

Oh et al., 2018

Volume 3 Issue 3, pp. 1220 -1233

Date of Publication: 1st February, 2018

DOI-<https://dx.doi.org/10.20319/pijss.2018.33.12201233>

This paper can be cited as: Oh, Y, Hamir, A.M.H.B.P & Shah, M.A.S.B.M. (2018). The Viability of Halal Food Industry for Brunei Economic Diversification: Swot Analysis. PEOPLE: International Journal of Social Sciences, 3(3), 1220-1233.

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THE VIABILITY OF HALAL FOOD INDUSTRY FOR BRUNEI ECONOMIC DIVERSIFICATION: SWOT ANALYSIS

Youri Oh

Universiti Brunei Darussalam, Brunei Darussalam
yourioh@hotmail.com

Ak Md Hisyamuddin bin Pg Hamir

Universiti Brunei Darussalam, Brunei Darussalam
hisyamhamir@gmail.com

Mohd Azwan Shah bin Mohd Shah

Universiti Brunei Darussalam, Brunei Darussalam
mohdazwan106@gmail.com

Abstract

There has been a growing interest in research for halal industry as the market has seen a tremendous growth in the global market and develops a strong presence in developed countries. With the halal industry being worth of US\$1.2 trillion worldwide or US\$650 billion alone in the food sector, vast opportunities in the global halal food industry for Brunei to use in order to diversify its economy. Brunei has been prioritised economic diversification as a mean to economic development; however, it has not shown any successful result so far. For a long period, Brunei has sustained its high dependency on oil and gas sector, in which economic diversification is a key to lower down the current dependency. Brunei Halal brand was established as one of attempts to help push forward Brunei's halal industry and supply the amount of halal certified food to the global Muslim population. In addition, owing to strong religious identity and principle, Brunei halal gained a reputable status to international and Islamic standards. The attempt of this paper is to assess the viability of the

halal food industry as a source for economic diversification of Brunei with understanding of the current status of Brunei halal food industry by SWOT analysis. This study conducted semi-structured interview with respondents who are stakeholders in halal food industry to obtain further data in addition to data collected from secondary sources.

Keywords

Halal Food Industry, Economic Diversification, Halal Industry, Brunei Halal Food Industry

1. Introduction

Brunei Darussalam has tried to adopt economic diversification in the 2nd National Development Plan (1962-1966) and it has also been recognised as an important development agenda since in the 3rd National Development Plan. The reason for economic diversification is to reduce Brunei Darussalam dependence on the oil and gas sector, which contributes more than half of the country's GDP and government revenue (EID, 2016; OECD, 2013). Economic diversification is a way to reduce Brunei Darussalam's dependence on the oil and gas sector and to find an alternate source of income for the government and to create more job opportunities. In addition, it is a mean to pursue sustainable economic growth. The government has made various suggestions and projects to achieve economic diversification. Brunei, with its stable political and social conditions, and viable business environment, we believe halal industry can be a way to attain Brunei's economic diversification amongst all non-oil and gas industry that has a potential to sustain its economy, economic growth and further development. In addition, owing to strong religious identity and principles that has been practiced in the nation, Brunei has a reputable status to international and Islamic standards (Brunei Halal, 2016a). This study is an exploratory study to investigate the viability of halal food industry as a source of economic diversification of Brunei by SWOT analysis based on the current status of the industry in Brunei from secondary data and perspectives from stakeholders.

2. Literature Review

2.1 What is Halal?

Islam is one of the largest religions in the world that consists of 1.6 billion populations widespread around the world (Ireland & Rajahzabeh, 2011; Pew Research Center, 2012). *Halal* refers to "lawful" and "permissible" that recognises products, behaviours and services allowed for Muslims to consume (Esposito, 2003). There are

complexities in comprehending requirements of halal by different schools although the general understandings on halal could be summarized as below.

- Pork and all swine by-products
- Animals not slaughtered by Halal requirements
- Dead animals killed prior to slaughter
- Animals killed in a manner that prevents their blood from being fully drained from their bodies
- Animals slaughtered in the name of anyone other than *Allah*
- Blood and Blood by-products
- (Halal) Foods that have been contaminated by any of Haram products
- Carnivorous animals such as lions, tigers, or wolves
- Birds of prey such as eagles, owls, falcons or vultures
- Pests such as rats, centipedes, scorpions and other similar animals
- Animals considered repulsive such as lice, flies, maggots and other similar animals
- Mules and domestic donkeys
- Animals live both on land and in water (e.g.) frogs, crocodiles and other similar animals
- All poisonous and hazardous aquatic animals
- Intoxicants of all types, including alcohol and drugs
- Gambling, Pornography, *Riba* (charging and paying of interest)

However, consuming halal is an obligation to Muslims and its importance is quoted several times in the *Quran*. Following quotes are cited as examples stated an obligation of Muslims on consuming halal: “O mankind, eat from whatever is on earth lawful and good and do not follow the footsteps of Satan. Indeed, he is to you a clear enemy (The *Quran* 2:168),” “So eat of that upon which the name of *Allah* has been mentioned, if you are believers in His verses. And why should you not eat of that upon which the name of *Allah* has been mentioned while He has explained in detail to you what He has forbidden you ... (The *Quran* 6:118-119),” “... eat of what *Allah* has given you, lawful and good, and give thanks for Allah's favour if Him do you serve (The *Quran* 16:114),” “... Eat of the good things and do good... (The *Quran* 23:51).”

2.2 Global Halal Food Industry

The recent global halal market estimated at about US \$2 trillion excluding Islamic finance sector with 20 per cent of an annual growth rate (Ainullah, 2016; Thomson Reuter, 2015; Othman, Sungkar, & Hussin, 2009; Kim, 2015). Halal industry seems only relevant to Islamic nation-states in the past; however, it is now increasingly spreading to worldwide that

became a global industry along with increasing Muslim population. In 2010, Muslim population consists 23 per cent of the total world population with an expected annual growth of 3 per cent (Grim & Karim, 2011). Most Muslim-majority countries are located in Asia-Pacific and Middle East-North Africa region - see Table 2.1. Although consuming halal is an obligation to Muslim consumers, non-Muslim consumers recognise halal products as good quality as well as healthy due to strict requirements to prevent harms and for the highest standards of *Tahara* – physical sense of purity, hygiene and quality upon the growing reputation of global halal industry. According to the research of Rezai, Mohamed and Shamsudin (2012), 79 per cent of non-Muslim consumers are also aware of the existence of halal principles and 40 per cent of the respondents understood the concept of halal principle.

Halal food industry is the most rapid-growing market among halal industry. Along with the great success of global halal food industry, halal certification has gained its global reputation, as a measure to guarantee trustful-quality and safety. Halal certification is a measure to certify the halalness of halal product and service. There are about 122 halal certification bodies exist globally (Komitopolou, 2015), however, halal certification awarded by government or quasi-government agents are considered highly convincing based on credibility and reliability of the government than the private agencies.

With the growing reputation of halal in global market, the industry became a national level agenda upon its growth and great contribution to nation's economy. In fact in Malaysia, export of halal products helped creating 250,000 jobs with making nearly US \$10 billion in 2015, which contributes at about 5.1 per cent of the total export of the country (Naidu, 2016). Malaysian government's ambition and support towards halal food industry resulted those benefits with several foreign investment made in Malaysia such as Nestle. Many governments have been trying to achieve a success like Malaysia by engaging government as halal certification awarding body or set up a special agency for controlling halal related matters. However, there are only few governments have such agency handling halal matters. Brunei halal certification is solely owned and managed by Religious Council of Brunei which gives more conviction to its halal certification due to its institutional body and strict procedure (Kamarul Aznam Kamaruzanam, 2017).

Table 1: World Muslim Population by Region

Region	Estimated 2010 Muslim Population	Estimated 2010 Total Population	Percentage of Population that is Muslim (%)
Asia-Pacific	985,530,000	4,054,990,000	24.3
Middle East-North Africa	317,070,000	341,020,000	93.0
Sub-Saharan Africa	248,110,000	822,720,000	30.2

Europe	43,490,000	742,550,000	5.9
North America	3,480,000	344,530,000	1.0
Latin America-Caribbean	840,000	590,080,000	0.1
World Total	1,598,510,000	6,895,890,000	23.2

(Pew Research Center, 2012)

2.3 Brunei Halal Food Industry

Brunei is a nation practicing *Melayu Islam Beraja* (“MIB”: Malay Islam Monarchy, the national principle of Brunei Darussalam) with an implementation of the Syariah law. Halal industry was identified in the 9th National development plan (2007 - 2012) as a development resource. The importance of halal food industry was highlighted through the branding of ‘Brunei Halal’ that ensures the validity of its halal food industry, which was officially endorsed in August 2007 (Brunei Halal, 2016) with the initiative of several government agencies such as the Ministry of Industry and Primary Resources, the Islamic Religious Council of Brunei Darussalam, Ministry of Religious Affairs, the Ministry of Health and the Ministry of Finance. All food products of the brand are certified by Brunei Halal (MUIB), Figure 1 shows an example of a product and advertisement of Brunei Halal brand products in supermarket. Several food products of Brunei Halal brand have been manufacturing and recently it has received the seal of approval for the use of the Ministry of Health’s ‘Healthier Choice’ (Borneo Bulletin, 2016). Besides, the brand has established the first halal food product processing plant in Birmingham, United Kingdom, and as a product shown in recently has launched various frozen products in Tesco.

In July 2017, the government has announced its strong will to enhance production and distribution of halal food in Brunei by enforcing all food-related businesses to obtain halal certification or permit. In fact, food products distributed in local supermarkets are mostly halal certified products to comply Islamic regulations and the needs of Muslim consumers which makes up at about 78 per cent of the total population of Brunei. Figure 2 illustrates MUIB logo attached on food product. And as demonstrated in Figure 3, food products distribute in local supermarket must contain halal logo as halal certified products.



Figure 1: 'Brunei Halal' Product & Advertisement in Supermarket, Brunei. September 2017.



Figure 2: Logo Attached on Halal Food Product, Brunei. September 2017.



Figure 3: Food Products Displayed in Local Supermarket, Brunei. September 2017.

The effort of the government does not only confine by halal food industry but entire halal industry or the further development of Brunei's halal industry. The government has set up the corridor for halal products in one of its Bio-Innovation Corridor in Southern Guangxi province, China, with aims to promote its halal certified products especially halal food

products, cosmetics, pharmaceuticals and health supplements, bio-tech and logistics; and to develop Brunei's halal industries into a global stage: Brunei-Guangxi Economic Corridor (BGEC) (Thomson Reuters, 2015). Such cooperated project with Saahtain Foods FZ LC and Ministry of Industry and Primary Resources (currently it has changed to Ministry of Primary Resources and Tourism: MPRT), specialise in processed ready to eat food - MREs; were designed to set up a production plant in Brunei to support development of halal industry's production and market penetration to global level.

3. SWOT Analysis

Strength

- Government interest on halal industry as a mean to economic diversification
- Government efforts to develop the industry
- Institutional halal certification awarding body
- Strict process and requirement to obtain MUIB certification
- Consumers' high-trust on local halal products
- Muslim-majority country (makes up at about 78% in total)
- MIB & Implementation of the Syariah Law

Weakness

- Not much infrastructure for manufacturing
- Strict access to data and information
- Lack of marketing & promotion
- High-priced local halal products (e.g.) Brunei halal
- High dependency on food import

Opportunity

- Consumers in Brunei conceived the local halal certified products as quality products
- Create employment opportunities
- Increasing Brunei Halal recognition in global level
- Platform for the development of local products & SMEs
- Affordable costs for Brunei halal certification

Threat

- Global / Regional competitors
- Small population in Brunei (Low demand, Small market) compare to other Muslim majority countries
- Low accessibility (air/sea transport)
- Long procedure of Brunei halal certification

3.1 Strength

Brunei government has been on developing halal industry along with its economic diversification plan. It has been discussed as an agenda in Legislative council meeting and National development plan. Brunei is the only institutional halal certification authority in Southeast Asia that is considered as one of the strict halal certification in the region (ERIA, 2016). Several acts such as, Halal Meat Act: Public Health (food) Act and Regulations, 2000; Halal Certificate and Halal Label Order, 2005 gives additional strictness to Brunei halal certification as well. Brunei is a Muslim-majority country with 78 per cent of Muslim (CIA, 2016), where has been practicing MIB and implemented the Syariah law. Consumers have grown its trust on local products and Brunei's halal certification due to its institutional agencies and strict procedure for the certification. According to Economic Research Institute for ASEAN and East Asia (ERIA) (2016), some private halal certification issues its certification with low alcohol content as 'halal' whereas in Brunei halal certification, alcohol is not allowed and also the use of stun gun in slaughtering animals is not allowed unlike some other countries. With the implementation of such measure, Brunei is committed in increasing the recognition of Brunei Halal in the global halal market by becoming a premium Halal certification and it has also signalled in becoming a major player in contributing to the growth of the halal industry. If the venture into this industry were to be a success, we assume Brunei can reduce the current high dependency on energy resources.

3.2 Weakness

While Brunei halal certification is well known for its strict requirements, long and detailed procedure are indicated as a weakness to obtain the certification. The Islamic Religious Council of Brunei Darussalam whose members are more qualified, experienced and are prominent level of clerics must approve all the procedures of it in order to be certified. However, there are no specific data available regarding halal industry, which gives difficulties to researchers, companies and publics to gain access to such indicators. According to the consumer behaviour survey, consumers identify the main factor for the slow growth of halal industry as lack of its local halal products marketing and advertising. Lack of promotion

leads to lack of appeal towards consumers and result consumers' preference on imported products rather than locally produced goods, which indicate steady high dependency of Brunei's food on imports - 80 per cent of its food requirements (Kwek, 2016). Local halal products are more expensive than imported products that consumers conceived local goods tend to be unreasonably overpriced. Substantial food import retains drawback in the nation with low self-sufficiency rate and slow development of food manufacturing industry in Brunei.

3.3 Opportunity

The Brunei Halal Brand, which is partially owned by the government, has been used as one of the drivers for encompassing halal industry especially on food products to pursue the economic Brunei. Currently, Brunei halal certification is charging affordable price than other halal certification authorities - BND 30 for every halal certification and BND 50 for halal permit which will be valid for one year from the date of issue (The Religious Council, 2007). According to Brunei Halal's Consumer Behaviour Survey 2016, consumers in Brunei conceived the local halal certified food products as quality and trustful products that contribute benefits and potentials to further development of local halal products. Throughout the development of halal industry, more employment opportunities for locals are expected and it also can be a platform for the development of local products and SMEs. Furthermore, it can satisfy domestic consumers' demand of halal products and assist the development of Brunei to a halal hub in the region as well. In fact, Brunei halal brand is a major contributor to other development projects such as the Halal Science Centre, Agro-technology Park and Brunei Port Expansion (Pulau Muara Besar). We hope the success of Brunei Halal Brand place Brunei Darussalam on the world map as one of the leading participants in the halal industry; and to achieve its aim of creating career opportunities for locals and contributing to economic diversification.

3.4 Threat

There are major global halal pioneers in the region such as JAKIM (Jabatan Kemajuan Islam Malaysia: Department of Islamic Development Malaysia), MUIS (Majlis Ugama Islam Singapura: Islamic Religious Council of Singapore) and MUI (Indonesia Ulema Council). To compare other halal countries' halal industry, Brunei's halal industry still seems meagre. Small population of Brunei contributes disadvantage to the development of Brunei's halal industry, which indicates small market and lower demand within the country. In addition, Brunei has lower accessibility such as flight routes; compare to other halal pioneer countries Malaysia, Singapore and Indonesia. Royal Brunei has limited

destinations, mostly in Southeast Asian region and UK, which may not able to attract more foreign investors from other regions. Long procedure of Brunei halal certification may delay or elongate the procedure of food products' sales and promotion in the market, which affects as a disadvantage to pursue prompt development.

4. Analysis

4.1 The Viability of Halal Industry to Brunei's Economic Diversification

The Current Status	Degree	Strategy
Government interest	😊	<ul style="list-style-type: none"> • More Investment (Foreign Direct Investment (FDI), Local fund etc.) • Establishment of halal manufacturing facilities (Enough Muslim manpower, but experts May decrease the price of local halal products → increase competitiveness of local products to imported halal products Overcome high dependency on food imports More employment opportunities) • Establishment of R&D centre for further research on halal industry (for training more halal experts) • Increase recognition of Brunei Halal and its stringency abroad • More promotion for local halal products in domestic market and abroad • Improve transparency on accessibility of halal-related data • Create more flight route (for better accessibility Increase of potential market due to ease of accessibility)
Government financial support	😊	
Public perception on halal	😊	
Halal-friendly environment	😊	
Muslim population	😊	
Recognition of Brunei Halal certification (Domestic)	😊	
Recognition of Brunei Halal certification (International)	😐	
Infrastructure	😐	
Market size	😐	
Promotion & Marketing of local halal products	😐	
Price of local halal products	😐	
Data transparency & accessibility (R&D)	😞	
Food self-sufficiency	😞	
Geographical accessibility	😞	

As mentioned earlier, Brunei is keen on promoting its halal industry globally. There is a government and public support to local halal products as well. Brunei's halal brand - Brunei Halal has been made several efforts to gain global reputation by promotion and sales. In UK,

for example, the Brunei halal brand has established its manufacturing plant and currently supplying their products in UK market. Along with the promotion of its halal brand, Brunei can promote the nation as a 'halal' with an image of 'Islamic' values through promotion of its own halal brand and can increase recognition of Brunei halal certification in global market. Brunei has very halal-friendly environment, simply to put, practicing MIB, institutional halal authorising body, existence of halal brand, Muslim-majority (consists 78 per cent of the total population) and Implemented Islamic regulations in nation that benefits on the development of halal industry. Establishment of halal farm, halal raw meat manufacturing, halal processed food, halal product manufacturing or any other halal related facilities can be considered as a way to diversify the industry with Brunei's halal-friendly environment. In fact, innovative technology, quality manpower and infrastructure are essential for halal products' Farm-to-Fork process. Therefore, establishing halal manufacturing facilities will create more job opportunities to manage those facilities, product products, investigate process and promotion of the products. The more job opportunities creates, the higher standard of living can be achieved that increase each employee's household income which will contribute benefits towards people's welfare and the nation's development. Price of the current local halal product may decrease due to competitiveness in domestic market that can lead to more consumption of local halal products than the present. Halal industry may benefit to overcome Brunei's low self-sufficiency rate by producing or growing such food resources within the nation. Various ingredients produced from the halal farm and facilities can be used to manufacture further innovative products with using modern technology in manufacturing process, which is not only confined by food production but also to all other commodities.

All halal facilities must follow halal certification requirement as Islamic regulation with pursuing the finest quality and hygiene. Therefore, all final products from halal facilities in Brunei will obtain halal certification as an assurance of hygiene and purity. By sales of quality halal products, companies can gain reputation in market, which will contribute positive effects to the growth of the company and motivate its further development. Consumers in Brunei will have more options for products with safer, fresher, and more varieties of locally made products. This will contribute to the growth of Bruneians' living standards by offering hygienic and healthy choices that prevents public from harmful sources. Positive consequence of halal industry will offer investment to other halal or non-halal industrial sector such as research innovation centre, pharmaceutical, halal tourism and others that provides synergy to other industrial sectors. With an ease accessibility on halal-related data and establishment of halal R&D can pursue further improvement on halal to strengthen

Brunei's halal industry by training more local experts on the industry, advanced technology and replenishing current status for advanced development of the industry.

5. Conclusion

5.1 Conclusion of the Work

Such disadvantages identified by SWOT analysis as small market, lack of infrastructure and low transport accessibility reveal impediments to progress of Brunei's halal food industry. The industry evidenced its favourable contribution to the country's economic development as creating employment opportunities and attracting FDI. Brunei has been focusing on the industry as a source to economic diversification which contributes significant benefits to countries' economic development in worldwide. The establishment of infrastructures and investment in R&D certainly anticipate growth of Brunei's halal food industry and local production, which may solve the current anguish of Brunei's economic development. The greatest benefit of halal food industry is that the industry does not against to Brunei's current development policy or principles but pursues common interests in Islam. The development of the industry can increase the recognition of Brunei's national image as 'halal', not only religious but also a pregnant meaning of halal as clean, trustful and safe. The increase of competitiveness of Brunei halal standard accreditation and food production in global level will encourage locals and attract international stakeholders investment in local halal food industry, which certainly dedicate huge benefits to the nation's development. Halal food industry will not only lead to successful economic diversification but also sustain well-being of consumers in Brunei to enjoy quality products by increasing satisfaction of local products. From those expected positive consequences by halal food industry, it can certainly be a trigger point for Brunei's economic diversification and towards sustainable development along with sustaining and promoting the current Brunei's principles.

5.2 Limitation of the Research

There are limitations on data collection due to accessibility issues. In addition, not much statistics were available because of confidentiality issues that this study could not duly provide detailed or numerical data. There are not much research works have devoted to this specific topic which the authors experienced difficulties in secondary data collection.

5.3 Scope of Future Research

The present study provides fundamental background to investigate the viability of halal food industry as a mean to diversify Brunei's economy by analysing the industry with understanding of the current status of the Brunei related to the industry. As accessibility to

data was identified as the foremost limitation, future research should actively engage in data collection from stakeholders such as government agencies, halal food manufacturers and people engaged in the sector. A comparison study among global leading halal food countries could provide broader scope to investigate impacts and viability of the industry for economic development. The scope of research can be widening to other halal industries such as finance, cosmetics, health supplements or service sectors.

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