



NewsNetwork

SEPTEMBER 2021



RE-SET, RE-FOCUS, RE-START



Snippets
RIVAC (Retail Industry Vaccination Programme)

Page 8

Inside this Issue



What's New
Pier8 Retail Mall

Page 4



Feature
What's next for spa and wellness?

Page 5 - 7



Industry News
July 2021 Overview Report On Shopping Malls, NRP Phase 1 & 2

Page 18

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President's Message

Dear members,

Shopping malls have been journeying in stormy waters for almost 1.5 years now, with the many ups and downs directly related to business re-openings and enforced lockdowns. There have been many months of non-operations or even partial operations for numerous businesses - even those considered as 'essential' - as we all struggle to grapple with the constantly changing scenario and eternally eleventh-hour amendments to Standard Operating Procedures (SOPs).

Outside this scenario, it has been said that natural disasters, crises and adversity bring people and countries together, and in Malaysia, the pandemic has certainly brought shopping malls and the retail industry fraternity together in an unprecedented manner.

Some time ago, PPKM mooted the idea of organising vaccination centres at shopping malls with the focus on shopping mall front liners and worked with the Ministry of Domestic Trade and Consumer Affairs (MDTCA) on this programme. Now, some six months later, the Retail Industry Vaccination (RiVAC) looks almost completed. There was actually a total of more than 70 malls who were keen to host the vaccination centres but due to logistics, MDTCA only confirmed nine vaccination centres nationwide. Although the location of these centres did not manage to encompass all states in Malaysia, they have together vaccinated an estimated 55,000 shopping frontliners, with the rest having been vaccinated under the national immunisation umbrella.

We wish to again express our heartfelt gratitude to ALL of you because we know it is no easy task and involved unplanned expenditures. With this altruistic undertaking and sincere cognisance of our corporate social responsibility to ensure all our staff and our tenants' staff are safe, this is to create a safe environment for our shoppers to participate in outings and visitations to the malls with family and friends confidentially and with peace of mind. We should rightfully be proud of ourselves to push our nation towards herd immunity. Yes, as at the time of writing, we have already achieved 80.2% vaccination of Malaysia's adult population and this augurs well with the imminent commencement of vaccinations for our youths.

We have always advocated that although lockdowns control movements, they have very drastic and adverse consequences on the economy. Now, after our innumerable and continuous representations to various authorities over the past many months, the government has recognized that Covid-19 is endemic in our community and that we have to learn to live with it.

That said, much of shopping malls and retail businesses have re-opened since mid-September and it is time now to **Re-Set, Re-Focus and Re-Start**. As we journey towards the end of the tunnel, barring any unforeseen circumstances, and maybe an uncertain future, we must remain vigilant and continue to comply with SOPs at all times, coupled with the need to re-strategise our mall operations and businesses during this 'Covid era'.



We opine that so long as businesses can comply with SOPs, all businesses should be allowed to re-open and we will continue to lobby for full re-opening of the rest of the trade categories in our malls. For this, we are glad to have the continued support of the various related associations as we continue to push ahead for full operations so that the shopping mall and the retail industry can start to revive and recover in due course.

The journey is not over yet and we must all prudently manage our cash flow so that we can continue to hold on strongly to ride out the stormy weather together.

Do continue to stay safe and stay strong.

Warmest regards,

A handwritten signature in black ink, which appears to read 'Teo Chiang Kok'. The signature is stylized and fluid, with a large loop at the end.

TAN SRI DATO TEO CHIANG KOK
President

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SNIPPETS

New App for Johor Tourism



With the objective of promoting tourism in one platform, Johor Tourism will be launching the Johor Tourism Interchange Application by end of 2021 wherein the app will feature tourism attractions including shopping malls. Thank you to our member malls from Johor who have submitted their materials!

National Language Programme for the Decade with Dewan Bahasa & Pustaka (Program Dekad Bahasa Kebangsaan)

Together with Malaysia Retailers Association (MRA), Malaysia Retail Chain Association (MRCA) and PPKM, Dewan Bahasa & Pustaka (DBP) is currently running two competitions with the theme *Bahasa Jiwa Bangsa* to promote the use and enhancement of the Malay language among Malaysians. These include:

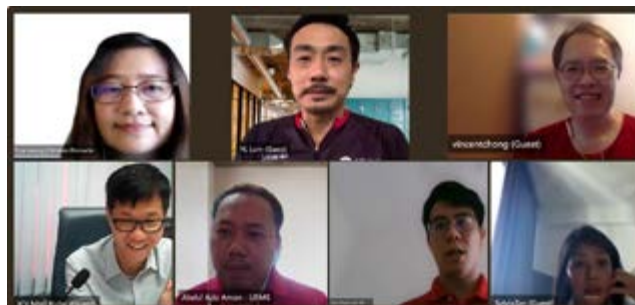


- Express Your Language Short Video Competition (Pertandingan Video Pendek EKSPRESIKAN BAHASAMU)
- Citra Bahasa Competition (Pertandingan Citra Bahasa)

The competition is open to shopping malls and their retail outlets with attractive cash prizes to be won. Closing date: **15 October 2021**.

For more details, please contact Shahrizul Razli Seth of DBP at 03-2147 9299.

Certification Courses in Shopping Mall Management



As members are very much aware, our usual biennial courses have only been held in April 2021 and to date, we have still not been able to hold the second session. As we keep our fingers crossed and await the relaxation of SOPs in order to hold

seminars, we may still yet have a chance to do so in November, failing which we will meet participants again in 2022.

Nevertheless, we managed to offer the April Part 3 sessions which were held virtually and three very gung-ho candidates achieved the full certification in their respective modules. Two other candidates also attained their qualifications for Certified Mall Managers and our congratulations to all. We know times have been tough, but you are much tougher!

Pier8 @ Gravit8: Where Urban Meets Nature



Pier8's entrance

As part of an integrated mixed development developed by Mitraland Group, Pier8 @ Gravit8, features an eight-acre lake, with a strong sense of the auspicious-sounding figure eight which means prosperity or “fatt” in Chinese. Its location in Kota Bayuemas, Port Klang targets to serve the southern Klang communities.

The word, pier, has been chosen to depict its maritime-themed retail concept. Tan Chee Hoaw, Group General Manager of Mitraland Group remarks, “Housed inside the two-level Pier8 is a six-metre diameter salt water aquarium, which will not only showcase a myriad of marine life but will also double up as an occasional live underwater performance arena once it is operational.

“A first-of-its-kind in Klang, the aquarium will serve as an educational component for both children and adults to learn about the fascinating marine life.”

The whole of Pier8's level one, measuring 55,000 sq ft, is occupied by its anchor tenant Orbix International School, which is the Orbix Education Group's third campus and flagship School of Artificial Intelligence and robotics. Operational since January 2021, this bilingual school in English and Mandarin caters to students aged four to 17 years. It currently welcomes the public for viewing.



Interior of Pier8

Meanwhile, Pier8's other tenant KFC, occupying 2,500 sq ft, has been opened since February 2020.

Reflecting its tagline, Where Urban Meets Nature, Tan says its placemaking lake at Pier8 features the first pet-friendly park in Klang within an integrated development and is popular with joggers in the mornings and evenings.

“We also have an open-air performance space of about 20,000 sq ft for holding activities such as festive celebrations, events and the launch of Pier8,” adding

that there are ample 700 parking bays at its retail space.

Pier8 can be accessed via nine major highways or expressways, including the Federal Highway, Shah Alam (KESAS) Highway, North Klang Valley Expressway and South Klang Valley Expressway.

With a net lettable area of 150,000 sq ft, Pier8 is offering special guarantee rental return deals and additional promotion rates for a limited period in October for those keen to grow their business. Don't miss this opportunity!

What's next for spa and wellness?



Spa and wellness treatments such as massage and foot reflexology have proven to aid in our management of stress, mental health and post-operation recovery; more so now after months of lockdown from the Covid-19 pandemic.

As aptly put by one of its practitioners, going to a spa or reflexology wellness centre is more of a preventive care to address these concerns. The spa and wellness industry contributes a sizeable portion to Malaysia's tourism earnings with many of its operators running their businesses in four- and five-star hotels as well as shopping malls that cater to both locals and tourists.

Following its reopening on 1 October after many pleas to the authorities since their prolonged closure for almost 1.5 years, its industry players are now working to reset, refocus and restart their operations. However, they would require a lot of assistance from the relevant authorities and financial institutions to get their businesses rebuilt.

Among the bodies governing this industry, which has been around for more than three decades, are the Association of Malaysian Spas (AMSPA) and the Malaysian Association of Wellness and Spa (MAWSpa).

With its reopening, AMSPA president Datin Jeanette Tambakau foresees that spa and wellness holidays will be much sought after as Malaysia recovers from the Covid-19 pandemic and once border restrictions are eased.

Datin Jeanette, who attended the focus group session for the National Budget 2022 for the tourism sector with the Ministry of Finance (MOF) and the Ministry of Tourism, Arts and Culture (MOTAC) on 17 September, says MOTAC's proposed budget for 2022 is all about Recovery, Resilience and Reform of the tourism sector.

“With its reopening, AMSPA president Datin Jeanette Tambakau foresees that spa and wellness holidays will be much sought after as Malaysia recovers from the Covid-19 pandemic and once border restrictions are eased.”

“Since the industry comes under MOTAC's umbrella, we hope to work closely with MOTAC, including its marketing arm Tourism Malaysia, by activating plans besides powering compelling ideas and contents that combine publicity, public relations and promotions to showcase our Malaysian spa and wellness industry with a new perspective.

Photo courtesy of MAWSpa



“We hope Tourism Malaysia will allocate part of their marketing and promotion budget to help our industry recover and restart.”

Representing 250 members, of which 30% of them are housed in malls, she laments that many of its operators have closed and estimates that at least half of the 30,000 employees in the spa industry have lost their jobs since MCO 1.0.

Given that the multiple lockdowns, Ringgit's poor exchange rate and freezing of new foreign worker permits have caused severe skilled manpower shortage to the industry, she says, “We have asked for the revival of the Centre of Excellence Training Programme to help reskill, upskill and build up our local talent pool of spa therapists as many of our experienced staff have left to work in other industries that were not subjected to the prolonged closure.”

With the majority of its workers from E-Kasih (a category covering the poor) and B40 who are from low-income families, underprivileged communities from the rural areas and single mothers, Datin Jeanette says, “This is the only skill they have. Losing employment is detrimental to them and their families.”

Concurring with her, MAWSpa president Datin Dorothea Justin Moduying says among their most badly affected members are the small spa business operators. They comprise mostly single mothers and entrepreneurs who have dug into their savings, and not discounting their vulnerable staff from the B40 group.

“Our members have been losing a staggering RM1 million daily since the latest lockdown while over 50,000 people from our industry have lost their jobs, including some visually impaired individuals.” MAWSpa members include

product suppliers and design consultants for spas as well as wellness centres that provide skin care, facials, laser skin treatments, other surgical or non-surgical skin and body treatments to improve both physical and mental well-being.

“We have requested the MOF to provide financial loan assistance with low interest rates to help these businesses as most of the operators are restarting their business with zero cash reserves.”

She reckons that its members would not have been able to survive until end-2021 for their industry to be lifted from the government's negative list as originally scheduled under the National Recovery Plan. “We had about 600 members before the pandemic but are now left with less than half of them.”

Wishlists

To enable the operators of this industry to survive during the recovery period, AMSPA and MAWSpa are appealing to the government for reduced taxes, tax exemptions and deferred payments for the financial year 2022 as well as monetary assistance and subsidies.

Datin Dorothea says MAWSpa is urging for an automatic bank loan moratorium with interest waivers until the end of the year and hopes that the approvals could be given swiftly.

While wishing for the loan moratorium to be extended until the end of first quarter

2022, Datin Jeanette says that retail banks have not been approving their industry's loan applications under the targeted relief and recovery facility as its players and owners are not in a positive financial position.

“We have requested the MOF to provide financial loan assistance with low interest rates to help these businesses as most of the operators are restarting their business with zero cash reserves.”

To address manpower issues affecting their industry, MAWSpa is asking for total waiver of work permit renewals for 2021 from the relevant authorities. Datin Dorothea says, “Our security deposits for foreign workers should be allowed to be refunded as soon as possible and the amount lowered in order to ease our cashflow.”

Conscious of potential Covid-19 risks affecting the industry, she says stringent proactive actions have been taken to implement measures to protect their staff and community's health in accordance with the standard operating procedures issued by both the state and federal governments.

They include mandating regular polymerase chain reaction (PCR) tests for staff and investing in sanitisers, personal protective and hygiene equipment at their own costs. Thus, for the renewal of spa and wellness license for 2021, MAWSpa is asking for a waiver or reduction of the current amount, she adds.

As with all other business sub-sectors which have been recently allowed to reopen after a long hiatus, spas and wellness centres will now be starting on the long recovery journey and will need critical financial assistance from the relevant authorities not only to revive but to survive.

Elevation of Hammam Spa brand

Coming out of the tunnel from the prolonged lockdown affecting the spa and wellness industry, Hammam Spa co-owner Kam Su-En, views the prospects as “very bright”, especially with its reopening on 1 October. Operating her outlets at shopping malls in Kuala Lumpur, she attributes her optimism to the consumers being increasingly more wellness focused.

Preparing for the opening of her third outlet in Lot 10’s Isetan in October, the enterprising Su-En explains, “That was a pre-pandemic decision. It was a good deal and also, malls provide greater security for my customers.

“My capital expenditure cost is higher than other spas due to the Hammam machinery and the level of detailing to achieve a Moroccan ambience where most items are imported.

Although her new outlet is smaller, she says it is “more exquisite” and carries a “brand elevation”, with the treatments being differentiated. “For example, after washing your feet, we will spray a cooling peppermint onto them and do a little sound bowl routine to open up the chakras before the massage.

Thai Odyssey optimises on personal healthcare and wellbeing

With the reopening of the spa and wellness industry on 1 October 2021, Thai Odyssey is ready to reopen its doors for its long-awaited customers. Its Sales and Marketing Director Samantha Tan says, “When it comes to the aspect of business operators, we will focus on developing proactive strategies to propel our business forward in a post-Covid-19 environment after being closed for almost 11 months since Malaysia’s Movement Control Order 1.0.

“One of the most crucial elements is to raise public confidence level in what we offer. In Thai Odyssey, we have set up high standards of hygiene practices as an initiative for Safe to Spa.”

“We are confident in the industry as the need will remain or grow even stronger with the public and community having

“Currently, the dry treatments such as the massage for body and feet, waxing, manicure and pedicure are available. The hammam rooms offering the cornerstone hammam and gommage, body masque treatments will be ready soon.”

Manpower is one of the issues plaguing her industry where Su-En sits on the board of the Association of Malaysian Spas, which her outlets are members of.

Su-En, who engages both foreign and local staff for her Hammam Spa, says her Moroccan therapists were pivoted to be chefs of her ‘Moroccan Kitchen’ during the Covid-19 pandemic and resultant lockdown of non-essential businesses. “However, I could not retain the staff from Bali or Sabah as staying home for four months without a sense of purpose is impossible.”

Her two spa outlets, with four-star ratings, were closed the past 18 months, with the Hammam Spa at Publika Shopping Gallery reopening on 18 September with fully vaccinated staff as she holds a beauty centre and spa license for this outlet.

With many spa players having zero cash reserves and incurring financial debts now, Su-En says, “We cannot endure another prolonged closure again. Currently, only 40% of pre-pandemic outlets are still in existence.”

concerns about their personal health and wellbeing. Spa and wellness will continue to thrive because people still need to feel good despite the industry being bound to experience tectonic transformation, and the interface will change. We are also optimistic for the opportunities to expand next year.”

“Most of our workforce comprises Thai masseurs. With a recruitment centre and training academy in Thailand serving our manpower needs for highly-skilled and well-trained therapists, we are only just waiting for the borders to reopen as we recover from the Covid-19 pandemic.”

As the country’s largest authentic Thai massage chain and award-winning brand, Thai Odyssey has 43 outlets, of which 39 are located in prestigious, boutique and neighbourhood shopping malls.

Besides being a member of both the Association of Malaysian Spas and Malaysian Association of Wellness & Spa, Thai Odyssey outlets are also rated by the Ministry of Tourism, Arts and Culture.



Façade of Hammam Spa at Publika



Moroccan design at Hammam Spa in Lot 10's Isetan



A warm welcome by Thai Odyssey front desk personnel and therapist.



One of Thai Odyssey massage rooms for aromatherapy.

RiVAC (Retail Industry Vaccination Programme)

It's now been more than five months since the RiVAC programme commenced under the purview of the Ministry of Domestic Trade and Consumer Affairs (MDTCA) at The Spring and Vivacity Megamall in Kuching in April 2021. More malls in the Klang Valley soon joined the vaccination programme at Mid Valley Megamall, IOI City Mall, 1 Utama Shopping Centre, Centro Mall Klang from end of July onwards. Vaccination centres then followed at Dataran Pahlawan Melaka, and Penang at Gurney Paragon Mall and Design Village Outlet Mall. Subsequently, there were two other RiVAC centres organised by MDTCA in Perak at Aeon Ipoh Falim and Pahang at Proton Indera Mahkota, Kuantan. In total, the RiVAC programme has vaccinated an estimated total of 56,000 shopping malls' frontliners and we are proud to have contributed significantly towards helping our country achieve herd immunity. Thank YOU shopping malls for your dedication and hard work, generosity and big heartedness!

MID VALLEY MEGAMALL



↻ Mid Valley Megamall kicked off the RiVAC from 26 July at their exhibition hall, with Minister of Domestic Trade and Consumer Affairs, YB Dato Sri Alexander Nanta Linggi putting in an appearance.



SNIPPETS

IOI CITY MALL



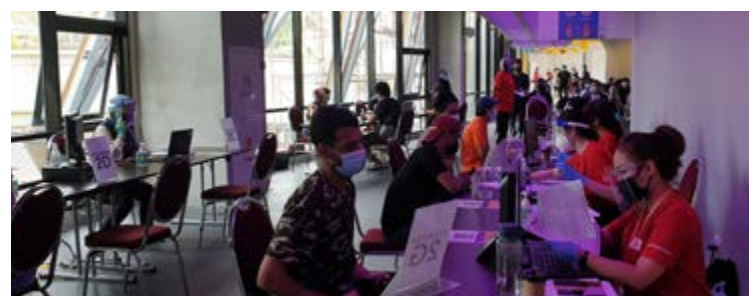
With lots of room and capacity, IOI City Mall extended their vaccination to other member malls in the Klang Valley when they started the programme also on 26 July



1 UTAMA



Over at 1 Utama, they converted the yet-to-be-opened PJ Performing Arts Centre into a RivAC premise from 28 July, with a site visit by the Deputy Minister of Domestic Trade and Consumer Affairs, YB Dato Rosol Wahid



SNIPPETS

CENTRO MALL KLANG



An orderly crowd gathered for vaccination at Klang's Centro Mall centre as they commenced on 28 July

GURNEY PARAGON



Penang's RiVAC programme started at Gurney Paragon from 16 August 2021 with Chief Minister, YB Tuan Chow Kon Yeow (4th from left) taking time off to lend his support



SNIPPETS

DESIGN VILLAGE



At Design Village, organisers and health personnel took over the food court from 18 August for their vaccination shots and were also visited by YB Tuan Chow Kon Yeow



DATARAN PAHLAWAN



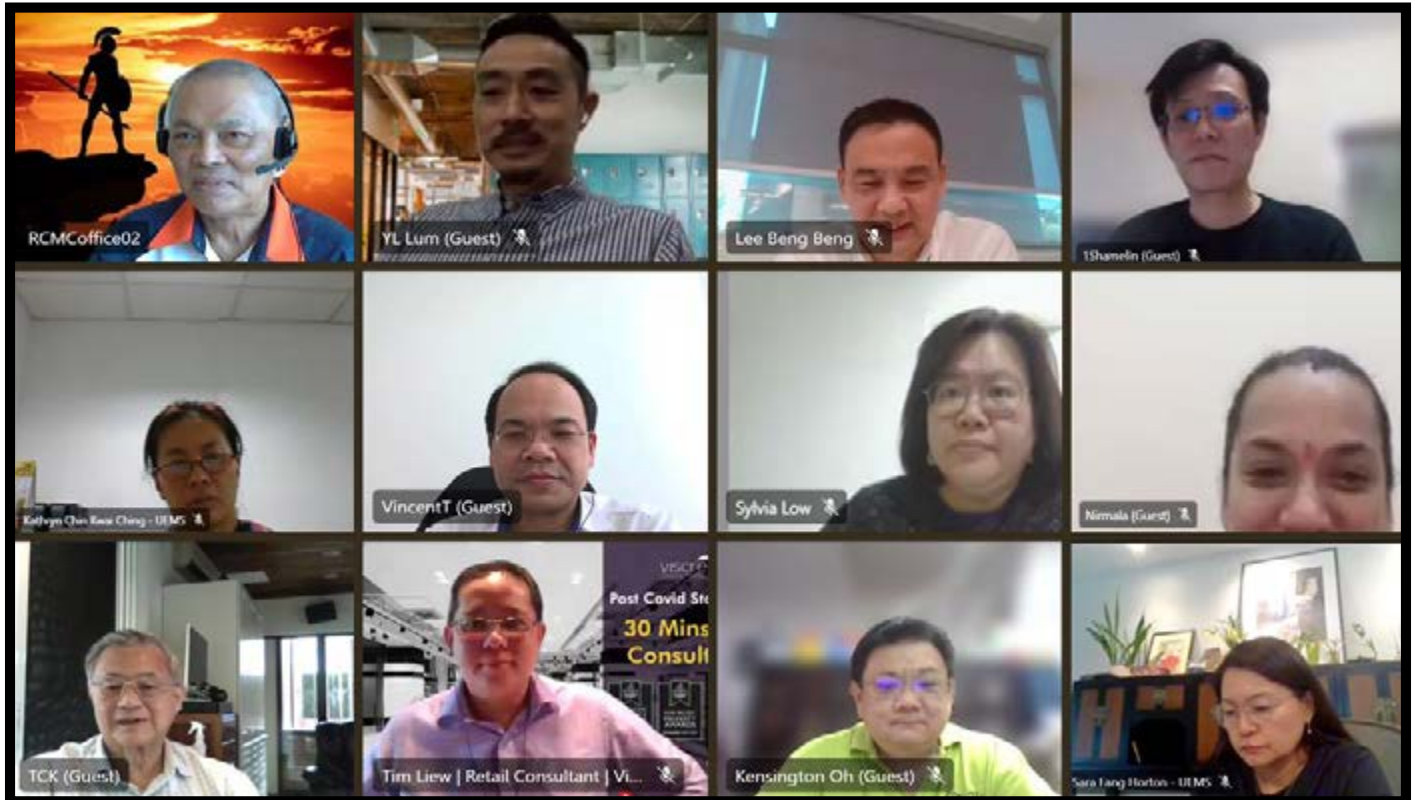
Here, the programme started from 13 August and included vaccinating all security personnel at Dataran Pahlawan with Tuan Yang Terutama, Yang di-Pertua Negeri Melaka, Tun Seri Setia (Dr) Mohd Ali Mohd Rustam taking a personal interest





Strata Management in the Face of MCO

12 AUGUST 2021



The constantly changing standard operating procedures (SOPs) on how malls and businesses need to be managed in the face of the Movement Control Order, have definitely heaped on a fair share of confusion and diverse interpretations, even more so where shopping malls are owned by numerous entities, that is, stratified buildings. Our three speakers shared their various experiences, with some management making good use of this enforced lull period for strata malls to improve their properties with much needed housekeeping work.

Vincent Tiong, Executive Director of PropLead briefly revisited the history of this confusion and lessons learned from it, making property managers more prepared and effective in managing properties in the future.

With more than 39 years of experience, Richard Chan, Director Consultant of RCMC, is one of the pioneer leaders in the field of shopping centres and high-rise retail complex management industry. Quoting him, *The Strata Mall - what has not killed you makes you stronger* – required managers to make operational

adjustments to survive through the current crisis. He shared real-life key examples on how to get through the situation, which included much needed repair and maintenance works to get the mall ready to be reopened.

For the next speaker, Ir YL Lum, Vice President 2 of PPK Malaysia, business is not that usual and many procedures and processes had to be converted to become virtual. For example, annual general meetings became e-meetings, paperwork like invoicing became soft copies only – all done within the framework of the current SOPs decreed by the authorities. He opined that strata property management during the Covid era was akin to running a marathon, where one needs to survive one stage to go on to run another yet more gruelling phase. So, we need to be resilient because the fact we are still around means we are likely to survive.

Overall, the 182 participants felt *'it was very good sharing because sharing is good at these times when we all need to hold each other hands now and stay afloat'*.



Re-Set, Re-Focus and Re-Start

30 SEPTEMBER 2021



It seems that time does fly - whether in good times or bad - and to date, the shopping mall and retail industry have already endured more than 1.5 years of intermittent lockdowns, closures and re-starts. Even as our businesses re-start now, many need to cope with restrictive operating conditions and how they are going to attract patrons after the many months of closure since 2020.

With the recent re-opening of cinemas, we do see a glimmer of hope that other entertainment and leisure businesses will restart, hopefully within the next few weeks. Going forward, all businesses have to RE-SET, RE-FOCUS AND RE-START to cater for a different business environment and our experienced speakers shared their insights, plans and hopes for the future.

As the CEO of Golden Screen Cinemas (GSC) group with almost 480 screens throughout the country, Koh Mei Lee has more than 20 years of experience in the cinema business. She shared that film exhibitors have continually invested into additional screens annually since 2009, growing into a RM1.4 billion industry until the pandemic hit in 2020. All in all, cinemas have closed for a total of 365 days since then and GSC has had to diversify beyond the big screen. Needless to say, it was a tough time just to maintain a brand presence but they are optimistic of drawing back their patrons because there is simply no replacement for immersion on the big screen. Like Mei Lee says, The Show Must Go On, with cinemas providing escapism and contributing to our emotional well being.

Tan Sri Dato Sri Richard Koh is the pioneer for the first water theme park in Asia and his passion has earned him the title 'King of Malaysian Theme Parks'. As President of the Malaysian Association of Themepark and Family Attractions (MATFA), he says that providing and making fun is a serious and expensive business. As they were closed for most of the past 1.5 years, revenue dried up but operating costs continue to be incurred for the necessary ongoing maintenance works. The theme park industry has had to revolutionise into digitalisation of their marketing strategies with

increased dependence on social media algorithms to reach out to their customers. Virtual Realty, Augmented Reality and Mixed Realty now offer more entertainment value and the integration of technology helps to directly monitor safety. He also opined that indoor Family Entertainment Centres (FECs) will substantially extend a mall's draw, lengthen shoppers' stay and ultimately increase revenues for other tenants such as food and beverage (F&B). Theme parks and FECs are all ready to reopen soon and he is hopeful that this will happen over the next few weeks.

With more than 18 years working on international F&B and Entertainment brands, Jeremy Lim is the current Vice President and Media Liaisons for Persatuan Pemilik Restoran dan Bistro (PPRB), an association with approximately 500 owner/operator members across major cities in Malaysia. As the co-owner and operator for Blackbyrd and Dragonfly KL, which are part of a partnership deal with regional F&B and entertainment powerhouse, Ismaya Group from Indonesia, Jeremy stated that many F&B outlets faced a 60% potential closure rate. The recent relaxations for dine-in have definitely helped and although turnover volumes were now only slowly growing, the 50% capacity restriction is a constraint. Part of the recovery process involved customer and regulatory engagement as well as with landlords as F&B occupy up to 30% of mall space. Jeremy shared some food for thought that as F&B quickly grew to become a popular online order and once operators realised they can 'move' online, high traffic, premium physical spaces may not remain a priority.

Next topic in our webinar series for October 2021 will be on Indoor Air Quality. So, do watch out for our announcements soon as we plan other events in the coming months to share on common operational matters which will change how we operate shopping malls nowadays.

Joint Media Conference – Urgent and Desperate Plea to Reopen Retail Sector

3 JULY 2021

PPKM held a joint media conference virtually with industry practitioners as follows:

- Malaysia Retailers Association (MRA)
- Malaysia Retail Chain Association (MRCA)
- Bumiputra Retailers Organisation (BRO)
- Malaysia REIT Managers Association (MRMA)
- Malaysian Association of Theme Park and Family Attractions (MATFA)

A desperate appeal was made to the authorities to accelerate nationwide vaccination and to re-open businesses by July which had been not allowed to operate since May 2021. The panel of speakers included the Presidents/Chairmen from the above associations who opined that achievement of herd immunity urgently would save the economy and livelihoods. Following the statement by World Health Organisation (WHO), the imposition of



lockdowns will only result in extreme economic damage and we have to accept that Covid will remain part of our lives and move forward. Businesses cannot afford to remain closed continually, otherwise the result will be massive manpower lay-offs,

business failures and shop closures with drastic impacts on the other components in the supply chain and the entire retail ecosystem.

The full media statement is available [here](http://ppkm.org.my/wp-content/uploads/2021/07/Joint-Media-Statement-on-Urgent-Desperate-Plea-to-Reopen-Retail-Sector-3-July-2021.pdf)*

[*http://ppkm.org.my/wp-content/uploads/2021/07/Joint-Media-Statement-on-Urgent-Desperate-Plea-to-Reopen-Retail-Sector-3-July-2021.pdf](http://ppkm.org.my/wp-content/uploads/2021/07/Joint-Media-Statement-on-Urgent-Desperate-Plea-to-Reopen-Retail-Sector-3-July-2021.pdf)

Focus Group Discussion (FGD) on Water Sector Transformation 2040

5 JULY 2021



Organised by the Academy of Sciences Malaysia (ASM), the FGD was attended by PPKM's representatives Tan Sri CK Teo and Khairul Ariffin Ibrahim who shared their opinions on the current water situation.

ASM was appointed as a strategic partner by the Economic Planning Unit to undertake the *Roadmap for the National Agenda on Water Sector Transformation 2040 Development Study*.

Dialogue with Malaysian Institute of Economic Research (MIER) on the National Recovery Plan (NRP)

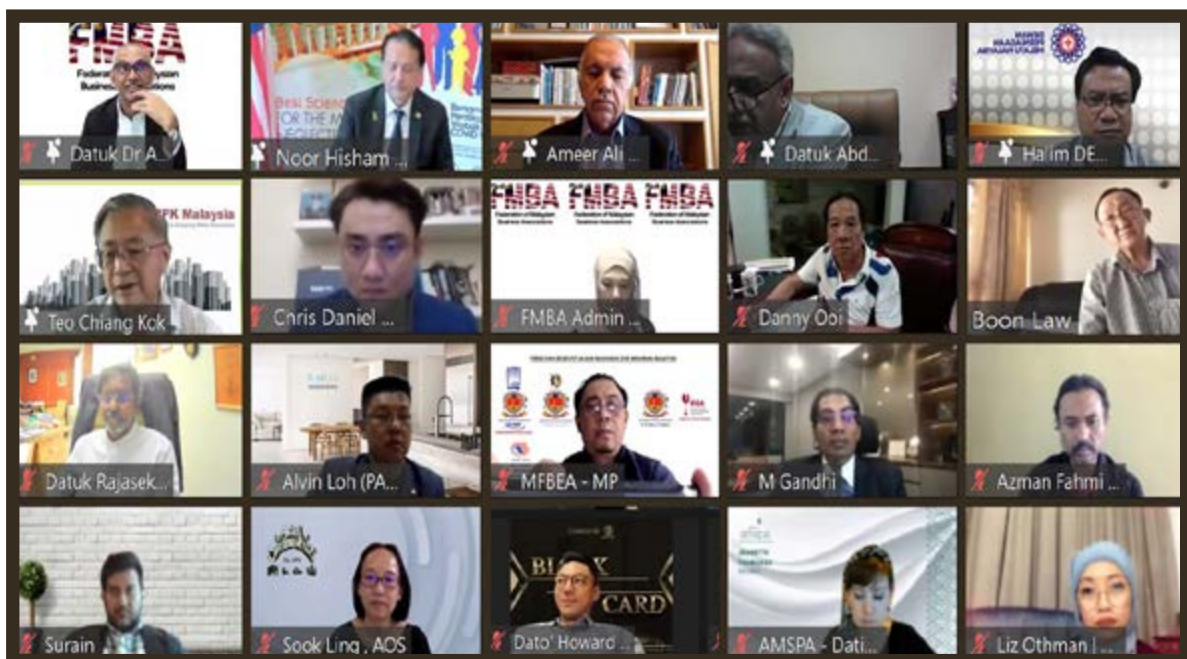
14 JULY 2021



PPKM joined in the dialogue with retailers and hotels to provide recommendations to the Government and discuss strategies on how to move the NRP forward at a faster pace.

Engage, Explore, Empower with Ministry of Health (MOH)

22 JULY 2021



Tan Sri CK Teo emphasised the need to re-strategise as Covid has become endemic and to disband the essential versus non-essential business categories. He also proposed privileges for those who are vaccinated eg dine in services as we need to accept that Covid will remain in our lives for some time to come.

Northern Region Meeting

6 AUGUST 2021



It was a lively session with more than 40 members from Northern Region malls in attendance discussing the hot topic of vaccinations for shopping frontliners. Peter Chan, Northern Region representative gave an overview of malls' activities in Penang, Kedah and Perak together with the states' overall vaccination status. Members were also updated on the shopping malls scenario in Johor, Sabah and Sarawak by the respective regional representatives.

Engagement with Bank Negara

9 AUGUST 2021

Various representatives from shopping malls and retailers attended the session with Bank Negara to apprise them of the current situation facing our industry. We shared the findings from our recent July 2021 survey (see details in pages 18-19) which indicated a bleak future if businesses were still not allowed to re-open. Thankfully, relaxations of more business categories being allowed to operate were then announced in September 2021.



Engagement with the Ministry of Finance (MOF) on Budget 2022 – Reviving and Rejuvenating the Retail Sector

8 SEPTEMBER 2021

At the engagement session with the Minister of Finance, Tan Sri CK Teo presented the cash flow crisis scenario which all shopping malls are currently enduring and appealed to MOF that for our very survival, malls are in critical need of numerous financial assistance. In the face of increasing operational costs due to the need for SOP compliance, it is noted that all malls have backlogs of unpaid rentals of up to 12 months. The vacancy factor also is foreseen to increase to possibly 30% by end of this year, so there is little hope of financial recovery in 2021.



It is hoped that MOF will take heed of our appeals and we look forward to positive news for our industry in Budget 2022.



Security Technology - Business Process Re-Engineering

3 AUGUST 2021



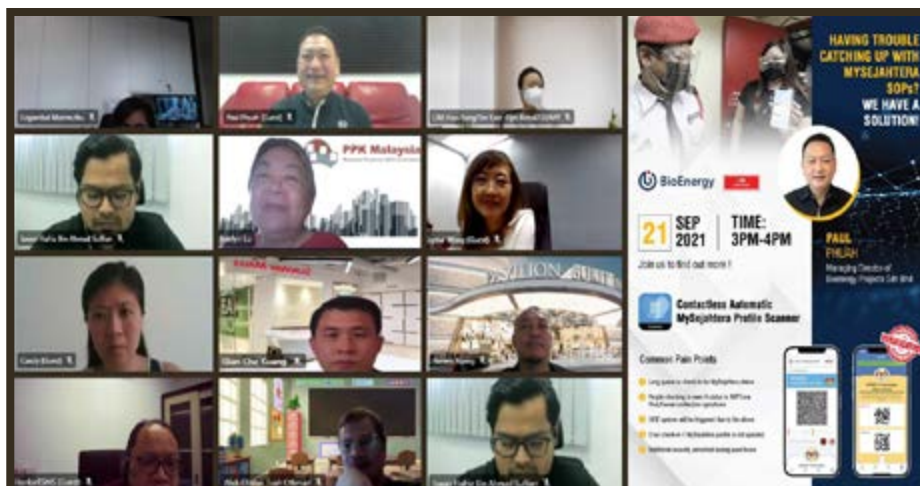
VTTT 6

More than 50 participants joined the talk on security technology where Raffles Force Security in collaboration with AGARAM Global offered a total solution for security – security services, manpower technology and training integrated with technology. The speaker was Mr DS Maran from Agaram Global who has developed cost-effective security management methods that embrace technology to maximise work productivity and efficiency of security personnel.



Contactless Automatic MySejahtera Profile Scanner

21 SEPTEMBER 2021



VTTT 7

With 101 participants at the VTTT, Bioenergy Projects shared a new system to enforce and strengthen current gatekeeping at shopping mall entrances. With the contactless and automatic procedure, malls can try to keep both the its employees and shoppers as safe as possible, minimising the need for manual checking and eliminating human error.

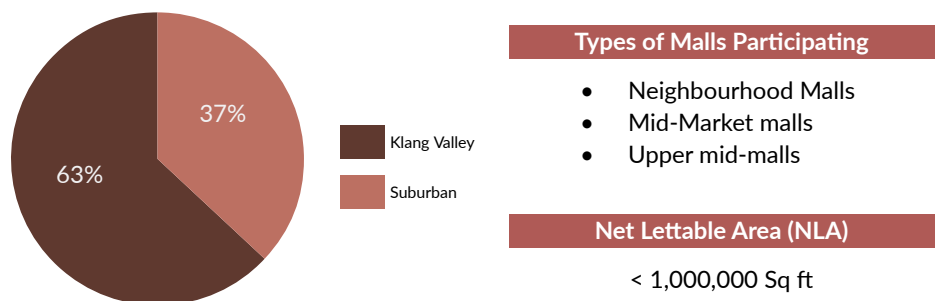
Overview Report On Shopping Malls, NRP Phase 1 & 2, July 2021

The pandemic outbreak in Malaysia has resulted in numerous economic lockdowns since March 2020 and it has been almost 18 months of constant interruption for businesses in shopping malls, with the latest suspension of more than three months causing untold damage to the entire mall and retail industry and their supply chain. It must be noted that the mall and retail sector had already suffered drastically in 2020 and the present impact is affecting businesses who have been trying to survive on whatever savings are still available and which has been desperately stretched and are now already depleted. Therefore, to say that 2021 is an even worse year for businesses would be a gross understatement.

In the light of the above scenario, PPK Malaysia, together with Stratos Pinnacle SB, ran a survey to gather relevant data to ascertain the situation faced by malls due to the major disruptions to the shopping mall and retail industries to date.

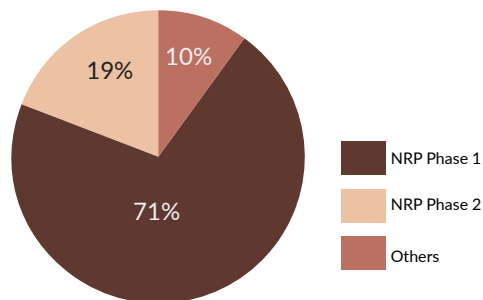
A total of 94 malls across Malaysia participated, with the majority of 63% located in the Klang Valley and suburban areas. The survey ran from 23 to 30 July 2021 and included a fair representation of neighbourhood malls, mid-market malls and upper mid-malls. A large proportion of participating malls sampled had a net lettable area (NLA) of less than 1,000,000 sq ft.

% of malls across Malaysia participating in this survey



During the survey period, the majority of malls or 71% were placed under the National Recovery Plan (NRP) Phase 1, while 19% were in NRP Phase 2, both of which had similar constrictive business restrictions of only allowing the 'essential' sectors to operate ie supermarkets, hypermarkets, departmental stores (partial operations), pharmacies, food & beverage (F&B - takeaways only), hardware, e-commerce, pet shops, optical trade and laundries and then only lately, books and stationery, computers and telecommunications.

% of malls placed under NRP Phase



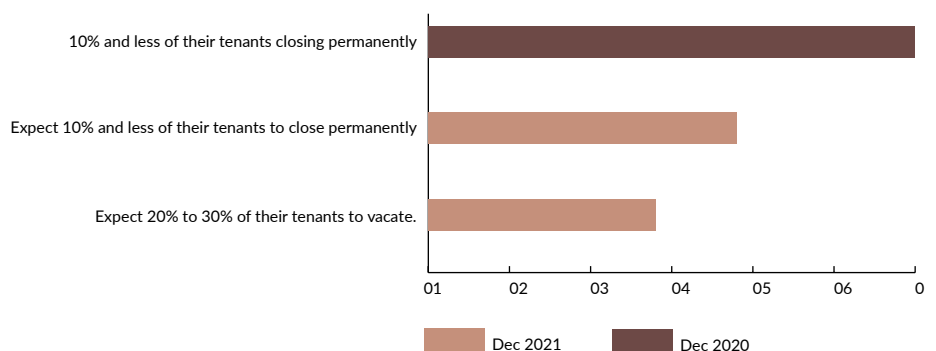
BUSINESS OUTLETS OPEN AT MALLS

Within the above circumstances, therefore, the majority of malls had only between 10% and 20% of tenants that were still operating at their premises.

As at December 2020: nearly 60% of malls saw 10% and less of their tenants closing permanently.

By December 2021, however, only 38% of malls expect 10% and less of their tenants to close permanently, whilst 28% are expecting 20% to 30% of their tenants to vacate.

% of malls' expectation towards their tenants closing permanently/vacate



INDUSTRY NEWS

FOOTFALL



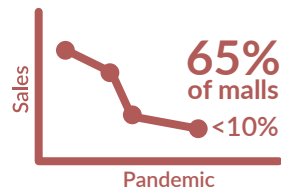
60% of malls currently had footfall decreases to less than 10% to 40% of pre-pandemic levels, indicating that footfall had dropped dramatically, ranging from 60-90%. This drop was seen to be relatively consistent across various shopping mall sizes.

EMPLOYEE LAYOFFS



To assist in cash flow, **14% of the malls have already laid off their employees.** The majority have already reduced headcount by 10% to 20% and the percentage of cuts could grow if the current business closures were to persist any longer.

SALES TURNOVER



Of the malls surveyed, **65% of malls only achieved sales of less than 10% to 40% of pre-pandemic levels, indicating a drop of between 60 and 90%.**

Notably, the above included the business sectors deemed as 'essential' by the authorities, reflecting the drastic drop in footfall, fear and weak buying power.

SALARY CUTS



In addition to layoffs, almost 80% of the companies have cut salaries as the economic impact of the pandemic begins to bite their bottom line, with majority implementing 10% to 20% salary cuts as well as withdrawing annual incentive bonuses and other benefits.

RENTAL REBATES



Most malls have been offering rental rebates to their tenants who are taking the brunt from the pandemic and implementation of MCO/NRP, with **40% of them offering between 30% and 50% of rebates.**

COMMENTS

25% of malls would like to urge the government to allow the shopping mall and retail businesses to reopen and resume operations URGENTLY as many are on the verge of closing down.

19% of the malls also urge the government to provide more financial aid and assistance such as rebates and tax reliefs in an effort to preserve cash flow and maintain employment.

Other suggestions also include **speeding up the vaccination rate, especially outside the Klang Valley,** and requesting for clearer SOPs and guidelines as current instructions are not timely, confusing and unclear.

RENTAL PAYMENT



There is a significant increase in number of tenants who are unable to pay their rent due to the pandemic. **30% of malls are unable to collect rental from more than 70% of their tenants.** The pandemic and MCO/NRP SOP restrictions have inevitably caused adverse impact on the overall sales of tenants and their customer traffic. **Almost 50% of the total malls have up to a year of overdue payments owed by their tenants.**

EXPECTED RECOVERY

44% of the malls think their business could take up to one year to recover once the MCO has been lifted as they expect consumers would be most likely to continue staying at home. This is a vast contrast with our previous survey conducted in July 2020, when more than half of shopping malls thought that it would take six to 12 months before businesses returned back to normal.

Shopping mall operators have already taken a huge beating from the pandemic and lockdowns which have not been judiciously implemented and this has certainly resulted in less optimistic outlooks by mall operators currently.

To enable the mall and retail sector to even begin on the long journey of firstly, achieving mere survival, and then recovery, it will require much vital and critical government assistance and financial support.

CASH FLOW



With such severe limitations in rental income collection, malls found it difficult to preserve cash flow and **32% of malls claimed that they could only sustain the current cash flow under the pressure of MCO for a period of three months and less.**

MEMBERSHIP 2021

CORPORATE MEMBERS

118 Mall
163 Retail Park
1 Utama Shopping Centre
1MK Mall
1Shamelin Shopping Mall
1st Avenue, Penang
3 Damansara
Aeon Mall Taman Maluri
Alamanda Shopping Centre
Alor Star Mall
Aman Central
Amcorp Mall
Amerin Mall
Ampang Point
Atria Shopping Gallery
avenue K
Bangsar Shopping Centre
Batu Pahat Mall
BBCC
Berjaya Megamall
Berjaya Times Square Kuala Lumpur
Berjaya Waterfront Complex
Central i-City Shopping Centre
Central Market
Central Square Sungai Petani
Centrepoint Bandar Utama
Centre Point Sabah
Centro
Cheras LeisureMall
Citta Mall
City Mall
Cityone Megamall
Damen Mall
Dataran Pahlawan Melaka Megamall
Datum Jelatik Mall
Dayabumi
DC Mall
Design Village Outlet Mall
Dpulze Shopping Centre e @ Curve
East Coast Mall
Eastern Mall
Ekocheras Mall
Empire Shopping Gallery
Encorp Strand Mall
Endah Parade
fahrenheit 88
Financial Park Complex Labuan
First World Plaza
Freeport A'Famosa Outlet
Galleria@Kotaraya
Gamuda Walk
gateway@klia2
Genting Highlands Premium Outlets
Giant Hypermarket Bandar Kinrara
Giant Hypermarket Banting
Giant Hypermarket Batu Caves
Giant Hypermarket Bayan Baru
Giant Hypermarket Kemuning Utama
Giant Hypermarket Klang
Giant Hypermarket Klang Sentral
Giant Hypermarket Kota Damansara
Giant Hypermarket Kuala Terengganu
Giant Hypermarket Kuantan
Giant Hypermarket Plentong
Giant Hypermarket Putra Heights
Giant Hypermarket Senawang
Giant Hypermarket Seri Kembangan
Giant Hypermarket Shah Alam
Giant Hypermarket Subang Jaya
Giant Hypermarket Tampoi
Giant Hypermarket Ulu Klang
Giant Mall Kelana Jaya
Giant Superstore Tunjung
Giant Setapak
Giant Superstore Jerreh
Giant Superstore Kangar
Giant Superstore Kuala Pilah
Giant Superstore Prima Saujana (Kajang)
Glo Damansara
GM Klang Wholesale City
Grand Merdeka Mall
Great Eastern Mall
Green Heights Mall
Gurney Paragon
Gurney Plaza
Harbour Mall Sandakan

Hartamas Shopping Centre
Ikano Centres
Imago, KK Times Square
Intermark Mall
IOI City Mall
IOI Mall Bandar Putra Kulai
IOI Mall Puchong
IPC Shopping Centre
Ipoh Parade
Island Plaza
ITCC Mall
Jaya Shopping Centre
Jetty Point Duty Free Complex
Johor Bahru City Square
Johor Bahru City Square Office Tower
Johor Premium Outlets
KB Mall
KL East Mall
KL Gateway Mall
Klang Parade
Kluang Mall
KLEC Mall
Kompleks Bukit Jambul
Kompleks Metro Point
Kompleks Mutiara
Kompleks Star Parade
Kompleks Tun Abdul Razak (KOMTAR)
Kota Raya Complex
KSL City @ Johor Bahru
KSL Esplanade Mall
KTCC Mall
Kuantan Parade
KWC Fashion Mall
Kulim Central
Larkin Junction
Lot 10
M3 Mall
Mahkota Parade, Melaka
Maju Junction Mall
Megamall Pinang Shopping Complex
Melawati Mall
Mesamall
Mesra Mall
Mid Point Shopping Complex
Mid Valley Megamall
Mid Valley Southkey
Mitsui Outlet Park KLIA
Mydin Mall
MyTown Shopping Centre
New World Park
Nexus Bangsar South
Nu Sentral
Ole Ole Shopping Centre
Pandan Kapital
Paradigm Mall
Paradigm Mall Johor Bahru
Paragon Market Place
Paragon Point Shopping Centre
Pasaraya Komuniti @ Mart Kempas
Pavilion Kuala Lumpur
Paya Bunga Square (PB Square)
Pearl Point Shopping Mall
Pedas RSA
Pelangi Leisure Mall
Perling Mall
Pernama Kompleks Mutiara Armada
Pertama Complex
Pier8 Retail Mall
Plaza Alam Sentral
Plaza Angsana
Plaza Low Yat
Plaza Merdeka
Plaza Metro Kajang
Plaza Pelangi
Plaza Salak Park 'SPARK'
Plaza Shah Alam
Prangin Mall
Publika Shopping Gallery
Riverwalk Village
Quayside Mall
Queensbay Mall
Quill City Mall
RCMC Sdn Bhd
SACC Mall
Sarawak Plaza
SB Mall
Segamat Central Shopping Centre
Sejati Walk
Semua House
Setapak Central
Setia City Mall

AFFILIATE MEMBERS INDIVIDUAL

Shaw Parade KL
Shaw Centrepoint
South City Plaza
Star Avenue Lifestyle Mall
Starhill Gallery
Straits Quay Retail Marina
Sunbag Parade
Sungei Wang Plaza
Sunshine Tower
Sunway Big Box
Sunway Carnival Mall
Sunway Citrine Hub
Sunway Giza Mall
Sunway Putra Mall
Sunway Pyramid
Sunway Velocity
Suria KLCC
Suria Sabah Shopping Mall
Sutera Mall
Taiping Mall
Tasek Central
Terminal Larkin Sentra
Terminal One Shopping Centre
The Curve
The Exchange TRX
The Hills
The Linc
The Gardens Mall
The Main Place
The Mines
The Shore Shopping Gallery
The Spring
The Spring Bintulu
The Starling
The Summit Subang USJ
The Waterfront @ Parkcity
The Weld
Toppen Shopping Centre
Tropicana Gardens Shopping Mall
Utropolis
Viva Home Shopping Mall
Vivacity Megamall, Kuching
Wangsa Walk Mall
Wetex Parade Shopping Centre
Zenith Lifestyle Centre

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Gan Siew Chain
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Lok Chin Lum
M.Letchumanan
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Nga Mee Liong
Phan May Ling
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Tee Kok Guan
Timothy Liew Heng Kwun
Timothy Sangawa
Wong Paik Tho
Woo May Foong
Yasmin Mokhtar
Yew Poh Ling
YY Lau

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Dato' Joyce Yap, CMM
HC Chan, CMM

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Ng Hean Yin

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Norbiayah bt Mohd Yusof
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