ASEAN Tourism Strategic Plan
2011 - 2015

TABLE OF CONTENTS

EXECUTIVE SUMMARY

CHAPTER 1: PLAN CONTEXT 1

1.1 Tourism and the ASEAN Community 2
1.2 Developing the ASEAN Tourism Strategic Plan (ATSP) 6
1.3 ATSP Objectives 7
1.4 Overarching Principles 8
1.5 The ATSP Process and Methodology 9

CHAPTER 2: SITUATIONAL ANALYSIS OF ASEAN TOURISM 11

2.1 Marketing 12
2.2 The Development of Regional Products and Experiences 13
2.3 Investment 14
2.4 PR and Promotion 15
2.5 Mutual Recognition Arrangement (MRA) 15
2.6 Creation and Implementation of ASEAN Tourism Standards 17
2.7 Travel Facilitation and Connectivity 18
2.8 Communications 19
2.9 Issues of Governance, Planning and Implementation 19
2.10 Summary 20

CHAPTER 3: ATSP VISION, STRATEGIC DIRECTIONS AND STRUCTURE 21

3.1 ATSP Vision 22
3.2 Strategic Directions 22
3.3 The Congruence between ATSP and ASEAN Goals and Objectives 24
3.4 Revised ASEAN Tourism Cooperation Structure 27
3.5 Roles and Responsibilities of the ASEAN NTOs 28
3.6 Roles and Responsibilities of the Working Groups and Committee 29
3.7 Roles and Responsibilities of the ASEAN Secretariat 32
3.8 Roles and Responsibilities of the ATPMC (ASEAN Tourism Professional Monitoring Committee) 33

CHAPTER 4: STRATEGIC ACTIONS AND ACTIVITIES 34

4.1 Develop Experiential Regional Products and Creative Marketing and Investment Strategies 35
4.2 Strategically Increase the Quality of Human Resources, Services and Facilities in the Region 37
4.3 Enhance and Accelerate Travel Facilitation and ASEAN Connectivity 41

CHAPTER 5: STRATEGIC ACTIVITIES AND DETAILED ACTION PLANS 42

5.1 Activities for Strategic Direction 1 44
5.2 Activities for Strategic Direction 2 56
5.3 Activities for Strategic Direction 3 68

CHAPTER 6: PLAN IMPLEMENTATION 74

6.1 Transitional Period 75
6.2 Development of a Workable Funding Model 75
6.3 Report Card 77

APPENDIX: TORs OF NEW ASEAN WORKING GROUPS & COMMITTEE

TABLE OF EXHIBITS

Exhibit 1	ASEAN Tourist Arrivals	2
Exhibit 2	Existing Regional/ Sub-Regional Groupings	5
Exhibit 3	Guiding Principles	8
Exhibit 4	Country's Ranking of the Importance of Various Tourism Resources and Experiences	14
Exhibit 5	Schematic Outline on the MRA on Tourism Professional Mechanism	16
Exhibit 6	Regional Vision and Strategic Directions	23
Exhibit 7	Economic Issues	24
Exhibit 8	Social Cultural Issues	25
Exhibit 9	Political Security Community Issues	26
Exhibit 10	Present Structure of the ASEAN Tourism Cooperation (as of December 2010)	27
Exhibit 11	ASEAN Tourism Cooperation Structure	28
Exhibit 12	Six Labor Divisions	37
Exhibit 13	Activities to be Implemented for Each Labor Division	39

EXECUTIVE SUMMARY

The ASEAN Member States are about to enter a very exciting period of development in the ongoing evolution of the regional community. It is recognized that there are a wide range of issues to be considered within the community. This strategic plan has been designed to complement these priorities while emphasizing tourism as an important element of the community.

There is now increased awareness of the power of tourism as a tool for development and change. Poorly planned and managed tourism can have negative impacts on the host communities and their environment. However, with the increased sophistication of the Member States there is now every possibility that tourism can in fact help deal with many poverty and social issues as well as act as a strong supporter of heritage and natural conservation. In some cases tourism must be seen as transformative in its ability to bring about change and to achieve a wide range of social, cultural and economic goals. This has been well recognized by the United Nations World Tourism Organization as well as others. It is important therefore that this plan be seen not simply as a document concerned with increasing international arrivals into the region but one that seeks to meet a number of societal goals. Within the report there has been an analysis of the plan's contribution to various dimensions of the community.

The ASEAN National Tourism Organizations (NTOs) have done a great deal of commendable work and this plan builds on that successful record.

Developing any strategic plan is a time-consuming and complex process. However, the task has been a very positive one given the willingness of all of the major stakeholders to contribute positively to its development. Tourism unlike some other areas of activity is an industry of industries embracing very large multinational corporations and small locally owned businesses in a wide range of activities. Public-sector tourism planning and development requires the cooperation and input of international organizations, national governments with their many partners impacting tourism right down to the local government level. It also has a ripple effect in a wide number of areas of human endeavor many of them within the informal sector. The plan has attempted to incorporate all of these concerns.

Throughout the planning process a wide number of recommendations were made. Using a consensual process of decision-making priorities were carefully examined and determined. This plan therefore contains but a small part of a larger set of activities and actions that were proposed. Throughout the process the emphasis has been on identifying realistic initiatives that have a high possibility for success. The document has also been written in such a way that it is intended to be user-friendly and hopefully to be used as a guide for action over the five years of the plan. Throughout the process several documents have been prepared and then summarized into this final document.

Given the rapidly changing global environment and especially that of tourism this strategic plan must be seen as a living document. Recent history has shown that any plan must be able to adapt quickly to changing circumstances and driving forces. It is stressed that the ASEAN NTOs regularly update the plan in order to ensure that it stays relevant as a tool for guiding actions and investment.

The plan provides a balanced set of actions and activities based on a vision that is felt to provide the right level of guidance and direction to the ongoing activities of the ASEAN NTOs. The vision put forward in the strategic plan is as follows:

> "By 2015, ASEAN will provide an increasing number of visitors to the region with authentic and diverse products, enhanced connectivity, a safe and secure environment, increased quality of services, while at the same time ensuring an increased quality of life and opportunities for residents through responsible and sustainable tourism development by working effectively with a wide range of stakeholders."

The plan is organized around three different sets of strategic directions:

- The development of experiential and innovative regional products and creative marketing and investment strategies
- Increasing the quality of human resources, services and facilities in the region
- Enhancing and accelerating travel facilitation and ASEAN connectivity.

Each of these strategic directions has a series of actions and activities. There are recommendations for realigning and restructuring the way that the ASEAN tourism cooperation functions in order to achieve economies of scale and to make best use of scarce resources. It is hoped that this realignment will enable the ASEAN tourism cooperation to become ever more effective in guiding tourism in the region.

One of the limiting factors in achieving the full potential of the regional cooperation structure has been the lack of resources. While Member States allocate large amounts of money to develop and promote their products and support that effort with sophisticated bureaucracies the ASEAN NTOs are vastly under resourced. The ASEAN Secretariat is highly efficient and devoted but simply has too few resources to support present activities let alone the directions being put forward in this plan.

Tourism is too important an activity not to receive sufficient funding to help achieve the region's goals and objectives. The present allocation by each Member State must be substantially increased in order for the plan to be implemented. It is not realistic to expect that the directions identified above can be accomplished with the present very low rates of funding. Developing this model will require that the ASEAN NTOs put into place the legal and regulatory framework and the institutional infrastructure that will allow ASEAN to effectively fund its regional tourism initiatives.

The plan is realistic, action oriented, attuned to the global realities and designed to ensure that the ASEAN region can continue to be a successful tourism destination. It must be remembered that within the Asian region many large countries are devoting significant resources to positioning themselves as competitors to Southeast Asia. The strategic plan if implemented will allow Southeast Asia to be a strong competitor within the global tourism environment.

CHAPTER 1

PLAN CONTEXT

CHAPTER 1: PLAN CONTEXT

1.1 Tourism and the ASEAN Community

Tourism into the region has continued to grow with intra-ASEAN tourist traffic accounting for the greatest bulk of international arrivals to the region. This growth can be seen in Exhibit 1. (2010 data was not available at the time of the preparation of the strategic plan.)

Year	Total Arrivals
2005	52,811,170
2006	56,914,488
2007	62,272,270
2008	65,400,908
2009	65,680,330

Exhibit 1: ASEAN Tourist Arrivals

Based on the best available information it is anticipated that by 2015 international arrivals into ASEAN will have grown to 86,700,000 representing a growth rate of 25%. (This forecast was prepared by Professors Turner and Witt for the Pacific Asia Travel Association and ASEAN.) It must be understood that this growth in tourism in the region will be a result of number of different forces and trends. Some of these will be well beyond the control of either the ASEAN NTOs or their various Member States such as natural disasters, uncertain global political situations and the availability and cost of fossil fuels. Obviously any of these factors can have a significant impact on achieving the projected growth numbers. Given the low level of funding for regional marketing that will likely be available to the ASEAN NTOs it must be recognized that the overall effort to reach out to international travelers in large part be the result of the effectiveness of the marketing of the individual NTOs.

Given that sustainable development is one of the important themes of the strategic plan it must be remembered that international arrivals must be seen as but one means of measuring the region's success in meeting the overall goals of the ASEAN countries. An increase in the quality of life of residents, increased conservation of the natural and cultural heritage, higher levels of service, increased skill level attainment and facilitated liberalization are all essential elements that must be considered in judging the success of the ATSP.

The potential of tourism as a major socio-economic driver for growth and tools for development in the ASEAN region, tourism has been identified as one of the twelve priority sectors that will help to hasten the integration of the ASEAN countries by 2015. The plan's contributions to the overall goals of the ASEAN community are discussed within this plan.

Roadmap for ASEAN Tourism Integration

Based on the assessment undertaken by the ASEAN Secretariat on the measures outlined in the Roadmap for the integration of the said sectors, tourism is the only sector which has accomplished all of its 19 measures in the roadmap, namely:

- Engaging the private sector to participate in joint promotion and marketing of ASEAN tourism activities;
- Building deeper understanding of identified tourist markets, such as, China, Japan, Republic of Korea, India, US, EU and Russia;
- Using the Visit ASEAN Campaign logo;
- Organizing collectively an ASEAN Tourism Area in international tourism events;
- Developing a common ASEAN audio-visual presentation;
- Promoting ASEAN Tourism Heritage Sites;
- Developing an ASEAN tourism portal;
- Undertaking the marketing of cruise as an attractive ASEAN tourism package;
- Providing incentives in the development of tourism infrastructure;
- Undertaking a study on tourism areas which can be promoted for investment;
- Implementing an eco-tourism project;
- Organizing an ASEAN Tourism Investment Forum;
- Establishing an ASEAN tourism standards initially focusing on environmental management certification system for hotels;
- Establishing ASEAN minimum competency standards for tourism professionals;
- Establishing a Tourism Resource Management and Development Framework;
- Developing an intra-ASEAN curriculum;
- Creating an ASEAN Tourism Research Databank;
- Developing the language capacity of local tourist guides;
- Developing an ASEAN Crisis Communication Framework and Action Plan.

These measures were consistent with the objectives of the ASEAN Tourism Agreement (ATA) adopted by the ASEAN Leaders during their 8th Summit in November 2002 in Phnom Penh, Cambodia. The ATA was aimed at facilitating travel into and within ASEAN, enhancing cooperation in the tourism industry to improve its efficiency and competitiveness, reducing restrictions to trade in tourism and travel services, establishing an integrated network of tourism and travel services to maximize the complementary nature of the region's tourist attractions, promoting ASEAN as a single tourism destination, enhancing mutual assistance in human resources development and training, and creating favourable conditions for public and private sector partnerships.

More than ensuring that the Roadmap for Integration of Tourism Sector is completed, the ASEAN NTOs together with the ASEAN Tourism Association (ASEANTA) completed the implementation of the Visit ASEAN Campaign (VAC). Various promotional and marketing programs were undertaken through the VAC to promote the ASEAN region as a single tourist destination especially in the short-haul

markets of China, Japan and Korea as well as long-haul markets of Europe, the Middle East and Americas. However, there is a need to follow through the gains from the VAC and embark on a new marketing and branding strategy to sustain the growth of tourism in ASEAN. Likewise, the need to address the gaps in the implementation of the VAC and the need to redefine the roles of the NTOs and the private sector is necessary to ensure that future marketing programs become sustainable.

The measures outlined in the Roadmap for Integration of ASEAN and the work undertaken by the ASEAN NTOs have indeed boosted tourism growth in the ASEAN. The boom in free trade has stimulated the increasing demand for travel among people concerned with businesses, meetings, conventions and exhibitions, both within the ASEAN region and to/from other Member States. In addition, the liberalization in air services has increased connectivity and facilitated greater intra-ASEAN movement of tourists, including the dispersal of tourism investments, creation of employment, and diversification of tourism products and services.

At this stage, there is a need for ASEAN tourism to move to the next level of tourism activity while critical issues affecting regional branding and marketing, travel connectivity and facilitation, product diversification and standards, as well as human resources development are given utmost attention.

Working with other ASEAN Bodies, Dialogue Partners and Regional Groupings

The ASEAN NTOs have also embarked on a task to work closely with the Senior Transport Officials (STOM) to address issues relating to, and facilitating air, land and sea travel in the region with the view to enhance and boost intra-ASEAN travel and promote the region as a single tourist destination. Coordination has also been undertaken by the NTOs to ensure that its activities provide impetus to other ASEAN initiatives such as the free trade areas (FTAs), sub-regional groups (BIMP-EAGA, GMS, IMT-GT, CLMV, CLV, ACMECS, and Emerald Triangle), socio-cultural, environmental, connectivity and facilitation. The different stakeholders in this dialogue are illustrated in Exhibit 2. It is vital that these initiatives be reported on regularly and that all parties seek to ensure a regional perspective to tourism development. There are neither the financial or human resources to duplicate efforts and there is now growing recognition that there are strong possibilities for overlapping activities.

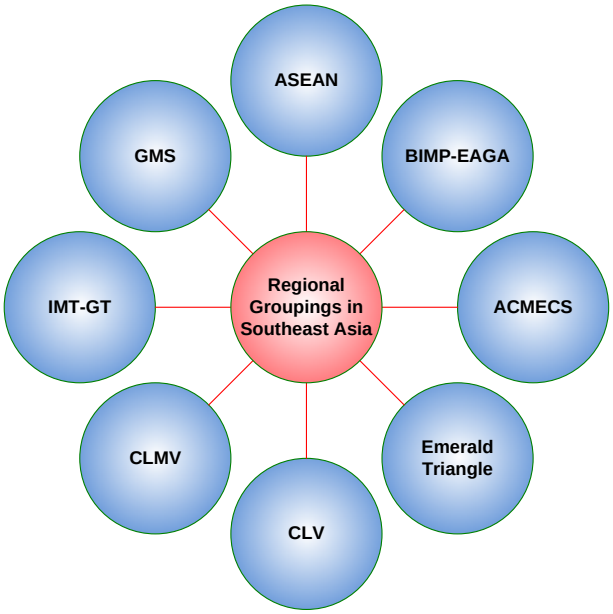

Exhibit 2: Existing Regional/ Sub-Regional Groupings

Some of the regional groupings have been more active than the others. GMS has developed the Greater Mekong Subregion Tourism Sector Strategy funded by ADB in 2005. Under the GMS tourism strategy, there are 29 projects identified for implementation during 2006-2010. In 2010, ADB provided funding for another study, which is an ongoing, to review the progress of this strategy. Under the BIMP-EAGA (Brunei-Indonesia-Malaysia-Philippines East Asian Growth Asia), ADB also provided fund in 2010 for a study on BIMP-EAGA Community-based Ecotourism Strategy. Its outcome is "Community-Based Ecotourism is the Focal Point of the Subregion's Tourism Development Approach".

Once the ATSP is in place it will become vitally important for the country coordinators of all regional groupings to share the nature of their discussions and planning with the ASEAN NTOs in order to ensure that the there is no duplication between sub-regional grouping planning and development efforts and the ATSP 2011 – 2015.

Relations with Dialogue Partners, namely, China, Rep. of Korea (ROK) and Japan as well as India, Russia, EU, US, New Zealand and Australia have likewise been strengthened by the NTOs that enabled the tourism sector to benefit from technical assistance and numerous programs relating to human resources development, marketing and ecotourism among others. The ASEAN-Japan Center has extended important support to ASEAN NTOs to implement training skills development programs for tour guides, front liners and officials from the national and local tourism offices as well as production of audio-visual material which is now being shown in various television network in Japan and in-flight videos of ASEAN airlines.

The ASEAN-Korea Center was established in 2009 and has provided an extensive support for ASEAN on tourism. Activities implemented by the Center in 2009

included organizing the ASEAN Culture and Tourism Fair, producing the ASEAN Tourism Guide for 10 Member States translated in Korean language, organizing training programs on Korean tourism trends/Korean language and culture in ASEAN Member States, and organizing lecture series on “Backpacking in ASEAN” in Korea.

1.2 Developing the ASEAN Tourism Strategic Plan (ATSP)

In 2009, the Special Working Group on ASEAN Tourism Integration made a decision during its 9th Meeting in Phnom Penh to prepare the new ASEAN Tourism Strategic Plan (ATSP) for 2011 – 2015 to achieve the overall goals of the ASEAN Community in 2015. The Philippines, Chair of ASEAN Tourism Marketing Task Force, is responsible for the coordination of the overall ATSP development. The ACE Project (ASEAN Competitiveness Enhancement) now renamed the VALUE Project - Valuing ASEAN Linkages under Economic Integration through the College of Innovation, Thammasat University, Thailand is providing assistance on the development of the strategic plan.

The preparation of any strategic plan is a complex process. It involves a number of stakeholders, at times with differing views about the future and priorities, identifying the resources necessary to implement the plan and the difficult task of developing action plans that can be realistically implemented within the timeframe of the plan itself.

Preparing a strategic plan for the ASEAN region is by definition ever more challenging given the need to meet the vision and needs of 10 different Member States. It is made even more complex by the fact that there are a wide number of stakeholders that have a direct influence on the future of tourism in both the Member States themselves as well as the region. Within any country there are a number of ministries and departments who are responsible for developing plans, policies and programs that will facilitate the development of tourism across the region. Ministries and departments of tourism, foreign affairs, immigration, investment, airports, ports, roads, education, vocational training, natural and heritage interests, urban and rural development, construction etc. all have essential roles in ensuring sustainable tourism while providing for a unique and memorable set of tourism experiences. The private sector is an essential player given its role in providing many of the services and in some cases the tourism products themselves. Increasingly as sustainable tourism principles come into play communities, NGOs and community groups are seen as an essential part of the overall planning process.

The challenge of preparing the plan is further complicated by the umbrella of the ASEAN Member States and its secretariat. There are a number of initiatives being carried out at the regional level specifically in the area of investment, transportation and connectivity that directly impact the contents of the plan and most importantly its implementation. While the tourism plan is being developed so are other ASEAN wide documents being prepared. Of particular interest to the ATSP are the master plan for connectivity and the transportation strategic plan.

The planning process for the ATSP was designed within the time and resources available to ensure that as wide range as possible of stakeholder views and concerns are reflected in the process. It also recognizes that developing the plan must be done over a period of time in order to ensure that all interest groups and perspectives can be considered in the planning and development process. While every attempt has been made to ensure a wide range of consultations as possible it is crucial to take into account that this is a living document that constantly must be updated given global events as well as regional and national priorities and concerns.

The plan recognizes that much of what occurs in terms of tourism activity is directly impacted by a series of global forces whether they are economic, social, cultural or political. These forces have had a significant impact on tourism activity and all predictions are that they will continue to positively and negatively impact the level and nature of tourism in the future. The region has been impacted by a series of human as well as natural disasters that have affected the region in general but more specifically certain countries. It is therefore within this context of uncertainty and turbulence that the plan is being developed.

1.3 ATSP Objectives

Overall Objective

The overall objective is to develop a blueprint defining the policies, programs and projects of the ASEAN NTOs in the areas of marketing, product development, standards, human resources development, investment, and communication, among others. The blueprint will be developed using world recognized sustainable and responsible tourism principles and practices.

Specific Objectives

- Review the ASEAN Leaders and Ministerial Declarations in regard to the establishment of ASEAN Community and the integration of tourism sector under the ASEAN Framework Agreement on Services (AFAS), the Vientiane Action Plan, ASEAN Tourism Agreement, and Roadmap for Integration of Tourism Sector, among others.
- Conduct consultations and interviews with the ASEAN NTOs and Chairs of the Task Forces and Working Groups as well as the private sector, including the ASEANTA and NTO officials from Dialogue Partners to elicit their inputs, ideas, opinions and recommendations on the vision, goals and objectives for ASEAN Tourism by 2015.
- Conduct an assessment of the work and projects undertaken by the NTOs, Task Forces and Working Groups in the areas of marketing, product development, standards, manpower development, investment, cruise tourism and crisis management and other relevant committees.
- Identify new areas as well as programs and activities that the NTOs, Task Forces and Working Groups as well as other ASEAN forums should be engaged and undertake in to attain the vision and goals for ASEAN Tourism by 2015.

- Prepare a new roadmap for ASEAN Tourism identifying programs and activities, timeframes and coordinating/responsible units.

1.4 Overarching Principles

Based on the discussions at the ASEAN Tourism Forum (ATF 2010) in Brunei Darussalam six overarching principles were adopted that would guide the development of the ASEAN Tourism Strategic Plan (ATSP) and are illustrated in Exhibit 3.

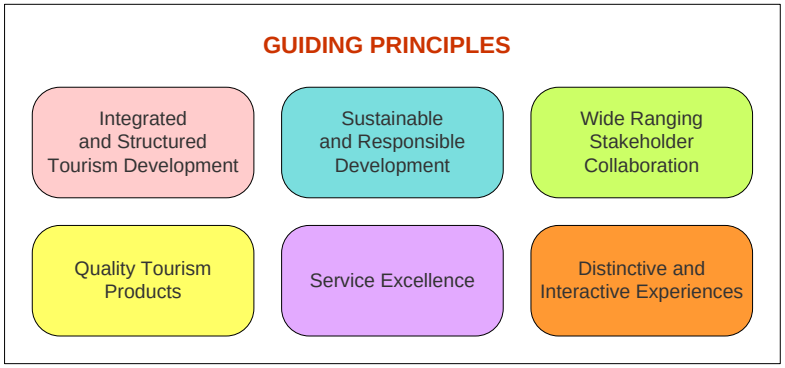

Exhibit 3: Guiding Principles

- **Integrated and Structured Tourism Development**
  An integrated and structured approach will assist the ASEAN Member States to meet the various objectives of a wide range of stakeholders, enhance the positive impacts of tourism and reduce the negative ones. The ATSP's framework is therefore designed to logically and systematically capture the multitude of factors, influences and processes, which affect the development of ASEAN tourism.

- **Sustainable and Responsible Development**
  It would be unacceptable not to see sustainability and responsibility as essential elements of the ASEAN planning and development process. An important dimension of this set of sustainability considerations is the need to ensure that not only does tourism directly benefit the disadvantaged sectors of the population but at the same time tourism does not create negative impacts such as increased housing costs or displacement as well as degradation of the environment and loss of cultural heritage.

- **Wide-Ranging Stakeholder Collaboration**
  Maintaining effective stakeholder organizations and processes are an important part of sustainable development and by extension of the ASEAN tourism planning and management process. The tourism planning process needs to further refine and develop stakeholder models that are reflective of the complexity of the ASEAN region. A major objective of any strategic plan must be to bring together stakeholders from government and the private sectors to discuss, plan, implement and monitor tourism development, and promote a cohesive and integrated mechanism for sustaining and boosting ASEAN tourism growth.

- **Quality Tourism Products**
  The development of tourism products needs to emphasize the issue of quality, as world travelers are now increasingly looking for greater variety, flexibility and quality products that offer value for money. Drawing upon a quality framework, the ATSP will provide policies that help improve the quality of service delivery. High quality tourism supply will also help ASEAN to not only meet the challenges of competitors and increase its market share but also become one of the world's leading destinations.

- **Service Excellence**
  While promoting the growth of tourism in the region, it is vital to ensure that such growth is based on customer-focused services and meet world-class standards. Thus, the ATSP is designed to progressively raise the professionalism and service excellence standards of the tourism industry as well as establish an industry-based accreditation system in ASEAN.

- **Distinctive and Interactive Experiences**
  Many of those in the industry as well as the research community indicate that visitors are now looking for distinctive interactive experiences. This has been defined as experiential tourism, which allows for the interaction of travelers with various elements of the destination. Within the planning process emphasis has been placed on developing distinctive and interactive experiences. The ATSP will provide new strategic directions that value experience as an important new attribute. It will also focus on the enrichment of content for tourist services in combination with strategies of differentiation and customization.

1.5 The ATSP Process and Methodology

The Department of Tourism in the Philippines has been entrusted with the responsibility of coordinating the development of the ATSP with the cooperation and support with the ASEAN Secretariat. A consulting team from the College of Innovation, Thammasat University serves to support the development of the plan. The plan was developed over a 12-month period in order to allow for sufficient analysis as well as consultations.

Based on the situation analysis presented in the ASEAN Tourism Forum (ATF 2010) in Brunei Darussalam and the resulting decision on a framework for the plan, consultations were held throughout the region. These consultations which were organized by the NTOs in large part reflected the widespread views and interests within the tourism industry. It is recognized that the plan is a work in progress and that each iteration of the plan will bring with it new ideas, concepts and issues.

The strategic directions presented in this document reflect the views of the ASEAN NTOs/Task Forces/various stakeholders consulted and the research and consultations of the consulting team.

The plan and the directions put forward within the document must reflect a series of realities. Most importantly the development of the plan must take into consideration the scarce resources allocated to the management of the ASEAN NTOs itself and the implementation of any strategic action. The setting of priorities within this resource-constrained environment will become a crucial factor. While there may be significant agendas that could be considered, the plan has no choice but to realistically set a series of directions and actions that can be accomplished within the economic as well as the administrative structure of the ASEAN NTOs. The setting of priorities is obviously the responsibility of the ASEAN NTOs. It is also recognized that the identification and obtaining of the necessary human and financial resources is the responsibility of the NTOs working with the ASEAN Secretariat and the ASEAN Dialogue Partners.

CHAPTER 2

SITUATIONAL ANALYSIS OF ASEAN TOURISM

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The consulting team together with the Member States has examined a wide range of activities and actions that are currently in place and the issues, obstacles and opportunities that exist for ensuring competitive and sustainable tourism in the region. Based on the analysis of the information gathering and consultation stage a number of regional issues were identified.

2.1 Marketing

ASEAN NTOs have been working together on marketing issues and initiatives for over 10 years. Many of these initiatives have been related to activities such as Visit ASEAN Campaign, participating at international tourism and travel fairs, establishing an ASEAN Promotional Chapter for Tourism (APCT), promoting youth travelers in ASEAN, and producing a variety of promotional materials for ASEAN tourism etc.

In 2009, a tourism marketing strategy and plan for ASEAN was developed by the ASEAN Competitiveness Enhancement (ACE Project). The marketing strategy defined five key recommendations:

- Redefine the ASEAN tourism brand as "Southeast Asia" and to develop new brand communications based around a positioning of "Feel the Warmth."
- Develop marketing and promotional vehicles targeting adventurous culture seekers and young independent travelers in Australia and the UK.
- Reassess after 12 months heavily recession-impacted markets, such as the US. Alternative language communications, such as Japanese and Chinese, can also be considered in a second phase of the campaign.
- Develop marketing and promotional vehicles targeting the cruise segment in the US and, when budget permits, Europe.
- Build and market a new website as a one-stop shop for consumers interested in travel to and within the Southeast Asia region.

The new brand "Southeast Asia - Feel the Warmth" and the new website www.southeastasia.org were formally launched at the ASEAN Tourism Forum in Brunei Darussalam 2010 with the support of the ASEAN Tourism Ministers. There was a formal launch at ITB in March 2010. In August of 2010 funding for the support of the website was ended by USAID.

Although there has been some progress made by the ASEAN Tourism Task Force on Marketing led by the Philippines, there are still issues identified by both the ASEAN NTOs and other stakeholders that urgently need to be addressed if there is to be an effective regional marketing activity including:

- The present level of funding is simply insufficient to support the activities of the NTOs as well as a professional marketing campaign.
- Insufficient coordination among ASEAN NTOs and the private sector in marketing the region.

- The need for regional market research that will guide marketing efforts.
- A clear understanding between the public and private sectors on responsibilities and roles in the regional marketing effort.

The ASEAN NTOs must develop a marketing strategy that is:

- Endorsed and supported by all stakeholders, including the ASEAN Tourism Ministries, ASEANTA, and the wider travel and tourism industry.
- The strategy must be practical (given budget constraints) and sustainable in the long term.
- Any collaborative marketing effort must not duplicate – but rather add value and complement to the actions of individual destinations and their NTOs.

2.2 The Development of Regional Products and Experiences

Presently there is no task force dealing specifically with ASEAN tourism product development issues and strategies. Based on the analysis of the consultants and results of the consultation process it became clear that the NTOs required a coherent product development process to remain competitive in the global tourism environment. It was recognized that tourism products must be enhanced and made to be more interactive to meet the needs of the changing consumer.

There have been some significant changes brought about by evolving demographics and markets. The challenge for the region is to develop a set of unique products and experiences that recognize these changes. The rise in experiential travel is one example of the need to upgrade as well as add new products and experiences.

The development of individual products and experiences is clearly the responsibility of individual Member States, their NTOs, the private sector and a range of non-governmental organizations. The role of the ASEAN NTOs is to package these products and experiences in such a way that there is more visitation to the region.

Tourism products identified by the ASEAN NTOs and stakeholders during the consultation meetings that have regional appeal and can meet the overall objective of encouraging travel within the region are shown in the Exhibit 4.

	Culture*	Nature	Cruise	Marine**	People	Urban	Food	Medical tourism	Festivals and Events	Adventure	Gaming	Creative***	Education	MICE	Gateway/ Hubs	Shopping	Business	Handicrafts	Sport Tourism	Pilgrimage Tourism
Brunei Darussalam	x	x	x	x					x					x					x	
Cambodia	X	X	X	X	X	X	X		X		X	X								
Indonesia	X	X	X	X		X				X										
Lao PDR	X	X	X		X				X											
Malaysia	X	X	X	X		X		X			X			X						
Myanmar	X	X	X	X						X										X
Philippines	X	X	X	X	X	X	X	X	X	X	X	X	X					X		
Singapore	X		X			X	X	X	X		X	X	X	X	X	X	X			
Thailand	X	X					X	X	X			X		X		X		X	X	
Vietnam	X	X	X	X	X		X													

Exhibit 4: Country's Ranking of the Importance of Various Tourism Resources and Experiences

Note:
* Culture includes UNESCO World Heritage sites, local tradition and intangible heritage, ethnic groups/ minorities, community based tourism/homestay.
** Marine includes diving, surfing, beaches.
*** Creative includes the performing and visual arts, music, Broadway shows, design etc.

Based on this feedback clearly culture, nature and cruise activities are seen as having the highest potential for product development by the various stakeholders who were consulted.

2.3 Investment

There has been a great deal of work done by the Task Force on ASEAN Tourism Investment such as the study on "ASEAN Tourism Investment" in 2006, the workshop on "ASEAN Tourism Development Corridor" successfully held in 2009 to promote the ASEAN tourism investment.

Based on the consultation process, it was widely recognized that investment is largely a function of national government agencies such as boards of investment or ministries of commerce and is clearly not a direct function of the NTOs. There was universal recognition of the need for the ASEAN NTOs as well as the relevant government ministries and departments to work closely with other ASEAN bodies that are responsible for investment related matters.

There are a number of obstacles facing investors such as different policies and approaches in every country, rules and regulations, unclear resettlement issues and land titles. In addition, labor laws are protective and do not encourage doing business across national borders. As a result, the private sector has a difficult time in complying with existing rules on local and foreign nationals when establishing a new business. Even with the agreements in place to harmonize investment strategies

there is still a great deal of ground to be covered before there are even a common set of investment procedures and standards within the region.

There is also uncertainty about the nature of the liberalization process. The realities of liberalization are becoming recognized and many countries are now struggling to develop a set of investment strategies that meet both the regional goal of liberalization and protecting the interests of national stakeholders.

2.4 PR and Promotion

Once there is an agreement on the regional products and experiences the next major strategic issue will be to focus on who determines how to get the message out, what the distribution channels will be and how to conduct the assessment of the effectiveness of these various initiatives. Given the reality of limited funding this will be a significant challenge. One obvious strategy to explore is that the Southeast Asian presence will be supported by the various NTOs and private sector groups at trade shows and in various promotional activities. One of the issues will be to determine benefits and incentives for various stakeholders who promote the region in addition to national products.

2.5 Mutual Recognition Arrangement (MRA)

Led by the ASEAN Tourism Task Force on Manpower Development and chaired by Indonesia, a great deal of effort has been expended in developing and putting into place the Mutual Recognition Arrangement (MRA) in a large set of competency standards. Work has been done on developing the specific competency standards in 32 jobs titles with 242 competency units.

In the consultation process it was recognized that this is an important initiative to facilitate the movement of people from one Member State to another. However this will be a challenging task to implement. Moving from an agreement on competencies to actually implementing them and getting approval at the national level among Ministries of Labors, Education and Tourism and then at the regional level is seen as a long process that would take a number of years. There are some areas especially in the area of culinary where it was been recognized that standards would be a distinct advantage in order to facilitate the movement of nationals from one country to another. Many Member States have now recognized that the free movement of nationals will have impacts on local workers and there was a growing recognition that there will be a need to protect national interests. In minimizing a country flooded by unskilled labour, the application of MRA on Tourism Professionals will be a mechanism to control the mobility of those people. Through this mechanism, application of national law and regulations of Member States to award the working permit to a people is still applicable.

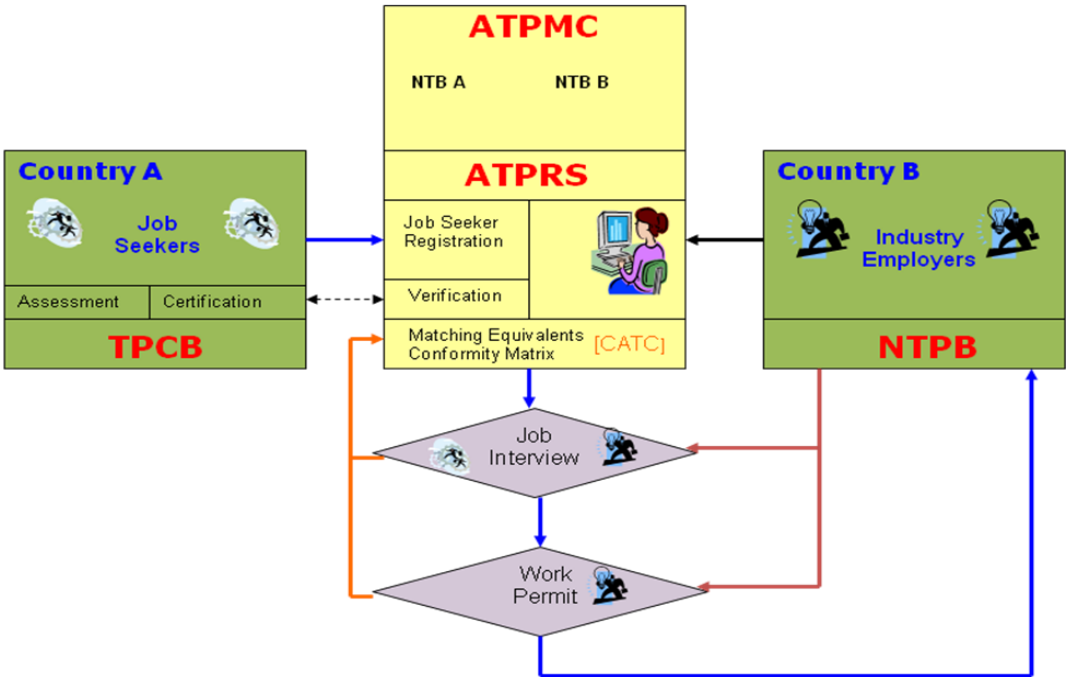


Exhibit 5: Schematic Outline on the MRA on Tourism Professional Mechanism

Note: TPCB, Tourism Professional Certification Board
NTPB, National Tourism Professional Board
ATPMC, ASEAN Tourism Professional Monitoring Committee
ATPRS, ASEAN Tourism Professional Registration System

It also must be recognized that while competencies can be identified and MRA on Tourism Professionals has been concluded, their application by the various tourism educational and training providers will be voluntary. This is especially true in terms of quality of instruction, evaluation and standards of curriculum development. However, should these institutions would want to have their graduates being recognized by other ASEAN Member States using this MRA, the application of competencies would be a must.

In addition to the issues discussed above other topics to be addressed include the feasibility of specialist training carried on in each Member State and therefore the possible need for central training opportunities, the ownership of curriculum materials and the assessment of distributed and distance learning approaches to raise capacity in a cost-effective and appropriate manner. Also obtaining the necessary financial resources for implementing the competencies is seen as a major issue.

There are a series of questions related to implementation especially given the different regulatory frameworks and structures within each Member State. Based on consultation meetings throughout the planning process, it was widely accepted that not all Member States will be able to set up comprehensive system of competencies by 2015. There is a need for discussion to evaluate the implementation of the competency standards regularly and adjust the goal accordingly. In order to ensure

the credibility of competency standards, the third-party certification will be applied in this mechanism.

2.6 Creation and Implementation of ASEAN Tourism Standards

Given the overall goal of the plan to be a quality destination the creation and implementation of standards in many areas of activity is essential. It is recognized that this is a significant task given the multiplicity of stakeholders in the public, private and nongovernmental sectors. The issue of standards and enforcement becomes particularly important as source markets become increasingly concerned about consumer protection. There are already clear indications that major tour operators are now very much concerned with a wide range of standards in a destination. Those destinations that are able to satisfy those increasingly high standards will have a distinct position of advantage.

It is well recognized that the overall tourism experience is influenced by a wide range of different touch points including airport immigration procedures, taxi service, levels of attention in hotels and so forth. It also must be recognized that the creation of standards is straightforward if it is basically dealing with an inventory of attributes such as facilities. When concerns of quality are introduced it becomes much more complex both in terms of defining standards and most importantly assessing the process. Clearly the certification/assessment process is not something that can be left to the ASEAN NTOs but must be the purview of a third party. An essential element of any set of standards is the concern with safety and security. This includes not only personal safety but also the safety of food, transportation and attractions. Priorities must be established on what sectors will be examined.

To date, there have been important achievements by the Task Force on ASEAN Tourism Standards led by Thailand with specific requirements for six ASEAN tourism standards developed and agreed to by the ASEAN NTOs. These standards include:

- Homestay
- Green Hotels
- Food and Beverages Services
- Public Restrooms
- Ecotourism
- Tourism Heritage

It must be stressed that these are generic principles (in fact they really are goals or objectives) as opposed to specific standards that can be objectively measured and compared with other jurisdictions. Out of the six, homestays and green hotels assessment exercises have been dealt with at a generic level. Homestays and green hotels candidates were proposed by the 10 Member States. However, the basis of and the procedures used for the assessment and selection process were not clearly revealed. At this point there is no way to determine whether the standards nor the assessment are comparable from country to country. What has occurred must not be seen as a certification process but rather an awards program based on a process

of trust that nominated hotels or homestays are comparable in quality from country to country.

Measurable standards and indicators for each of the areas have yet to be determined. Once specific indicators have been determined and accepted by the Member States, procedures for assessment and reporting would have to be developed. If these are standards to be used by tourists in making decisions, the basis for the assessment and the procedures used have to be transparent.

During the consultation process representatives of various tourism stakeholders also raised the concern of the need for third-party organizations to certify the standards and identify products and experiences that meet those standards. Without this mechanism it is difficult to see how the standards process will have any credibility. Developing standards and implementing them is a difficult task given the multi-jurisdictional nature of this activity in many countries. The challenge is really on how to establish the entire certification system with voluntary standards.

2.7 Travel Facilitation and Connectivity

There can be no doubt that achieving the vision of an integrated region where travel is facilitated to the highest possible degree is a major challenge facing the 10 Member States. While the overall goal is well recognized and supported there remain a number of significant security, safety, customs, income and other issues to be resolved before a vastly improved travel system is realized.

It was clear that a single tourist visa could substantially benefit travel facilitation in the region. There is equal recognition that the establishment of such a visa will not likely occur in the next five years due to barriers of technology, political issues, concerns of sovereignty and security and the different visa systems in the Member States. In the feedback process ministries of foreign affairs and immigration officials were pessimistic about the possibility that one visa would be in place within five years. However, many private sector representatives felt confident that with careful planning and increasing cooperation that the lack of a common visa would not be seen as a major impediment to increasing travel in the region. Many stressed the need for innovative sub- regional approaches e.g. sub-regional visas and e-visas.

A major policy issue within ASEAN is that of connectivity. Strategies coming from the tourism working group will complement those in the Master Plan on ASEAN Connectivity developed by the ASEAN High Level Task Force at the same time as the ATSP. Connectivity can be enhanced by policies and programs dealing with various transport linkages (e.g., road, sea, air and rail linkages). Several attempts have been made to achieve this goal. For example, there are ongoing regional efforts for open skies in ASEAN cities. In November 2008, the Member States adopted the ASEAN Multilateral Agreement on Air Services that seeks to liberalize market access and control requirements for air carriers in the region. In November 2010, ASEAN Member States also concluded the ASEAN Multilateral Agreement on the Full

Liberalization of Passenger Air Services (MAFLPAS) and its two Protocols, which would further expand the scope of the ASEAN Multilateral Agreement on Air Services (MAAS) to include other ASEAN cities. These Agreements are precursor to an eventual ASEAN Single Aviation Market (ASAM) arrangement targeted for 2015. Member States also coordinate the ASEAN Highway Network and the Singapore-Kunming Rail Link, which aims to be completed by the year 2015. It is important to note that the ASEAN Senior Transport Officials Meeting (STOM) and ASEAN Transport Ministers have adopted the ASEAN Strategic Transport Plan called as Brunei Action Plan 2011-2015.

During the planning process various stakeholders addressed several problems associated with the connectivity of ASEAN Member States. Many of the issues are nationally based and need to be resolved as part of the larger regional effort to improve connectivity. There is significant interest and support for enhancing deep-sea cruises and coastal cruises as a major form of connectivity. However, consultations indicated that in many cases the port authorities are not willing to work with the cruise operators. Member States need to resolve the issues of port handling and immigration procedures as well as the availability of market information. It is widely recognized that there is an urgent need to develop port facilities that will help to grow the cruise industry and with it the economic impacts of increased water based activity.

2.8 Communications

While there has been a focus on crisis communication within the ASEAN NTOs it has been recognized that the communication function must be expanded to include a wide range of different types of communication in concert with various promotional activities of the ASEAN NTOs. There is no doubt that the ability to deal with crises once they have occurred is of importance and needs to be a central part of any overall communication strategies. Determining areas of responsibility for communications and obtaining the necessary human and financial resources will be a major consideration in achieving a better process for internal and external dialogue and consultation.

There is an urgent need to ensure that protocols are well understood and deal with a wide range of communication issues including crises. Capacity can be built through training and workshops. As with many other aspects of the ATSP partnerships need to be identified and relationships established with both internal and external organizations/agencies such as PATA and NGOs.

2.9 Issues of Governance, Planning and Implementation

One of the objectives of the strategic plan is to determine how ASEAN tourism cooperation specifically can be most effectively managed. One of the integral dimensions of the issue is the role of a wide range of stakeholders in the process.

Based on the analysis that has been carried out there are a number of overarching issues that need to be considered in the strategic planning process.

A policy on governance, planning and implementation has to take into account the reality that many of the issues impacting tourism are not the responsibility of NTOs but rather the purview a wide range of international, national, local public and private sector interests.

Presently the ASEAN tourism cooperation structure and activities are not focused around the key ASEAN strategic issues facing tourism such as product development, facilitation, research/scanning and futures planning. The present task forces and working groups have overlapping mandates and activities (e.g. manpower development is discussed by several Task Forces, product development is mentioned by several Task Forces) lessening the effectiveness of the group working process. Examining various stakeholder and structural options becomes an important part of the strategic planning process. Some of the key stakeholders include PATA, ADB, World Bank, UNESCO, UNESCAP, Mekong Tourism Coordination Office, UNWTO, WWF, Child Wise, and Green Globe etc. how these various stakeholders interact with ASEAN needs to be carefully examined with clear communication processes put into place.

The plan must develop a structure for analysis and decision-making and most importantly how the public sectors as well as a range of other interest groups are to be involved in the implementation of the plan.

2.10 Summary

Developing a plan with this wide range of issues and opportunities is indeed a significant task since it will not only guide the work of the ASEAN NTOs but indirectly that of the entire economic community given the importance of tourism is an area of social and economic activity.

CHAPTER 3

ATSP VISION, STRATEGIC DIRECTIONS AND STRUCTURE

CHAPTER 3: ATSP VISION, STRATEGIC DIRECTIONS AND STRUCTURE

3.1 ATSP Vision

After a long process of consultation and revisions the following mission statement has been approved to guide the development of tourism in the region from 2011 to 2015.

> "By 2015, ASEAN will provide an increasing number of visitors to the region with authentic and diverse products, enhanced connectivity, a safe and secure environment, increased quality of services, while at the same time ensuring an increased quality of life and opportunities for residents through responsible and sustainable tourism development by working effectively with a wide range of stakeholders."

3.2 Strategic Directions

Based on the vision and discussions throughout the ATSP development process the following three strategic directions have been developed as presented in Exhibit 6. These strategic directions form the basis for establishing competitive and sustainable tourism in the region.

Exhibit 6: Regional Vision and Strategic Directions

The strategic directions have been carefully crafted in order to align with the problems and opportunities that have been identified in the planning process together with the need to meet the overall goals of the ASEAN community. It is clear that there is an urgent need to continue to effectively position the region within the world tourism economy. Without a strong strategic marketing plan together with the necessary resources it will be difficult for the incredible opportunities that now exist within the region to be realized. There can be no doubt that high quality human resources are essential to maintaining the excellent reputation of the region. As visitors become more demanding so must the standards of human resource development continue to develop. An increasingly sophisticated visitor demands high levels of facilities with an increasing concern for responsible and green operations and facilities. Finally and most importantly without a concentrated effort to increase the ease of traveling both into the region and within the region the full potential of Southeast Asia as a tourism destination cannot be realized.

3.3 The Congruence between ATSP and ASEAN Goals and Objectives

Throughout the past years, ASEAN have been working to achieve the goal of comprehensive regional integration in the areas of economic, socio-cultural and political dimensions. As envisioned by ASEAN Leaders, the ASEAN single community needs to be established by 2015. Progressively, a set of guiding principles, priorities and policies has been established to guide the Member States towards this ultimate goal. These policies are addressed in three major documents: the ASEAN Economic Community (AEC), ASEAN Socio-Cultural Community (ASCC), and ASEAN Political-Security Community (APSC).

Part of the strategic planning process has been to identify policies and directions that have been developed for the entire ASEAN community. Based on this identification the ATSP plan proposes a number of strategic directions and actions to support and complement the overall regional effort. Exhibits 7-9 illustrate where the ATSP deals with these regional priorities and policies.

ASEAN ECONOMIC COMMUNITY (AEC)		(1) Develop Experiential Regional Products & Creative Marketing & Investment Strategies	(2) Strategically Increase the Quality of Services and Human Resources in the Region	(3) Enhance and Accelerate Travel Facilitation and ASEAN Connectivity
A. Single Market and Production Base				
A2	Free flow of services			
A3	Free flow of investment			
A5	Free flow of skilled labor			
A7	Food, Agriculture and Forestry			
B. Competitive Economic Region				
B4	Infrastructure Development			

Exhibit 7: Economic Issues

ASEAN SOCIO-CULTURAL COMMUNITY (ASCC)		(1) Develop Experiential Regional Products & Creative Marketing & Investment Strategies	(2) Strategically Increase the Quality of Services and Human Resources in the Region	(3) Enhance and Accelerate Travel Facilitation and ASEAN Connectivity
A. Human Development				
A2	Investment in human resource development			
A7	Building civil service capability			

ASEAN SOCIO-CULTURAL COMMUNITY (ASCC)		(1) Develop Experiential Regional Products & Creative Marketing & Investment Strategies	(2) Strategically Increase the Quality of Services and Human Resources in the Region	(3) Enhance and Accelerate Travel Facilitation and ASEAN Connectivity
B. Social Welfare and Protection				
B1	Poverty reduction			
B3	Enhancing food security and safety			
B7	Building disaster-resilient nations and safer communities			
C. Social Justice and Rights				
C3	Promoting Corporate Social Responsibility (CSR)			
D. Ensuring Environmental Sustainability				
D5	Promoting quality living standards in ASEAN cities/ urban areas			
D8	Promoting sustainable management of natural resources and biodiversity			
D10	Responding to climate change and addressing its impacts			
E. Building ASEAN Identity				
E1	Promotion of ASEAN awareness and sense of community			
E2	Preservation and promotion of ASEAN cultural heritage			
E3	Promotion of cultural creativity and industry			
E4	Engagement with the community			

Exhibit 8: Social Cultural Issues

ASEAN POLITICAL-SECURITY COMMUNITY (APSC)		(1) Develop Experiential Regional Products & Creative Marketing & Investment Strategies	(2) Strategically Increase the Quality of Services and Human Resources in the Region	(3) Enhance and Accelerate Travel Facilitation and ASEAN Connectivity
A. A Rules-based Community of Shared Values and Norms				
A1	Cooperation in Political Development			
B. A Cohesive, Peaceful and Resilent Region with Shared Responsibility for Comprehensive Security				
B6	Effective and timely response to urgent issues or crisis situations affecting ASEAN			

Exhibit 9: Political Security Community Issues

3.4 Revised ASEAN Tourism Cooperation Structure

As noted earlier throughout the plan development process there was an assessment of the effectiveness and efficiency of the existing ASEAN Tourism Cooperation structure. The present structure is presented in Exhibit 10.

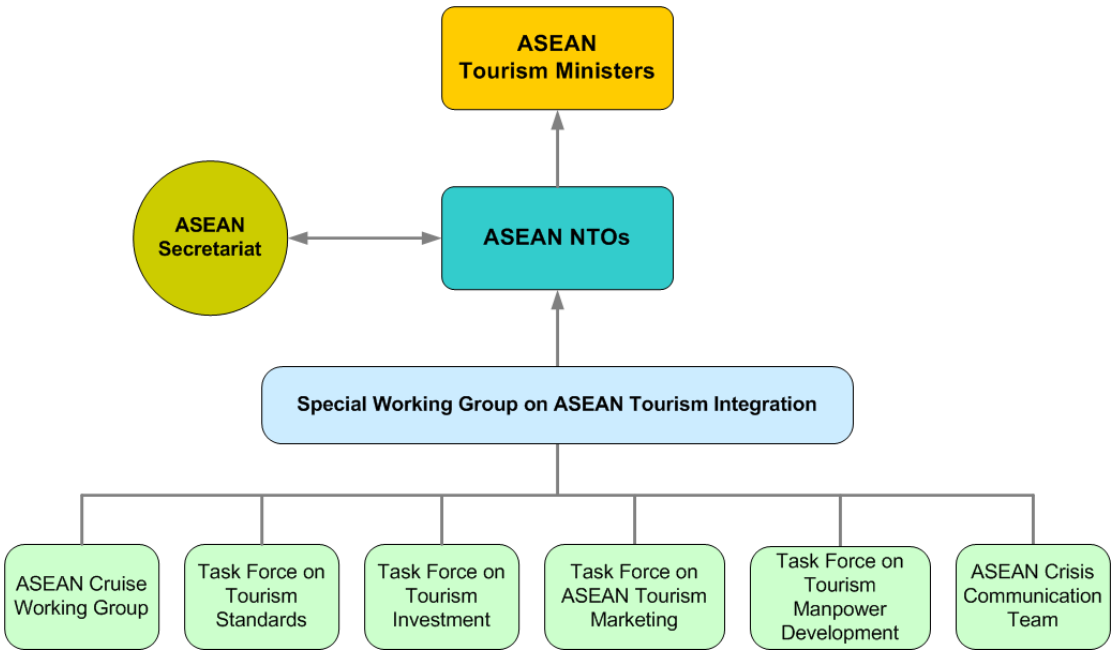


Exhibit 10: Present Structure of the ASEAN Tourism Cooperation (as of December 2010)

Throughout the plan making process there were concerns raised about the time involved in meetings, the duplication of discussion during the meetings themselves and the fact that the present working groups/task forces did not necessarily align with the ASEAN Tourism Strategic Plan (ATSP): 2011 - 2015 directions.

At the ASEAN Tourism Task Force meetings in Singapore, April 2010 it was determined that the structure should be aligned with the strategic directions set out in the ATSP. There was also concern raised about the communication systems both internally as well as within the larger ASEAN structure. Given the present periodic meetings of the ASEAN NTOs and Task Forces it was difficult for members to keep track of developments. Often Member States were unaware of events and activities that were crucial to the functioning of the task force of which they were a member. Given limited resources there can be no doubt that better communications and organization are essential to achieving the goals of the strategic plan.

Based on a wide ranging consultation and discussion process a new structure is presented in Exhibit 11.

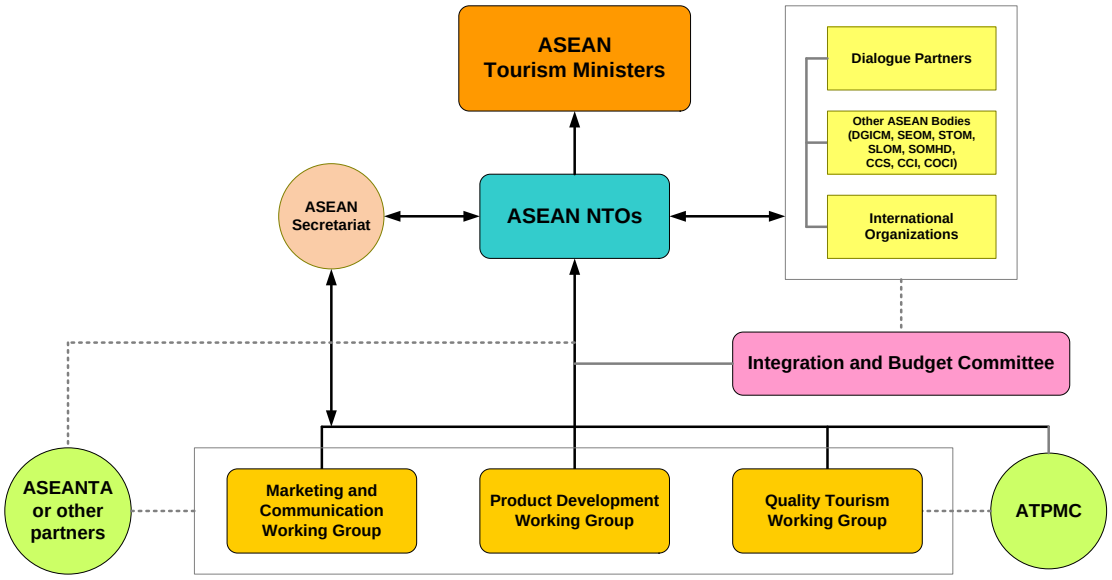


Exhibit 11: ASEAN Tourism Cooperation Organizational Structure

The major changes to the present structure involved reducing the number of Task Forces and forming three working groups and one committee including:

- Marketing and Communication Working Group
- Product development Working Group
- Quality Tourism Working Group
- Integration and Budget Committee

The working groups will be responsible for the overall guidance of the ASEAN NTOs. Task forces can be set up when required to accomplish a task set by the working groups. The Task Forces will have limited life spans and will be disbanded as soon as the task they have been assigned has been realized. It is highly recommended that people with the necessary experience and knowledge participate in the working groups and task forces. Members of task forces do not necessarily have to be from the ASEAN NTOs and can be drawn from the private and public sectors as well as other areas of the ASEAN Secretariat. This will ensure that the decision-making process is as effective as possible.

3.5 Roles and Responsibilities of the ASEAN NTOs

Under the new structure, the ASEAN NTOs have a number of roles and responsibilities including:

- Reviewing and approving all proposed actions and activities from the various working groups.
- Approving the yearly work plan based on the strategic plan.
- Liaising directly with the Ministers of Tourism on priorities and required actions.
- Reviewing the use of funds by various working groups and assessing the effective and efficient use of those resources.
- Approving the yearly budgets.

- Ensuring that the yearly report card is prepared for consideration by the ministers.

3.6 Roles and Responsibilities of the Working groups and Committee

Based on the proposed structure aligned with the ATSP 2011 – 2015, the roles and responsibilities of the three working groups and the committee are as follows.

I) The Marketing and Communication Working Group

It is important that the collective wisdom and experience of the various NTOs with their extensive research capacities are brought to bear on the regional marketing and product development efforts. This working group will also be responsible for determining overall marketing directions and establishing communication protocols. Under this working group, the establishment of a Market Research group is recommended. The group would be made up of one representative from each NTO and will meet on a yearly basis to discuss trends and driving forces that will affect the region.

The Working Group would have the following roles:

- Develop responsive and where appropriate integrated marketing and communication policies and strategies to support the goals and objectives of the ATSP. This responsibility recognizes that it is essential for the NTOs to work and communicate effectively with its stakeholder groups to maximize the use of resources and ensure that the significant potential tourism as a development tool is recognized within ASEAN.
- Work closely with the Product Development Working Group in order to ensure a match between product development and marketing activities.
- Develop innovative promotional vehicles and distribution channels to promote ASEAN tourism experiences.
- Develop and monitor internal and external communication strategies and protocols to ensure an effective flow of information and a consistent image for the NTOs. This will require that the Working Group cooperates closely with the other working groups, ASEAN bodies and its network of partners.
- It is understood that the Working Group is responsible for development and monitoring and the ASEAN Secretariat will be the principle communication source in order to ensure consistency and permanency in the ASEAN message.
- Through the Working Group ensure the timely dissemination of sound and high quality research and analysis.
- Support and hold ASEAN-wide promotional events within the region and overseas.
- Intensify public-private sector marketing and communication partnerships. The ASEAN NTOs presently have a number of partnerships (ASEAN+3, ASEAN+1, ASEANTA etc.) that can be built upon to ensure that the NTOs resources are maximized through effective marketing and promotion.
- Facilitate necessary coordination with other related ASEAN bodies in facilitating inter- and intra- ASEAN travel.

- Work closely with the ASEAN Secretariat in identifying areas of potential funding and helping to develop the necessary documentation to secure the funding.
- Ensure the implementation of the marketing and communication including the crisis communication dimensions of the ATSP are carried out in a timely fashion.
- Assist ASEAN NTOs manage and provide communications issues pertaining to crisis and events threatening or affecting directly or indirectly the travel and tourism in ASEAN countries.
- Recommend where feasible common ASEAN positions on events or crisis impacting tourism to ASEAN member countries.
- Form sub working group or task forces as seen as appropriate based on the nature of the activities being pursued.

II) <u>The Product Development Working Group</u>

The Product Development Working Group will be responsible for identifying new products and experiences working with a wide range of stakeholders. The working group will also be responsible for identifying where investment will be required for product development and working with the relevant bodies to identify sources for investment.

The Working Group would have the following roles:

- Monitor and assess the product development and investment strategies of the various Member States to identify unique opportunities to create innovative regional tourism experiences.
- Work closely with the Marketing and Communication Working Group to understand changes in consumer preferences and new product experiences and approaches.
- Recognizing its role as a catalyst and facilitator of regional experiences work closely with NTOs, national, regional and international agencies responsible for developing and supporting unique tourism experiences and most importantly the private sector who play a crucial role in providing regional product experience.
- Work closely with ASEAN bodies e.g. CCI and CCS as well as the investment entities in various Member States to ensure the highest possible level of investment in regional products and experiences in the region. It is recognized that the national entities play a crucial role in ensuring a positive investment climate and the Working Group will help to identify possibilities for regional products and experiences that also support national objectives.
- Develop experience and product packages that will encompass regional circuits, corridors and clusters for the major areas identified in the strategic plan including: nature-based tourism, cultural and heritage tourism, community-based tourism, and cruise and river-based tourism. It must be recognized that new opportunities and products will be identified on an ongoing basis and must be included in the experience and product development process.

- Work closely with the ASEAN Secretariat in identifying areas of potential funding and helping to develop the necessary documentation to secure the funding.
- Ensure the implementation of the ATSP in a timely fashion.
- Form sub working group or task forces as seen as appropriate based on the nature of the activities being pursued.

III) <u>The Quality Tourism Working Group</u>

The Quality Tourism Working Group will be responsible for enhancing the quality of services, facilities and human resources in the region. The Working Group will be primarily responsible for developing standards, ensuring third-party certification and identifying new areas for standards development. It must be recognized that the Working Group will require significant outside funding in order to develop professionally developed standards.

The Working Group will be working with the ATPMC (ASEAN Tourism Professional Monitoring Committee), which is formally established in June 2010, Lombok, Indonesia, on the implementation of the MRA on ASEAN competency standards.

The Working Group would have the following roles:

- Working closely with its wide partnership network identify areas where existing standards are seen not to meet required levels of performance or new areas which require the development of quality standards to ensure the competitiveness of the region. It must be recognized that these will be voluntary activities.
- Based on the identification process discussed above develop a common set of principles to guide the formulation and implementation of regional quality and sustainable standards for a wide range of tourism facilities and activities.
- Within the period of the ATSP concentrate its quality standard development activities in the following areas: green hotels, homestay, tourism security and safety and wellness spa services.
- Where appropriate develop certification and monitoring systems for the ASEAN tourism industry and destinations that would contribute to world class and sustainable tourism.
- On a regular basis carry out capacity building needs analysis to identify areas where ASEAN can deliver learning opportunities for both individuals as well as organizations to increase the quality of service and facilities. This activity is obviously beyond those areas that are the purview of the ATMPC.
- Work with a wide range of partners in delivering these learning experiences. It must be recognized that there are a number of partners that are essential to this delivery process.
- Review and approve any ASEAN training and learning initiative to ensure that these initiatives meet ASEAN standards. The Working Group will not be concerned with national or sub regional initiatives.
- All learning opportunities must be designed to meet the needs of industry and disadvantaged groups within the region.

- Carefully monitor and report on any ASEAN NTOs sponsored training and learning initiatives.
- Working closely with the ASEAN Secretariat to carry out fund development exercises to support the implementation of the capacity building and standards activities of the ATSP.
- Intensify the sharing of resources and facilities for tourism training and learning program among ASEAN Member States.
- Ensure the implementation of the ATSP in a timely fashion.
- Form sub working group or task forces as seen as appropriate based on the nature of the activities being pursued.

IV) Integration and Budget Committee

The Committee will play a crucial role in ensuring that the essential elements of the strategic plan are implemented. It will be faced with the reality that there are restricted funds to carry out the various activities that will be identified. It must be stressed that identifying funding sources is a collective responsibility but one that will be guided by the Integration and Budget Committee. The Committee will develop a series of policies and procedures for the creation of year budgets for implementing the ATSP during the 2011 – 2015 period as well as monitoring the use of resources.

The Committee would have the following roles:

- Provide recommendations to ASEAN NTOs on strategic directions for ASEAN tourism integration.
- Coordinate with other relevant ASEAN bodies on facilitation and connectivity issues.
- Review project proposals from the Working Groups.
- Recommend the annual budget and work plan to the ASEAN NTOs.
- Identification of the sources of funding required to implement the ATSP.
- Monitoring the implementation of the ATSP 2011 – 2015.

3.7 Roles and Responsibilities of the ASEAN Secretariat

Much of the success of implementing the strategic plan will depend on the ASEAN Secretariat. The present resources allocated to the Secretariat are quite clearly inadequate to meet this expectation. It is essential that additional resources be allocated to the Secretariat role in order to ensure that the plan can be implemented but more importantly that the essential role of tourism as a development tool is fully realized within the ASEAN community.

The Secretariat should have the following roles:

- Act as the "memory" of the ASEAN NTOs given that the representatives from various Member States change on a regular basis.
- Responsibility for coordinating the work of the various working groups. This will mean that members of the Secretariat must be fully involved in the work

of the working groups which will require a significant investment of time and money.

- Liaising with the relevant ASEAN bodies to ensure that the concerns and priorities of the ASEAN NTOs are reflected in overall ASEAN community decision-making. This will require that members of the Secretariat are fully briefed and comfortable with the directions and policies being developed within the ASEAN NTO.
- Communications with outside agencies, stakeholders and the media based on policies established by the ASEAN NTOs.
- Responsibility for coordinating and in many cases developing the fund development proposals to support the work of the ASEAN NTOs.

3.8 Roles and Responsibilities of the ATPMC (ASEAN Tourism Professional Monitoring Committee)

The establishment of the ASEAN Tourism Professional Monitoring Committee (ATPMC) is in pursuance of Article 5 (3) – Responsibilities, of the ASEAN Mutual Recognition Arrangement (MRA) on Tourism Professionals adopted by the ASEAN Tourism Ministers during their 12th Meeting on 8 January 2009 in Hanoi, Viet Nam.

The ATPMC should have the following roles:

- Create awareness and disseminate information about the MRA on Tourism Professionals within ASEAN;
- Promote, update, maintain and monitor the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) and the Common ASEAN Tourism Curriculum (CATC);
- Notify promptly the concerned Tourism Professional Certification Board (TPCB) upon receipt of feedback from National Tourism Professional Board (NTPB), in case a foreign Tourism Professional is no longer recognised by the host country;
- Facilitate the exchange of information concerning assessment procedures, criteria, systems, manuals and publications relating to this Arrangement;
- Report its work progress to the ASEAN NTOs;
- Formulate and update necessary mechanisms to enable the implementation of the MRA on Tourism Professionals;
- Such other functions and responsibilities that may be assigned to it by the ASEAN NTOs in the future;
- Recommend, as appropriate, to the ASEAN Tourism Ministers through the ASEAN NTOs measures to improve and/or amend the Agreements; and
- Resolve any differences among ASEAN Member States concerning the interpretation or application of the MRA on Tourism Professionals and to settle them in an amicable manner.

CHAPTER 4

STRATEGIC ACTIONS AND ACTIVITIES

CHAPTER 4: STRATEGIC ACTIONS AND ACTIVITIES

In Chapter 3 the vision as well as the strategic directions and actions of the strategic plan were presented. In this chapter the actions and their associated activities will be presented. In Chapter 5 detailed work plans and budgets for each of the activities are proposed.

4.1 Develop Experiential Regional Products and Creative Marketing and Investment Strategies

One of the key responsibilities of the ASEAN NTOs is to ensure that there is an increase in the visitors arriving in the region and visiting more than one country. While increasing visitor numbers is important it is essential that this increase be achieved in a sustainable and responsible way in order to meet the overall objectives of the region. This will require working with a range of stakeholders. There can be no doubt that the private sector must be very much involved in the market and product development process.

This strategic direction will be the responsibility of the Marketing and Communication Working Group and the Product Development Working Group. The Product Development Working Group is responsible for packaging these various products and experiences into circuits, corridors, nodal areas of action and circuits. This will be based on research from the individual Member States, public and private sector groups and the Market Research team under the Marketing and Communication Working Group. The work of these two working groups will always be guided by the principle that there has to be a strong correlation between well-identified documented market demands and product and experience development.

Actions and Activities for Strategic Direction 1

In order to accomplish Strategic Direction 1 there are three proposed priority actions together with a number of prioritized activities.

STRATEGIC DIRECTION 1 **DEVELOP EXPERIENTIAL REGIONAL PRODUCTS AND CREATIVE MARKETING AND INVESTMENT STRATEGIES**		
STRATEGIC ACTIONS		
1.1 Develop and Implement a Tourism Marketing Strategy for the ASEAN Region	**1.2 Develop Experiential and Creative Regional/Sub Regional Circuits & Packages Together with Investment Strategies**	**1.3 Enhance the External Relation Policies and Procedures of ASEAN Tourism**
ACTIVITIES		
1.1.1 Develop an ASEAN tourism marketing strategy which will create a brand, target markets, communication strategy, distribution approach and implementation structure. 1.1.2 Establish a market research group to provide analytical information on tourism trends and situation on a regular basis.	1.2.1 Develop packages for regional corridors, circuits and clusters for nature-based tourism. 1.2.2 Develop packages for regional corridors, circuits and clusters for cultural and heritage tourism (tangible and intangible). 1.2.3 Develop packages for regional corridors, circuits and clusters for community-based tourism. 1.2.4 Develop packages for regional corridors and circuits for cruise tourism and river-based tourism. 1.2.5 Work with CCI and CCS in reducing barriers and encouraging investment in product development.	1.3.1 Create a public relation policy and program to publicize and promote the objectives and activities of the ASEAN NTOs. 1.3.2 Develop policies and procedures for cooperating with dialogue partners to support the implementation of the ATSP. 1.3.3 Develop policies and procedures for cooperating with international organizations to support the implementation of the ATSP. 1.3.4 Develop communication systems and policies for communicating with the essential private sector stakeholders.

4.2 Strategically Increase the Quality of Human Resources, Services and Facilities in the Region

The task of developing standards cannot be minimized. Obtaining approval on standards from the 10 Member States will require significant time and facilitation. Developing standards will involve not only the NTOs but also a range of other government departments and private sector groups. This will require careful management in order to ensure that the needs of the industry and governments are clearly met. In the strategic directions section of the ATSP the complexity of the process was discussed.

The task of implementing MRA on Tourism Professionals including the ACCSTP will be equally complex and will require the agreement and participation of a number of stakeholders. The complexity of doing this is also discussed in the strategic directions section of the strategic plan. It has been determined that the competencies will require outside professional assistance given the complexity of the task. Essentially there are 6 labor divisions as illustrated in Exhibit 12.

Exhibit 12: Six Labor Divisions

It must be recognized that the positions listed under each labor division are of varying levels of sophistication and responsibility. Clearly some of the positions will require a university degree with vocational training and others might only require short-term training of one to two weeks. It is important that in the development process that the required training and education dimensions be clearly identified. This will also have a significant impact on who will be the education and training providers. The consulting team is firmly of the opinion that these are skills attained on the job.

Some of the job classifications especially in food production are highly specialized and require significant training and experience. This area is especially important since it deals with food safety. It also must be remembered that a great many of the people working in food production have developed their skills and knowledge on the job. This must always be remembered in the development process.

The principle must be that for some positions it is entirely possible that someone can carry out a series of responsibilities in a highly professional manner without any formal education. This is certainly the case within the industry where some of the leaders (for example hotel general managers) have little formal education but a great deal of life and industry experience. This is not to say that formal education at the higher managerial levels is not important but clearly industry experience needs to be recognized in any hiring process.

It must be pointed out that the term labor division is somewhat problematic. Quite clearly some of the tasks could be seen under the heading of what might be commonly understood to be labor but many of the position classifications are clearly of a supervisory or managerial nature. There should be careful consideration given to ensuring proper nomenclature.

In 2007, ASEAN received the technical assistance from AUSAID through the ASEAN-Australia Development Cooperation Programme (AADCP) Phase 1 to carry out the followings:

- Development of the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP)
- the Common ASEAN Tourism Curriculum (CATC)
- Capacity Building for an ASEAN Mutual Recognition Arrangement in Tourism Project

In order to maintain the implementation of the MRA, it is critical to seek technical assistance to carry out further activities for all labor divisions. Under each division, there will be a need to develop a training toolbox (common, generic core and functional competencies), TOT program for Master Trainer and Train of Master Assessor. This will require experts in each field to carry out the development work. Given the nature of the task significant financial resources will be required. At present, the ASEAN Secretariat has been able to secure funding from AUSAID (through AADCP Phase 2) to carrying the task for the housekeeping labor division only. There is still a need to seek financial support for developing the other five divisions. As noted later a primary responsibility will be to find funding for the other divisions. It may be that the present model for housekeeping will have to be modified in order to obtain funding. The nature of the activities is illustrated in Exhibit 13.

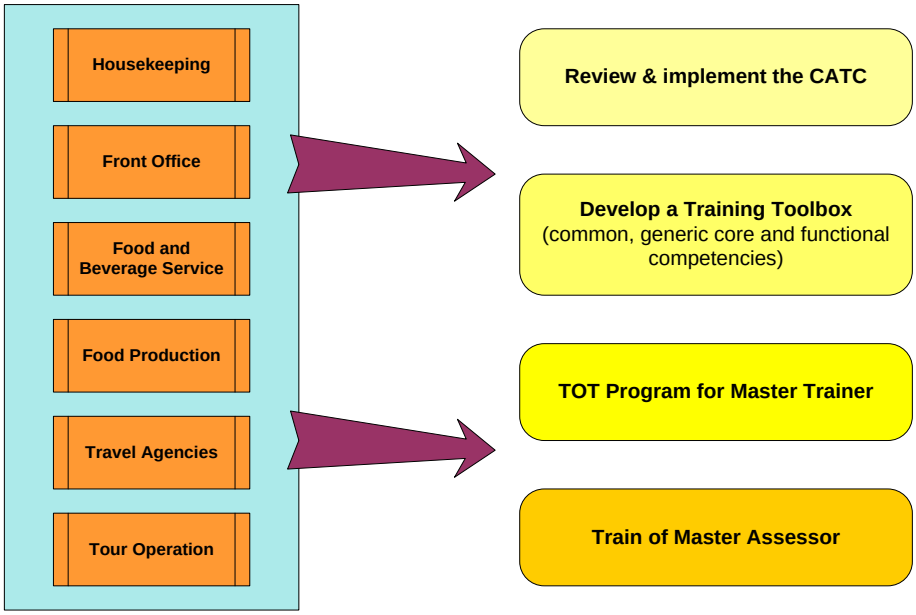


Exhibit 13: Activities to be Implemented for Each Labor Division

Actions and Activities for Strategic Direction 2

In order to accomplish Strategic Direction 2 there are three proposed priority actions together with a number of prioritized activities.

STRATEGIC DIRECTION 2 INCREASE THE QUALITY OF HUMAN RESOURCES, SERVICES AND FACILITIES IN THE REGION		
STRATEGIC ACTIONS		
2.1 Develop a Set of ASEAN Tourism Standards with a Certification Process	**2.2 Implement the MRA on ASEAN Tourism Professionals and its Requirements**	**2.3 Provide Opportunities for Increased Knowledge and Skill Development**
STRATEGIC ACTIVITIES		
2.1.1 Revise and develop an ASEAN green hotel standard with a certification process. 2.1.2 Revise and develop an ASEAN homestay standard with a certification process. 2.1.3 Revise and develop an ASEAN public toilet standard with a certification process. 2.1.4 Develop an ASEAN spa services standard with a certification process. 2.1.5 Develop ASEAN tourism security and safety guidelines. 2.1.6 Enhance the ability of ASEAN tourism to address the climate change issue.	2.2.1 Develop tools and implement human resource development programs for housekeeping division. 2.2.2 Develop tools and implement human resource development programs for front office, food and beverage services, food production, travel agencies and tour operation divisions. 2.2.3 Develop tools to monitor the tourism labor market situation in each ASEAN Member State that would support the implementation of MRA on Tourism Professionals.	2.3.1 Establish policies and procedures for the development of capacity building programs (including the process to be followed, assessment systems and the criteria to assess initiatives that will get ASEAN backing.) 2.3.2 Develop a yearly human resource development plan based on regional priorities.

4.3 Enhance and Accelerate Travel Facilitation and ASEAN Connectivity

One of the major concerns of the industry as well as visitors is the difficulty of obtaining visas, a series of widely differing regulations and information needs for visas, differing procedures for air as opposed to ground travel, the lack of airplane seats and in some markets the need for more airports, ports and roads.

Clearly much of this activity is not within the realm of NTOs but belongs to a range of other government departments. The role of this portion of the plan will be to identify strategic activities and actions to help ensure facilitated and seamless travel through a strong problem definition and advocacy role.

There can be no doubt that a single visa is a noble goal but clearly will be something accomplished outside of the 2015 timeframe. Nevertheless the Integration and Budget Committee should work to ensure the timely adoption of a single visa. Prior to that adoption ongoing harmonization and the development of sub regional visas should be carefully investigated.

Actions and Activities for Strategic Direction 3

In order to accomplish the objective of Strategic Direction 3 there are 2 proposed priority actions as below.

STRATEGIC DIRECTION3 ENHANCE AND ACCELERATE TRAVEL FACILITATION AND ASEAN CONNECTIVITY	
STRATEGIC ACTIONS	
3.1 Advocate for a Single Visa for the ASEAN Region	**3.2 Work with Other ASEAN Bodies to Expand Connectivity through Air, Water, Rail and Ground Transportation**
STRATEGIC ACTIVITIES	
3.1.1 Continue to work towards a single visa for the region by identify obstacles and opportunities and working with the relevant groups within ASEAN. 3.1.2 Define the case for and advocate the implementation of an e-visa system. 3.1.3 Explore the possibility for innovative visa arrangements that facilitate travel (e.g. sub-regional visas).	3.2.1 On a consistent basis identify and clearly define land-based, air and maritime obstacles and opportunities to increase connectivity into and within the region. 3.2.2 Work closely with the relevant ASEAN bodies to ensure the adoption and implementation of NTO priority activities.

CHAPTER 5

STRATEGIC ACTIVITIES AND DETAILED ACTION PLANS

CHAPTER 5: STRATEGIC ACTIVITIES AND DETAILED ACTION PLANS

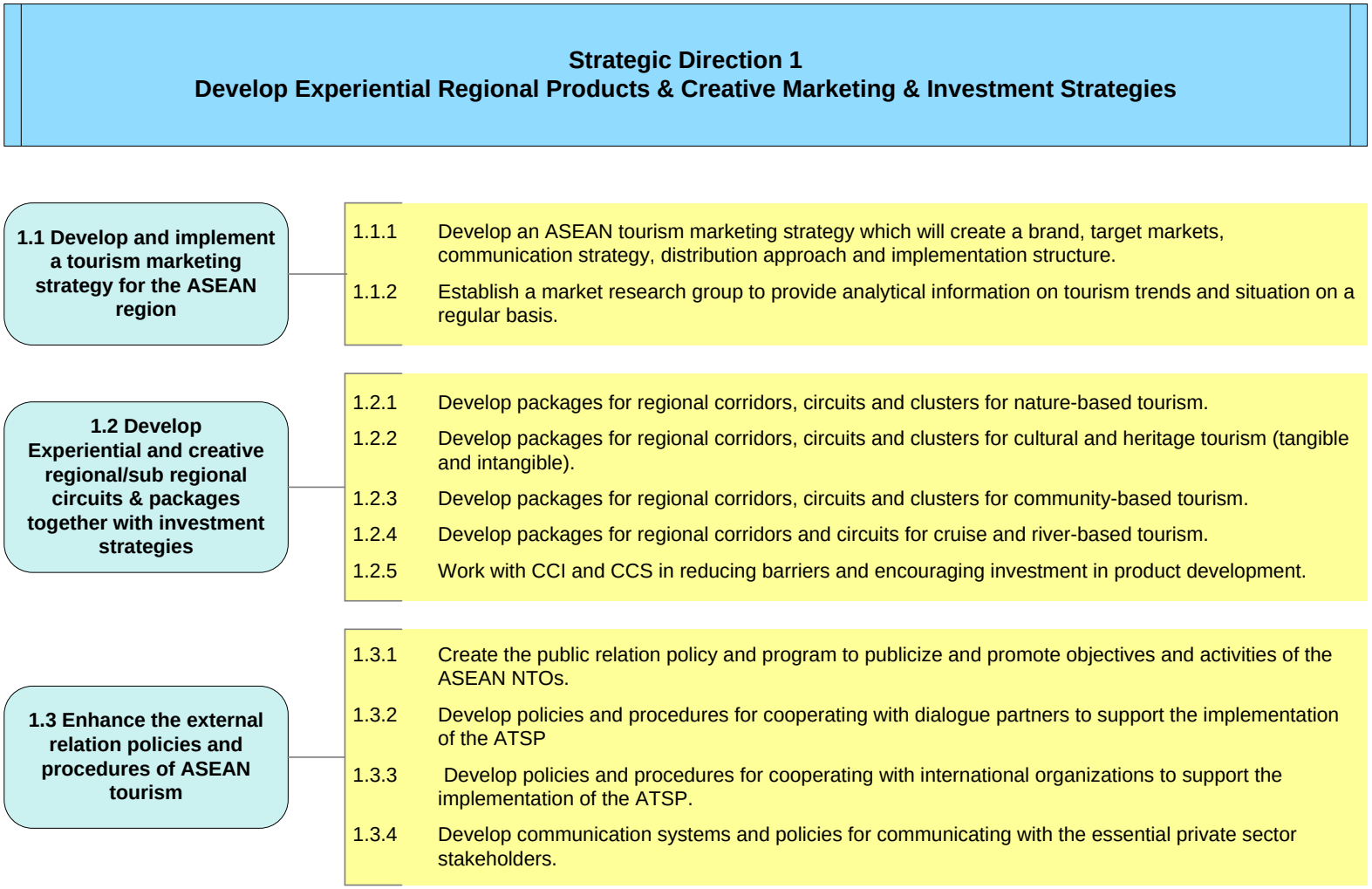
As noted earlier in the plan there were a number of strategic activities identified by the consultation process. It was recognized that given the level of resourcing for the NTOs and time constraints that only a limited number of activities could be undertaken. The ATSP deals with the high priority activities identified earlier. There may be instances where activities with differing levels of priorities may be adopted if funding can be obtained.

In this section timelines together with potential areas of funding are identified. Timelines have been used to provide the working groups and in turn the NTOs a way of assessing its success in achieving the objectives of the ATSP.

Throughout the discussion of the various action plans the resources required and funding sources are identified. The action plans have been developed on the basis that there will have to be increased funding from the NTOs in order to implement the entire plan. The present level of funding will simply not be sufficient to accomplish what are seen as priority actions. As discussed earlier in the strategic plan each country is investing a significant amount of money in the promotion and development of their products and experiences. Most countries have a significant bureaucracy that needs in the overall quest to ensure that each country is achieving the highest possible levels of economic and social benefit from tourism. While there can be no argument that the ASEAN NTOs will be relying in part on the work of the various NTOs the ASEAN initiatives will have to be funded in order to ensure that tourism continues to play an important role in the development of the regional community.

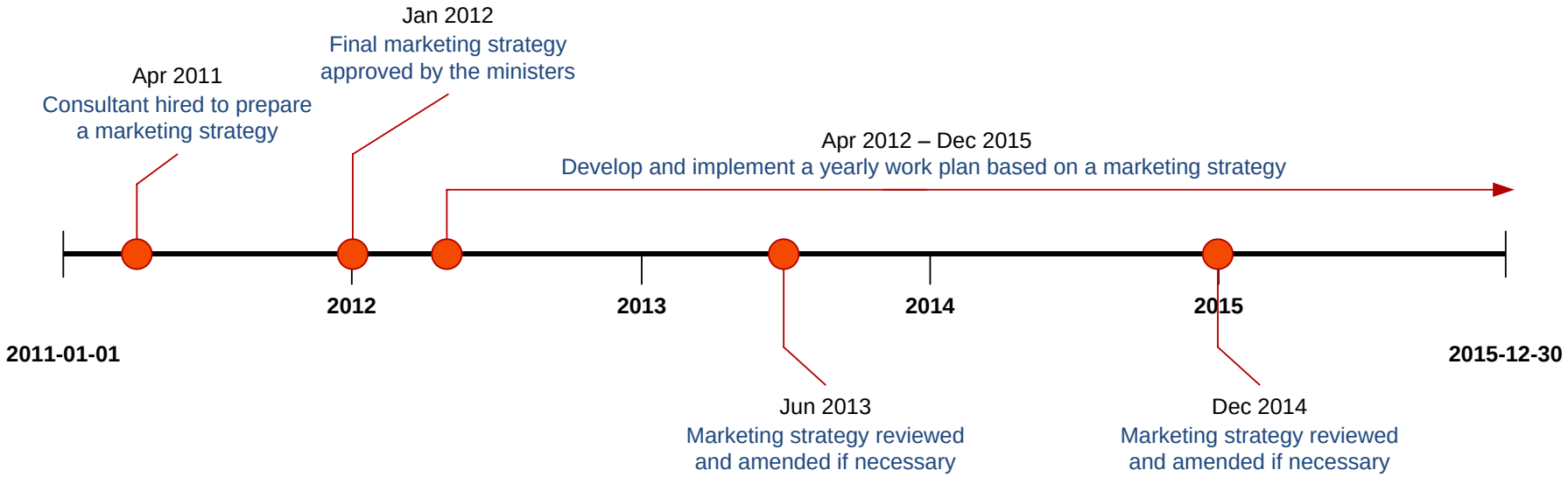
It is therefore imperative that a reasonable funding structure be adopted in order to ensure the success of the strategic plan and as importantly to ensure that tourism can play the central role that it must within the larger community. This issue is discussed in Chapter 6 of the strategic plan.

5.1 Activities for Strategic Direction 1



1.1 DEVELOP AND IMPLEMENT A TOURISM MARKETING STRATEGY FOR THE ASEAN REGION

1.1.1 Develop an ASEAN tourism marketing strategy which will create a brand, target markets, communication strategy, distribution approach and implementation structure

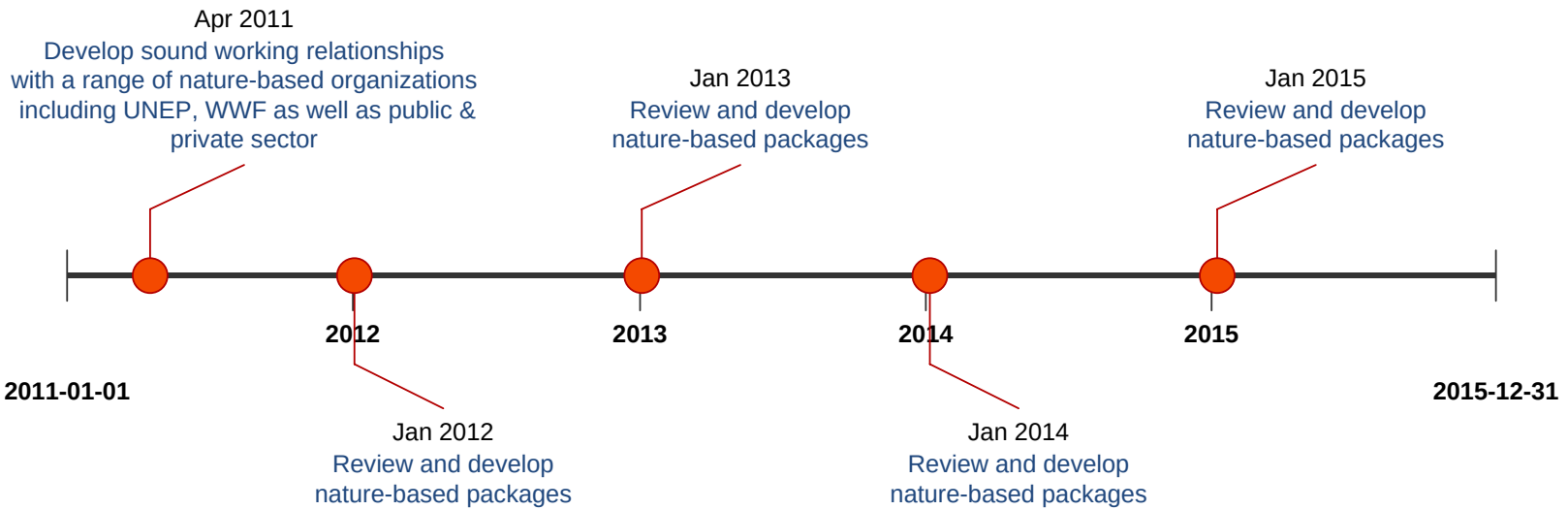


Responsible Body:	Marketing and Communication Working Group working with a consultant.
Feasibility:	High feasibility.
Comments:	It is understood that the marketing strategy will revise and implement promotional vehicles and distribution channels that complement the product development and experience (including social media/ digital marketing, ASEAN Promotional Chapters for Tourism, trade shows). Terms of reference for this particular initiative has been prepared and is essential to guide the activities and budget allocations of the NTOs.

1.1 DEVELOP AND IMPLEMENT A TOURISM MARKETING STRATEGY FOR THE ASEAN REGION

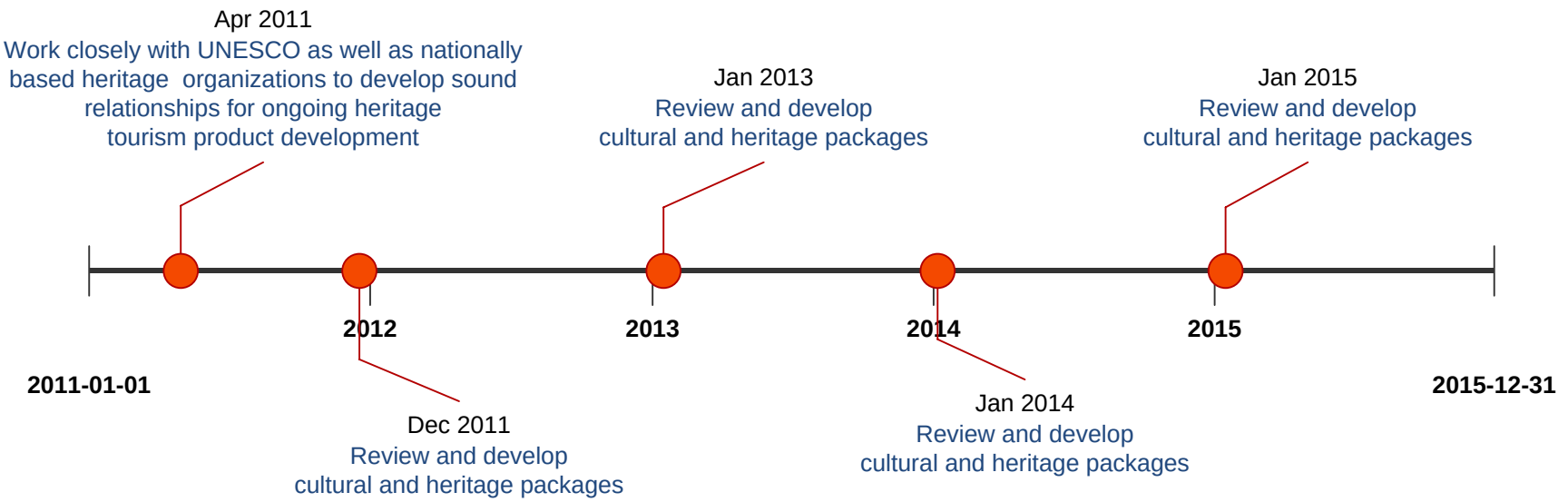
1.1.2 Establish a market research group to provide analytical information on tourism trends and situation on a regular basis	
Responsible Body:	Marketing and Communication Working Group
Feasibility:	No problem in implementation.
Comments:	The Market Research Group should be made up of representatives from the member states and private sector.

1.2 DEVELOP EXPERIENTIAL AND CREATIVE REGIONAL/SUB REGIONAL CIRCUITS & PACKAGES TOGETHER WITH INVESTMENT STRATEGIES

1.2.1 Develop packages for regional corridors, circuits and clusters for nature-based tourism	
	
Responsible Body:	Product Development Working Group.
Feasibility:	High feasibility.
Comments:	There are a number of studies that have been carried out on a sub regional basis on nature-based tourism with a particular emphasis on ecotourism. Working with the country coordinators of sub-regional groupings, the Product Development Working Group should require no new resources. It must be remembered that the task of the Working Group is not to develop natural sites or attractions. Its task is to assess regional resources and develop thematic packages (trails, corridors, clusters and circuits)

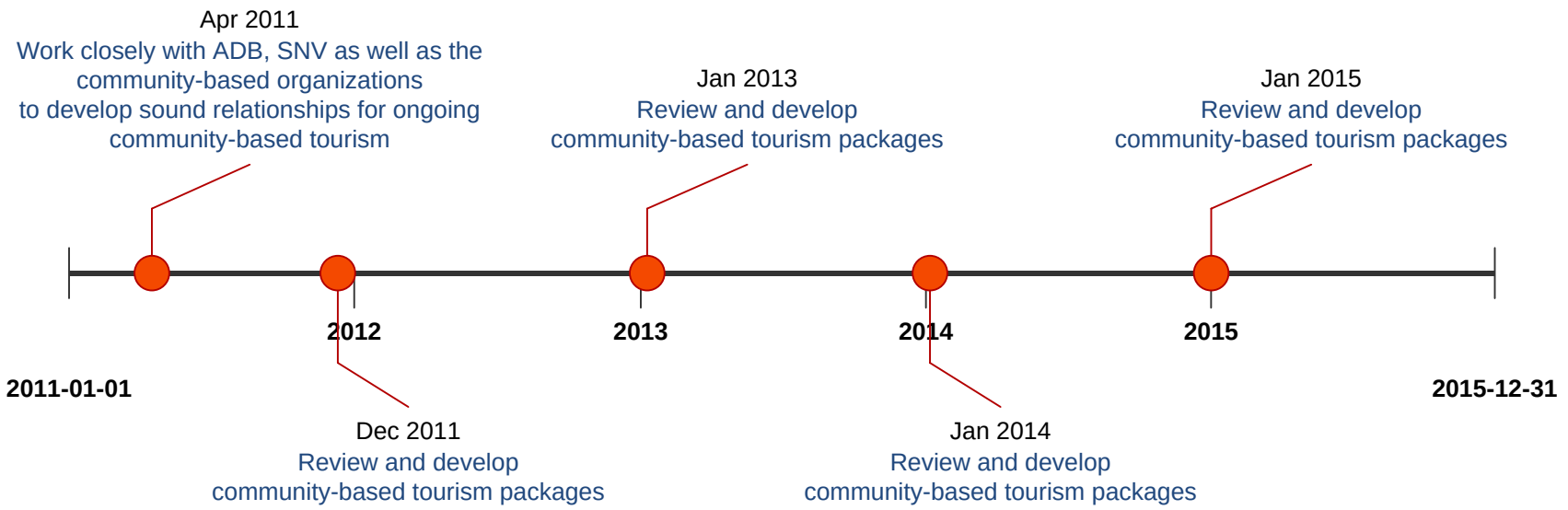
1.2 DEVELOP EXPERIENTIAL AND CREATIVE REGIONAL/SUB REGIONAL CIRCUITS & PACKAGES TOGETHER WITH INVESTMENT STRATEGIES

1.2.2 Develop regional corridors, circuits, clusters and packages for cultural and heritage tourism (tangible and intangible)

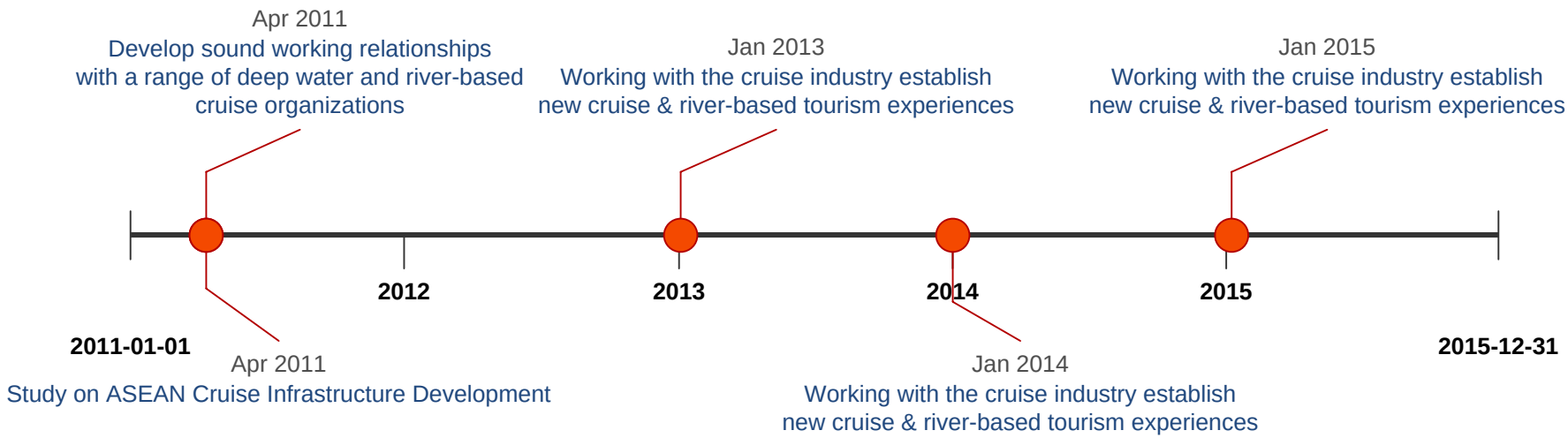


Responsible Body:	Product Development Working Group.
Feasibility:	High feasibility.
Comments:	There have been a number of heritage strategies developed throughout the region. The Product Development Working Group working with UNESCO, regional groupings and national heritage organizations should be able to develop new experiences without additional funding.

1.2 DEVELOP EXPERIENTIAL AND CREATIVE REGIONAL/SUB REGIONAL CIRCUITS & PACKAGES TOGETHER WITH INVESTMENT STRATEGIES

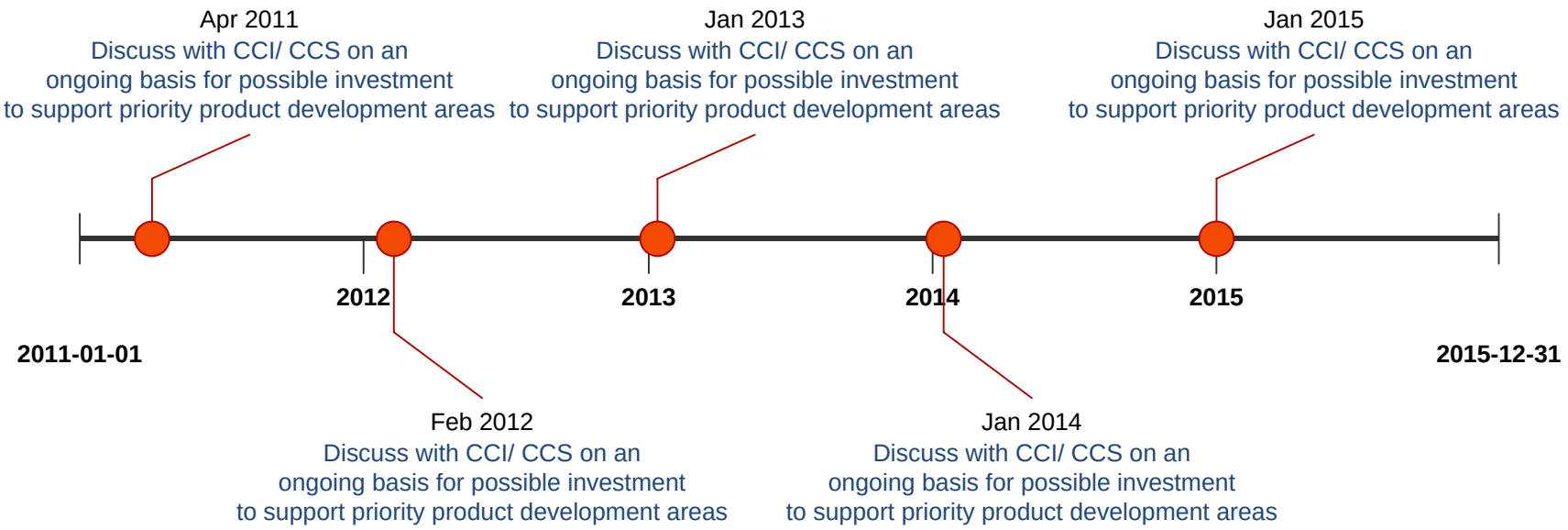
1.2.3 Develop regional corridors, circuits, clusters and packages for community-based tourism	
	
Responsible Body:	Product Development Working Group.
Feasibility:	High feasibility.
Comments:	Many countries have developed strong community based development programs. In addition, the ADB has funded studies in the GMS and BIMP-EAGA. SNV has also developed a number of community-based tourism approaches. The community-based tourism experience should be based on the programs that been developed by regional groupings.

1.2 DEVELOP EXPERIENTIAL AND CREATIVE REGIONAL/SUB REGIONAL CIRCUITS & PACKAGES TOGETHER WITH INVESTMENT STRATEGIES

1.2.4 Develop regional corridors, circuits and packages for cruise and river-based tourism	
	
Responsible Body:	Product Development Working Group.
Feasibility:	Medium feasibility depending on the level of funding available. It is unlikely that this strategy will be implemented without the JAIF funding.
Comments:	Initially significant funds will be required to develop a cruise strategy. Once the strategy is in place the Product Development Working Group will work with the cruise industry to identify new opportunities and products for and now new resources will be required. Without funding the nature of the product development activities related to the cruise industry will be limited.

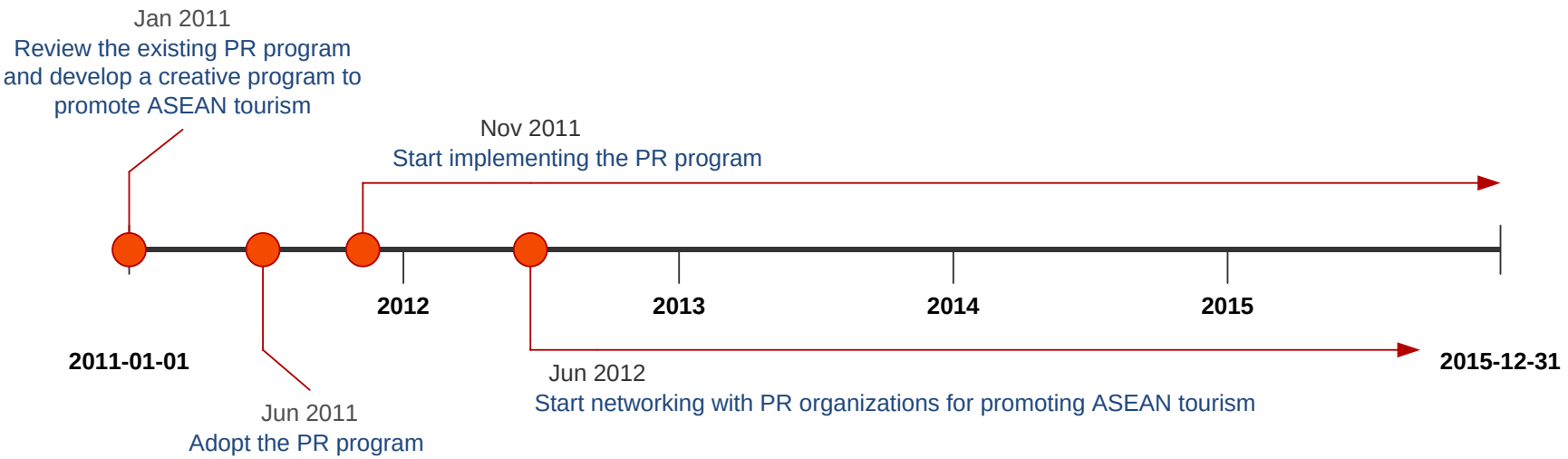
1.2 DEVELOP EXPERIENTIAL AND CREATIVE REGIONAL/SUB REGIONAL CIRCUITS & PACKAGES TOGETHER WITH INVESTMENT STRATEGIES

1.2.5 Work with CCI and CCS in reducing barriers and encouraging investment in product development

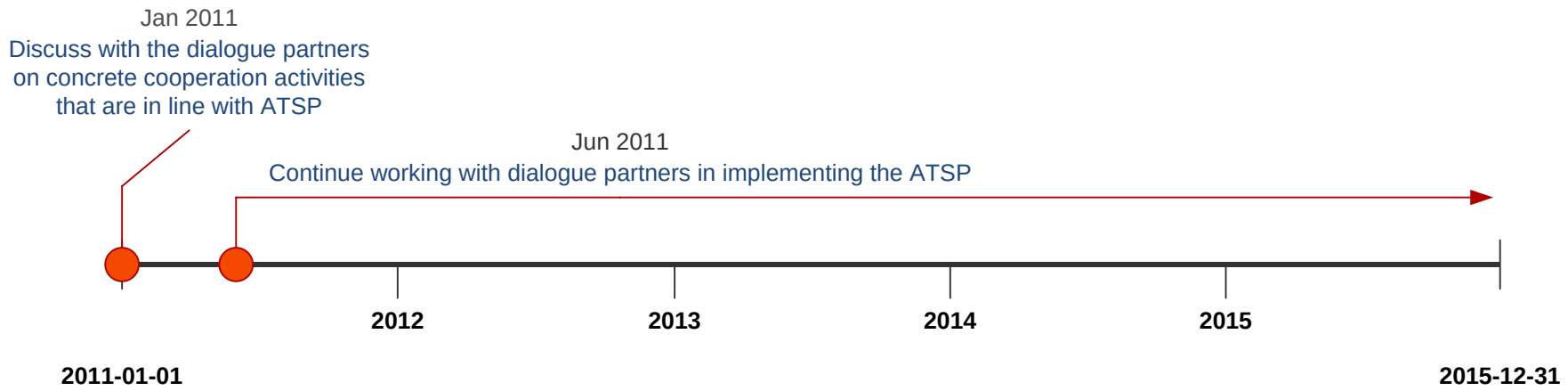


Responsible Body:	ASEAN NTOs and ASEAN Secretariat.
Feasibility:	High feasibility.
Comments:	The ASEAN NTOs will have to work with CCI/ CCS to develop policies and specific investment plans for circuits, corridors, clusters and packages of priority products.

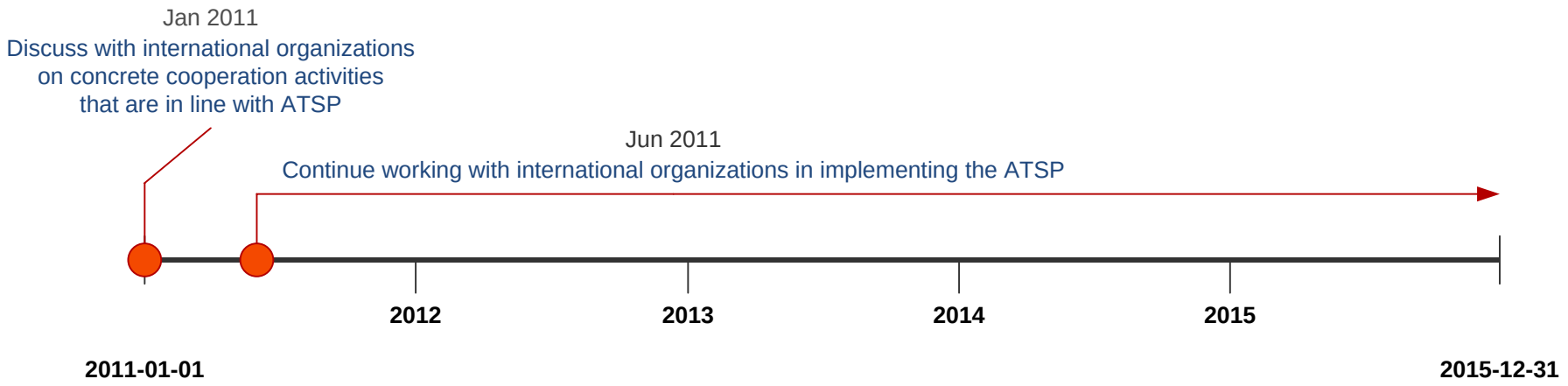
1.3 ENHANCE THE EXTERNAL RELATION POLICIES AND PROCEDURES OF ASEAN TOURISM

1.3.1 Create a public relations policy and program to publicize and promote objectives and activities of the ASEAN NTOs.	
	
Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	High feasibility.
Comments:	No resources required since this will be done during the regular meetings of the NTOs.

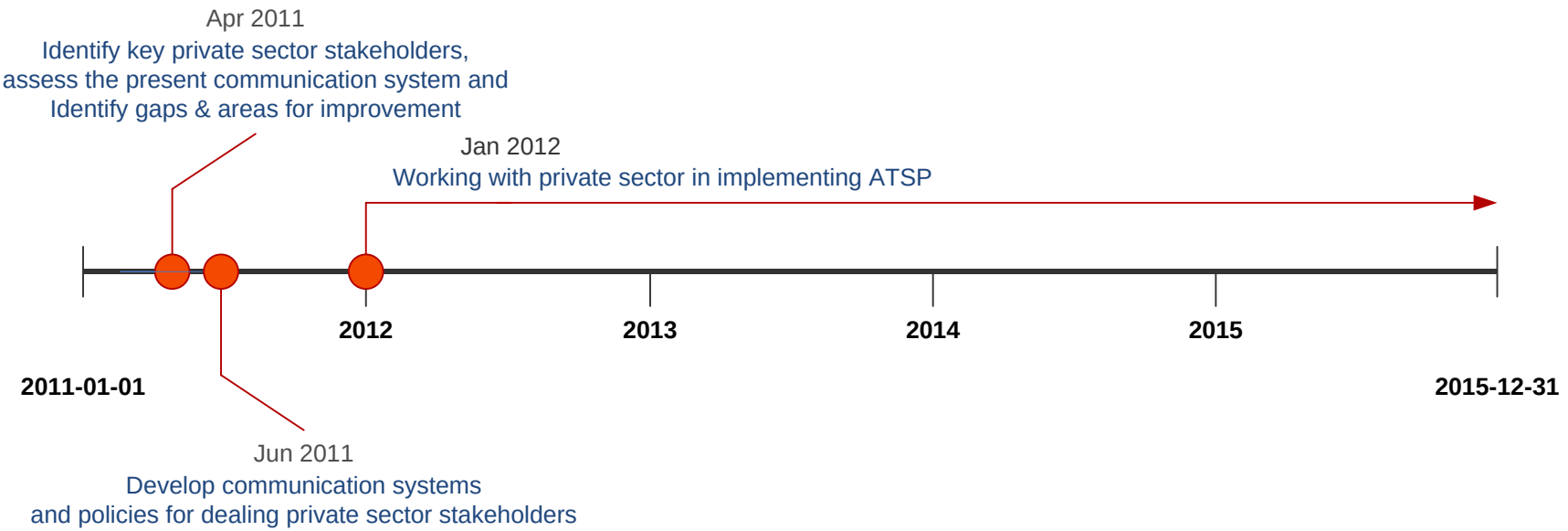
1.3 ENHANCE THE EXTERNAL RELATION POLICIES AND PROCEDURES OF ASEAN TOURISM

1.3.2 Develop policies and procedures for cooperating with dialogue partners to support the implementation of the ATSP	
	
Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	High feasibility.
Comments:	-

1.3 ENHANCE THE EXTERNAL RELATION POLICIES AND PROCEDURES OF ASEAN TOURISM

1.3.3 Develop policies and procedures for cooperating with international organizations to support the implementation of the ATSP	
	
Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	High feasibility.
Comments:	-

1.3 ENHANCE THE EXTERNAL RELATION POLICIES AND PROCEDURES OF ASEAN TOURISM

1.3.4 Develop communication systems and policies for communicating with the essential private sector stakeholders	
	
Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	High feasibility.
Comments:	-

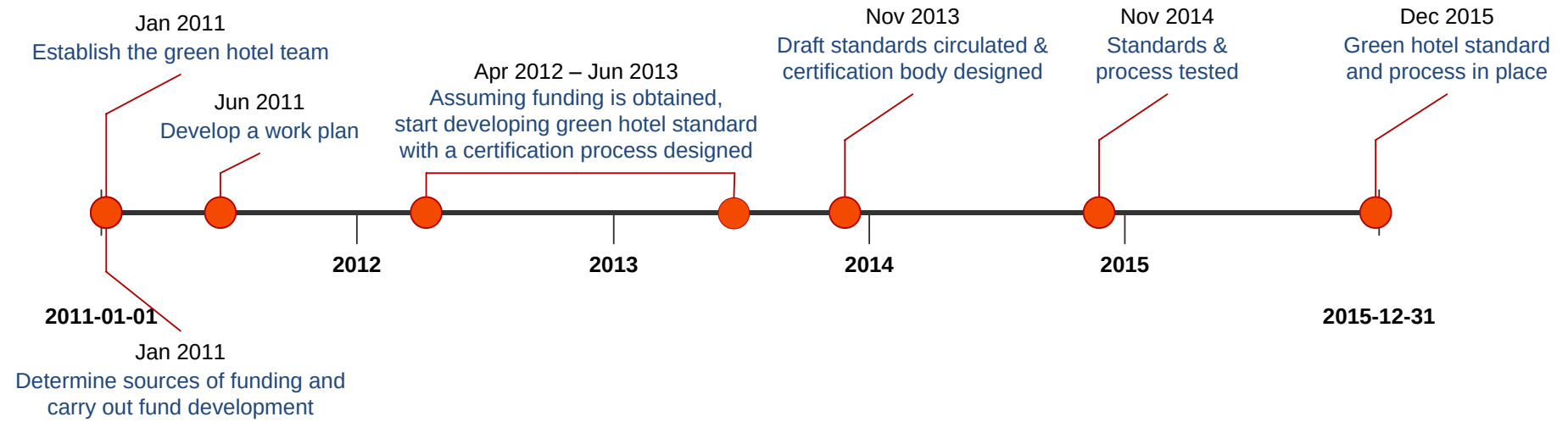
5.2 Activities for Strategic Direction 2

Strategic Direction 2
Strategically Increase the Quality of Services and Human Resources in the Region

2.1 Develop a set of ASEAN tourism standards with a certification process	2.1.1	Revise and develop an ASEAN green hotel standard with a certification process.
	2.1.2	Revise and develop an ASEAN homestay standard with a certification process.
	2.1.3	Revise and develop an ASEAN public toilet standard with a certification process.
	2.1.4	Develop an ASEAN spa service standard with a certification process.
	2.1.5	Develop ASEAN tourism security and safety guidelines.
	2.1.6	Enhance the ability of ASEAN tourism to address the climate change issue.
2.2 Implement the MRA on ASEAN Tourism Professionals and its Requirements	2.2.1	Develop tools and implement a human resource development programs for an ASEAN competency standard on housekeeping.
	2.2.2	Develop tools and implement human resource development program for ASEAN competency standards for front office, food and beverage services, food production, travel agencies and tour operation activities.
	2.2.3	Develop tool to monitor the tourism labor market situation in each ASEAN Member State that would support the implementation of MRA on Tourism Professionals.
2.3 Provide opportunities for increase knowledge and skill development	2.3.1	Establish policies and procedures for the development of capacity building programs (including the process to be followed, assessment systems and the criteria to assess initiatives that will get ASEAN backing.)
	2.3.2	Develop a yearly human resource development plan based on regional priorities.

2.1 DEVELOP A SET OF ASEAN TOURISM STANDARDS WITH A CERTIFICATION PROCESS

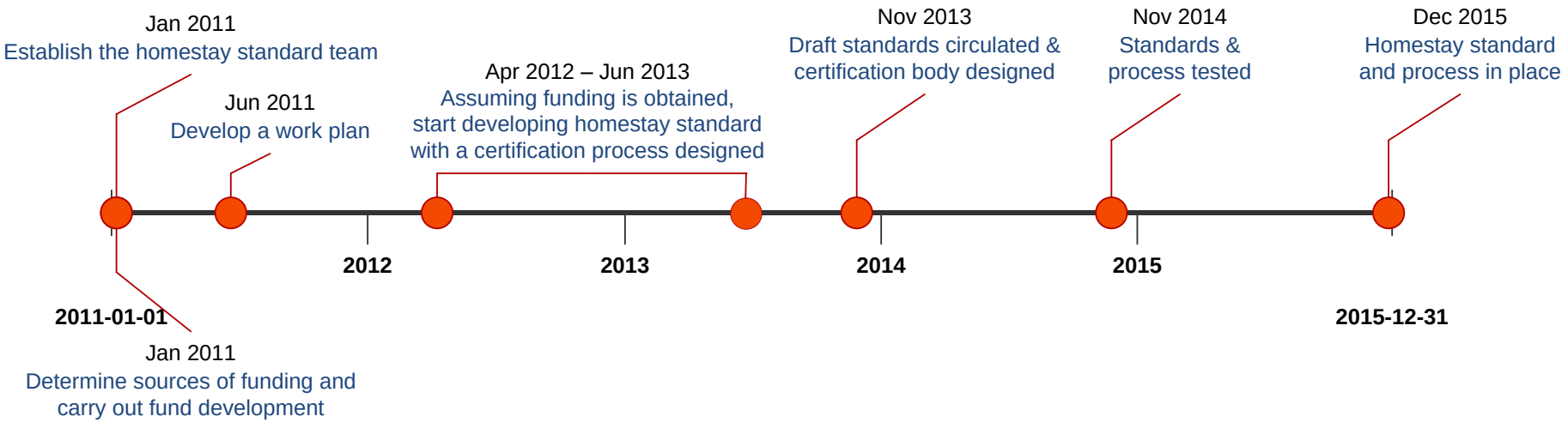
2.1.1 Revise and develop an ASEAN green hotel standard with a certification process



Responsible Body:	Quality Tourism Working Group.
Feasibility:	This will require significant coordination and input from the NTOs.
Comments:	This is an important study that will clearly signal the ASEAN community's concern about global warming and its intention to take a leading role in ensuring that tourism is a sustainable as possible.

2.1 DEVELOP A SET OF ASEAN TOURISM STANDARDS WITH A CERTIFICATION PROCESS

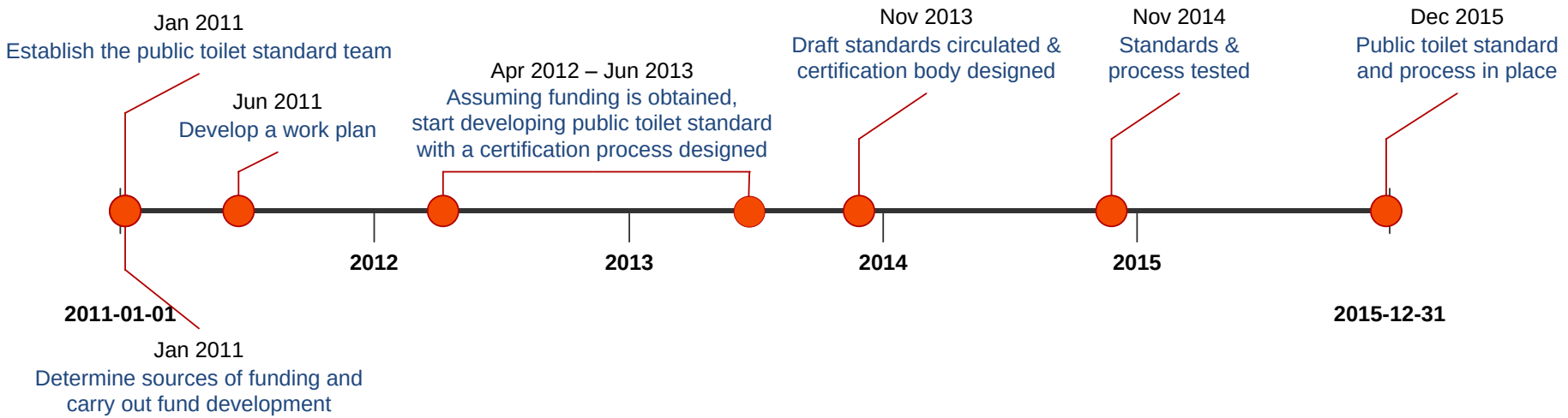
2.1.2 Revise and develop an ASEAN homestay standard with a certification process.



Responsible Body:	Quality Tourism Working Group.
Feasibility:	High feasibility.
Comments:	There will be a need to look for possible funds to support the implementation of this activity.

2.1 DEVELOP A SET OF ASEAN TOURISM SAFETY AND SECURITY STANDARDS WITH A CERTIFICATION PROCESS

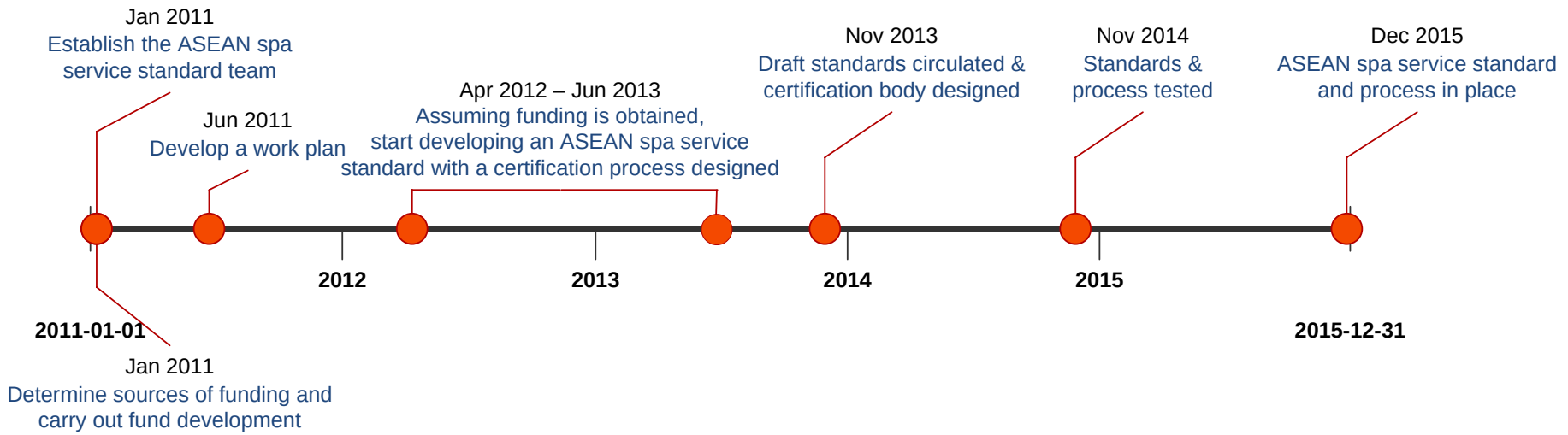
2.1.3 Revise and develop an ASEAN public toilet standard with a certification process.



Responsible Body:	Quality Tourism Working Group
Feasibility:	High feasibility.
Comments:	Given that there are other member states that have developed national standard on public toilets, the study could be based on the existing works that Member States have already done. Thus, financial resource for developing detailed public toilet standard will be minimal.

2.1 DEVELOP A SET OF ASEAN TOURISM STANDARDS WITH A CERTIFICATION PROCESS

2.1.4 Develop an ASEAN spa service standard with a certification process.



Responsible Body:	Quality Tourism Working Group
Feasibility:	Depends on the level of funding available.
Comments:	There will be a need to look for possible funds to support the implementation of this activity.

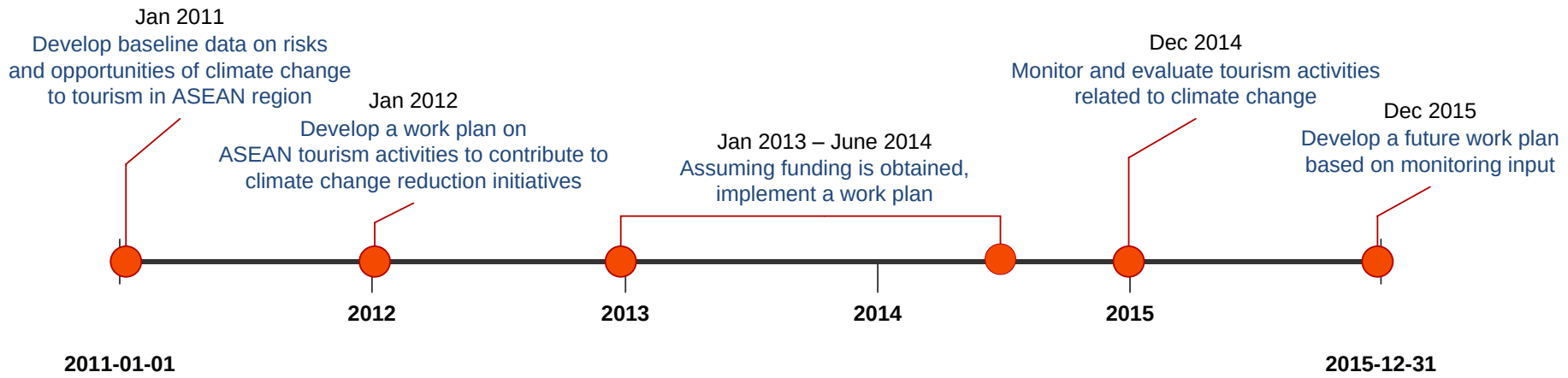
2.1 DEVELOP A SET OF ASEAN TOURISM STANDARDS WITH A CERTIFICATION PROCESS

2.1.5 Develop ASEAN tourism security and safety guidelines.

Responsible Body:	Quality Tourism Working Group.
Feasibility:	Depends on the level of funding available.
Comments:	This initiative was made based on the possibility in securing funds from GTZ to support the development of this guideline.

2.1 DEVELOP A SET OF ASEAN TOURISM STANDARDS WITH A CERTIFICATION PROCESS

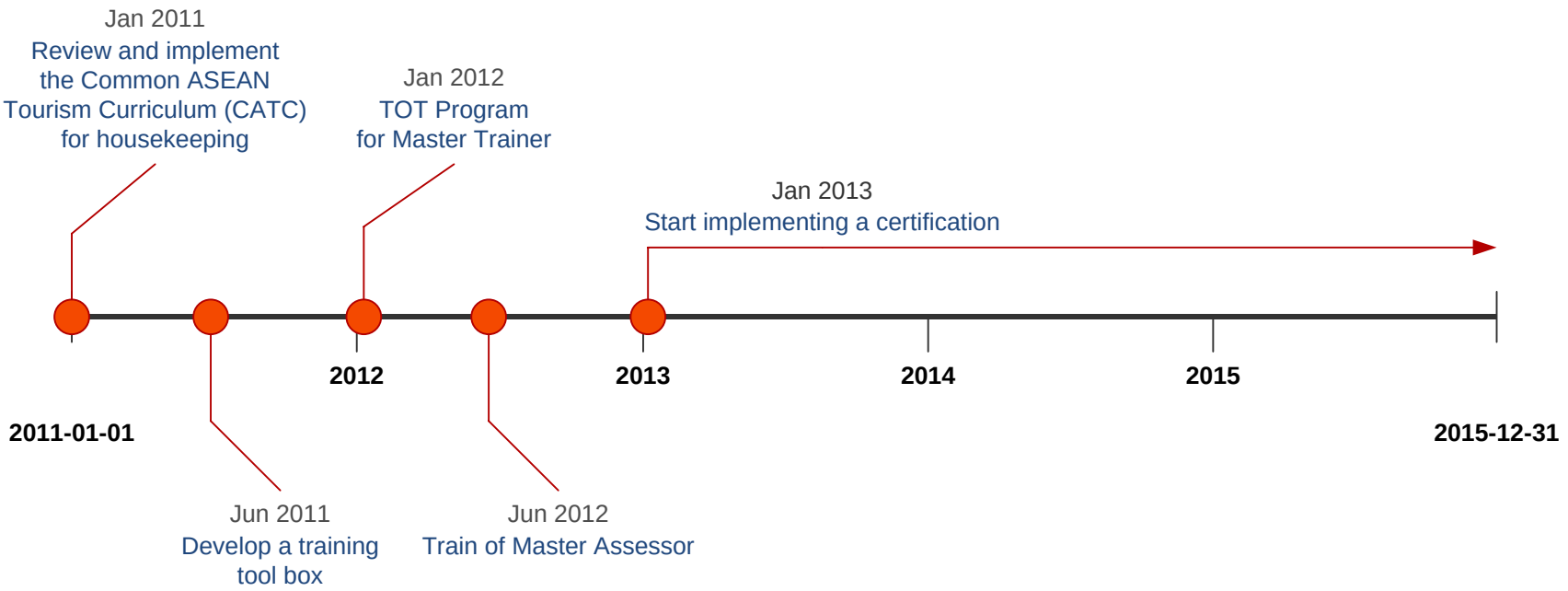
2.1.6 Enhance the ability of ASEAN tourism to address the climate change issue.



Responsible Body:	ASEAN NTOs and ASEAN Secretariat
Feasibility:	Depends on the level of funding available.
Comments:	There will be a need to look for funds to support the implementation of this activity.

2.2 IMPLEMENT THE MRA ON ASEAN TOURISM PROFESSIONALS AND ITS REQUIREMENTS

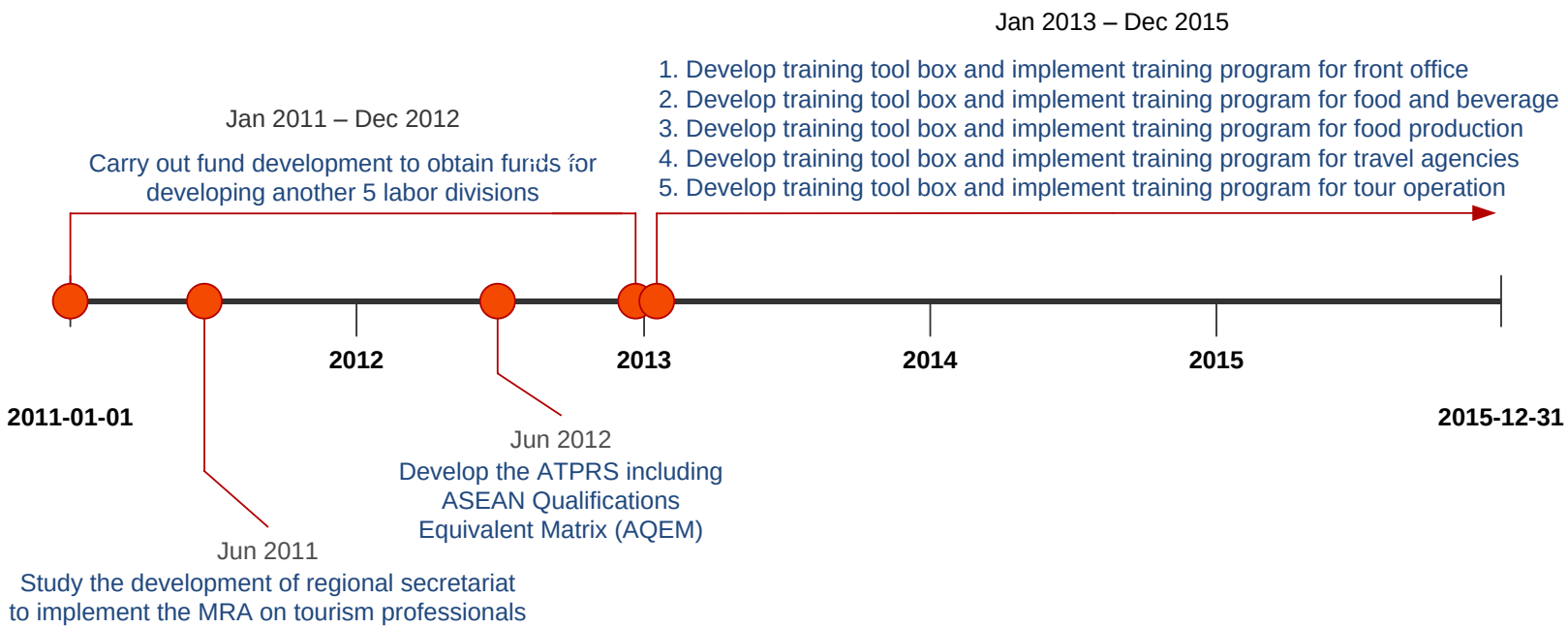
2.2.1 Develop tools and implement a human resource development programs for an ASEAN competency standard on housekeeping.



Responsible Body:	ATPMC (ASEAN Tourism Professional Monitoring Committee).
Feasibility:	High feasibility.
Comments:	Given that there is a need for financial resources and experts to develop a training toolbox, TOT program for Master Trainer and Train of Master Assessor. ASEAN Secretariat has been able to secure funding from AUSAID (USD 650,000) to implement these activities.

2.2 IMPLEMENT THE MRA ON ASEAN TOURISM PROFESSIONALS AND ITS REQUIREMENTS

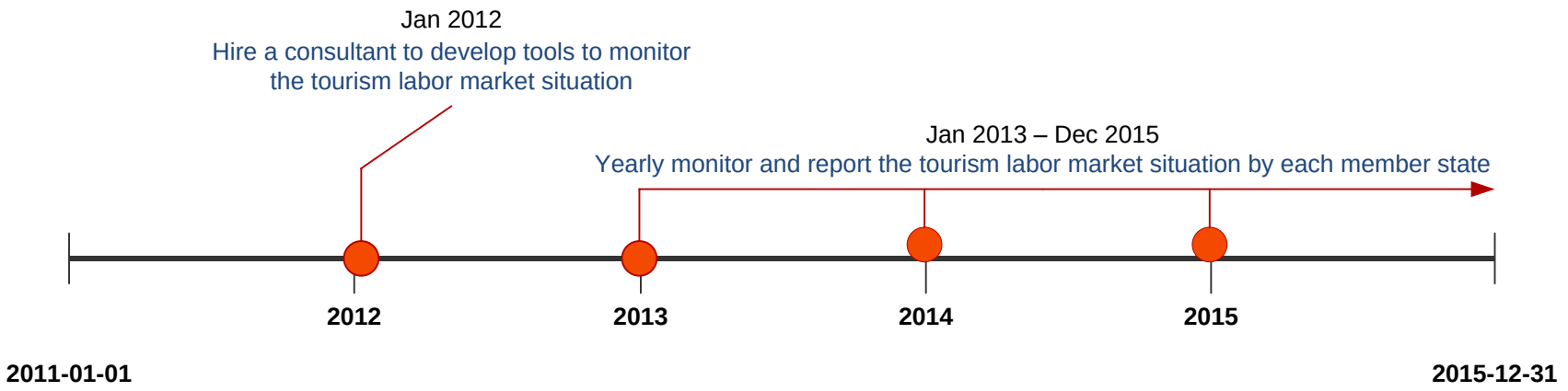
2.2.2 Develop tools and implement human resource development program for ASEAN competency standards for front office, food and beverage services, food production, travel agencies and tour operation activities.



Responsible Body:	ATPMC (ASEAN Tourism Professional Monitoring Committee).
Feasibility:	Depends on the level of funding available.
Comments:	There will be a need for financial resources and experts to develop a training toolbox, TOT program for Master Trainer and Train of Master Assessor. The most important activity is to secure funds to implement these activities. Without financial resource, this activity cannot be accomplished. Without the funding a modified development programs if be adopted that may in fact quite different than the AUSAID funded project.

2.2 IMPLEMENT THE MRA ON ASEAN TOURISM PROFESSIONALS AND ITS REQUIREMENTS

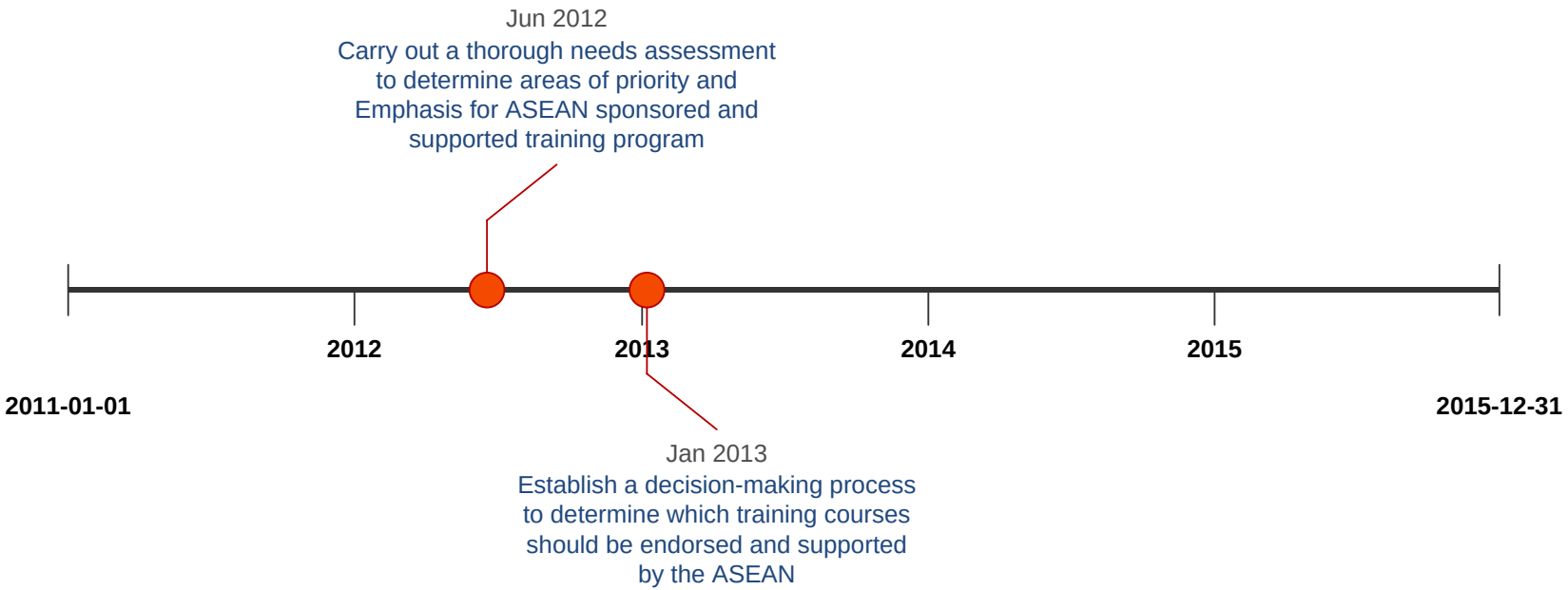
2.2.3 Develop tools to monitor the tourism labor market situation in each ASEAN member State that would support the implementation of MRA on Tourism Professionals.



Responsible Body:	ATPMC (ASEAN Tourism Professional Monitoring Committee) and ASEAN Secretariat.
Feasibility:	Level of activity depends on the level of funding available.
Comments:	-

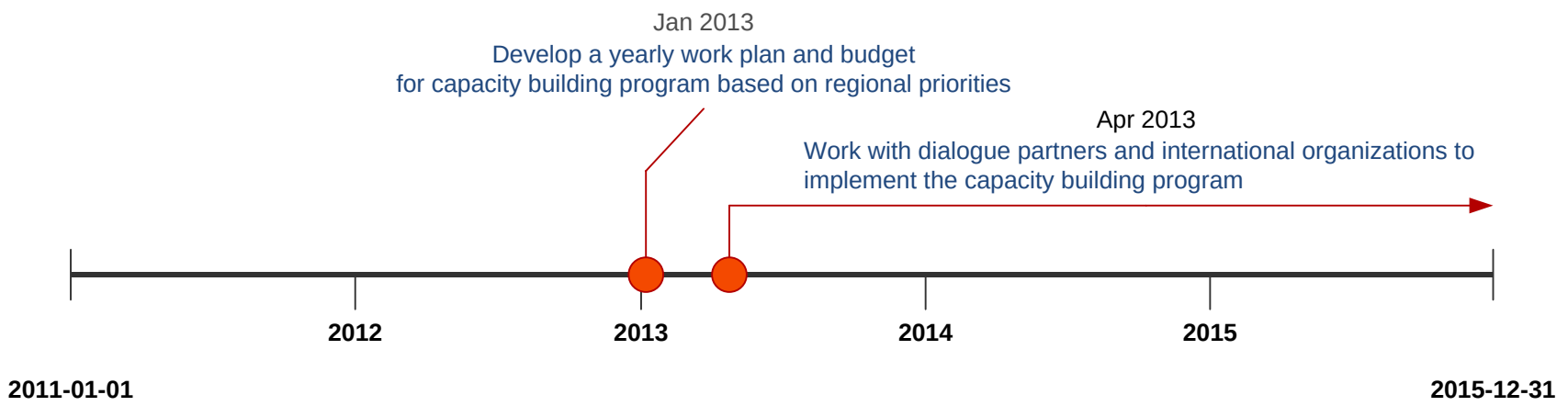
2.3 PROVIDE OPPORTNITIES FOR INCREASED KNOWLEDGE AND SKILL DEVELOPMENT

2.3.1	**Establish policies and procedures for the development of capacity building programs including assessment systems and the criteria to assess initiatives that will get ASEAN funding.**



Responsible Body:	Quality Tourism Working Group.
Feasibility:	High feasibility.
Comments:	The relatively low number of people attending ASEAN supported training courses indicates that there is a serious need to determine not only what the priorities areas are for capacity building but just as importantly the ability and willingness of employers to send their staff to regional training programs. The needs analysis would also need to take into account alternative means of course delivery including the Internet as well as videoconferencing.

2.3 PROVIDE OPPORTNITIES FOR INCREASED KNOWLEDGE AND SKILL DEVELOPMENT

2.3.2 Develop a yearly human resource development plan based on regional priorities.	
	
Responsible Body:	Quality Tourism Working Group.
Feasibility:	High feasibility.
Comments:	It is assumed that the capacity building programs would be sponsored by funding agencies or would be self financing.

5.3 Activities for Strategic Direction 3

Strategic Direction 3
Enhance and Accelerate Travel Facilitation and ASEAN Connectivity

3.1 Advocate for a single visa for the ASEAN region	3.1.1	Continue to work towards a single visa for the region by identify obstacles and opportunities and working with the relevant groups within ASEAN.
	3.1.2	Define the case for and advocate the implementation of an e-visa system.
	3.1.3	Explore the possibility for innovative visa arrangements that facilitate travel (e.g. sub-regional visas).
3.2 Work with other ASEAN bodies to expand connectivity through air, water, rail and ground transportation	3.2.1	On a consistent basis identify and clearly define land-based, air and maritime obstacles and opportunities to increase connectivity into and within the region.
	3.2.2	Work closely with the relevant ASEAN bodies to ensure the adoption and implementation of NTO priority activities.

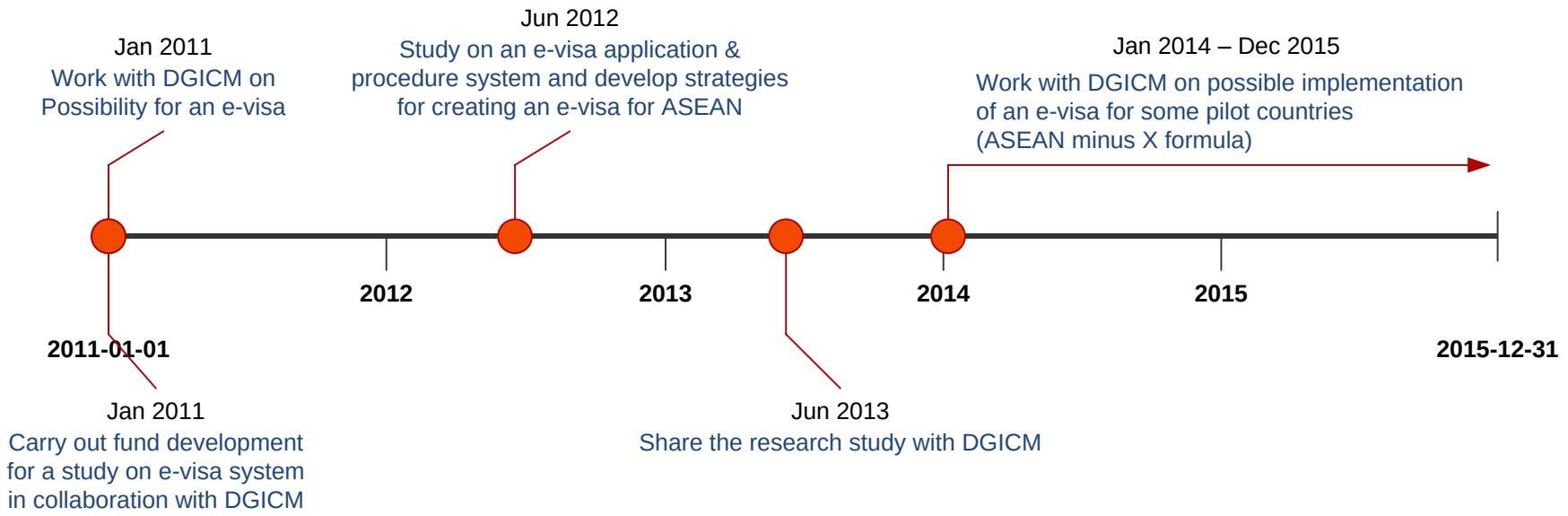
3.1 ADVOCATE FOR A SINGLE VISA FOR THE ASEAN REGION

3.1.1 Continue to work towards a single visa for the region by identify obstacles and opportunities and working with the relevant groups within ASEAN.

Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	High feasibility.
Comments:	This work will be done internally and will not require funding.

3.1 ADVOCATE FOR A SINGLE VISA FOR THE ASEAN REGION

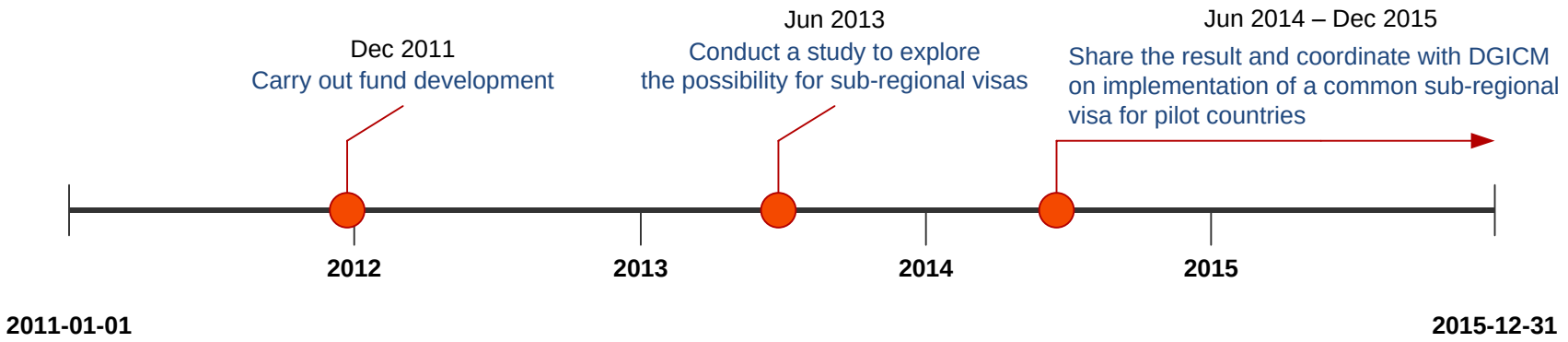
3.1.2 Define the case for and advocate the implementation of an e-visa system.



Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	Potential problem of acquiring the fund.
Comments:	Given that This task is under the DGICM's purview, it is important for the Working Group work to closely work with DGICM since the beginning for possible e-visa system development in ASEAN.

3.1 ADVOCATE FOR A SINGLE VISA FOR THE ASEAN REGION

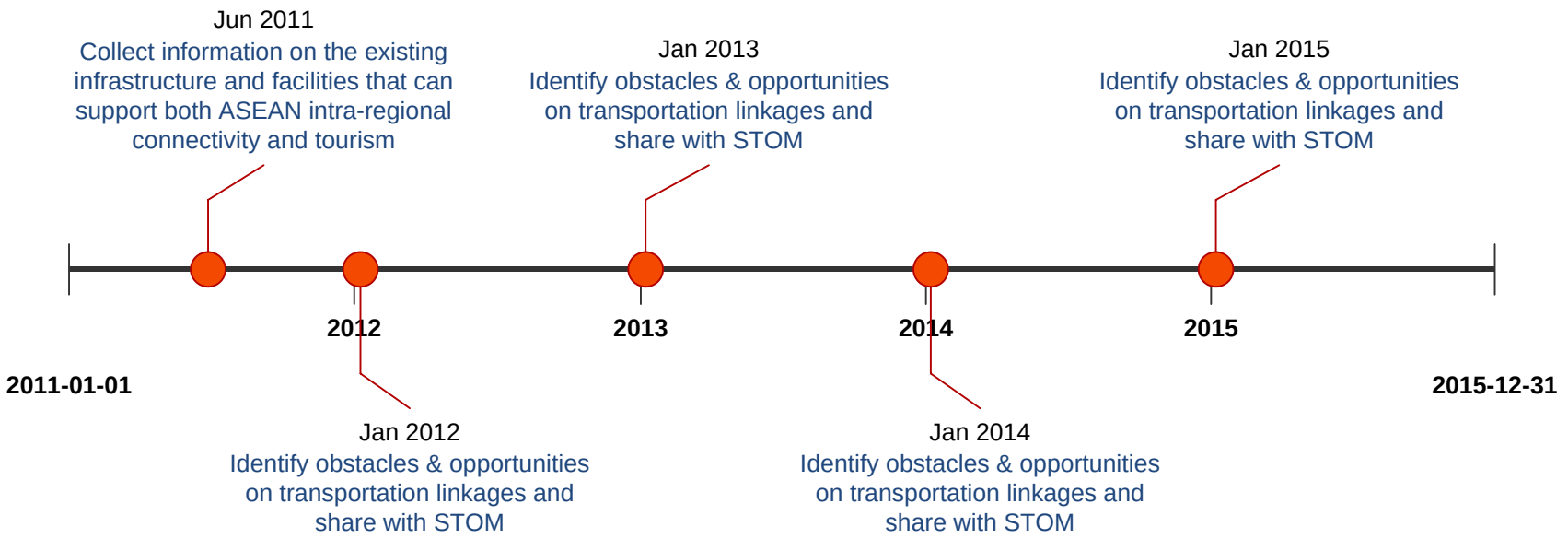
3.1.3 Explore the possibility for innovative visa arrangements that facilitate travel (e.g. sub-regional visas)



Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	Potential problem of acquiring the fund.
Comments:	-

3.2 WORK WITH OTHER ASEAN BODIES TO EXPAND CONNECTIVITY THROUGH AIR, WATER, RAIL AND GROUND TRANSPORTATION

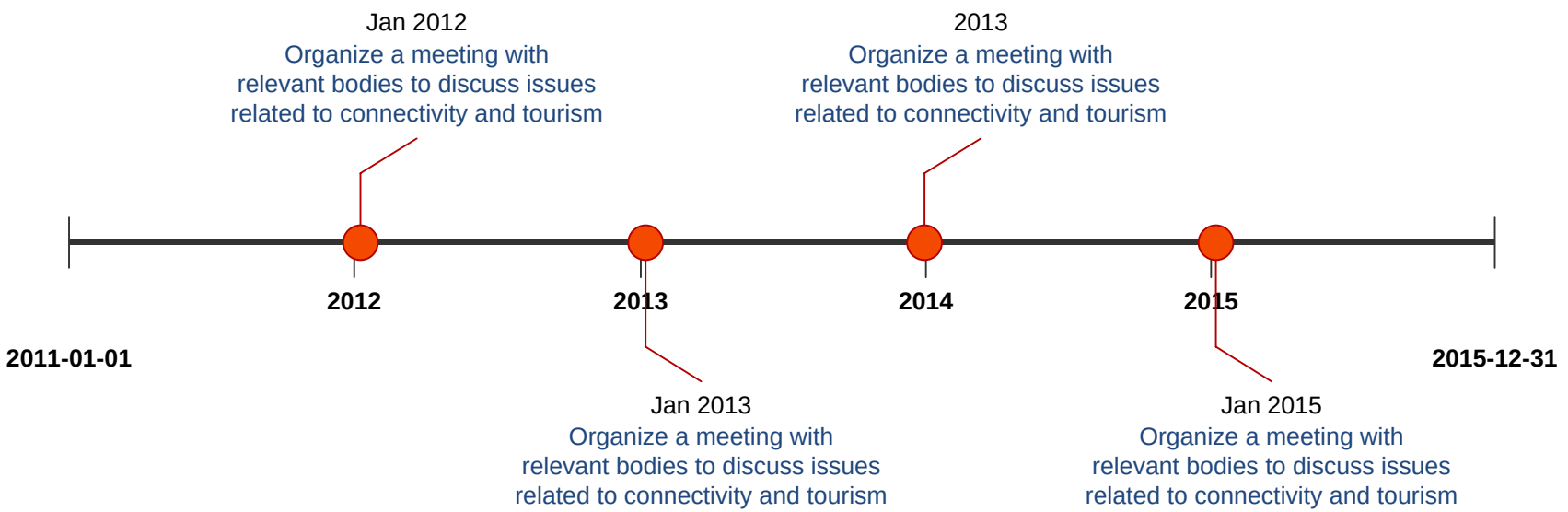
3.2.1 On a consistent basis identify and clearly define land-based, air and maritime obstacles and opportunities to increase connectivity into and within the region.



Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	Probability of a high-level success.
Comments:	This task must be carried out and is essential to the ongoing success of the implementation of the strategic plan.

3.2 WORK WITH OTHER ASEAN BODIES TO EXPAND CONNECTIVITY THROUGH AIR, WATER, RAIL AND GROUND TRANSPORTATION

3.2.2 Work closely with the relevant ASEAN bodies to ensure the adoption and implementation of NTO priority activities.



Responsible Body:	Integration and Budget Committee & ASEAN Secretariat
Feasibility:	Probability of a high-level success.
Comments:	There will be no financial resources required but there will be a need for human resource.

CHAPTER 6

PLAN IMPLEMENTATION

CHAPTER 6: PLAN IMPLEMENTATION

6.1 Transitional Period

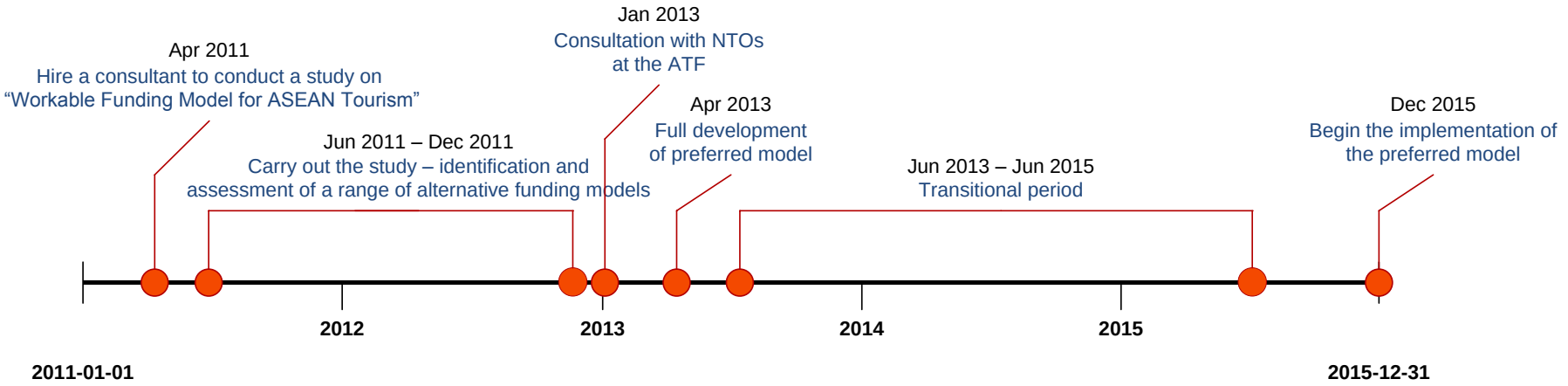
Throughout the planning process it was recognized that there would have to be a period of transition from the existing organizational model to the one proposed in the ASTP. Given the transition the first year will in part be based on developing new ways of together and most importantly obtaining the resources to carry out the strategic activities described in this plan. It is also recognized that the overall plan as well as the organizational structure in particular needs to be constantly assessed to ensure that it meets the needs of the NTOs and is effective in expanding tourism in the region.

6.2 Development of a Workable Funding Model

In order to meet the commitments of the ATSP 2011 - 2015 the ASEAN NTOs require a resource development/funding model (RD/FM). At the ASEAN Tourism Task Force Meetings in October 2010, Pattaya, Thailand, there was an agreement to proceed with a study that would:

- Identification and assessment of a range of alternative funding models based on research as well as consultation with relevant stakeholders.
- Careful analysis of the alternatives based on the realities of the ASEAN NTOs. The analysis will require looking at the agendas and programs of potential funders/sponsors such as international aid agencies, NGOs, private sector groups (especially ASEANTA).
- Close consultations with representatives of all NTOs on the alternative models.
- Detailed development of a funding model based on the consultations as well as a detailed cost-benefit analysis.

It is recommended that such study be carried out in 2011. A detailed timeline is provided below.

Conduct a study on alternative workable funding model for AEAN tourism	
	
Responsible Body:	This will be one of the first tasks of the Budget and Integration Committee. The committee will be assisted by consultant in the development of a funding model.
Feasibility:	High feasibility.
Comments:	-

6.3 Report Card

The ATSP has been carefully crafted to provide a series of action plans for the NTOs. Once it is approved by the ministers it will be essential that the NTOs report back on a yearly basis on progress to date. As with any strategic plan some activities may not be achieved due to changing priorities and time or budget constraints. Difficulties in achieving certain activities must be clearly identified for the ministers and strategies put in place to either achieve the activities or amend the ATSP. It will be the responsibility of the various working groups to provide the Budget and Integration Committee of the yearly assessment of their activities. On a yearly basis the Budget and Integration Committee will provide the ministers with a report card of successes and difficulties in achieving the activities of the ATSP. The report card process needs to be sophisticated in order to isolate the reasons for success and failure. In some cases the ability of a working group to achieve its objectives may very much be affected by external forces beyond its control.

APPENDIX

TERMS OF REFERENCE FOR THE NEW ASEAN WORKING GROUPS AND COMMITTEE

TERMS OF REFERENCE FOR
THE MARKETING AND COMMUNICATION WORKING GROUP

Background

This working group brings together the marketing and communication activities of previous task forces (in particular the Marketing Task Force and Crisis Communication Team). The Working Group will build on the excellent work of these groups. Many of the protocols and policies developed by the ASEAN Crisis Communications Team could form the basis for this expanded communication role. The significant record of achievement of the Marketing Task Force will become an important part of establishing the activities of the new working group.

Role and Responsibilities of the Marketing and Communication Working Group

The Working Group will commence with the following roles and responsibilities always recognizing that in the process of transition these roles and responsibilities may be amended to ensure maximum effectiveness.

- To develop responsive and where appropriate integrated marketing and communication policies and strategies to support the goals and objectives of the ATSP. This responsibility recognizes that it is essential for the NTOs to work and communicate effectively with its stakeholder groups to maximize the use of resources and ensure that the significant potential tourism as a development tool is recognized within ASEAN.
- To work closely with the Product Development Working Group in order to ensure a match between product development and marketing activities.
- To develop innovative promotional vehicles and distribution channels to promote ASEAN tourism experiences.
- To develop and monitor internal and external communication strategies and protocols to ensure an effective flow of information and a consistent image for the NTOs. This will require that the Working Group cooperates closely with the other working groups, ASEAN bodies and its network of partners.
- It is understood that the Working Group is responsible for development and monitoring and the ASEAN Secretariat will be the principle communication source in order to ensure consistency and permanency in the ASEAN message.
- Through the Working Group ensure the timely dissemination of sound and high quality research and analysis.

- To support and hold ASEAN-wide promotional events within the region and overseas.
- To intensify public-private sector marketing and communication partnerships. The ASEAN NTOs presently have a number of partnerships (ASEAN+3, ASEAN+1, ASEANTA etc.) that can be built upon to ensure that the NTOs resources are maximized through effective marketing and promotion.
- To facilitate necessary coordination with other related ASEAN bodies in facilitating inter- and intra- ASEAN travel.
- To work closely with the Secretariat in identifying areas of potential funding and helping to develop the necessary documentation to secure the funding.
- To ensure the implementation of the marketing and communication including crisis communication dimensions of the ATSP are carried out in a timely fashion.
- Assist ASEAN NTOs manage and provide communications issues pertaining to crisis and events threatening or affecting directly or indirectly the travel and tourism in ASEAN countries.
- Recommend where feasible common ASEAN positions on events or crisis impacting tourism to ASEAN member countries.
- To form sub working group or task forces as seen as appropriate based on the nature of the activities being pursued.

Membership

The Marketing and Communication Working Group shall be composed of representatives of ASEAN NTOs.

Chairmanship

The Chairman and Vice-Chairman shall be elected by the Working Group with a tenure of two years. In the absence of the Chairman, the Vice-Chairman shall serve as Chairman.

Frequency of Meetings

The Working Group shall meet at least twice a year and special meetings of the Working Group may be held whenever deemed necessary by the members, or upon directive of NTOs/ Meeting of ASEAN Tourism Ministers.

The ASEAN Secretariat shall notify all members of the Working Group of the date and venue of the meetings. The ASEAN Secretariat shall prepare the provisional agenda of the meetings, in close consultation with the Chairman.

Role of the ASEAN Secretariat

The ASEAN Secretariat shall assist the Working Group in carrying out their functions including technical advisory support and assistance in the supervision, coordination, implementation and monitoring of cooperation programs, projects and activities in their respective sectors. The ASEAN Secretariat shall also assist the Chair in organizing meetings of the Working Group.

TERMS OF REFERENCE FOR
THE PRODUCT DEVELOPMENT WORKING GROUP

Background

This working group commences work with a solid basis given the excellent work of the Investment Task Force and the Cruise Working Group.

Role and Responsibilities of the Product Development Working Group

The Product Development Working Group will be responsible for identifying new products and experiences working with a wide range of stakeholders. The Working Group will also be responsible for identifying where investment will be required for product development and working with the relevant bodies to identify sources for investment. The Working Group has the task of not only defining individual products and experiences but looking for opportunities for integrated approaches to providing innovative experiences to visitors. The Working Group is also tasked with the responsibility of determining where investment will be required to meet regional goals and to develop policies and programs to attract investment.

As with many other areas of the NTOs the Working Group will build upon the product development activities of the various Member States. It is recognized that the Working Group will in itself not develop individual attractions or experiences. This is clearly the responsibility of the various NTOs. Its priority task will be to identify products and experiences that bring together at least more than one country and that are designed to increase travel to the region.

The Working Group will have the following roles and responsibilities:

- To monitor and assess the product development and investment strategies of the various Member States to identify unique opportunities to create innovative regional tourism experiences.
- To work closely with the Marketing and Communication Working Group to understand changes in consumer preferences and new product experiences and approaches.
- Recognizing its role as a catalyst and facilitator of regional experiences work closely with NTOs, national, regional and international agencies responsible for developing and supporting unique tourism experiences and most importantly the private sector who play a crucial role in providing regional product experience.
- Work closely with ASEAN bodies e.g. CCI and CCS as well as the investment entities in various Member States to ensure the highest possible level of

investment in regional products and experiences in the region. It is recognized that the national entities play a crucial role in ensuring a positive investment climate and the Working Group will help to identify possibilities for regional products and experiences that also support national objectives.

- Develop experience and product packages that will encompass regional circuits, corridors and clusters for the major areas identified in the strategic plan including: nature-based tourism, cultural and heritage tourism, community-based tourism, and cruise and river-based tourism. It must be recognized that new opportunities and products will be identified on an ongoing basis and must be included in the experience and product development process.
- To work closely with the ASEAN Secretariat in identifying areas of potential funding and helping to develop the necessary documentation to secure the funding.
- To ensure the implementation of the ATSP in a timely fashion.
- To form sub working group or task forces as seen as appropriate based on the nature of the activities being pursued.

Membership

The Product Development Working Group shall be composed of representatives of ASEAN NTOs.

Chairmanship

The Chairman and Vice-Chairman of the Working Group shall be elected by ASEAN Member States with a tenure of two years. In the absence of the Chairman, the Vice-Chairman shall serve as Chairman.

Frequency of Meetings

The Working Group shall meet at least twice a year and special meetings of the Working Group may be held whenever deemed necessary by the members, or upon directive of NTOs/ Meeting of ASEAN Tourism Ministers.

The ASEAN Secretariat shall notify all members of the Working Group of the date and venue of the meetings. The ASEAN Secretariat shall prepare the provisional agenda of the meetings, in close consultation with the Chairman.

Role of the ASEAN Secretariat

The ASEAN Secretariat shall assist the Working Group in carrying out their functions including technical advisory support and assistance in the supervision, coordination, implementation and monitoring of cooperation programs, projects and activities in their respective sectors. The ASEAN Secretariat shall also assist the Chair in organizing meetings of the Working Group.

TERMS OF REFERENCE FOR
THE QUALITY TOURISM WORKING GROUP

Background

The Working Group will build on the extensive and innovative work of the Tourism Standards Task Force and the Tourism Manpower Development Task Force.

Role and Responsibilities of the Quality Tourism Working Group

The Quality Tourism Working Group will be responsible for enhancing the quality of services, facilities and human resources in the region. Under the previous structure many of the task forces had a quality control and capacity building series of activities which will now be grouped together to ensure integrated approaches and effective use of resources. It is recognized that there are two primary areas of responsibility for the Working Group and it may choose to form two sub working groups: one concerned with a wide range of standards and their certification and the other with capacity building.

It must be recognized that the Working Group given the nature of its mandate will require significant outside funding. An essential role of the working group will be to closely work with the Secretariat in ensuring a fit between projected programs and available resources.

During the period of the ATSP 2011 - 2015 the capacity building activities of the Working Group will have two primary dimensions: implementing the MRA and identifying and ensuring the delivery of learning experiences to improve the quality of tourism in the region and increase opportunities for residents of ASEAN to fully participate in the tourism economy. The NTO structure discussed in section 3.4 recognizes that the Working Group will be working closely with the ATPMC (ASEAN Tourism Professional Monitoring Committee).The ATMPC, formally established in June 2010, Lombok, Indonesia, will have the primary responsibility of implementing the MRA on ASEAN competency standards. The Quality Tourism Working Group will provide advice unnecessary but it is recognized that the ATMPC will have primary responsibility for developing the competency standards. The roles and responsibilities of the ATMPC are discussed in section 3.8.

The Working Group will have the following roles and responsibilities recognizing the key responsibilities and roles of the ATMPC:

- Working closely with its wide partnership network identify areas where existing standards are seen not to meet required levels of performance or new areas which require the development of quality standards to ensure the

competitiveness of the region. It must be recognized that these will be voluntary activities.

- Based on the identification process discussed above develop a common set of principles to guide the formulation and implementation of regional quality and sustainable standards for a wide range of tourism facilities and activities.
- Within the period of the ATSP concentrate its quality standard development activities in the following areas: green hotels, homestay, tourism security and safety and wellness spa services.
- Where appropriate develop certification and monitoring systems for the ASEAN tourism industry and destinations that would contribute to world class and sustainable tourism.
- On a regular basis carry out capacity building needs analysis to identify areas where ASEAN can deliver learning opportunities for both individuals as well as organizations to increase the quality of service and facilities. This activity is obviously beyond those areas that are the purview of the ATMPC.
- To work with a wide range of partners in delivering these learning experiences. It must be recognized that there are a number of partners that are essential to this delivery process.
- To review and approve any ASEAN training and learning initiative to ensure that these initiatives meet ASEAN standards. The Working Group will not be concerned with national or sub regional initiatives.
- All learning opportunities must be designed to meet the needs of industry and disadvantaged groups within the region.
- To carefully monitor and report on any ASEAN NTOs sponsored training and learning initiatives.
- Working closely with the ASEAN Secretariat to carry out fund development exercises to support the implementation of the capacity building and standards activities of the ATSP.
- To intensify the sharing of resources and facilities for tourism training and learning program among ASEAN Member States.
- To ensure the implementation of the ATSP in a timely fashion.
- To form sub working group or task forces as seen as appropriate based on the nature of the activities being pursued.

Membership

The Quality Tourism Working Group shall be composed of representatives of ASEAN NTOs.

Chairmanship

The Chairman and Vice-Chairman of the Working Group shall be elected. In the absence of the Chairman, the Vice-Chairman shall serve as Chairman.

Frequency of Meetings

The Working Group shall meet at least twice a year and special meetings of the Working Group may be held whenever deemed necessary by the members, or upon directive of NTOs/ Meeting of ASEAN Tourism Ministers.

The ASEAN Secretariat shall notify all members of the Working Group of the date and venue of the meetings. The ASEAN Secretariat shall prepare the provisional agenda of the meetings, in close consultation with the Chairman.

Venue

The regular Quality Tourism Working Group meeting shall be held in conjunction with other tourism working group meetings.

Role of the ASEAN Secretariat

The ASEAN Secretariat shall assist the Working Group in carrying out their functions including technical advisory support and assistance in the supervision, coordination, implementation and monitoring of cooperation programs, projects and activities in their respective sectors. The ASEAN Secretariat shall also assist the Chair in organizing meetings of the Working Group.

TERMS OF REFERENCE FOR
THE INTEGRATION AND BUDGET COMMITTEE

Background

This working group brings together the work of the ASEAN Tourism Integration Task Force and the Budget Committee.

Role and Responsibilities of the Integration and Budget Committee

The Committee will play a crucial role in ensuring that the essential elements of the strategic plan are implemented. It will be faced with the reality that there are restricted funds to carry out the various activities that have been defined in the ATSP and will be identified as the work of the NTOs continue. It must be stressed that identifying funding sources is a collective responsibility but one that will be guided by the Integration and Budget Committee. As a primary task the Committee will develop a series of policies and procedures for the creation of year budgets for implementing the ATSP during the 2011 – 2015 period as well as monitoring the use of resources.

The Committee would have the following roles:

- To provide recommendations to ASEAN NTOs on strategic directions for ASEAN tourism integration.
- To coordinate with other relevant ASEAN bodies on the facilitation and connectivity issues.
- To review project proposals and budgets from the Working Groups.
- To recommend the annual budget and work plan to the ASEAN NTOs.
- To identify the sources of funding required to implement the ATSP.
- To monitor and report on the implementation of the ATSP 2011 – 2015 for the NTOs.

Membership

The Integration and Budget Committee shall be composed of representatives of ASEAN NTOs.

Chairmanship

The Committee shall have following structure:

Option 1

(a) Chair: the incoming chair of the ASEAN NTOs/next host of ATF

(b) Vice Chairs: the current and the outgoing chairs of the ASEAN NTOs

Option 2

(a) Chair: ASEAN Secretariat (as in its function of overseeing the plan implementation and review of budget proposals)

(b) Members – all NTOs

Frequency of Meetings

The Committee shall meet at least twice a year. Special meetings of the Committee may be held whenever deemed necessary by the members, or upon directive of NTOs/ Meeting of ASEAN Tourism Ministers.

The ASEAN Secretariat shall notify all members of the Committee of the date and venue of the meetings. The ASEAN Secretariat shall prepare the provisional agenda of the meetings, in close consultation with the Chairman.

Venue

The regular Integration and Budget Committee meeting shall be held in conjunction with other tourism working group meetings.

Role of the ASEAN Secretariat

The ASEAN Secretariat shall assist the Committee in carrying out their functions including technical advisory support and assistance in the supervision, coordination, implementation and monitoring of cooperation programs, projects and activities in their respective sectors. The ASEAN Secretariat shall also assist the Chair in organizing meetings of the Integration and Budget Committee.