to external shocks like the COVID-19 pandemic. This theory is crucial in examining how crises trigger shifts in institutional structures and governance mechanisms within regional organizations. Meanwhile, Liberal Intergovernmentalism (Moravcsik, 1993) serves as a complementary framework to analyze how ASEAN member states, driven by national interests, negotiated and shaped the ACRF to address economic recovery. By integrating these theories, the study examines how ASEAN states' preferences influenced the institutional adjustments reflected in ACRF Strategy 3 on Maximizing Intra-ASEAN Market Potential and Broader Economic Integration.

The level of analysis in this study is the regional level, focusing on ASEAN as a whole while also considering individual member states' strategic preferences. This approach is essential to capture the broader institutional shifts within ASEAN while acknowledging the diverse economic conditions of its members. The analysis is conducted through an interpretive lens, drawing from comparative case study techniques to highlight variations between VPA and non-VPA countries in navigating the timber trade crisis.

The study's findings are presented through explanatory arguments, divided into three key sections, fist is the regime shifting in the pandemic era to analyzing ASEAN's institutional response to the crisis. Second is state preferences influencing the creation of ACRF' to examine how national interests shaped ASEAN's policy coordination, and the last is opening intra-market and Atiga as an exit strategy to assessing how the ACRF facilitated intra-ASEAN trade recovery. By structuring the study in this manner, the research systematically links theoretical insights with empirical findings, ensuring a robust methodological approach.

Result and Analysis

ASEAN Timber Trade Market

Before the occurrence of COVID-19, the timber trade in ASEAN was proceeding normally and functioning well. Intra and extra-regional cooperation within ASEAN was implemented in accordance with the existing framework of collaboration. However, the COVID-19 pandemic had significant economic impacts on the tropical timber trade across the region's major trading nations. The International Tropical Timber Organization (ITTO), as an international timber trade organization, explains that it is currently focused on strategies to address challenges in the manufacturing and trade of tropical timber. In the ASEAN region, the manufacturing industry experienced significant fluctuations during the pandemic. Concerns about the pandemic's impact in the first year, 2020, were followed by rising production costs and increased demand for tropical timber exports to meet global needs. Subsequently, in the following year, 2021, the production of tropical timber in the ASEAN region continued to face challenges.

With the increased production of furniture, transportation tariff issues caused many factories to fill their warehouses because the production of finished goods was awaiting container shipments. This led to a decline in timber production during the lockdowns in some ASEAN countries in the middle of 2021. From the speculation of this trade scenario, it can be inferred that the COVID-19 pandemic could pose various challenges to the regionalization of the furniture market (ITTO, 2021). The high demand for furniture during the COVID-19 pandemic made ASEAN countries with abundant tropical timber resources benefit greatly, while some ASEAN countries with limited tropical timber supply experienced minor shocks in international trade during the COVID-19 outbreak.

In this scenario, the timber sector also faced significant impacts, as disclosed by the International Tropical Timber Organization (ITTO). Global-scale forestry companies experienced factory closures, decreased sales, price reductions, shipping disruptions, supply chain interruptions, and a halt in capital investment, leading to unemployment and the collapse of the wood industry. Additionally, the increasing illegal logging and societal pressure on forest resources meant that the timber industry could only recover from the crisis by 2026. This analysis covers the period from January 2020 to June 2022 by the steering committee of the Forest Law Enforcement Governance and Trade (FLEGT) program in Asia EU in September 2021, with a specific focus on Indonesia, Laos, Thailand, and Vietnam as the four active Voluntary Partnership Agreements (VPA) countries in this region (FLEGT, 2021).

Among these four VPA countries, the conditions of the tropical timber trade in the ASEAN region experienced a significant increase. This was due to the export allocation of wood in the four ASEAN countries participating in FLEGT, which received high export demand from their destination countries in Europe. ITTO also explained that the existence of the country's legality assurance system, the Timber Legality Verification System (SVLK), a collaborative effort, facilitated cooperation in overcoming trade constraints during the pandemic. This included the elimination of value-added tax on wood, export tariff reduction, and simplification of export bureaucratic procedures. However, most VPA countries experienced a decline in demand in 2021 due to lockdowns, gradually recovering towards the end of the year. This was accompanied by field cooperation reviews by FLEGT in handling tropical wood certification as an independent monitor of the global timber trade.

Subsequently, the timber trade conditions in ASEAN countries not included in VPA faced similar challenges. Non-VPA countries exported their wood industries to China to meet its demand. Countries like Malaysia, the Philippines, Cambodia, Singapore, Brunei Darussalam, and Myanmar experienced significant declines in the trade sector in 2021. These countries addressed the challenges by implementing respective policies such as reducing taxes, export tariffs, and providing subsidies to struggling wood industries. Nevertheless, the regionalization of the timber trade in the ASEAN region after 2021 progressed well with the normalization of global timber trade policies (ITTO, 2021).

ASEAN Comprehensive Recovery Framework (ACRF)

Since being declared a pandemic in March 2020, COVID-19 had a crisis impact on ASEAN countries, especially on the economy sector. In 2020, the Regional economic growth in the ASEAN region was estimated to decline by 3% from 5,2% in 2019 to 2,2% in 2020 (Asian Development Bank, 2020). Responding to the crisis caused by COVID-19, the ASEAN Comprehensive Recovery Framework (ACRF) was officially established, along with its Implementation Plan in November 2020 during the 37th ASEAN Summit by member countries. Thus, it can be seen that the ACRF was formed as one of the ASEAN community's exit strategies for recovering from the COVID-19 pandemic (ASEAN Secretariat, 2020). Through the ACRF, ASEAN countries are expected to formulate various collective policies that not only focus on health recovery, but also consider various social and economic recovery strategies for the long term in the ASEAN region. The recovery process through the ACRF should be implemented proactively, covering the entire community, adaptable, sustainable and efficient to facilitate the application of policies by ASEAN regions to adapt with the changes caused by the COVID-19 crisis.

Therefore, based on this framework, the ACRF includes five broad strategies within its Implementation Plan. For ACRF Broad Strategy 1, it focuses on Enhancing Health Systems. Through this strategy, the ACRF aims to contribute both in the short and long term to the recovery of the health sector in ASEAN by building, strengthening, and maintaining health services, also ensuring the supply chain for health products and equipment is well-distributed among ASEAN countries. As for Broad Strategy 2 concerning Strengthening Human Security, it aims to enhance social protection and human rights, especially for vulnerable groups to build a resilient region. Meanwhile, one of the most significant strategies in the economic recovery of ASEAN countries is ACRF Broad Strategy 3 about Maximizing The Potential of Intra ASEAN Market and Broader Economic Integration. Through this strategy, ACRF recognizes that ASEAN countries have experienced a sharp economic downturn during and post the COVID-19 pandemic (ASEAN Secretariat, 2020).

With strategy 3, it is crucial to make efforts to boost trade and investment in ASEAN. This includes maximizing the potential of the internal market to strengthen supply chains and enhance regional value chains. Improving regional value chains involves optimizing collaboration between countries in the region to increase the value of products or services produced in the ASEAN region. This process includes integrating production processes, research collaboration, and development of production and commodities in the region as part of the efforts to make ASEAN a more competitive market globally. Through Strategy 3, ACRF emphasizes the need for ASEAN countries to keep markets open, simplify trade and investment processes, and reduce non-tariff barriers. ACRF also initiated travel bubbles during the pandemic. Through the travel bubble policy, ACRF aims to facilitate trade travel between ASEAN countries without strict travel restrictions, based on the standpoint that the COVID-19 pandemic is well-managed. Thus, the travel bubble policy is seen as a crucial step to accelerate the regional connectivity recovery in the trade sector. Furthermore, through Strategy 3, ASEAN also commits to remaining engaged in the global market post-pandemic, through initiatives such as ASEAN Trade in Goods Agreement (ATIGA).

With the help of ATIGA, ACRF strategy 3 can contribute to facilitating and supporting sectors affected by the COVID-19 crisis, including the timber sector, as a key export commodity of ASEAN countries. ATIGA facilitates the reduction of tariffs on various commodities in the intra-ASEAN market, particularly within the timber industry (Ke, 2014). This tariff reduction diminishes trade barriers and encourages lower cost expenditures and is considered instrumental in creating a more interconnected market, fostering increased strength and resilience in regional value chains within the ASEAN timber industry. Therefore, the various policy initiatives driven by the implementation of Strategy 3 are expected to encourage broader regional integration among ASEAN countries, especially in the economic recovery process.

As for ACRF Broad Strategy 4 Accelerating Inclusive Digital Transformation is also a crucial strategy to boost the ASEAN economy post-COVID-19. Through this strategy, ASEAN countries are directed to actively promote e-commerce and digital economy systems, along with initiatives for e-governance, e-services, digital connectivity, and digital transformation (ASEAN Secretariat, 2020). Then for Broad Strategy 5 of the ACRF, advancing towards a More Sustainable and Resilient Future, emphasizes that every stage of recovery must have long-lasting, inclusive outputs that can sustainably preserve the region's natural resources, maintain social order, and ensure the well-being of the community. (ASEAN Secretariat, 2020).

Analysis and Discussion

The Regime Shifting in ASEAN during the Pandemic Era

ASEAN as a political and economic organization encompassing nations in the Southeast Asian region, underwent a regime shift during the pandemic era. This transformation is evident through several cooperative frameworks that initially focused on economic aspects but later shifted to prioritize security concerns amid the pandemic. Once security issues were addressed, ASEAN as an organization, reverted to its primary focus on economic cooperation, particularly in the context of post-pandemic economic recovery. This shift in emphasis within ASEAN's cooperative frameworks reflects the dynamic response of the organization to the evolving challenges presented by the pandemic. During the pandemic era, ASEAN emphasizing security collaboration to address immediate threats, demonstrated flexibility in its priorities. Subsequently, as security concerns were mitigated, the organization redirected its attention to its core mission of fostering economic cooperation, with a specific focus on post-pandemic recovery efforts. This illustrates the organization's adaptability and responsiveness to the multifaceted challenges presented by the pandemic, showcasing a pragmatic approach to effectively address the diverse needs of its member states.

The events reveal that in 2015, ASEAN was primarily focused on realizing economic cooperation through the establishment of the ASEAN Economic Community (AEC). The AEC aimed to create a more competitive and evenly sustainable economic region (Ishikawa, 2021). However, in 2020 in an early pandemic, ASEAN implemented close borders as security policies to prevent the transmission of the virus (Jati et al., 2020). During this pandemic, ASEAN shifted its focus towards improving healthcare systems and human security before fully exploiting the potential of the intra-ASEAN market and advancing economic integration. This shift in focus of the ASEAN framework was also exemplified by the holding of a special ASEAN Summit on COVID-19, which discussed collective steps to handle, contain and mitigate the impact of the COVID-19 pandemic. The emphasis is on ensuring the smooth functioning of regional supply chains for essential goods, such as medicines and medical equipment in response to the pandemic (ASEAN, n.d).

The idea behind the ASEAN COVID Summit focuses on strengthening the healthcare system for economic recovery. This emphasis ensures that Southeast Asian countries need to fortify their healthcare systems and establish health crisis management to combat diseases. With the notion that an attack on the healthcare system, much like a virus, creates instability in all social, political, and even economic spheres, ASEAN prioritizes addressing the virus first before refocusing on economic recovery. The shift in ASEAN's focus to the economic sector post-pandemic is marked by meetings that discuss the economic impacts post-pandemic and ways to handle them, economic recovery, ideas regarding trade digitization, and so forth (Asian Development Bank).

The Theory of Regime Transformation provides a framework for understanding periods when a regime undergoes significant and sustained changes, although it may not necessarily result in a complete regime transition. This theory adopts a process-oriented approach to identify and explain regime transformations, aiming to draw conclusions about the factors behind these transformations. According to Oran R. Young, regime transformation can be identified through several points, including internal contradictions, the underlying structure of power, and exogenous forces. In the case of ASEAN, the changes within the organization are influenced by the third point, namely exogenous forces. Exogenous forces refer to external developments outside the regime that impact the behavior of member states in the international regime. Moreover, external forces indirectly contribute to modifying the regime. To elaborate on this, during the COVID-19 pandemic, countries worldwide focused on pandemic mitigation, prompting ASEAN to shift its focus from economic cooperation frameworks to human security or healthcare systems. As previously explained, this is marked by the high demand for health-related supplies such as medicines, masks, and others, coupled with a decrease in demand for other sectors like electronics and textiles. However, as the pandemic gradually subsides and healthcare system management progresses as targeted, ASEAN returns to focusing on economic activities, particularly post-pandemic economic recovery (Young, 1982).

The ASEAN regime has undergone a transformation from being security-oriented to becoming more economically-focused over time. This shift was influenced by various factors, including the rise of economic powers like China and India, as well as challenges such as foreign protectionism. However, during pandemic COVID-19 ASEAN transformed back intro security-oriented with the close border initiative to tackle the spread of the virus and protect the health and safety of its member states.This transformation can be explained by Region transformation theory by Oran R. Young, which suggests that regional organizations tend to shift their focus from security concerns to economic ones during times of relative stability, but may revert back to security concerns during times of crisis and uncertainty. During the COVID-19 pandemic, ASEAN has experienced a shift in its priorities, focusing more on security and health concerns rather than economic integration. This shift was evident in the ASEAN Special Summit on COVID-19 and the implementation of measures such as travel restrictions, border controls, and regional cooperation in the health sector (Pradityo).

ASEAN's response to the COVID-19 pandemic has highlighted the importance of regional cooperation in addressing common challenges.ASEAN has demonstrated its ability to adapt and respond to crisis situations, effectively transitioning from an economic focus to a security-oriented approach. However, as the pandemic eventually subsides and economies begin to recover, it is crucial for ASEAN to revert back to its economic-oriented approach.ASEAN must carefully navigate the transition from a security focus to an economic focus once again, as this will be essential for the region's long-term recovery and prosperity. Therefore, ASEAN started to plan an economic recovery initiative to revive and promote trade among ASEAN members. As one the biggest export commodities timber become, the important one appropriate strategy within the ACRF to address the timber trade crisis amidst the pandemic would be to focus on sustainable and responsible timber trade practices.

State Preferences' Implications on the Creation of ACRF

To further understand the regionalism of ASEAN countries, there is a keen interest and motivation of each member state in supporting the ASEAN Comprehensive Recovery Framework (ACRF) to become a well-functioning regional organization. The ACRF is designed to aid economic and social recovery in the ASEAN region after facing challenges such as pandemics or economic crises. By establishing the ACRF, ASEAN member countries can collaborate to coordinate recovery efforts, strengthen economic resilience, and enhance the well-being of their societies. Therefore, the formation of the ACRF is necessary to ensure a coordinated and effective response to crises affecting the ASEAN region (ERIA Study Team, 2022).

For strong timber trading member countries like those in the Voluntary Partnership Agreement (VPA), they utilize the ACRF as a collaborative framework for recovering the tropical timber industry. In this context, an analysis of four VPA countries in response to market liberalization within the ASEAN region is presented. Firstly, Indonesia's timber sector proved resilient during the COVID-19 pandemic. Indonesia exceeded its timber and wood product export targets in 2020 despite the pandemic. In 2021, Indonesia achieved a 31% increase in exports, surpassing the target of $7 billion per year to exceed $14.5 billion per year. However, in 2022, soaring shipping costs became a significant challenge, increasing by 900% compared to pre-pandemic levels. This led to approximately 25% of the 2,500 registered businesses in the Indonesian Furniture and Handicraft Industry Association (HIMKI) experiencing bankruptcy in January 2022 due to high shipping costs. In 2022, the Indonesian government implemented the Export-Ready Me (ASE 2) program, providing support through mentoring, workshops, business meetings, and exhibitions domestically and internationally to boost trade production in Indonesia (Nikkei Asia, 2022).

Secondly, Laos faced negative economic impacts from the COVID-19 pandemic, resulting in a 1.7% increase in poverty levels compared to the non-COVID-19 scenario. This affected the timber, pulp, and paper export sector, which saw a 27% decline. Despite the challenges, Laos experienced a 289% year-on-year increase in timber exports to China during the pandemic in 2021. However, a second wave of COVID-19 in April 2021 led to lockdown measures, decreasing job effectiveness and income. The lockdown impacted Laotian employment and led to a decline in income compared to pre-lockdown levels (The World Bank, 2023).

Thirdly, Thailand's timber sector demonstrated resilience during the COVID-19 pandemic, with a 33% increase in wood exports in 2021 compared to 2020, reaching 2.85%. Thailand remained a major exporter of tropical sawn timber to China, holding a 62% market share worth USD 1 billion. To mitigate the economic impact of the pandemic, Thailand implemented various measures, including a financial assistance package of 1.9 trillion Baht (USD 58.6 billion), tax reductions, and reduced taxes for salary payments. The Ministry of Natural Resources and Environment (MNRE) provided financial support of USD 13.3 million to forestry sector workers who lost their jobs during the pandemic (Kalpana, 2021).

Fourthly, Vietnam effectively controlled COVID-19 with relatively low costs. Public investment and direct investment stimuli supported sustainable export production, leading to a 2.9% increase in Vietnam's GDP. However, the Delta variant of COVID-19 in 2021 caused a GDP delay to 2.6%, with a recovery starting in October due to border relaxations. In 2022, Vietnam's production normalized, and the timber industry accelerated production to meet export orders. Vietnam experienced a significant increase in timber product exports, reaching USD 14.8 billion, with high export growth to the US, Japan, China, South Korea, and the EU, totaling

92% annually. The government supported the economy with financial support for wage businesses, income tax and business registration cuts, cash assistance, and reduced electricity costs to adapt to the COVID-19 situation (Vietnam News, 2021).

From the analysis of these four VPA countries, significant trade constraints in the regional area demand ASEAN countries to have a unified recovery organization, such as the proposed ACRF. At the level of regionalism cooperation analysis, being a member of VPA alone is not sufficient to enhance the timber industry in ASEAN. Therefore, the ACRF is needed as a tool to gain greater dominance in the ASEAN timber industry. As a form of economic liberalization, timber trade becomes a crucial economic sector in VPA countries. Regional cooperation is deemed essential when facing external challenges such as increased import tariffs due to rising costs and transportation. Compared to the formation of the ACRF, regionalism becomes a tool for countries with strong dominance to further develop the timber trade in their nations (Kaewkamol, 2022). However, for countries without sufficient dominance, they rely on financial aid to rebuild their markets and recover from the COVID-19 pandemic, accompanied by the ACRF regionalism framework.

From the definition of VPA countries above, there are also non-VPA countries that have an interest in building ACRF. Before the COVID-19 pandemic, specifically in 2018, Malaysia produced 18.6 million m3 of timber products for the export sector, contributing to Malaysia's export revenue of US$2,175 million. Three regions—Peninsular Malaysia, Sarawak, and Sabah—were the major contributors to Malaysia's timber industry. Malaysia categorized its timber industry production into four sub-sectors: (1) Sawn timber, with the majority produced in Peninsular Malaysia (70%), followed by Sarawak (20%) and Sabah (10%); (2) Veneer and panel products, mainly produced in Sarawak (70%), Sabah (20%), and Peninsular Malaysia (10%); (3) Mouldings and builders joinery carpentry, such as doors and windows; and (4) Furniture (Latib et al., 2022).

As a significant revenue source for Malaysia's economic growth, the timber industry primarily exports its products to Asia, particularly Japan for plywood. India, Thailand, and China are also key export markets for Malaysia's logs, sawnwood and plywood. Additionally, the European Union and the United States also have a big market for Malaysia's timber industry export sector. However, during the COVID-19 pandemic in 2020, Malaysia's timber industry export experienced a 25% decline in the second quarter of the year (Malaysian Timber Council). In response to the economic crisis, Malaysia, along with other ASEAN member countries, officially launched the ASEAN Comprehensive Recovery Framework (ACRF) in November 2020. Through the ACRF's implementation plan, particularly Strategy 3 Maximizing The Potential of Intra ASEAN Market and Broader Economic Integration, Malaysia implemented policy flexibility, allowing businesses to operate under strict SOP standards. Specifically, the implementation of a travel bubble policy, aligning with ACRF Strategy 3, facilitated the recovery of Malaysia's timber industry by the end of 2020, resulting in a significant increase throughout the next year.

During the COVID-19 pandemic, there was an increased demand for the timber industry in Malaysia due to the needs for furniture, construction, and home renovations resulting from work and learn-from-home policies (Ratnasingam et al., 2020). However, the increased demand was hindered by limitations on timber quotas faced by various companies in Malaysia. In 2019, the Malaysian government imposed a policy requiring timber industry companies to obtain harvesting licenses, with each company having quotas for timber product extraction. Consequently, the high demand with limited resources posed a significant challenge for Malaysia, particularly because the timber industry remained a stable sector crucial for Malaysia's economic sustainability during the COVID-19 pandemic.

In response to these challenges, Malaysia leveraged the implementation of ACRF Strategy 3 to enhance regional connectivity within ASEAN to meet its timber product needs. Consequently, three ASEAN member countries Indonesia, Thailand, and Vietnam supplied their timber products to Malaysia from 2020 to 2021. The following data illustrates the value of timber supply from these three countries to Malaysia in Malaysian Ringgit (RM).

Table 1. Timber Supply Data from Other Countries to Malaysia

ASEAN Country	Jan-Dec 2020 (RM)	Jan-Dec 2021
Indonesia	1,587,339,386	1,606,292,187
Thailand	537,403,497	658,004,143
Vietnam	397,498,631	614,745,305
Total	**2,522,241,514**	**2,879,041,635**

Source: Malaysian Timber Industry Board and Department of Statistics Malaysia

The establishment of cooperation in fulfilling the supply-demand nexus not only contributes to sustaining the timber industry in Malaysia, but also demonstrates an enhancement in the export values of the three respective countries. Evidently, Vietnam experienced an increase in exports from US$3.5 million in 2020 to US$5 million in 2021. Meanwhile, Indonesia also witnessed an escalation from US$3.7 million to US$4.9 million during the 2020-2021 period. This phenomenon indicates the practical application of Liberal Intergovernmentalism by Malaysia, Indonesia, Vietnam, and Thailand through various actions leveraging the ACRF institution. The four countries have demonstrated their collaboration through the ACRF forum based on their national interests, particularly in the timber industry sector.

The Potential of Intra-Market and ATIGA as ASEAN Exit Strategy

In the previous discussion, it was explained that several countries in ASEAN experienced a decline in industrial wood exports during the COVID-19 pandemic. The closure of borders by various countries with different policies, such as lockdowns that restricted people's movement and hampered the economy, had a negative impact on the timber industry. To overcome this problem, countries in ASEAN, such as Malaysia, Indonesia, Vietnam, and Thailand, are working together to fulfill supply-demand relationships and address the timber crisis in their countries. This collaboration is established through ACRF by maximizing the intra-ASEAN market.

The negative impact of the COVID-19 pandemic has caused several ASEAN countries to experience economic decline, including a decline in wood exports. However, through the ACRF cooperation framework, Malaysia, Indonesia, Vietnam, and Thailand have proven capable of experiencing an increase in wood exports after the pandemic. In this section, we will discuss in more detail ACRF Strategy 3 - Maximizing Intra-ASEAN Market Potential and Wider Economic Integration, especially point 3.d, namely eliminating Non-Tariff Barriers (NTBs) and reducing policies that distort markets and their interrelationships with ATIGA.

As an agreement between member countries of the Association of Southeast Asian Nations (ASEAN) with the aim of achieving the free flow of goods in the region and as one of the main means of building a single market and production base, ATIGA has five elements, and the focus of our research is on element 3. In element 3, it is stated that ATIGA contains elements to guarantee the realization of the free flow of goods with ASEAN, including tariff liberalization and elimination of non-tariff barriers, customs duties, standards and conformity, as well as sanitary and phytosanitary measures. This is related to the ACRF where the 3rd ACRF strategy, as previously mentioned, aims to maximize intra-ASEAN market potential and broader economic integration, so to achieve this goal through the ACRF, ASEAN member countries are encouraged to implement a non-tariff barrier policy.

Agreements related to non-tariff policies have previously been contained in the ATIGA agreement, which is one of the ASEAN framework agreements that can assist post-pandemic open market policies. With the implementation of ATIGA, ASEAN countries should be able to reopen their timber trade and re-emphasize that the non-tariff policy has been in effect since ATIGA was agreed.

At ATIGA, there is a Tariff Liberalization point, where at this point there are policies related to reducing or eliminating import duties, eliminating tariff quotas, enjoying concessions, temporary modification, or suspension of concessions, and special treatment for rice and sugar. However, what needs to be underlined in this point is related to the reduction or elimination of import duties, where ATIGA signatory countries must eliminate import duties on all products, including those from the wood industry. Trade between Member Countries in 2010 for ASEAN-6, namely Brunei Darussalam, Indonesia, Malaysia, Philippines, Singapore, and Thailand, and in 2015, with flexibility until 2018 for CLMV, namely Cambodia, Laos, Myanmar, and Vietnam. In addition, each member state shall reduce and/or eliminate import duties on originating goods of the other member states.

ATIGA offers various benefits to ASEAN member countries such as; 1) Free flow of goods, because ATIGA aims to achieve free flow of goods in areas that produce few trade barriers, 2) cheap or lower business costs, because in ATIGA there is a policy of eliminating import duties, and 3) increased trade, with the existence of ATIGA, ASEAN member countries will be facilitated to carry out intra-ASEAN market cooperation. Apart from that, ATIGA also emphasizes transparency in publications and regulations. The existence of ATIGA opens up larger market opportunities in the ASEAN region.

Even though ATIGA was implemented by ASEAN-6 in 2010 and CLMV in 2015, due to the COVID-19 pandemic, the implementation of ATIGA was hampered due to border closures, which affected export and import demand. The COVID-19 pandemic has caused various lockdowns in various countries, hampered supply chains, and imposed travel restrictions, resulting in a sharp decline in trade flows worldwide, including the timber industry, which is experiencing a crisis due to these factors.

Conclusion

In conclusion, the COVID-19 pandemic has profoundly impacted the timber trade within ASEAN, highlighting the vulnerabilities and resilience of member countries in navigating this crisis. The establishment of the ASEAN Comprehensive Recovery Framework (ACRF) represents a strategic response to the economic challenges posed by the pandemic, particularly in the timber sector. The ACRF emphasizes the importance of regional cooperation, flexibility, and inclusivity, aiming to enhance economic recovery while addressing health and human security concerns.

The disparities in timber export performance between VPA-certified and non-VPA countries during the pandemic underscore the effectiveness of certification in providing stability and market access. VPA countries like Indonesia, Laos, Thailand, and Vietnam demonstrated remarkable resilience, with significant increases in timber exports despite initial declines. In contrast, non-VPA countries faced more severe challenges, often struggling to maintain their market positions. This divergence illustrates the critical role of regulatory frameworks in shaping trade dynamics during crises.

The ACRF's focus on maximizing intra-ASEAN market potential and broader economic integration, particularly through the ASEAN Trade in Goods Agreement (ATIGA), is pivotal for revitalizing the timber trade. By reducing non-tariff barriers and facilitating trade, the ACRF aims to create a more interconnected and resilient regional market. The collaborative efforts among member states to address supply-demand relationships in the timber sector exemplify the potential of regionalism in overcoming economic challenges.

Furthermore, the application of Regime Transformation Theory and Liberal Intergovernmentalism provides valuable insights into the evolving nature of ASEAN's cooperative frameworks. The pandemic has prompted a shift from a primarily economic focus to a more security-oriented approach, reflecting the need for immediate responses to health crises. However, as the region transitions towards recovery, there is a pressing need for ASEAN to reaffirm its commitment to economic integration and cooperation.

In summary, the ACRF serves as a crucial exit strategy for ASEAN member countries, facilitating recovery in the timber trade and beyond. The lessons learned from the pandemic highlight the importance of adaptability, collaboration, and strategic planning in addressing future challenges. As ASEAN continues to navigate the post-pandemic landscape, the emphasis on sustainable and responsible timber trade practices will be essential for ensuring long-term economic resilience and growth in the region.

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