



FINAL STUDY REPORT FOR THE POST-COVID-19 RECOVERY PLAN FOR ASEAN TOURISM

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List of Acronyms

ACRF	ASEAN Comprehensive Recovery Framework
ADB	Asian Development Bank
AIPA	ASEAN Inter-Parliamentary Assembly
AMS	ASEAN Member States
APEC	Asia-Pacific Economic Cooperation
ASEAN	Association of Southeast Asian Nations
ASW	ASEAN Single Window
ATMS	ASEAN Tourism Marketing Strategy 2021-2025
ATSP	ASEAN Tourism Strategic Plan 2016-2025
CDC	Centre for Disease Control
CLIA	Cruise Lines International Association
CTIF	Canadian Trade and Investment Facility for Development
COVID-19	Coronavirus Disease 2019
GDP	Gross Domestic Product
GSTC	Global Sustainable Tourism Council
IATA	International Air transportation Association
ICAO	International Civil Aviation Organization
IFC	International Finance Corporation
ILO	International Labour Organization
IT	Information Technology
KPI	Key Performance Indicators
MICE	Meetings, incentives, conferences and exhibitions
MSME	Micro, Small and Medium Enterprises
MTCO	Mekong Tourism Coordinating Office
NTO	ASEAN National Tourism Organizations
NTO	National Tourism Organization
OECD	Organization for Economic Co-operation and Development
PATA	Pacific Asia Travel Association
PCR	Polymerase Chain Reaction
SMEs	Small and Medium-sized Enterprises
UFI	The Global Association of the Exhibition Industry
UNCTAD	United Nations Conference on Trade and Development
UNWTO	World Tourism Organization, a UN agency
VFR	Visiting friends and relatives
WEF	World Economic Forum
WTO	World Trade Organization
WTTC	World Travel & Tourism Council

SECTION 1: Introduction

Background

The Final Study report has been prepared in the context of the technical assistance “**Study to Inform the Post-COVID-19 Recovery for ASEAN Tourism**” provided by the Canadian Trade and Investment Facility for Development (CTIF) to the Association of Southeast Asian Nations (ASEAN) Secretariat’s ICT and Tourism Division and ASEAN National Tourism Organisations (NTOs) to aid the development of a climate-smart and gender and socially inclusive ASEAN Post-Pandemic Tourism Recovery Plan.

As part of this technical assistance, Greenview as the selected Consultant prepared as a first deliverable the ‘**Desk Study on the Impact of COVID-19 on the Tourism Sector in ASEAN**’ on January 15th 2021 that identified the impact of the COVID-19 pandemic on the ASEAN tourism sector and its medium to long-term consequences in the absence of an effective policy response by ASEAN Member States. The Executive Summary of the Desk Study can be found in Appendix 2.

The Desk Study report findings framed the development of the second deliverable ‘**Draft Policy Recommendations for the ASEAN Post-COVID-19 Tourism Recovery Plan**’ report submitted by Greenview on February 26th 2021, including virtual consultations with industry stakeholders to ensure that the recommendations reflect their views and interests across the region, as well as two ASEAN NTOs workshops to reflect insights on current policies, challenges and priorities for tourism recovery plans at an individual country level of ASEAN Member States. The industry stakeholders engaged and the key feedback provided by the private sector is summarized in Appendix 4. The updated Draft Policy Recommendations included in this Final Study report incorporate the feedback received from the ASEAN Secretariat’s ICT and Tourism Division and NTOs by March 15th 2021.

The ‘**Draft Post-COVID-19 Recovery Plan for ASEAN Tourism**’ report was submitted by March 26th 2021 to ASEAN Secretariat as the third deliverable of the project, providing a proposed timeline and high-level key performance indicators (KPIs) for implementing the updated policy recommendations for ASEAN Tourism Recovery.

Greenview received valuable feedback from the ASEAN Secretariat’s ICT and Tourism Division by April 14th 2021, which has been considered and incorporated to this **Final Study report**. The Consultant received feedback from NTOs on May 17th 2021, which has also been considered and included in the updated version of the Final Study Report. Furthermore, the ASEAN Secretariat’s ICT and Tourism Division circulated the document amongst other ASEAN Secretariat Divisions that provided further feedback (Appendix 7).

The Final Study report has been drafted ensuring that the recommendations and actions align with existing ASEAN regional plans¹, mandates, and standards². Priority has been given to fully align with the ASEAN

¹ Priority has been given to the ASEAN Tourism Strategic Plan 2016-2025 and the updated ATSP, the ASEAN Comprehensive Recovery Framework, the ASEAN Gender and Development Framework on Tourism, the Pakse Declaration on Roadmap for Strategic Development of Ecotourism Clusters and Tourism Corridors, the Declaration on an ASEAN Travel Corridor Arrangements, the ASEAN Declaration on Digital Tourism, the Phnom Penh Declaration on a more Sustainable, Inclusive and Resilient ASEAN Tourism, the Strategy on the participation of local communities and private sectors in tourism development, ASEAN Tourism Marketing Strategy 2021-2025, amongst others.

² ASEAN Clean Tourist City Standard, ASEAN Community-based Tourism Standard, ASEAN Green Hotel Standard, ASEAN Homestay Standard, ASEAN MICE Venue Standard, ASEAN Public Toilet Standard, and the ASEAN Spa Services Standard, amongst others.

Tourism Strategic Plan 2016-2025 (ATSP) as the guiding document for the sector, focusing on the ATSP priorities identified for 2021-2025 on section 4 of the updated ATSP and its proposed Work Program 2021-2025 for tourism recovery.

Furthermore, the recommendations and actions align and build upon with the ASEAN Comprehensive Recovery Framework as a guiding document for ASEAN as a whole and an opportunity for the ASEAN Secretariat and NTOs to further collaborate with other key ASEAN divisions and sectors at the regional and national level for a phased recovery. The recommendations proposed in this paper are not intended to duplicate or replace the ATSP plan, but instead to supplement it. The proposed recommendations are to serve as a guide for ASEAN Member States only as they would be subject to respective ASEAN Member States' national readiness and plans in managing the COVID-19 situation. A full list of all ASEAN level initiatives that were reviewed to prepare this document can be found in Appendix 1.

Phased Recovery Framework

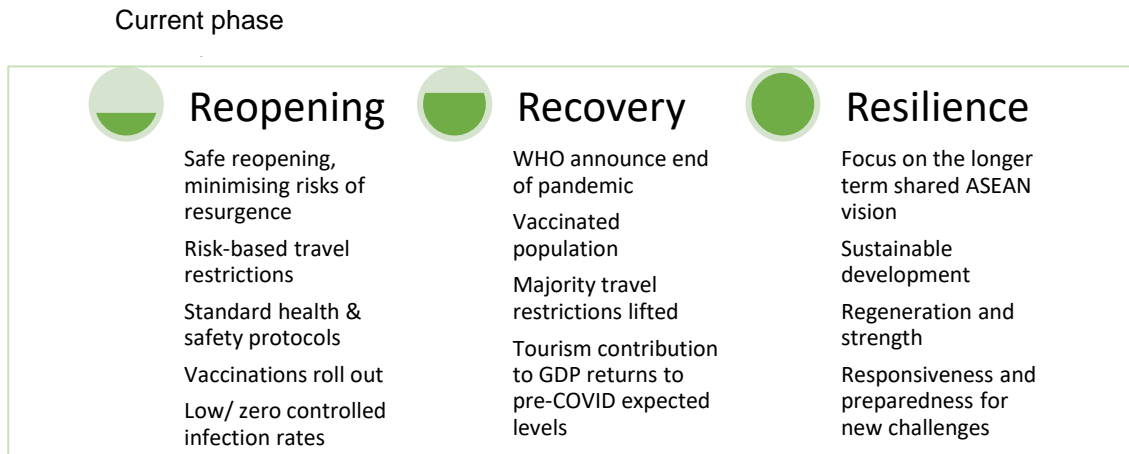
Our phases are based on the ASEAN Comprehensive Recovery Framework, adapted to tourism and some key considerations expressed by the NTOs.

Where are we now?

As we are considering the stages of the recovery progression, it is important to reflect on where ASEAN Tourism sector is at the moment. The devastating impact of COVID-19 on the tourism sector is well documented and, in particular the impact on Southeast Asia which is a region with high dependency on international tourism. On the ground, the sector is facing over 12 months of little or no business, and across Southeast Asian countries businesses have already gone bankrupt and many jobs have been lost, and with them livelihoods and a wealth of tourism knowledge and expertise. Whilst Southeast Asia has generally done well when compared to the other regions in terms of containing the virus, travel and social restrictions still remain in place and virus containment efforts are still in force. There is however, significant progress in terms of travel corridors and bubbles, [health indicators](#), economic response measures and sector recovery roadmaps. Whilst there are still locations with challenging situations health-wise and the borders are generally closed, the region overall is starting to reopen and lay down the essential building blocks of strategic planning while the level of tourism operational activity is low. Once the borders reopen, the operational demands will pose competing priorities, so it is important to be prepared and give the sector assurance and a confident path through recovery.

The overview of the phases below (Figure 1) is indicative, and each ASEAN country may progress through these stages at different paces, however as a region, this provides an indication of the phasing for the Tourism Sector.

Figure 1. Recovery phasing



The Recovery trajectory is not going to be linear as the situation globally is fluid and there are likely to be starts and stops, and the process will go through loops and iterations. This is expected and a degree of flexibility is built into the existing ASEAN recovery frameworks and plans and is important to keep in mind. Through this recovery journey, the collaborative efforts, public, private and cross-national partnerships and sharing of lessons learned are key for successful recovery. The phases do not have a fixed start and end dates and serve as a guide for prioritisation purposes. In line with the existing ASEAN recovery frameworks, the proposed phased action plan offers a framework and guide, rather than a prescriptive roadmap with fixed timelines and sequencing. With this in mind, it is important to note that each country within the ASEAN region may go through these phases at its own pace and there are likely to be setbacks as circumstances change, resulting in an iterative recovery process. This may mean that there needs to be constant review and evaluation of the progress of the implementation of measures to ensure appropriate emphasis in the context of circumstances at the time.

Figure 2. Illustration of the likely recovery trajectory



Phase 1: Reopening

This is a period of differing states of epidemiological status across the ASEAN region and globally, which means that the health situation is becoming more under control and pockets of significant improvement are increasing, providing more assurance and safety for some travel to restart. In this phase, health considerations take priority in decision making and there can still be a level of uncertainty and fluctuations. Global and regional economies will start reopening safely, while minimising the risk of resurgence of the virus without resorting to lockdown measures.



When thinking about the progression of this phase, the following indicators may be helpful to consider in the regional context (all or most to be in place):

- a) Tracking and tracing systems in place across the region
- b) Medical infrastructure is deemed to be operating under capacity and immediate pressure on health resources have been alleviated
- c) Infection and spread rates are kept low and controlled for a prolonged period of time
- d) Logistical and supply challenges associated with the vaccination programmes have been resolved
- e) Vaccination programmes rolled out and most vulnerable populations have been inoculated with other population groups commencing their vaccinations at a steady and progressive pace
- f) Stable tourism corridors and bubbles established with an upwards trend in numbers with no or limited instances of infection spread
- g) Standard travel health & safety protocols have been agreed and routinely implemented for several months with successful results providing comfort and assurance to travellers and host countries
- h) Border crossing restrictions are consistently reducing with no negative health impact

Reopening will allow the tourism sector to start operating again, albeit in a very limited way. Reliance on government support will remain high but will reduce during the evolution of the phase. International travel will increase progressively and grow while restrictions start to ease slowly from the long lockdown and border closure period. International travel reopens beyond the essentials, continuously opening new routes and linking new destinations and experiences, providing a source of income to the tourism sector workers and offering a path to a more stable future. Pandemic control measures will need to continue at all tourist destinations and venues. This means the whole panoply of individual (social distancing, restriction of movement, enhanced personal hygiene, mask wearing in public) and collective measures, such as quarantine and mass immunisation programmes.

Close cross-sectoral coordination is required for safe reopening and regional success, as well as ongoing communication and sharing of lessons learned. It is important to note that it is in the reopening phase that the foundations of the sustainable/ green economy and tourism will be laid and that should take priority right after preserving lives and livelihoods. Sustainability principles are then to be further embedded in the recovery stage.

Phase 2: Recovery

This phase is likely to commence no sooner than 2022 and last for at least 2-3 years in order to provide sufficient time and resources to support the communities and tourism sectors. These timelines are indicative, subject to the events that may take place in the coming months and the intervening periods. An important point to note is that the transition to Recovery is conditioned on the general level of confidence amongst international tourists, associated business and organisations, and therefore are likely to be influenced by a



range of factors outside of ASEAN control. Whilst this should not preclude the ASEAN NTOs from taking action and progressing with the plans, it is important to note that the wider context will play an important role.

It may take longer across the region or in individual countries, and it is important to acknowledge that the health circumstances can change rapidly - this may mean that further COVID-19 outbreaks are possible in the recovery stages, however these are expected to be more localised and easier to control and contain if they do occur.

The focus in this phase is on supporting the tourism sector to adapt to the new norms of operation, new source markets and to ensure that the foundations of sustainability and inclusivity which are set up in the reopening phase continue to be prioritized.

Indicators that the region may be transitioning into recovery include the following indicators. Note that it is not necessary to wait for all 4 to be in place to commence the recovery activities, however at least 2 out of 4 would be a strong signal of transition into Recovery:

- a) WHO announce the end of the pandemic or the local COVID-19 epidemic. Note, that this does not mean that COVID-19 has been eradicated everywhere and some local outbreaks may still occur.
- b) Majority of population has been vaccinated in each of the ASEAN countries, as well as in the main tourism source markets
- c) Widespread implementation and international acceptance of authenticated and verifiable health/vaccine certificates or passports via various applications are available and becoming a standard international practice
- d) The majority of travel restrictions on border crossings have been lifted
- e) Levels of tourism economic activity have returned to those that do not require significant government intervention and financial support

The economic activities in this phase will be aimed towards full restoration to pre-COVID levels with some adjustment to the impacts of the new “normal”, at which point it may be deemed that the sector is moving into the next phase - Resilience.

Phase 3: Resilience

In this phase the focus will shift to convergence with the longer-term ASEAN shared vision and regional resilience and regeneration, while being cognizant of the new trends and emerging challenges. Climate change is likely to be the next significant challenge that will impact ASEAN tourism, thus it is critical to factor in building a robust journey towards resilience, as well as climate change mitigation and adaptation measures into the earlier phases' activities.

Context and considerations

Collaborative approach in the region has proven effective. Going forward, there is an opportunity for the Tourism Recovery Plan to further strengthen ASEAN's coordination in sharing knowledge, information, best



practices and lessons learnt through the existing networks across sectors, the three ASEAN Community Pillars, as well as with ASEAN's strategic dialogue partners, the private sector and business associations, in order to emerge with a stronger and more resilient tourism sector in the region. In setting out our recommendations, the following considerations are important to highlight:

- a) Tourism is a complex sector, with multiple stakeholders, sub-sectors and regional levels, however, there has been a really strong collaborative effort which is important to maintain and build upon.
- b) The global economic and tourism recovery depends on the health crisis management. According to Future outlook analysis by Euromonitor³, the best-case scenario is that the COVID-19 vaccine will be available for widespread distribution mid-2021, and the worst case predicts that this will not happen until 2023. The reality may well be somewhere in the middle and it is essential that the tourism sector is prepared for any of those scenarios, whilst making every effort to strengthen the health response.
- c) A key challenge is funding and keeping the businesses open and employees paid until tourism resumes. An added challenge is the large number of workers in unregistered jobs⁴, where women tend to be overrepresented⁵. Women are more likely to participate in uncontracted work in sectors that are worst affected by the pandemic, such as food and beverage, as well as accommodation. As governments scramble to support small- and medium sized businesses, firms that are not registered and workers who are informal are excluded from labour statistics and are therefore seldom reached by official relief channels as well as access to social protection services⁶.
- d) Responses to COVID-19 should be adapted to specific characteristics of tourism destinations.
- e) The ongoing climate and biodiversity crises are urgent matters to address and which cannot be delayed, and therefore should be woven into all of the policy responses and initiatives from the start. There will be no better opportunity to put the right foundations in place to help ASEAN address these crises and build resilience and necessary mitigations at all levels of the tourism value chain.
- f) The preparedness of the health system in terms of number of human resources for health such as physicians, nurses and hospital beds, and relevant equipment and supplies will be an important health factor to be accounted for when restarting tourism, as travellers need to be assured of their safety. Tourism providers need an organized and robust health system to support destinations to provide quick responses when needed during this pandemic or future health crises. The healthcare access for women working in the tourism sector, which has been adversely impacted by shifting priorities and allocation of resources during the COVID-19 pandemic, needs to be re-established and extended in rebuilding efforts.
- g) An important consideration is the implication of the geographical and infrastructure conditions in the region on the ability to deliver COVID-19 immunization across ASEAN countries. The transportation and storage of the vaccines, and their delivery to the remote communities will require a particular logistical effort in a coordinated and well-planned approach. Whilst this may not be within the direct control of NTOs, a significant level of collaboration with the health

³ Euromonitor International (January 2021) "Future Outlook: Looking Beyond COVID-19 for Recovery" presentation by Caroline Bremner, Head of Travel Research during PATA Visitor Forecasts 2021-2023 webinar (access to study only available by request to Euromonitor).

⁴ UNCTAD, "COVID-19 and Tourism - Assessing the Economic Consequences", 1 July 2020. Including Zarrilli and Aydiner-Avsar (2020) providing an overview of female employment in the tourism sector in SIDS (small island states) countries and how they might be affected by the COVID-19 crisis

⁵ ILO's thematic brief (2020) "COVID-19 and employment in the tourism sector: Impact and response in Asia and the Pacific".

⁶ As mentioned by ILO's thematic brief (2020) "COVID-19 and employment in the tourism sector: Impact and response in Asia and the Pacific". In many Asia and Pacific countries, more than three in four workers in the tourism sector are in informal jobs, leaving them especially vulnerable to the negative impacts of the COVID-19 crisis.



authorities from tourism sector stakeholders will be needed to ensure that these challenges are addressed.

- h) COVID-19 will become endemic so all efforts put in place now will provide a platform for resilience going forward so that the sector can proactively manage future crises rather than just being reactive.

SECTION 2: Recovery Pillars, Recommendations and Actions

Each pillar has a set of high-level recommendations and identifies relevant actions to deliver them. The KPIs, expected outputs/outcomes, and suggested timeline for each action are outlined after each pillar's specific recommendations, in order to relate the rationale behind each recommendation with the actions proposed. It is well understood that several recommendations are not within the purview of the NTOs and successful delivery of these is reliant on the progress of other stakeholders and government departments. With this in mind, we recommend that the proposed action plan is used to facilitate the engagement with the relevant stakeholders to identify synergies with their plans and priorities in order to secure their buy-in and cooperation. The phased action plan provides visibility of the interconnectedness of various initiatives throughout the process and has been built to provide an indicative progress against each of the recommendations. The proposed Key Performance Indicators (KPIs) offer a way of measuring the progress for each of the ASEAN Member States, without setting a firm ASEAN level target. Leveraging the progress using the proposed KPIs (and possibly others as may be developed within each ASEAN Member State), an overview of the overall position across the region can be ascertained.

We do not recommend that the individual NTO's indicators are used for comparison purposes within the region, but instead as a "temperature check" and an opportunity to reflect on progress and next steps. The overall regional position could be assessed based on where most of the countries are across the region, as well as within the groups of countries that may be in similar circumstances: for example, those where tourism contributes over 20% of GDP will not be comparable to the ones with lower dependence on tourism, and therefore a multi-layered evaluation may be necessary to ensure appropriate emphasis in the context of circumstances at the time. The important indicator to monitor is an overall positive trend of progress indicated by the KPIs with the pace appropriate for each country and the region overall.

The ASEAN Secretariat is best placed to act as in a shepherd and a custodian role with its strategic overview of the initiatives across the AMS and ability to coordinate with various stakeholders to ensure progress. This might include:

- collation of the progress indicators at regular intervals, and providing a snapshot of the position at certain points in time;
- facilitating discussions amongst ASEAN Member States representatives about the progress, challenges they are facing, successes and lessons learned, next steps and any collaboration opportunities that may be necessary to move the regional progress along.

This report should be read linking both the details of each policy recommendation with the related planned actions to deliver them.



Figure 3. Recovery pillars and recommendations summary

<p>PILLAR 1</p> <p><i>Support tourism businesses with recovery and adaptation to the requirements of recovery</i></p>	<p>PILLAR 2</p> <p><i>Enable the safe and seamless restoration of intra-regional and international travel</i></p>	<p>PILLAR 3</p> <p><i>Ensure that recovery is underpinned by principles of sustainability and inclusivity</i></p>	<p>PILLAR 4</p> <p><i>Reinvent tourism services to drive competitiveness</i></p>	<p>PILLAR 5</p> <p><i>Underpin recovery with long term resilience and crisis preparedness</i></p>
<p>1.1 Unlock financial support to secure the viability of tourism businesses in the short term</p> <p>1.2 Provide appropriate training and skills development to serve the recovery-driven needs of tourism</p> <p>1.3 Develop specific support programs for women</p> <p>1.4 Establish formal support structures for tourism MSMEs</p>	<p>2.1 Promote ASEAN wide alignment for the reopening of travel</p> <p>2.2 Encourage aligned health and safety standards and protocols across ASEAN</p> <p>2.3 Move forward quickly on the establishment of a process to develop and trial travel corridors and bubbles</p> <p>2.4 Establish a mechanism for clear communications with travel buyers, operators and travellers</p>	<p>3.1 Establish new measures of tourism success</p> <p>3.2 Set foundations for sustainable tourism</p> <p>3.3 Invest in vital infrastructure in tourism destinations</p> <p>3.4 Promote action against gender-based discrimination, modern slavery and enhance child protection measures</p>	<p>4.1 Promote ASEAN-wide product development to respond to new travel trends</p> <p>4.2 Focus on specific segments which will kickstart recovery</p>	<p>5.1 Set up an ongoing advocacy programme for assuring the importance and interdependence of travel and tourism</p> <p>5.2 Centralize resources to support the tourism sector in times of crisis</p> <p>5.3 Enhance usage and understanding of digital technologies in the tourism sector</p>

Pillar 1: Support tourism businesses with recovery and adaptation to the requirements of recovery

The longer the crisis continues, and international travel restrictions remain in place, the more challenging it is for businesses to weather the storm and be in a strong position, both financially and in terms of human capital, to participate in the recovery. As such, the Tourism Recovery Plan prioritizes direct and indirect support for businesses and entrepreneurs as they navigate this situation. At the same time, it is important to recognize that direct cash support for businesses cannot continue indefinitely, and that businesses will need to restructure to meet the future realities of tourism in the region, such as a rebalancing between domestic, regional and international visitors. Therefore, providing clear and targeted support mechanisms will be vital to the future success of the region's tourism sector.

1.1 Unlock financial support to secure the viability of tourism businesses in the short term

Liquidity is vital, and access to funding, debt and credit facilities, as well as other mechanisms to reduce costs, is key to the very existence of tourism businesses at this time⁷. In addition, natural and cultural heritage sites which are so important to tourism are also struggling as conservation funding are all but wiped out through the lack of tourism. ASEAN can help unlock existing and new support for businesses in the short term through the following actions:

A. Setting guidelines and defining priorities for the creation of designated National-level Tourism Recovery Funds

Across the ASEAN Member States, Tourism Recovery Funds should be established with funds from governments, international agencies and the private sector to provide targeted financial support to tourism businesses in the form of grants, loans, or subsidies. They should be accessible for MSMEs which might require more flexible lending requirements. These funds would help address the challenges tourism business experience when it comes to securing traditional bank loans, where the sector is viewed as high risk. Sustainability criteria should be included in the application evaluation criteria to ensure that the businesses supported embed sustainable development principles in the way they operate.

The national Recovery Funds, and its risk assessment and lending mechanisms should be designed with equal access for female and male MSME owners in mind. Currently, women led MSMEs in tourism often have lower cash reserves, inventory levels, and less access to credit⁸. The rebuilding efforts in the wake of COVID-19 offers an opportunity to alleviate this problem, and provide women equal access to finance.

B. Promoting other available financing facilities by third parties to tourism sector

Across ASEAN, there are a number of different initiatives aimed at supporting businesses through the global pandemic. These also include initiatives by multilateral organisations such as the IFC's Green Hotel Revitalization Program for hotel real estate, and other work by the World Bank and the Asian Development Bank. ASEAN should 1) identify the existing initiatives within each country and available regionally, and 2)

⁷ UNWTO (August 2020) ['Policy Brief: COVID-19 and Transforming Tourism'](#)

⁸ UN-Women, ["COVID-19 and Women Migrant Workers in ASEAN"](#), 2020

work with these organisations to help channel information to relevant businesses, and support the application and due diligence processes, particularly for MSMEs.

C. Encouraging for setting up and/or continuing relief programs

Many ASEAN Member States have put in place relief programs to support businesses across the economy such as moratoriums on rent payments, and reduced or waived utility payments, and deferment of loans. For tourism businesses who continue to incur significant running costs even when there is no business, such moratorium actions are particularly important. ASEAN can play a role in advocating for the establishment or continuing of these relief programs by a monitoring and information sharing mechanism to exchange different approaches and benefits across ASEAN Member States, and advocating for the prioritization of the tourism sector, given its importance to the economy and the jobs at risk. It could also be linked to the ASEAN Tourism Strategic Plan (ATSP) 2016-2025 to implement the *Phnom Penh Declaration on a More Sustainable, Inclusive and Resilient ASEAN Tourism*.

1.2 Provide appropriate training and skills development to serve the recovery-driven needs of tourism

Tourism employment has experienced a structural change as a result of COVID-19. Reduced headcount requires fewer staff members to deliver the same level of service. While this proves a challenge in the short-term, the processes and best practices that emerge from it along with technological resources to reduce headcount will likely cause systemic changes to the job functions of hospitality workers, and flexibility of skills and new types of skills will be key to the recovery of tourism and for those who are looking to remain in or move into tourism jobs. ASEAN already has substantial plans underway to address the region's Human Resources needs [ATSP Section 1.4] and has also fostered collaboration of ASEAN Member States on the ASEAN Mutual Recognition on Tourism Professionals (MRA-TP). These efforts should be strengthened by an enhanced and updated response to the 'new normal' through the following actions:

A. Updating the current Human Resource Development Plan (ATSP 1.4.2)

The existing plan includes delivery of training for different types of tourism (e.g. cruise, heritage, ecotourism). This approach should be supported by new focus areas which will be of relevance in the future such as standardized safety and hygiene protocols, policies on payment structures (e.g. deposit rules, cancellations and refunds, electronic payments) and new skills required to support multi-tasking and flexibility in the workplace, in alignment with how the private sector is actually structuring these in practice.

ASEAN should explore building upon the MRA-TP to identify the key new skills needed for tourism professionals in a post pandemic world, as well as providing online training programmes to acquire the abovementioned skills. ASEAN and NTOs should ensure access to women for these new training and skills.

Furthermore, in line with the Development of ASEAN Common Guidelines on Hygiene and Safety for Workers and Communities in the Tourism Industry, ASEAN should seek collaboration with the private sector businesses and associations in the region with good practices regarding safety and hygiene protocols, policies on payment structures, new skills and multitasking (e.g. PATA, CLIA, etc.) as well as with international organisations (e.g. UNWTO, UNESCO, WHO, GSTC, World Bank, IFC, ILO, UN Women, etc.)

to identify the key new skills needed in the New Normal. Collaboration and partnership with academic institutions should also be explored.

B. Fast-tracking region-wide tourism digital skills training with the support of the private sector

The *ASEAN Declaration on Digital Tourism* highlights the importance of technology and digitisation for the region's tourism sector and item 1.4.2.2 in the ATSP prioritises collaboration with public and private partners to deliver the necessary skills to support a digital transformation in tourism. Digital skills are already essential not only for day-to-day operations in the tourism sector, but for enabling workers and MSMEs to benefit from emerging opportunities in the internet markets (e.g. virtual tourism solutions, new markets access via e-commerce and social media).

As the sector recovers from the pandemic, digital solutions for booking and payment systems, check-in and check-out, revenue management, human resources, contracts and document storage, automated and robotic technology, internet-of-things built environmental controls, promotion and communication, as well as basic IT infrastructure support will be vital and therefore this element of the ASTP should be prioritised, particularly within the recovery perspective of new upskilling needs.

Such programs will enable as many people as possible in the tourism sector to work in the new e-economy, be prepared for other pandemics or crises and be more comfortable with new technologies and information sharing. While the digital training needs encompass future shifts, they should also seek to increase the skills of line workers in terms of basic digital literacy and software to increase productivity and enable more use of digital solutions. This has even more importance in the circumstances where there are limitations on conducting physical business as e-commerce offers lower barriers to entry and is more inclusive to MSMEs.

These digital training and skills development should be implemented through close collaboration with various stakeholders, especially the private sector who will have a practical perspective on which skills are necessary in the New Normal.

1.3 Develop specific support programmes for women

As stated by the ASEAN Gender and Development Framework, tourism can contribute to women empowerment and gender equality by offering various entry points for women to seek employment and professional growth, as well as creating livelihoods for women in MSMEs – eliminating poverty and lack of opportunities. Women have been highly impacted by the pandemic and are particularly vulnerable and therefore require specific protection and support in order to achieve a sustainable and inclusive recovery⁹. Although overlapping with other support initiatives, such as ATSP (item 2.1.2.2) on developing a Plan for the ASEAN Gender and Development, and the work undertaken by the ASEAN Committee on Women (ACW), specific focus should be given to the following actions:

⁹ [UNCTAD, "COVID-19 and Tourism - Assessing the Economic Consequences", 1 July 2020](#)



A. Mapping of all women-owned tourism businesses in Southeast Asia

In order to know how to target women owned businesses, an initial action to identify, database and engage with women owned businesses should be undertaken. This should include unregistered businesses owned by women. It is suggested that NTOs collaborates with the ASEAN Committee on Women to identify if similar activities are already in place or within their work plan.

The process can be overseen at ASEAN level, with individual NTOs being responsible for the mapping in their country. Outreach can then be channelled through the support structures highlighted in Recommendation 1.4.

B. Establishing a support mechanism for MSMEs owned by women

Women-led MSMEs in tourism often have lower cash reserves, inventory levels, and less access to credit.¹⁰ It is therefore important to help female founders and MSMEs both in the formal and informal sector with cash transfers, subsidies and tax breaks. Significant thought should be put into how to reach unregistered businesses owned by women with relief measures, so that the smallest of enterprises do not get left out and risk going out of business¹¹.

C. Developing capacity building aimed specifically at women

Although women in the tourism sector are over-represented as a whole, they tend to hold the lower-level positions that are most vulnerable to layoffs when facing a tourism downturn like COVID-19¹². Thus, it is important for ASEAN Member States to invest in education for girls and women. Skills training with confidence building components added in should be offered, coupled with social safeguards for now to make up for the loss of livelihoods. Mentorship/sponsorship components for young women could be added to training programs for larger tourism businesses, so that women can move beyond lower skill jobs and rise up the ranks of the tourism industry.

1.4 Establish formal support structures for tourism MSMEs

The importance of supporting MSMEs in tourism across ASEAN is highlighted in the ASEAN Comprehensive Recovery Framework (Key Priority 3g). Furthermore, building upon the work undertaken by the ASEAN Coordinating Committee on Micro, Small and Medium Enterprises (ACCMSME) to support all type of MSMEs, and in order to harness opportunities for tourism MSMEs as the sector reopens and recovers, ASEAN can spearhead a new mechanism to support them through the following actions:

A. Supporting the creation of national Tourism MSME networks

¹⁰ OECD (2017) '[Strengthening Women's Entrepreneurship in ASEAN Towards increasing women's participation in economic activity](#)'.

¹¹ OECD (2020) '[Formalisation of Micro Enterprises in ASEAN: Policy Insight](#)' This report produced by ACCMSME and OECD provides considerations for policymakers in encouraging formalisation among micro enterprises.

¹² PATA (2020) '[Gender Inclusive Tourism Development](#)' – interview with Sophie Hartman, the Regional Platform Coordinator at the Association of Southeast Asian Social Enterprises for Training in Hospitality & Catering (ASSET-H&C), October 14, 2020.



A large proportion of Tourism MSMEs operate without access to formal networks, structures, connections, training and safety nets. These factors are crucial for successful tourism recovery and take a significant amount of time to build. Facilitating the creation of such networks at the national or sub-national level will offer an opportunity to bring together various tourism-related MSMEs that might otherwise be isolated and lacking support – financial, resources and mental/emotional – to accelerate recovery, build peer-to-peer support networks and relationships and develop capacity and capability that is needed for recovery and beyond.

The networks may be the platform for potential mutual welfare funds to which each MSME can contribute towards providing mutual support within the respective ASEAN Member States, based on the micro-finance community model. Some other areas where networks or associations may provide support in may include:

- a) Mentorship and develop/provide capacity building on business continuity plans so that they are able to mitigate future crisis, if any.
- b) Market & clients access through a directory of registered participating MSMEs. For example, the ACCMSME will be launching the ASEAN Access in June 2021 to be the business information gateway for ASEAN businesses to penetrate the ASEAN market. The web portal would allow registered businesses to interact on the platform.
- c) Information about available credit & funding opportunities, consolidated grant funding applications
- d) Information about and access to various government-led digital and other skills training or programmes funded by private sectors or NGOs.
- e) Pooled resources such as knowledge, tools and network.
- f) Participation in acceleration and incubation programmes, replicating those already present such as the Tourism Start-up Accelerator Program of the Korea Tourism Organization (KTO) aimed to specifically provide support for tourism start-ups¹³; and J-Start-up in Japan which aims to create successful, cutting-edge Japanese start-ups and empower Japan's start-up ecosystem¹⁴. For example, ACCMSME established a network of business incubators to support startups in ASEAN. It was established through a Japan funded project, and while the programme itself may have ended, there may be sustainable (but intangible) impact from the network formed among participating incubators to provide expertise / services beyond Project duration. Through the Project itself, participating startups benefited by having access to incubators beyond their host countries

B. Creating credit and funding facilities with more flexible criteria targeted at MSMEs

There is a risk that many smaller businesses may get absorbed by larger organisations which have more resources to carry them through the pandemic crisis due to issues such as liquidity challenges, difficulties in completing application and due diligence processes to seek funding support, and lack of awareness of support facilities that may be available to them. This may have negative impacts on the community, independent businesses, as well as the preservation of cultural heritage, as non-local management may place less focus on the community welfare and sustainability. Traditional lending criteria may be challenging to meet for businesses that have suffered financially due to the pandemic and therefore creating a facility with more flexible criteria will provide a lifeline which is not further burden the taxpayer.

¹³ [The Korea Times \(2020\) 'Government to nurture high-tech tourism ventures'](#)

¹⁴ [Ministry of Economy, Trade and Industry of Japan \(2021\) 'J-Startup'](#)



Alternative finance mechanisms that MSMEs can access post-COVID are needed to enable businesses to remain in business and recover. These mechanisms are already in existence in some countries, and these examples should be actively communicated to the appropriate tourism stakeholders within countries to apply for funding support. We recommend that NTOs collaborate with the financial sector stakeholders to address the lending criteria framework with the view of creating new financial products or amending the lending assessment criteria for existing products (e.g. credit lines, loans, etc.) in order to make them more responsive to MSMEs circumstances. This may include alternative risk assessment criteria, collateral or repayment mechanisms, etc. to address financial risk concerns.

In contrast to the relief recommendation 1.1. this recommendation focuses on providing a framework for restructuring the financial products offered to MSMEs in order to facilitate longer term recovery and resilience of tourism MSMEs sector.



ACTION PLAN PILLAR 1

*Lead Country information included here has been directly provided by ASEAN Secretariat's ICT and Tourism Division to the Consultant

Action	KPIs	Lead Country*	Expected Output / Outcomes	REOPENING	RECOVERY			RESILIENCE	Alignment with ATSP	Page with full recommendation
				2021	2022	2023	2024	2025		
Pillar 1: <i>Support tourism businesses with recovery and adaptation to the requirements of recovery</i>										
1.1 Unlock financial support to secure the viability of tourism businesses in the short term										
A. Setting guidelines and defining priorities for the creation of designated National-level Tourism Recovery Funds	<ul style="list-style-type: none"> Guidelines established in respective AMS (if not ready implemented) % of applications approved amount granted over the period number of tourism businesses supported 		Tourism businesses supported financially until recovery	Identify participating funds and sources of additional funding. Define priorities, needs and lending/ granting criteria. Update and exchange best practices and lessons in introducing and maintaining funding facilities under the Tourism Recovery Funds in ASEAN.	Continue awareness programme and application reviews and processing Evaluate success, lessons learned, access provided and uptake	Evaluate success, lessons learned, access provided, uptake and next steps where needed				12
B. Promoting other available financing facilities by third parties to tourism sector	<ul style="list-style-type: none"> Number of awareness events conducted/ stakeholders engaged tourism sector stakeholders feedback on level of awareness 	Indonesia and Malaysia	Tourism sector is aware of all available financing facilities across the region	List of facilities compiled and communicated to tourism sector	Evaluate effectiveness, needs and uptake				ATSP 1.3.1.1	12



C. Encouraging the setting up and/or continuing relief programs	<ul style="list-style-type: none"> Encourage implementing of initiatives number of agreements reached for the benefit of tourism relief traceable to initiatives 		Support available for tourism businesses until recovery	<p>Link with the Work Plan to implement Phnom Penh Declaration on Sustainable, Inclusive and Resilient ASEAN Tourism.</p> <p>Identify relief programs and gaps in AMS.</p> <p>Work with relevant AMS to fill gaps.</p>	Establish a monitoring and information sharing mechanism across AMS				ATSP 1.3.1.2	13
1.2 Provide appropriate training and skills development to serve the recovery-driven needs of tourism										
A. Updating the current Human Resource Development Plan (HRDP)	<ul style="list-style-type: none"> All outputs of the HRDP reflect requirements of 'new normal' 	<p>- Singapore (Cruise)</p> <p>- Malaysia and Thailand (Ecotourism)</p> <p>- Indonesia (Tourism Heritage)</p> <p>Cambodia (ATSP 1.4.1.9)</p>	HRDP updated	<p>Draw up list of stakeholders (industry, international organisations, and academia).</p> <p>Update and agree new content for HRDP.</p>	<p>Publish updated HRDP.</p> <p>Update MRA-TP to include new skills required.</p> <p>Rollout HRDP</p>	Rollout HRDP	Rollout HRDP	Rollout HRDP	ATSP 1.4.2.1, 1.4.2.2, 1.4.1.9	13
B. Fast-tracking region-wide tourism digital skills training with the support of the private sector	<ul style="list-style-type: none"> Digital tourism training programs established in all AMS number of trained individuals 		Improved digital skills across ASEAN tourism sector	<p>Elaborate list of stakeholders that can partner and/or provide expertise.</p> <p>Engage with tourism stakeholders from private sector to ensure relevant content, adequate access to training and uptake</p> <p>Develop digital tourism training plan and begin rollout.</p>	<p>Rollout pilot training programmes for a selected group in partnership with key industry bodies</p> <p>Evaluate results and update training plans</p>	Rollout plan	Rollout plan		ATSP 1.4.2.2	14
1.3 Develop specific support programs for women										
A. Mapping of all women-owned	<ul style="list-style-type: none"> Mapping has been completed and initial baseline set 	The Philippines	Database of women owned tourism	Identify collaboration with ACW.	Commence outreach in collaboration with				ATSP 2.1.2.2	15



tourism businesses in Southeast Asia	with analysis by type of business, location, etc.		businesses across AMS created	Undertake mapping exercise at the national level. Populate database with information on each AMS tourism sector.	relevant stakeholders					
B. Establishing a support mechanism for MSMEs owned by women	<ul style="list-style-type: none"> At least one mechanism available in each AMS with tracked uptake levels 	The Philippines (ATSP 2.1.2.2) Viet Nam (2.1.1.1)	Women-owned tourism MSMEs have dedicated mechanisms for support	Based on outcome of mapping in 1.3.A, identify or build support mechanisms in each AMS	Promotion of support available and engagement of businesses	Promotion of support available and engagement of businesses	Promotion of support available and engagement of businesses	Promotion of support available and engagement of businesses	ATSP 2.1.2.2, 2.1.1.1	15
C. Developing capacity building aimed specifically at women	<ul style="list-style-type: none"> Number of women trained in each AMS annually capacity improvements reported 		Increased skills for women in tourism	Training partners identified (ASEAN or AMS level)	Pilot training delivered in each AMS	Overall training delivered in each AMS	Training programmes embedded in business-as-usual programmes in each AMS	Training delivered in each AMS	ATSP 2.1.2.2	15
1.4 Establish formal support structures for tourism MSMEs										
A. Supporting the creation of national Tourism MSME networks	<ul style="list-style-type: none"> Number of networks of national/ local tourism MSME in place in each AMS Membership (numbers) of the networks 	Singapore (1.7.1.3) Viet Nam (2.1.1.1)	Consistent engagement of tourism MSMEs across ASEAN	Engage ACCMSME for collaboration. Develop guidelines and resources for MSME networks support with appropriate partnerships. Develop a communication plan to raise awareness and invite MSME registration of interest. Undertake mapping of existing MSMEs forums, networks and associations and identify gaps.	Structure a program of activities across the network of national tourism MSME Provide tools and support to enable the networks to self-manage	Maintain liaison and ongoing engagement to offer necessary support			ATSP 1.7.1.3, 2.1.1.1, 2.1.2.1	15



				Recruit relevant partners to support the networks at national level to fill gaps.						
B. Creating credit and funding facilities with more flexible criteria targeted at MSMEs	<ul style="list-style-type: none"> Changes in lending criteria made at MSME Number of tourism MSMEs who have accessed funding who had previously not been able to 	Viet Nam (2.1.1.1)	Tourism MSMEs have increased access to financial support	<p>NTOs engage with financial institutions and the conditions that are attached to those banks to identify gaps in existing mechanisms and frameworks.</p> <p>Work up credit and funding opportunities for tourism MSMEs.</p>	Promote new facilities to MSMEs via networks in 1.4.A above	Promote new facilities to MSMEs via networks in 1.4.A above	Promote new facilities to MSMEs via networks in 1.4.A above	Promote new facilities to MSMEs via networks in 1.4.A above	ATSP 2.1.1.1, 2.1.2.1	16

Pillar 2: Enable the safe and seamless restoration of intra-regional and international travel

The speed and success of tourism recovery is directly linked to how quickly and effectively international cross-border travel can be resumed in a meaningful way. This is well recognized in the ASEAN Comprehensive Recovery Framework (item 3e) and is a priority for all involved in ASEAN's tourism sector.

2.1 Promote ASEAN wide alignment for the reopening of travel

While it is the right of sovereign states to make their own decisions regarding border and entry protocols, with a harmonized approach across the region it will be easier to highlight safety standards, communicate new travel protocols and reassure both travellers and residents that international travel is safe and seamless. ASEAN can promote this through the following actions:

A. Increasing Tourism representation across all existing Reopening Task Force teams and committees to make sure that the tourism sector is represented in health/travel plans and able to inform them accordingly

Across ASEAN and Member States, there are a variety of different entities working hard to ensure borders open in a way which minimizes the risks of further spread of the virus. Many of the solutions directly affect tourism, yet it is not always the case that tourism's voice is heard. It is understood that some of the measures planned and undertaken as part of the recovery transition may have a significant impact on the tourism sector, however these would not be under the purview and control of the tourism national bodies, e.g. health infrastructure development, vaccination roll out, financial assistance offered to the workforce, etc. There is however an important opportunity to influence how these decisions are made.

B. Developing a common tourism and health risk assessment methodology in collaboration with national health ministries or agencies

While it is recognized that each ASEAN Member State will have its own requirements on what constitutes a 'safe' country in terms of COVID-19 cases, vaccines and testing regimes which will influence how inbound travellers from different countries are welcomed (or not), sharing common risk assessment criteria across countries would allow transparency in terms of how decisions are made, and aid communications with travel operators and travellers. This could also be expanded to encompass a traffic light system to show which countries are where on the spectrum, depending on the specific criteria of the Member State. NTOs should work with the relevant health authorities to advise on the construct of such a system as well as identifying and prioritizing key source markets.

C. Enabling contactless documentation and processes within the tourism ecosystem through digitization

Everything from acquiring tickets, to bookings to checking in and going out to eat will be improved through digital channels and more comprehensive data collection infrastructure, as well as made safer through contactless technology. Transitioning from paper-based to digital documents for travel visa applications, tour and accommodation bookings, tourist permits, and registrations, events and other tourism-related paperwork will facilitate COVID-safe transactions by removing the need for face-to-face contact, physical movement

across establishments and exchange of physical items. Leveraging the example of the ASEAN Single Window (ASW), digitizing the tourism sector transactions will also enable various organizations to do business more efficiently which is essential in the re-opening and recovery phases.

Redesigning the processes towards becoming contactless and digitizing the paperwork also offer an opportunity for more accurate data collection and monitoring, which will be an important factor in understanding the impact of the measures undertaken and progression through the recovery phases by the respective ASEAN Member States. This may also be instrumental in facilitating safe movements between travel “bubbles” and along corridors as it will give an opportunity to introduce digital health passports.

2.2 Encourage aligned health and safety standards and protocols across ASEAN

Harmonization of standards, health regimes and choices of vaccines that build upon recognized international practices can help create an easily understood common approach and a regional hub that provides clarity to the sector and tourists in terms of requirements and confidence to travellers, which will boost regional tourism and benefit individual countries. As highlighted by UNWTO, full coordination with health authorities and international cooperation on consumer protection policies and travel restrictions are essential to promote safe travel, build confidence and accelerate recovery as tourism restarts¹⁵. Whilst this area sits within the purview of the national Health authorities, the NTOs have an important stake in ensuring that these are speedily established, and therefore may be in a position to influence these decisions and provide necessary input and coordination to advocate for tourism sector interests through calling for the following actions:

A. Harmonizing standards and protocols

Harmonized standards and protocols will enable more effective communication of what is and is not possible/open to the travel industry and travellers¹⁶. The Common ASEAN Guidelines on Hygiene and Safety for Workers and Communities in the Tourism Industry should also be considered and ensure harmonization. Specific opportunities exist around:

- a) Quarantine procedures and mechanisms for handling instances at each stage of travel from pre-travel to post-travel. It is important that the tourism stakeholders are kept informed of these to enable them to prepare adequately.
- b) Guidance and expectations in terms of structural needs for testing, quarantining, and proof of vaccinations. Particular consideration needs to be given to the key target tourism source markets to ensure alignment with their expectations and practices (e.g. China, Japan and South Korea travellers were highly concerned with health and safety measures even before COVID-19). To enable this, commitment to investment and sharing learnings is needed to ensure that the region stays healthy, and tourist destinations will have a significant role to play in this by way of sharing lessons and incidents.
- c) Testing approaches - higher and more accurate detection rate of COVID-19 cases which would assure tourists that there are low community transmission rates and tourism destinations are safe

¹⁵ UNWTO (August 2020) [‘Policy Brief: COVID-19 and Transforming Tourism’](#), particularly on recommendation 2.1.3 Strengthen coordination, partnerships and solidarity for socio-economic recovery.

¹⁶ UNWTO (August 2020) [‘Policy Brief: COVID-19 and Transforming Tourism’](#), particularly on recommendation 2.1.2 Build confidence through health and safety protocols in all tourism operations.



to visit. For example, ASEAN countries should mandate pre-travel PCR tests with a repeat test to be taken on arrival.

- d) Develop ASEAN protocols for the immediate quarantine of future cases, with clear communication to visitors as to how this will work. While it is important to maintain a low level of suspicion as false positives are considerably better than one missed case, there is also a need for such cases to be handled sensitively amongst visitors who may be far from home and familiar surroundings.
- e) Ensuring all tourist venues have certified (ASEAN regional standard) quarantine facilities. All tourist venues/accommodations should have certified (ASEAN regional standard) quarantine facilities and protocols to ensure small amounts of cheap and practical decontaminants could be held locally so that tourists who need to quarantine can do so in familiar surroundings and with proximity to friends and family with whom they may be travelling. Removing international holidaymakers from their familiar surroundings if they have to quarantine for a suspected or actual case, especially if the level of comfort is not on par with what they would expect, risks a high level of dissatisfaction and will quickly resonate around key markets, who will then be reluctant to visit. NTOs have an opportunity to collaborate with the national and ASEAN Health authorities to ensure that quarantine facilities in tourist venues/accommodations are provided in a safe way and in a proactive manner in order to avoid the negative impacts and provide confidence to the travellers on what to expect in case of suspected COVID-19 when visiting a tourist destination.
- f) While drafting COVID-19 related communication, it is important that ASEAN standards and protocols ensure that social stigma related to COVID-19 is avoided.¹⁷ NTOs should consider addressing the uncertainties, possible assumptions and fears that may exist in communities through providing educational, informative and inclusive communication in tourism destinations when engaging about measures related to COVID-19 to protect the health and well-being of both travellers and local communities in a way that prevents stigmatisation.

Health passports is one mechanism that is now being discussed to facilitate movement across borders in a contactless way. There is no agreed mechanism for this yet, but it is an important tool for building confidence and supporting reopening efforts. Since COVID-19 vaccination and testing will have significant impact in the tourism sector as borders reopen and travel corridors are agreed upon, the ASEAN Secretariat and NTOs should ensure that the tourism sector is aware of latest developments on health passports and encourage an agreed mechanism at the ASEAN level to facilitate travel within the region. Some of the key considerations with regards to health passports include:

- a) Health/vaccination passports should include the details of the vaccinations, dates, locations and issuer of the certification of vaccinations. The acceptable vaccinations include those that have been recognised by international health authorities on the basis of the published studies data on their efficacy and safety. There are a number of these internationally at the moment.
- b) A process for verifying the validity of the information provided in the health/vaccination passport will need to be established in a manner that will be acceptable internationally, e.g. certification by an internally recognised health authority in addition to the certificates issued by the body that has provided the COVID-19 test or vaccination e.g. a local medical centre. In practice, this may be

¹⁷ [WHO, UNICEF and IFRC \(2020\) Social Stigma associated with COVID-19](#)



done on a bi-lateral/ multi-lateral basis to provide health-passport-enabled travel corridors first and including additional countries as the negotiations on health passport recognition progress.

- c) Health passports should be interoperable and verifiable in both digital for ease of use (e.g. on a smart-phone) and paper formats, for those who may not have a smart phone. These may be facilitated via a QR code or linked to international travel passports.
- d) Considering sensitivities of the information and multiple parties involved, a blockchain-enabled verification process could be considered to facilitate the traceable and verified records from the initial vaccination administration or testing undertaken through to cross-border entries. This is already being implemented in Singapore via HealthCert vaccination records¹⁸. This mechanism will require a degree of influencing on the part of NTOs and collaborative efforts with health and tourism authorities in the countries with which the health passports are being negotiated.

B. Creating and promoting certified tourism ‘safe spaces’ schemes

Once common health and hygiene protocols (as mentioned in 2.2.A) have been established in the respective ASEAN Member States they can be communicated to the tourism destinations and companies through the use of a ‘stamp’ scheme of approval or certification which identifies those which have satisfactorily complied with the recognised health and hygiene standards and / or protocols. The creation and promotion of certified “safe spaces” within ASEAN Member States (such as attractions, accommodations, retail and dining offerings, etc.) will provide comfort and assurances to visitors and tourism workers. There are also internationally recognized health and hygiene guidelines and/or protocols, such as WTTC’s ‘Safe Travels Stamp’ which recognises destinations which have minimally met WTTC’s protocols and standard. Indonesia and Philippines have both received the WTTC Safe Travels Stamp¹⁹. NTOs have an opportunity to collaborate with the national and ASEAN Health authorities to adopt such an approach for the ASEAN context, and open it up to businesses, with recipients of the stamp showing a level of compliance with protocols. Private sector collaboration will be necessary to ensure that support is made available to the destinations to implement satisfactory health and hygiene measures.

C. Prioritizing tourism workers for vaccines where relevant in national vaccination programs

In those ASEAN countries where the tourism sector represents a significant proportion of employment and GDP, NTOs should work with the health authorities to advocate for tourism sector workers, especially customer-facing workers, to be included in the priority vaccination rounds.

ASEAN Member States may seek support through the COVID-19 ASEAN Response Fund that has already been established “to provide support to AMS in the detection, control and prevention of COVID-19 transmission and in protecting the safety of medical professionals, healthcare workers, frontline workers and the wider AMS population.” As stated in ACRF paragraph 112, the fund includes frontline workers and NTOs could point out that customer-facing tourism workers are amongst this group and thus need to be protected.

D. Establishing ‘tourism health focal points’ to help visitors and businesses navigate health expectations

¹⁸ Singapore (2021) ‘HealthCert’

¹⁹ [WTTC \(2021\) ‘Safe Travels’: Global Protocols & Stamp for the New Normal](#)

‘Tourism health focal points’ (i.e. support champions) for monitoring and ensuring that health protocols and requirements are being respected and practiced in both businesses and travellers, as well as residents, should be established and could be resourced by former tourism employees who will already have the necessary customer service skills. Supplemented by simple training on how to ensure protocols are being adhered to, this would be an effective ‘on the ground’ means of boosting the visitor experience and helping businesses navigate the requirements, as well as providing jobs.

2.3 Move forward quickly on the establishment of a process to develop and trial travel corridors and bubbles

The ASEAN Declaration on an ASEAN Travel Corridor Arrangement Framework recognizes the potential of the corridor approach and indeed, enhancement of existing travel corridors and opening of new ones between countries with a low COVID-19 prevalence could be a quick win. It also states the need to develop a common set of pre-departure and post- arrival health and safety measures to protect the well-being and safety of citizens. Whilst the establishment of travel corridors and bubbles is a mechanism that has already been discussed and is being implemented for essential travel, the NTOs should work closely with the Ad Hoc Task Force on the Operationalisation of the ASEAN Travel Corridor Arrangement Framework (TF-ATCAF), to identify and advise on possible travel destinations, islands and areas that would qualify for ‘travel bubbles’ or ‘corridors’ based on the importance to the sector and an opportunity to restart the economy with low risk of infectious spread e.g. islands, specific cities, etc. In addition, connecting the tourism private sector with relevant health authorities to ensure that all necessary measures are being taken in those areas to ensure safe outcomes will be vital for such corridors to be established. The ASEAN Secretariat’s role in shepherding this process is paramount to ensure that the tourism sector voice is heard while developing the travel corridors and bubbles. Both the ASEAN Secretariat and NTOs can contribute to valuable input through the following actions:

A. Adapting and modelling scenarios for travel corridors for tourism taking into account relevant updates phasing out under the ASEAN Travel Corridor Arrangement Framework (ATCAF)

As pointed in the ATCAF, where the current focus on essential business travel does not preclude the application of the framework to other categories of travel in the future, NTOs should build upon this framework and adapt and model it for leisure travellers. This includes various scenarios for leisure travel corridors, such as what actions would be taken when vaccines are rolled out, when new cases arise, etc. Coordination and tourism representation at this level of planning will be critical for ensuring that NTOs are able to prepare for such scenarios and disseminate the necessary information in a prompt and accurate manner to the tourism sector organizations where needed.

There is an urgent need to create pilot bubbles in order to improve the knowledge and cooperation efforts amongst ASEAN countries as they start to safely reopen their borders in a tailored approach. This includes, putting procedures into place, discussing risk assessment frameworks that could work at the ASEAN level, and defining how to clearly communicate what needs to be done pre-departure, at arrival, during and after the travellers’ stay. In addition, NTOs can provide insight on:

- a) Specific destinations to prioritize for safe reopening (e.g. certain islands, specific cities within a country, nature-based destinations away from the local populations, etc.);



- b) The type of travel suggested to resume at initial stages (e.g. hybrid MICE events to receive business travellers, visitors of specific tourism segments/products that are high-yield or enable social distancing such as golf, birdwatching, diving; pre-arranged itineraries for cruises, safe bundles of tour packages, etc.), and key industry stakeholders to engage to promote a safe tourism reopening.
- c) Communication channels to expedite accurate and timely dissemination of information to tourism stakeholders to inform them on safety and health protocols and guidelines for the tourism industry in case of new COVID-19 outbreaks, etc.
- d) Consumer insurance policies available and/or provided in case COVID-19 is contracted during travel and there are procedures to be followed for accommodating recovery while in the market.

B. Sharing ideas and best practice on initiatives to promote reopening

Across ASEAN countries and the world there are many examples of new and different approaches to tourism 'bubbles' which allow for tourism activities to take place. Some examples include the Singapore's Air Travel Pass²⁰ as well as the Connect@Changi²¹ business travel solution. Sri Lanka has also experimented with tourism 'bubbles' where tourists remain within their own group with no contact with locals, and in Thailand a 'golf quarantine' is offered²². Collating and sharing such examples as case studies will help ASEAN Member States find creative ways of restarting tourism in a safe way, learn from experiences, and support advocacy efforts with other ministries and authorities who will be responsible for approving the bubbles.

2.4 Establish a mechanism for clear communications with travel businesses, buyers, operators, and travellers

The reopening of international tourism across ASEAN will undoubtedly be complex, and the situation may change on a regular basis as new travel corridors are agreed, vaccines are rolled out, and if it is necessary to take action to contain new outbreaks. Therefore, having a clear means of communicating the current status to the travel industry and travellers, and being transparent about the different requirements of different countries will help educate, prepare, reassure and manage expectations. This can be achieved through the following actions:

A. Reviewing for regular updates of the existing Visit Southeast Asia website COVID-19 page to better communicate the current status of reopening in ASEAN to consumers and trade

The relevant pages of visitsoutheastasia.travel should be updated to include a more consumer/trade facing approach with clear, consistent and update information available across all countries. This should include information on:

- a) Current travel corridors and their requirements
- b) Borders which are open / closed
- c) Live cases / outbreaks
- d) Entry requirements

²⁰ [Singapore Immigration & Checkpoints Authority \(2021\) 'ATP Requirements & Process'](#)

²¹ [Connect@Changi \(2021\) 'Secure peace of mind with your next business trip to Singapore at the world's first safe Business Travel eXchange'](#)

²² [Tourism Authority of Thailand \(2020\) 'Thailand approves golf quarantine for foreign golfers'](#)

- e) Health and safety requirements (rules around masks, social distancing, number limits, contact tracing apps, etc.)
- f) Specific initiatives (such as the Connect@Changi initiative in Singapore which allows safe business exchanges between international visitors and Singapore residents)

If this is not possible in the short term then the above information should be provided by each country in a template format which can then be uploaded as a pdf or webpage and linked from the site. The current country information links are inconsistent in approach, some are in local languages and only those of Brunei, Singapore and Vietnam are presented in a way which is appropriate for visitor/trade consumption.

The website should be extensively promoted to consumers and media, perhaps through a partnership with a local trade media outlet.

B. Delivering a 'Know Before You Go' Campaign to educate travellers on COVID-related issues

COVID-19 has disrupted many of the norms of travel and travellers will need advice and education on how to navigate the new 'normal', especially as conventions in ASEAN countries may differ from their own. This public education campaign should ensure up to date information for the travellers on what to expect and what protocols are to be emphasised for protecting both the traveller and the residents. This includes approaches to mask wearing, quarantine, 'test, track and trace', what happens to them if they test positive, health systems and support, and insurance requirements.

The information should be available on multiple channels taking into account the various audiences' requirements, e.g. social media, online presence on all main tourism related (and other government bodies) websites, the SEA Tourism website mentioned above, TV, radio and printed media as well as visual posters in the communities, where relevant.

Engaging with the private sector to ensure that each venue/ destination/ tourist organization, etc. has a link to the information on their website will help raise awareness and positive impact of the campaign and the SEA Tourism website.



ACTION PLAN PILLAR 2

*Lead Country information included here has been directly provided by ASEAN Secretariat's ICT and Tourism Division to the Consultant

ACTION	KPIs	Lead country*	Expected Output / Outcome	REOPENING	RECOVERY			RESILIENCE	Alignment with ATSP	Page with full recommendation
				2021	2022	2023	2024	2025		
Pillar 2: Enable the safe and seamless restoration of intra-regional and international travel										
2.1 Promote ASEAN wide alignment for the reopening of travel										
A. Increasing Tourism representation across all existing Reopening Task Force teams and committees to make sure that the tourism sector is represented in health/travel plans and able to inform them accordingly	<ul style="list-style-type: none"> Number of Tourism stakeholders consulted across a range of stakeholder groups and proportion of relevant policies and decisions to which their input was provided 		Tourism's voice is well established and integrated into decision making	Identify relevant Reopening Task Force teams Draw up proposed terms of engagement. Agree on participation and engagement process	Ongoing engagement	Ongoing engagement	Ongoing engagement		ATSP 1.6.4	22
B. Developing a common tourism and health risk assessment methodology in collaboration with national health ministries or agencies	<ul style="list-style-type: none"> Common tourism and health risk assessment methodology in place across AMS 	The Philippines	Consumers and trade understand how decisions are taken and current status	Engage with health authorities to develop methodology, based on existing processes (e.g. traffic light system), to advise on the construct of such a system as well as identifying and prioritizing key source markets.	Communicate methodology to trade and consumers with regular updates. Provide support to ensure compliance and effectiveness	Communicate methodology to trade and consumers with regular updates. Provide support to ensure compliance and effectiveness	Communicate methodology to trade and consumers with regular updates		ATSP 1.6.4	22



				Communicate methodology to trade and consumers. Put in place necessary infrastructure and support resources						
C. Enabling contactless documentation and processes within the tourism ecosystem through digitization	<ul style="list-style-type: none"> Proportion of tourism-related processes that have been digitalised; number of paper-based documentation requirements that have been eliminated/ replaced by digital versions 	Singapore (ATSP 1.7.1.2)	Digitalised processes within tourism ecosystem improving speed and access to services	Map out key tourism processes across AMS, identify priorities for digitisation Scope out possible digital solutions & engage partners to identify the most suitable solutions					ATSP 1.7.1	22
2.2 Encourage aligned health and safety standards and protocols across ASEAN										
A. Harmonizing standards and protocols	<ul style="list-style-type: none"> Harmonized formalised protocols agreed across AMS as it relates to quarantine, testing and vaccinations Number of tourism businesses voluntarily adopted harmonized standards and protocols. Proportion of properties with certified quarantine facilities. 	The Philippines (ATSP 1.6.4) Cambodia (ATSP 1.5.1.2)	Clarity and confidence amongst consumers and trade in terms of understanding health and safety standards and protocols. Ability for visitors to quarantine in familiar surroundings, near fellow travellers	Evaluate opportunities to harmonize with ASEAN Guidelines on Hygiene and Safety for Workers and Communities in the Tourism Industry. Agree on ASEAN quarantine standard. Commence NTO communication with relevant health authorities to promote the importance of harmonisation. Promote certified quarantine facility standard to relevant	Continue NTO communication with consumers and trade of what is possible/not possible to the travel industry and travellers in all AMS. Continue NTO communication to trade and consumers of digital health passports requirements and procedure to safely travel. Increase proportion of venues with	Continue NTO communication with consumers and trade of what is possible/not possible to the travel industry and travellers in all AMS.	Continue NTO communication with consumers and trade of what is possible/not possible to the travel industry and travellers in all AMS.		ATSP 1.6.4, 1.5.1.2	23



				businesses and initiate rollout. Commence NTO communication with consumers and trade of what is possible/not possible to the travel industry and travellers.	quarantine facilities in place.					
B. Creating and promoting certified tourism 'safe spaces'	Proportion of ASEAN destinations/ businesses have regional 'safe' stamp	Cambodia (ATSP 1.5.1.2)	An ASEAN wide 'safe travels' stamp which businesses/ destinations can apply	Engage with key local and international stakeholders to scope and plan project. Seek agreement of assessment indicators and delivery. Design 'stamp' logo. Launch a pilot and promotion.	Review lessons learned and update the roll out plans Roll out more widely	Rollout	Rollout		ATSP 1.5.1.2	25
C. Prioritizing tourism workers for vaccines where relevant in national vaccination programs.	<ul style="list-style-type: none"> Proportion of customer-facing tourism workers who have been vaccinated in highly tourism dependent AMS countries/destinations. 		Tourism frontline workers protected through vaccination to prevent COVID-19 transmission.	NTOs identify priority tourism workers that need vaccination for community and tourism protection. Roll out priority vaccination.						25
D. Establishing a tourism health focal points to help visitors and businesses navigate health expectations	<ul style="list-style-type: none"> Proportion of major destinations across AMS with relevant tourism health officers, number of health officers in major destinations across AMS 		Tourists have a well-recognised 'go to' force for all health/travel related issues	Undertake full scoping and project plan. Launch training, promotion and rollout.	Force in action	Force in action	Force in action	Force in action		25
2.3 Move forward quickly on the establishment of a process to develop and trial travel corridors and bubbles										



A. Adapting and modelling scenarios for travel corridors for tourism taking into account relevant updates phasing out under ATCAF	<ul style="list-style-type: none"> Scenarios for leisure travel corridors have been developed by NTOs Evidence of policy decisions informed by these scenarios Possible leisure pilot corridors/bubble are shared with relevant stakeholders across AMS 	The Philippines (ATSP 1.6.4)	Tourism sector adapted ATCAF developed. Borders are safely reopened to key tourism destinations and types of travel.	Engage in discussions with relevant ASEAN bodies on scenarios for leisure travel corridors Identify pilot corridors / bubbles across AMS.					ATSP 1.6.4	26
B. Sharing ideas and best practice on initiatives to promote reopening	<ul style="list-style-type: none"> Structure for sharing in place, with initial sharing undertaken, number of ideas/ initiatives taken up that had arisen from these collaborations 	The Philippines (ATSP 1.6.4)	Best practices are shared with relevant stakeholders across AMS	Establish process for identifying and documenting best practices. Commence first instance of routine sharing of best practice across ASEAN	Regular sharing of best practice across ASEAN	Regular sharing of best practice across ASEAN			ATSP 1.6.4	27
2.4 Establish a mechanism for clear communications with travel businesses, buyers, operators and travellers										
A. Reviewing for regular updates of the existing Visit Southeast Asia website Covid page to better communicate the current status of reopening in ASEAN to consumers and trade	<ul style="list-style-type: none"> Web pages established and maintained metrics on engagement with the content and visits of the pages, feedback and survey results from trade/ consumers on quality of information provided 	Singapore	Clear, consistent, and updated messaging on website around status of reopening and requirements	Agree on framework for information collection and presentation. Design web pages/ section as appropriate. Promote pages across social media/PR and directly to trade	Web pages maintained	Web pages maintained	Web pages maintained		ATSP 1.7.1.2	27
B. Delivering a 'Know Before You Go' campaign to educate travellers on COVID-related issues	<ul style="list-style-type: none"> Number of visitors reached by the campaign in key markets for AMS 		Visitors arrive in SEA well prepared for travel in post-COVID-19 times	Scope and contract campaign (with external agency if necessary) Campaign rollout	Campaign rollout	Campaign rollout	Campaign rollout	Campaign rollout		27

Pillar 3: Ensure that recovery is underpinned by principles of sustainability and inclusivity

Ensuring that ASEAN tourism is sustainable and inclusive is one of the ATSP's Strategic Directions and as such must underpin the sector's recovery. Pre-COVID, Southeast Asian countries enjoyed some of the fastest tourism growth in the world and while the contribution to GDP and jobs was significant, so was the impact of the increasing number of visitors on natural resources and host communities. In recovery, therefore, it is vital that countries in the region, under the clear lead of ASEAN, take steps to ensure that the re-emergent tourism sector is based on the principles of sustainability and inclusivity.

3.1 Establish new measures of tourism success

Traditionally tourism success has been measured in terms of the number of international arrivals and tourism strategies linked to a target number of arrivals each year. Forecasts from UNWTO, PATA and others show that it will be several years before the volume of international visitors returns to that of 2019. This crisis also calls for a stronger framework to measure the full impacts of tourism and build evidence-based policies.²³ In addition, given the environmental and social pressures of increasing visitor numbers and in order to broaden the definition of success to engender a more in-depth understanding of the positive and negative impacts of tourism, ASEAN can lead the way by the following actions:

A. Conducting a study to develop a set of tourism KPIs for ASEAN, supplementing visitor numbers with broader social and environmental impact measures

ASEAN can take the lead in embedding KPIs in the statistical framework which go beyond visitor arrivals and give equal or more weight to other indicators such as revenues per visitor and per available room; length of stay; jobs created; gender parity in tourism employment; supply chain impacts; local economic multipliers and leakage; number and percentage of sustainably and quality certified businesses; tourism investment and funding generated for local conservation; resident wellbeing scores; physical status of visited natural and cultural heritage sites; resource usage and intensity figures of carbon emissions, energy, water, and waste; and education and poverty alleviation.

The ATSP (item 1.8.1) outlines the plan for strengthening the statistical framework for the region, and (item 2.3.2.3) proposes to “develop a toolkit/manual to measure sustainable tourism” and this important initiative should be extended so that the indicators are included in the statistical framework, then prioritized and used to inform policy making and resource allocation. UNWTO's Measuring Sustainable Tourism Framework²⁴, which is under development, can inform the various choices as can publications such as the Travel Foundation's ‘The Invisible Burden of Tourism’²⁵ and WTTC's recent ‘Tourism as a catalyst for social impact’ report²⁶. Collectively, the UN Sustainable Development Goals²⁷ and the Global Sustainable Tourism Council (GSTC) Destination Criteria²⁸ can serve as the frameworks for contextualizing the indicators and aligning

²³ [UNWTO \(August 2020\) ‘Policy Brief: COVID-19 and Transforming Tourism’](#), particularly on point 2.2 related to boosting competitiveness and building resilience.

²⁴ [UNWTO \(2021\) ‘Measuring the Sustainability of Tourism \(MST\)’](#)

²⁵ [The Travel Foundation \(2019\) ‘Destinations at Risk: The Invisible Burden of Tourism’](#)

²⁶ [WTTC \(2021\) ‘Travel and Tourism as a Catalyst for Social Impact’](#)

²⁷ [United Nations \(2021\) ‘Take Action for the Sustainable Development Goals’](#)

²⁸ [GSTC \(2021\) ‘GSTC Destination Criteria’](#)

with other initiatives and criteria affecting the private sector. This will ensure that policies and resources are focused in the future on a sustainable and inclusive sector, and not simply tourism growth.

The ATSP identifies the need to develop an ASEAN Tourism Statistical Framework and included in this update should be the data collection methodologies and templates to support the establishment of the identified new tourism KPIs for ASEAN. There is a particular need for more disaggregated data to inform a better understanding of the different tourism sub-sectors (e.g. accommodation, transport, attractions, restaurants, etc.) as well as gender, MSMEs and entrepreneurship, and given its increasing importance, domestic tourism.

Guidelines could be developed to support national implementation in respective ASEAN Member States first, in order to enable comparison at the regional level. A more in-depth understanding of the dynamics of the tourism sector, beneath simple arrivals and receipts will be key to knowing where to target resources and support for a sustainable and inclusive recovery. This is potentially a significant piece of work and could be undertaken with donor funding as a separate exercise.

3.2 Set foundations for sustainable tourism

The ATSP (1.3.1) proposes to ‘prepare an ASEAN Tourism Investment Program to support business recovery from COVID-19’. Embedded within this program should be “green recovery” principles. The current period allows a window of opportunity to set a framework for implementation in phases, once the priority actions aimed at saving lives and livelihoods have been addressed. This is the perfect time to capitalize on the current collaborative and cooperative efforts and set a strong foundation for future development. Some of the key actions to set the foundations for sustainable tourism are:

A. Aligning existing ASEAN sustainability standards and guidelines for the tourism sector with predominant frameworks of the Global Sustainable Tourism Council Criteria and the UN Sustainable Development Goals

As new systems and supply chains are being revitalized and established within the tourism sector, a requirement needs to be attached to those to practice sustainable procurement and to reduce, measure and monitor the carbon emissions and other quantifiable environmental impacts (e.g. emissions, water, air quality, biodiversity, land use and coastal restoration, etc.) as a normal course of business. While tourism activities have not resumed, the tourism sector may be better placed to devote time to developing new standards to be ready for implementation in time for tourism re-opening.

Though ASEAN has developed a Green Hotel Standard, Eco/Sustainable Tourism Standard, Community Based Tourism Standard, and has plans for a Sustainable Event Management Standard, a number of initiatives from government ministries and the private sector have emerged in the past two years and are growing significantly, so it is recommended that ASEAN update and develop as needed, standards in alignment with the Global Sustainable Tourism Criteria (GSTC)²⁹ and with the thematic reference to the UN Sustainable Development Goals (SDGs). All of these measures are becoming more of a requirement for investment funding and reporting as well as conditions for supply chain contracting.

²⁹ [GSTC \(2021\) ‘Global Sustainable Tourism Criteria’](#)

B. Creating an ASEAN-wide platform for tourism environmental performance data collection, access, benchmarking and analysis

Given that many operational emissions in ASEAN countries contribute to Scope 3 GHG emissions calculations of business travellers and tourism organisations in other parts of the world that face increasing pressure to measure and reduce or offset their emissions toward net-zero, having a centralised database would help the tourism businesses internationally that want or need to report on their environmental footprint and efforts to reduce it. With the increased need to accelerate decarbonisation, data is really valuable especially for SMEs who may not have the resources to do the calculations and environmental impact assessments themselves. Increased responsiveness to environmental protection and climate change being a priority for 2021-2025, NTOs may wish to set up or align with a platform for centralized submission and access of this data for wider sector benefit, with an option of offering support to the MSMEs with performing impact measurement in order to contribute to the database content (funded by a donor organisation or sponsored by a larger tourism private sector player). Examples already exist such as the Cornell Hotel Sustainability Benchmarking Index³⁰ and online Hotel Footprinting Tool³¹ which already provide freely available coefficients for energy, water, and carbon emissions from hotel stays and meeting space usage for six of the ASEAN nations.³²

Building on the measures of success in section 3.1, the data and KPIs should be used for collective and comparative intelligence and best practice sharing. Embedded into the statistical framework enhancement should be mechanisms for benchmarking the performance and analysing the drivers of success. An example of a methodology already developed in collaboration with the ASEAN Secretariat by the UNWTO is the Benchmarking Methodology for the Development sustainable Cruise Tourism in South-East Asia³³, which can be adapted for the statistical framework and KPIs to collect, analyse, and benchmark performance at the destination and country level.

NTOs may also wish to seek collaboration for ASOEN, the sectoral body responsible for environment in ASEAN, as air travel, transportation and food-related emissions will remain high on the environmental impact issues list, so there needs to be a framework for dealing with these consistently to help embed decarbonization strategies in all new investments and initiatives and collect data centrally. Furthermore, as carbon offsetting becomes commonplace and several ASEAN nations are well positioned to be among the largest originators of projects, the ability to streamline and integrate solutions relating to carbon calculation and reduction are significant opportunities for ASEAN to take a lead and set the example.

C. Enabling awareness of the opportunities for energy efficiency, carbon reduction, and health & safety nexus at tourism business facilities

Though the pandemic's health and safety protocols for tourism facilities initially focused on sanitizing surfaces, the airborne nature of COVID-19 and future respiratory virus threats have placed a systemic shift to focus on ventilation and indoor air quality. Upgrades in building heating, ventilation, and air conditioning (HVAC) systems and equipment will be needed and require significant investment. In Southeast Asia, air conditioning and ventilation are the primary sources of energy consumption and carbon emissions from both

³⁰ [Greenview \(2021\) 'Cornell Hotel Sustainability Benchmarking Index'](#)

³¹ [Greenview \(2020\) 'Hotel Footprinting Tool'](#)

³² Indonesia, Thailand, Vietnam, Malaysia, the Philippines, and Singapore.

³³ [UNWTO \(2017\) 'Benchmarking Methodology for the Development Sustainable Cruise Tourism in South-East Asia'](#)

electricity and refrigerants in tourism facilities. And with both the global Kigali Amendment to the Montreal protocol to phase out hydrofluorocarbons (HFCs) and global decarbonization targets being adopted by countries and businesses, related funding mechanisms and business opportunities are proliferating. Building upon recommendations in section 1.1.B, an effort should be made to identify and build awareness of the wide range of funding, performance-based financing, and credit facility mechanisms available to tourism businesses and MSMEs for improving HVAC equipment, or which are tied to energy efficiency requirements, which will also result in improved indoor air quality and ventilation to satisfy traveller concerns and meet corresponding protocols.

D. Adopting an ASEAN guideline to apply sustainability conditions attached to all public funds in tourism

The natural habitat and sustainability of the natural resources are foundational to the success and recovery of the tourism sector. As comprehensive recovery plans are being rolled out, it is crucial for the NTOs to work with other national authorities to ensure that any planned investments and grants of significant size have appropriate “green requirements” attached to all funding that is provided by the government to the sector in forms of grants, loans, infrastructure development, etc. (e.g. non-financial reporting, minimum ethical, labour, environmental standards, climate resilience measures, etc.). The requirements can be phased in a way that they do not place undue burden on the recipients in the early stages where economic activity progress is the main focus but come into play over a period of time and inform planning and design decisions.

3.3 Invest in vital infrastructure in tourism destinations

Some of the countries in the region have utilized the crisis as an opportunity to build back better and more sustainably. Thailand, for example, has launched a Bio-Circular-Green Economy³⁴ as part of the national agenda with tourism as one of the sectors in scope. Protection of the environment and natural habitat will go hand in hand with the development of nature-based tourism to boost international tourism after the pandemic. Addressing the challenges of basic infrastructure facilities to manage waste and energy responsibly in tourism destinations is important for ensuring health, safety and wellbeing of the local communities, who are impacted by the externalities of tourism activities and services. As an additional bonus, it will help the region align to the Sustainable Development Goals and meet the National Determined Contributions under the Paris Agreement. Some of the key actions to invest in vital infrastructure in tourism destinations are:

A. Engaging with municipal authorities to contribute to the development of waste management plans for tourism destinations

The pandemic has led to an increase in COVID-19 related biomedical and plastic waste such as disposed masks, sanitizer bottles, gloves, plastic coverall, and bags. As tourism reopens, these and other waste streams will increase significantly, and hinder initiatives to reduce plastic waste. This puts additional priority on the rapid development of adequate waste management facilities and thoughtful protocols that contemplate operational waste management implications and downstream waste effects, particularly in the coastal and rural communities. Waste is not only a utilities issue, but also a health issue and hinders the attractiveness and perceived value of tourism destinations. Countries that are planning to pivot to a strategy of targeting

³⁴ [Thailand’s National Science and Technology Development Agency \(2021\) ‘Bio-Circular-Green Economy to be declared a national agenda’](#)

higher value tourists, as well as the countries that are looking to open access to the less explored destinations should ensure adequate waste infrastructure development is core to their tourism recovery plans.

NTOs should work with the municipal authorities to develop a waste management plan for tourism destinations aligned with the municipal Waste Management Programmes, integrating tourism sector-related recommendations. This plan could be added to the ATSP infrastructure pillar (item 1.6) that currently focuses on connectivity and port structures.

B. Promoting the integration of ‘green’ transportation and renewable energy considerations in all new destination development plans

Countries that are looking to open access to less explored or more remote destinations or expand domestic tourism routes should ensure that their plans include considerations of “clean” transport and energy sources as part of the new destination development. Some level of new infrastructure may be required to provide access to the new destinations, and it is critical that these are delivered with potential sustainability impacts in mind from the outset. Some transport related opportunities may include electric fleets for tour operators, local coach/ bus services, as well as bio-fuelled, solar and electric powered tuk-tuks and short distance travel modes of transport. The associated transport infrastructure will need to take into account the types of transport modes that will need to be supported in the medium and long terms ensuring relevant facilities are planned for e.g. electric charging points and local repairs and maintenance capacity (which is an opportunity to develop new skills and jobs locally).

C. Advocating for improved broadband access for tourism workers and destinations

There is a digital divide growing between highly connected countries and those with less than 60 per cent Internet penetration³⁵. Within countries, people in urban areas enjoy more reliable internet connections, while rural consumers rely on sub-par 3G speeds. In order to enable the digital solutions across tourism and virtual experiences, reliable internet access is a crucial ingredient. The pandemic demonstrated that internet access has become an essential service, similar to energy and water. NTOs should encourage access, provide data to support it, and engage relevant ministries on the importance of delivering internet access and quality broadband coverage as a matter of urgency for the tourism sector. This capability will also be key to attracting the newest segment of the workforce mobility, in which destinations are being selected for remote work centres as well as leisure tourist purposes, engendering multi-purpose criteria and longer stays.

3.4 Promote action against gender-based discrimination, modern slavery and enhance child protection measures

The pandemic has seen rising poverty levels generally and tourism has particularly suffered due to the drastic financial impact of COVID-19 with many families pushed further into poverty, facing food insecurity, reduced access to education and economic hardship³⁶. This situation increases the vulnerability of women, youth and children to gender-based discrimination and harassment, as well as trafficking and modern slavery in the tourism sector³⁷. Some of the key actions to protect women and children in tourism destinations are:

³⁵ [OECD \(2019\), Southeast Asia Going Digital: Connecting SMEs, OECD, Paris.](#)

³⁶ Down to Zero Alliance (2020) “A Call for Restarting Travel & Tourism with Child Protection in Focus”

³⁷ WTTC (September 2020) “To Recovery & Beyond: The Future of Travel & Tourism in the Wake of COVID-19”



A. Engaging with organisations already working to eliminate modern slavery in the tourism sector's supply chain

NTOs should engage with organisations that can provide tools and resources for the tourism sector to avoid Modern Slavery and human trafficking, such as the Mekong Club³⁸, which already has a hospitality working group on modern slavery, and the Sustainable Hospitality Alliance³⁹ that can provide principles and resources on forced labour and freedom of movement. A campaign to raise awareness could be rolled out in partnership with private sector organizations in developing and promoting this initiative to mitigate the impact, e.g. hotel chains, restaurants, excursion operators, and attractions being made aware of modern slavery risks in the supply chain related to the procurement of food, textiles, and outsourced contract labour⁴⁰.

B. Raising awareness of gender-based discrimination/harassment through public education programs and training

As recognized by the ASEAN GAD Framework, it is important to raise awareness among ASEAN Member States on the effective prevention and intervention of discrimination, sexual harassment and gender-based violence in tourism. To counteract gender-based harassment and discrimination in general, public education programs and training programs are recommended, in particular in tourist locations and businesses, to encourage attitude change and better behaviours (e.g. Marriott International has a robust programme and has given it to American Hotel and Lodging Association for use in any hotels who wants to use it.)

C. Encouraging tourism businesses to sign the ECPAT Code to protect children

While contributing to social-economic recovery, travel and tourism needs to be developed with careful and constant attention to child protection as part of a sustainable and responsible perspective, in order to prevent the crime of trafficking and all forms of sexual exploitation of children. The Code of Conduct for the Protection of Children from Sexual Exploitation in Travel and Tourism⁴¹ initiative provides awareness, tools and support to the tourism industry to prevent the sexual exploitation of children. NTOs should enhance awareness of the adoption of the Code by tourism businesses, leveraging on existing organisations that have already signed the Code such as the Association of Southeast Asian Social Enterprises for Training in Hospitality and Catering (ASSET-H&C) for training and capacity-building activities⁴². Engagement with ECPAT would help Southeast Asian destinations to develop a set of standards and measures to ensure child protection in this new context of a contactless tourist experience applicable at ASEAN and national levels. These may include 'safety-checks' on new tourism digital solutions, safeguarding policies, access and registration requirements etc. This should be based on existing best practices and frameworks including the ECPAT Code of Conduct.

³⁸ [Mekong Club \(2021\) 'Fighting Modern Slavery Together'](#)

³⁹ [Sustainable Hospitality Alliance \(2021\) 'Responsible hospitality for a better world'](#)

⁴⁰ [United Nations Office on Drugs and Crime \(2020\) 'Impact of the Covid-19 Pandemic on Trafficking In Persons'](#)

⁴¹ [ECPAT, UNICEF and UNWTO \(2021\) 'The Code of Conduct for the Protection of Children from Sexual Exploitation in Travel and Tourism'](#)

⁴² [ECPAT, UNICEF and UNWTO \(2019\) 'ASSET-H&C and The Code establish valuable partnership to tackle sexual exploitation of children in Southeast Asian travel and tourism'](#)



ACTION PLAN PILLAR 3

*Lead Country information included here has been directly provided by ASEAN Secretariat's ICT and Tourism Division to the Consultant

ACTION	KPIs	Lead Country*	Expected Output / Outcome	REOPENING	RECOVERY			RESILIENCE	Alignment with ATSP	Page with full recommendation
				2021	2022	2023	2024	2025		
Pillar 3: <i>Ensure that recovery is underpinned by principles of sustainability and inclusivity</i>										
3.1 Establish new measures of tourism success										
A. Conducting a study to develop a set of tourism KPIs for ASEAN, supplementing visitor numbers with broader social and environmental impact measures	<ul style="list-style-type: none"> New tourism KPIs on social and environmental impacts agreed and established as part of ongoing and standard measurement and reporting evidence of decisions made on the basis of these KPI social, including gender specific and environmental data collection requirements included in ASEAN Tourism Statistical Framework. 	Indonesia (ATSP 1.8.1) Cambodia (ATSP 2.3.2.3)	Social and environmental impacts integrated into regular tourism measurement and targets to ensure a sustainable and inclusive tourism sector	<p>Form a Steering group</p> <p>Map out existing measurement frameworks and tools such as UNWTO Sustainable Tourism framework and identify opportunities</p> <p>Engage relevant tourism, gender and sustainability experts and partners across ASEAN in a consultation process e.g. workshops, comments and review session to shape and define tourism KPIs and</p>	Implementation	Implementation	Implementation	Implementation	ATSP 1.8.1 and 2.3.2.3	33



				key data requirements. Finalise the KPIs for inclusion and table for approval by ASEAN NTOs							
3.2 Set foundations for sustainable tourism											
A. Aligning existing ASEAN sustainability standards and guidelines for the tourism sector with predominant frameworks of the Global Sustainable Tourism Council Criteria and the UN Sustainable Development Goals	<ul style="list-style-type: none"> Proportion of AMS who have adopted a single set of GSTC-aligned standards for the tourism sector 	<p>Malaysia (ATSP 1.3.1)</p> <p>Thailand, the Philippines (ATSP 1.5.2)</p> <p>Thailand, Lao PDR, the Philippines (ATSP 2.2.2)</p> <p>The Philippines, Cambodia (ATSP 2.3)</p>	A single set of GSTC-aligned process-based and framework standards for tourism sector which are well recognised by consumers and businesses	<p>Review and map out the existing standards to identify synergies, gaps and opportunities for improvement</p> <p>Engage with GSTC to review and update work already done through the ASEAN Tourism Standards.</p>	<p>Roll out the pilot set of standards and invite feedback from the sector</p> <p>Update the standards and issue as final</p>	<p>ASEAN certification system developed</p> <p>Industry and consumer awareness programme</p>	Rollout of standards	Rollout of standards	ATSP 1.3.1, 1.5.2, 2.2.2, 2.3	34	
B. Creating an ASEAN-wide platform for tourism environmental performance data collection, access, benchmarking and analysis	<ul style="list-style-type: none"> Number of tourism businesses and destinations who have submitted their environmental performance data, number of data categories and data points available for access from the platform 	The Philippines, Cambodia (ATSP 2.3)	ASEAN-wide platform for tourism environmental performance data collection and analysis	<p>Based on outcomes of 3.1 establish scope and project plan for data platform, in collaboration with ASOEN.</p> <p>Define data ownership and governance parameters Engage external provider as</p>	<p>Commence development of the platform and engagement of businesses/</p> <p>Destinations to participate in data collection (pilot selection of businesses)</p>	<p>Continue engagement with industry to populate the platform with data</p> <p>Roll out engagement and awareness sessions to communicate value offering</p>	Platform used	Platform used	ATSP 2.3	35	



				necessary to develop platform Engage with the industry stakeholders to define the data collection, submission and use mechanisms						
C. Enabling awareness of the opportunities for energy efficiency, carbon reduction, and health & safety nexus at tourism business facilities	<ul style="list-style-type: none"> Level of awareness and uptake of energy efficiency and carbon reduction funding and credit mechanisms by tourism businesses across AMS 	Malaysia (ATSP 1.3.1) The Philippines, Cambodia (ATSP 2.3)	ASEAN tourism sector has improved air quality and ventilation systems to satisfy traveller health concerns and to meet international environmental protocols	<p>NTOs to map existing funding opportunities and share information across AMS.</p> <p>Communicate business opportunities to tourism businesses and MSMEs across AMS.</p>	Tourism business and MSMEs access related funding opportunities	Tourism business and MSMEs access related funding opportunities	Tourism business and MSMEs access related funding opportunities		ATSP 1.3.1, 2.3	35
D. Adopting an ASEAN guideline to apply sustainability conditions attached to all public funds in tourism	<ul style="list-style-type: none"> Proportion of public funds for tourism across ASEAN with sustainability conditions attached 	Malaysia (ATSP 1.3.1) The Philippines, Cambodia (ATSP 2.3)	All public funds in tourism have sustainability conditions		<p>Leveraging the strategies supporting the National Defined contributions, industry sustainability guidelines and GSTC (3.2A), define key sustainability expectations for inclusion</p> <p>Identify all funds and financing facilities available to the sector and amend the conditions to include the</p>	Work with funders and finance institutions to roll out the conditions wider and provide support to the business to comply	Monitor progress against the conditions and assess the impact		ATSP 1.3.1, 2.3.2	36



					sustainability parameters					
3.3 Invest in vital infrastructure in tourism destinations										
A. Engaging with municipal authorities to contribute in the development of waste management plans for tourism destinations	<ul style="list-style-type: none"> Proportion of AMS with agreed municipal waste management framework and plans that explicitly consider tourism businesses Number of municipally driven and/or funded waste management initiatives specifically supporting tourism sector destinations and requirements. 	The Philippines (ATSP 2.3.2.1)	Adequate waste management plans and initiatives are in place ensuring that waste is properly managed in tourism destinations preserving attractiveness and value of tourism destinations.	Engagement of NTOs with municipal authorities in tourism destinations to reflect tourism businesses' needs and requirements with regards to waste management Identify opportunities in current waste management strategies and agree enhancements, resource, funding sources and KPIs.	Roll out waste management enhancement programme across AMS on a priority basis (e.g. higher value/ traffic destinations and/or quick wins)	Ongoing rollout and review of the progress, needs and opportunities			ATSP 1.6, 2.3.2.1	36
B. Promoting the Integration of 'green' transportation and renewable energy (RE) considerations in all new destination development plans	<ul style="list-style-type: none"> Proportion of new destination development plans across ASEAN with green transport and RE considerations included 	The Philippines (ATSP 2.3.2.1)	New destinations have appropriate green transportation and RE infrastructure	Exchange of best practices, lessons and guideline that includes green transportation and RE considerations on new tourism destination development plans					ATSP 1.3.1.1, 2.3.2.1	37
C. Advocating for improved broadband access for tourism workers and destinations	<ul style="list-style-type: none"> Broadband coverage % for tourism destinations in all AMS Number and % of tourism sector workers reporting access to internet 		Tourism destinations and workers in ASEAN have a broadband access that enables digital solutions and promotes longer stays	Identify low coverage tourism destinations/ stakeholder groups NTOs engagement with relevant ministries to expedite	NTOs continued engagement ministries to expedite broadband access for the tourism sector.	Map percentage of tourism workers and destinations with access to broadband in all AMS	Measure changes in percentage of tourism workers and destinations with access to broadband in all AMS	Continued engagement with relevant ministries advocating for broadband access according to mapping and measuring of data for tourism.	ATSP 1.3.1.1, 1.3.1.2	37



				broadband access as a matter of urgency for the tourism sector						
3.4 Promote action against gender-based discrimination, modern slavery and enhance child protection measures										
A. Engaging with organisations already working to eliminate modern slavery in the tourism sector's supply chain	<ul style="list-style-type: none"> Number of tools, resources shared and initiatives conducted with tourism sector resulting from collaboration with Mekong Club and Sustainable Hospitality Alliance 		Conversations with relevant organisations	Reach out to relevant international	Develop campaign to raise awareness in partnership with private sector organisations. Campaign rollout	Campaign rollout	Campaign rollout	Campaign rollout		37
B. Raising awareness of gender-based discrimination/harassment through public education programs and training	<ul style="list-style-type: none"> Number of education sessions rolled out in all AMS number of stakeholders engaged/ reached through training 	The Philippines	Awareness materials are available	Identify and partner with relevant organisations (e.g. NGOs) to develop awareness material	Develop campaign to raise awareness. Campaign rollout	Campaign rollout	Campaign rollout	Campaign rollout	ATSP 2.1.2.2	38
C. Encouraging tourism businesses to sign the ECPAT Code to protect children	<ul style="list-style-type: none"> Number of new signatories in each AMS 		Tourism sector in ASEAN developed with careful attention to child protection as part of sustainable and responsible tourism	NTOs engage with ECPAT to develop standards and measures to ensure child protection in AMS tourism sector. Develop campaign to enhance awareness of the Code's adoption by tourism business in each AMS.	Campaign rollout	Campaign rollout	Campaign rollout	Campaign rollout		38

Pillar 4: Reinvent tourism services to drive competitiveness

Competitiveness is at the heart of the updated ATSP and is key to a successful and sustainable tourism sector. In addition, a clear path forward for marketing the region has been set out in the ASEAN Tourism Marketing Strategy (ATMS). COVID-19 has reset tourism around the world and the future of the sector includes having an increased focus on domestic and regional markets, especially in the short term, and on products and experiences which cater to the new preferences of individuals – outdoor space, fresh air, health and wellness, time with friends and family, remote working and increased connection to the places they visit. This all plays well for destinations across Southeast Asia with rich cultures and heritage, beautiful landscapes and open spaces, and attractive local and regional markets to attract. As the tourism sector recovers, it will be important to prioritise and enhance these strengths to make sure that tourism organisations and businesses are best able to position themselves to benefit fully from these new opportunities. The regional approach enhances the new value of cooperation as a reflection of sharing common assets and strengths in the region without surrendering individual or country competition.

4.1 Promote ASEAN-wide product development to respond to new travel trends

While the updated ATSP 2016-2025 and ATMS 2021-2025 set out a clear vision for the future of ASEAN tourism product and marketing, there are some key actions which should be considered in order to make sure the region capitalizes fully on new opportunities as it recovers, in particular deriving increased spend from domestic and regional visitors as well as, eventually, international ones. This can be achieved through the following actions:

A. Identifying special start-up funds and capacity building / marketing support for businesses in opportunity sectors such as adventure, wellness, ecotourism, and community-based tourism

This can be linked to recovery funds and facilities outlined in Section 1.1 but goes beyond immediate survival needs to include new businesses which cater to these new priorities. It could also be integrated into the MSME support mechanism outlined in Section 1.4. Start-up funds do not need to be large in size, but can be provided for basic support, and come tied with requirements of spending the funds in activities that will benefit the local economy (i.e. office space rental, permitting, local/national service providers) and stipulations that the business model should help solve challenges in environmental efficiency and create positive social impact.

B. Launching a program promoting 'new' and less explored destinations

It is often the case that smaller, secondary or more remote destinations can be overlooked by those promoting international tourism as they can be less accessible or perceived as less 'interesting' to long-haul visitors. However, for local and regional markets that will most likely have already experienced the key destinations and attractions there is an opportunity to work with local communities to develop a programme which provides a framework to promote the USP of towns and villages around the region. Hence 'new' would include outdoor, rural, and nature tourism as well as visiting villages and towns, as the main action is related to positioning and promoting existing destinations and tourism products in a way which can make them more appealing to the domestic or regional tourist. This not only stimulates tourism to those places but can also help disperse visitors from more established destinations, contributing to a more equitable distribution of tourism revenues, as well as underscore a sense of pride amongst residents. Examples of this from

elsewhere include Mexico's 'Magical Towns' initiative and the 'One Village One Product' movement in Japan. ASEAN Member States could share regional good practices and examples to be implemented in other countries.

C. Progressing initiatives to promote cross-ASEAN linkages to encourage longer stays and deeper exploration

The SEA Air Pass and SEA Attractions Pass are concepts which have already been identified in the ATSP (item 1.2.1.) and are being explored by ASEAN Member States. These initiatives will be a powerful tool to encourage longer stays and deeper exploration and should be prioritized. Where longer quarantine periods are required upon arrival, hybrid models such as the recent example in Phuket, Thailand which allows travellers to spend the quarantine within the confines of a hotel while using its facilities and amenities should be explored.⁴³ There may also be an opportunity to establish a SEA Remote Worker Pass – targeted at digital nomads and offering benefits in terms of longer stays, access to work space and Wi-Fi (in hotels for example), reductions on transport cost and reduced entry fees to attractions.

4.2 Focus on specific segments which will kickstart recovery

The ATSP and ATMS set out a clear approach on product development and marketing to enhance competitiveness. With a laser focus on recovery, the recommendations here aim to highlight those which can be prioritised in the short term in order to stimulate and contribute to recovery and future resilience. Specific actions to prioritize include:

A. Engaging directly with the cruise sector to stimulate the sustainable recovery of cruising

Pre-COVID, cruise was one of the fastest growing industries in tourism and research suggests that demand for cruise will return in due course. Given some of the pressures cruise can bring in terms of 'over-tourism' at the destination level, the current pause in activity is a good opportunity to bring the cruise companies, health and port authorities, and town/city governments to work together towards a sustainable recovery of the cruise sector which brings clear benefits to destinations across ASEAN. It is also an opportunity to test bubbles for international travel as cruise tourism products can integrate health and safety protocols into the activities of transportation, lodging, and attractions/excursions in a streamlined manner. This enables the transition of destination stewardship to critical effective management replacing the marketing focus. The international cruise lines together with the Cruise Lines International Association (CLIA) have established robust health and safety protocols both on board and on shore and are willing to work with ASEAN Member States to roll out a comprehensive recovery program for cruise across the region. Singapore, as the lead country coordinator for Cruise Tourism in ASEAN, has launched and implemented the mandatory CruiseSafe Certification Programme in 2020, following consultations with the cruise industry and benchmarking against global health and safety standards in order to provide assurance to the public with stringent hygiene and safety measures for cruising. Building on these protocols, there are opportunities for domestic and river cruises to establish cruise 'bubbles' to protect local populations and to designate new home ports in some ASEAN cities during recovery.

B. Developing a blueprint for VFR travel across the region

⁴³ CNN Travel (March 2021) [Traveling to Thailand during COVID-19: What you need to know before you go](#)



Even before the pandemic, visiting friends and relatives (VFR) was a key driver of domestic and regional travel. Given the extended separation which some people have experienced due to COVID-19, there is an opportunity to stimulate and support VFR travel across the region. Campaigns to promote leisure opportunities and attractions 'in your own backyard' can be an effective way of raising awareness and generating incomes for local sites, restaurants and shops.



ACTION PLAN PILLAR 4

*Lead Country information included here has been directly provided by ASEAN Secretariat's ICT and Tourism Division to the Consultant

ACTION	KPIs	Lead Country*	Expected Output / Outcome	REOPENING	RECOVERY		RESILIENCE	Alignment with ATSP	Page with full recommendation
				2021	2022	2023	2024		
Pillar 4: Reinvent tourism services to drive competitiveness									
4.1 Promote ASEAN-wide product development to respond to new travel trends									
A. Identifying special start-up funds and capacity building / marketing support for businesses in opportunity sectors such as adventure, wellness, ecotourism, and community-based tourism	<ul style="list-style-type: none"> Number of businesses across the opportunity sectors who have benefited from start-up funds and or marketing support across all AMS. Amount of funding disbursed for this support by opportunity sector across AMS 		ASEAN tourism is well geared to cater new priorities and to bring benefit to local tourism destinations	<p>Identify start- up funding opportunities to support business in key sectors including sustainability criteria (benefits local economy, improves environmental efficiency and creates positive social impact).</p> <p>Disseminate start-up funding opportunities through MSME associations outlined in 1.4.A</p>	Disseminate start-up funding opportunities through MSME associations outlined in 1.4.A			ATSP 1.1.1	44
B. Launching a program promoting 'new' and less explored destinations	<ul style="list-style-type: none"> Number of 'new' destinations in each AMS promoted Engagement and outreach stats of each of the destination campaigns Success of tourism based on new indicators developed in 3.1 		More equitable distribution of tourism revenues across each AMS.	<p>Identify destinations that would benefit from greater exposure</p> <p>Develop a program and a multi-channel communication plan to promote destinations.</p> <p>Engage with the local authorities and tourism representatives in the destinations to ensure adequate infrastructure, resource and processes in place to receive additional tourists</p>				ATSP 1.1.1	44



C. Progressing initiatives to promote cross-ASEAN linkages to encourage longer stays and deeper exploration	<ul style="list-style-type: none"> Initiatives promoting cross-ASEAN linkages in a safe way to travellers and AMS are promoted Average stay length for destinations across AMS Uptake rates of Sea Air Pass, Attraction Pass, Remote Worker Pass or similar 		AMS collaborate to encourage longer stays and deeper exploration by tourists in the 'new normal'	Develop pilot hybrid models through NTOs bi-lateral or multi-lateral collaboration to promote intra-ASEAN travel initiatives that align with the new normal safety and health requirements	Test pilot hybrid models	Continued testing and rollout of pilot hybrid models	Rollout of pilot hybrid models	Hybrid models rollout	ATSP 1.2.1, 1.2.1	45
4.2 Focus on specific segments which will kickstart recovery										
A. Engaging directly with the cruise sector to stimulate the sustainable recovery of cruising	<ul style="list-style-type: none"> Cruise sector engaged and opportunities, pilots, and outcomes documented 	Singapore (ATSP 1.6.1)	Sustainable recovery of the cruise sector which brings benefits to destinations across ASEAN and uses the experience to pilot processes that can be adapted outside of cruising.	NTOs engage with CLIA to roll out a cruise recovery programme for ASEAN	Programme rollout	Programme rollout			ATSP 1.2.1, 1.6.1	45
B. Developing a blueprint for VFR travel across the region	<ul style="list-style-type: none"> Conduct VFR travel campaigns across the region 		Awareness and income generated for VFR travel to local sites, restaurants and shops in AMS	Develop national campaigns promoting leisure opportunities and attractions in each AMS.					ATSP 1.2.1	45

Pillar 5: Underpin recovery with long term resilience and crisis preparedness

It is quite certain that the COVID-19 pandemic is not the last crisis that the world and the ASEAN region will experience. Climate change impacting and causing critical environmental changes means that we are very likely to experience other disasters (e.g. health or especially weather-related) as well as other crises. It is important to strengthen health systems in the region and safeguard habitats as a natural insurance to protect life as well as livelihoods. Effective rural as well as urban planning for withstanding severe weather impacts are long-term elements to ensuring sustainable tourism attractions, products and cultures. Many of the recommendations considered in the reopening and then recovery stages and associated pillars can be instituted to ensure state of the art crisis preparedness and response mechanisms are in place for future challenges, aligning with the efforts already undertaken by the ASEAN Tourism Crisis Communications Team (ATCCT) that helps to coordinate ASEAN's response to the COVID-19 crisis.

5.1 Set up an ongoing advocacy programme for assuring the importance and interdependence of travel and tourism

While the importance of travel and tourism is highlighted in key documents such as the ASEAN Comprehensive Recovery Framework, in the heat of a pervasive crisis, the sector often is the last consideration and one whose leadership is often not included in the critical decision-making. As a result, this severely affects the sector and livelihoods of communities which rely upon it. To ensure this important voice is heard and at the table with the other critical ASEAN sectors, it is key to amplify the profile of Travel and Tourism through such proactive actions such as:

A. Monitoring and advocating the impact of Travel & Tourism in ASEAN through an annual summary report

In order to keep the importance of travel and tourism top of mind and more substantively understood by officials across ASEAN, a simple and easy to digest report with an infographic summary page should be produced each year to highlight the impact of travel and tourism in ASEAN and its Member States to be used as an advocacy and communication piece. This report could be a culmination of the framework put in place via ATSP 1.8.1. enhancement of the statistical framework to help maximize the value of its implementation. Furthermore, this should reflect the KPIs identified in Section 3.1 of this Tourism Recovery Plan and provide a clear narrative to be used by individuals from Ministerial level downwards, across all departments, so that linkages can be understood.

B. Strengthening the ASEAN Tourism Crisis Communications Team (ATCCT) to improve tourism resilience

The current ATCCT could be strengthened to offer the tourism perspective to the ASEAN Coordinating Council by:

- a) conducting tourism impact assessments in a timely manner to be communicated for policy deliberations in the heat of the crisis;
- b) encouraging harmonized approaches in meeting the needs or protocols across ASEAN in times of crisis;

- c) monitoring and reporting on crisis response plans and actions by Member States to ensure the viability of the tourism businesses;
- d) ensuring funding access to the tourism-related businesses, particularly SMEs, and key supply chain entities to bolster survival during the crisis period;
- e) continually engaging with the other councils, divisions, and stakeholders to build awareness and procedural understanding regarding the interdependence of tourism with other sectors.
- f) undertaking a simulation exercise as part of the preparation stage for future crises, by learning from the disaster management sector in terms of running similar simulation exercises.

The government members of the Task Force should tap key stakeholders from both private sector and civic society in an advisory capacity for input and ongoing engagement.

5.2 Centralize resources to support the tourism sector in times of crisis

ATSP section 2.2.1.1 recognises the need to update the current Manual on Tourism Crisis and these recommendations can be included to further strengthen that endeavour. The most critical aspect during a crisis is the communication conduits and clear messaging. The immediate confusion that ensues as well as media demands and, most of all, social media instant reports by both media outlets as well as residents, can escalate the hysteria of a crisis. For this reason, immediate messaging points and trusted singular messengers become integral to calming those directly impacted and assure accurate reporting. As the time goes by, keeping up with the elements of the crisis across the region becomes an ongoing challenge. Because of the complexity of the industry and the vulnerability from being composed of so many MSMEs and SMEs, the “normal” financial tools are not geared to providing the support needed. This is the arena where ASEAN could serve the greatest impact for ensuring economic, social and environmental resilience and longevity of the sector is embedded in future updates of the ATCCT Manual. Some of the key activities to underpin this need would be through:

A. Undertaking a major risk and readiness assessment to identify gaps and actions to support resilience

A significant piece of work to assess risks to Southeast Asia’s tourism sector across all categories (health pandemics, natural disasters, extreme weather events, terrorism, political instability) should be undertaken. This should include an assessment of crisis readiness and plans across all countries as well as within ASEAN, and proposals for addressing any gaps should be drawn up. Scenario planning should then be undertaken to identify the interdependencies related to different types of crises, communications or other infrastructure which needs to be put in place, and any further needs and gaps which may undermine the sector’s resilience. AMS can share experiences and exchange information on national level risk assessment, in order to scope the regional level piece of work and seek funding of a third party to finance the study.

B. Creating a dynamic and updated ASEAN Tourism Situation Website

Partner with a technology company or existing partner such as ASEANTA to upgrade the current effort of ATCCT through the visitsoutheastasia.travel website to include a live portal to track conditions in each area impacted by the crisis, publicise resource links for assistance, amplify requirements and protocols to be

followed, and most of all to publicise when an area is *Open For Business*. A point person from each country would be held responsible for the inputs needed to keep the information current. Provision should be made to expand information to cover other crises which may arise in the future including extreme weather events, political instability, natural disasters and future pandemics. The aim of the portal is to ensure that information is presented in a consistent way across countries, is easy to understand for international visitors, and ensures that key messages about what is open/not open and what the expectations are for visitors can be communicated. Alternatively, should third parties develop similar websites and resources with major industry buy-in and use, ensure that ASEAN AMS support these channels.

C. Increasing ASEAN Member States' Contribution to the NTOs Fund

The ASEAN NTOs Fund was established to provide funding for projects to be delivered as part of the ATSP. Given the need to expedite some of the projects identified in the ASTP and the identification of new recovery-focused projects that benefit all ASEAN Member States and support the objectives of the ASTP, the annual contribution to the Fund should be increased.

D. Promoting the establishment of national level Tourism Resilience Funds

In order to underpin the resilience of the tourism sector, particularly as it relates to the most vulnerable, national level Tourism Resilience Funds should be established so that when the next crisis hits, support can be accessed quickly and efficiently. The intent of these funds would also be to avoid the difficulties of distribution of general funds not always available for the tourism-related businesses and supply chain businesses due to low margins and vulnerabilities. They could establish more flexible risk criteria and favourable rates and length of terms geared to the service nature of the sector so dependent upon demand. The local supply side of the business and the interrelationships of the businesses to other sectors engenders the need for such funds to ensure resilience into the future. They could be accomplished through partnerships with humanitarian foundations, grants, and/or small traveller contributions.

5.3 Enhance usage and understanding of digital technology in the tourism sector

The *ASEAN Declaration on Digital Tourism* underscores the importance of digital technology to the future resilience and sustainability of the tourism sector. The COVID-19 pandemic has significantly sped up the uptake and rollout of digital solutions, in particular online meetings and events, online retail and touchless technology and ASEAN's tourism sector needs to make sure it is embracing the opportunities of technology as it develops into the future. While actions around training and product development in the digital sphere have been addressed elsewhere in this recommendations report, specific ongoing actions to embrace technology include:

A. Using big data, AI and machine learning to refine and increase the impact of digital marketing activities and to improve product offering and experience

The ASEAN Tourism Marketing Strategy (ATMS) outlines various opportunities for improving marketing of the region and the use of digital technology to do so. There is a further opportunity, through partnerships with private sector tech companies, OTAs and the industry to capitalize on big data to ensure that marketing activities are targeted, relevant and impactful and through personalisation ensure that customer experience is amplified.



Similarly, there are myriad opportunities to improve tourism products and customer service through AI / machine learning. ASEAN can support the industry by identifying such opportunities, establishing partnerships, and providing relevant training in this area.

B. Implementing technological solutions to support environmental and social sustainability

The long term resilience of ASEAN's tourism sector is closely linked to environmental and social sustainability as set out in Pillar 3. This can be further enhanced by promoting and implementing technology solutions which support sustainability – such tech solutions for reducing energy and water consumption, and food waste. Ongoing measurement and tracking at property/business level can also be more effectively undertaken through online platforms and data management systems.

ACTION PLAN PILLAR 5

*Lead Country information included here has been directly provided by ASEAN Secretariat's ICT and Tourism Division to the Consultant

ACTION	KPIs	Lead Country*	Expected Output / Outcome	REOPENING	RECOVERY				RESILIENCE	Alignment with ATSP	Page with full recommendation
				2021	2022	2023	2024	2025			
Pillar 5: Underpin recovery with long term resilience and crisis preparedness											
5.1 Set up an ongoing advocacy programme for assuring the importance and interdependence of travel and tourism											
A. Monitoring and advocating the impact of Travel & Tourism in ASEAN through an annual summary report	<ul style="list-style-type: none"> Summary report produced and promoted each year 		Importance of travel and tourism understood by officials across ASEAN		Develop annual summary report structure and produce annual report.	Produce and communicate annual summary report	Produce and communicate annual summary report	Produce and communicate annual summary report	ATSP 1.8.1	49	
B. Strengthening the ASEAN Tourism Crisis Communications Team (ATCCT) to improve tourism resilience	<ul style="list-style-type: none"> Updated ATCCT Manual 	Malaysia (Tourism Crisis Communication) - Indonesia (Safety and Security Guidelines)	Strengthened and more resilient ATCCT		Conduct ATCCT update with collaboration of private sector and civic society stakeholders for input and ongoing engagement.			Review of updated ATCCT to include lessons learnt during recovery phase.	ATSP 2.2.1.1, 2.2.1.2	49	
5.2 Centralize resources to support the tourism sector in times of crisis											
A. Undertaking a risk and readiness assessment to identify gaps and actions to support resilience	<ul style="list-style-type: none"> Risk and readiness assessment undertaken and gaps identified 	Malaysia (Tourism Crisis Communication) - Indonesia (Safety and Security Guidelines)	Crisis readiness and interdependencies assessments are in place to support tourism sector resilience across all AMS as well as within ASEAN		Exchange best practices and lessons among AMSs on performing risk assessments. Scope the project of developing an assessment	Develop risk and readiness assessment methodology and test it. Undertake risk and readiness assessment and prepare proposals	Undertake scenario planning to identify interdependencies and further needs and gaps.	Review risk and readiness assessments and identify new gaps and actions to support tourism resilience	ATSP 2.2.1.1	50	



					framework for ASEAN. Engage with third party to finance the project.	for addressing identified gaps.				
B. Creating a dynamic and updated ASEAN Tourism Situation Website	<ul style="list-style-type: none"> Website live and regularly updated Engagement, visitors' stats 		Website is utilized by major travel trade as a resource for planning and engaging with the region for logistical issues on an ongoing, long-term basis			Partner (e.g. technology company, ASEANTA, etc.) to upgrade current website in a consistent and trade/traveller friendly way to provide information on the general tourism situation in case of any type of crisis.	Launch updated ASEAN Tourism Situation Website	Identify other crises which may arise in the future to expand information coverage in website when needed		50
C. Increasing ASEAN Member States Contribution to the NTOs Fund	<ul style="list-style-type: none"> Total amount contributed by AMS Rate of increase in contributions 		Funds are available for recovery-focused projects which support the objectives of the ASTP and benefit all AMS.	Agree amongst AMS to increase each country's contribution to the NTO Fund from 2022 onwards	Provide the agreed increased country's contribution to the NTO Fund	Provide the agreed increased country's contribution to the NTO Fund	Provide the agreed increased country's contribution to the NTO Fund	Provide the agreed increased country's contribution to the NTO Fund		51
D. Promoting the establishment of national level Tourism Resilience Funds	<ul style="list-style-type: none"> National Tourism Resilience Funds in place in all AMS 		AMS are better prepared for future crises and support for tourism business can be accessed quickly and efficiently when needed.		Explore funding opportunities (e.g. humanitarian foundations, grants, etc.) to establish national level Tourism Resilience Funds (if not already implemented in similar forms)					51
5.3 Enhance usage and understanding of digital technology in the tourism sector										



<p>A. Using big data, AI and machine learning to refine and increase the impact of digital marketing activities and to improve product offering and experience</p>	<ul style="list-style-type: none"> • Number of data analytics, AI/machine learning initiatives supported (directly or indirectly) by AMS NTOs in tourism marketing • Rate of increase in reach of ASEAN digital marketing initiatives as a result of big data initiatives above • Reported improvements in tourism product offering and/or experiences 		<p>Marketing activities across ASEAN are targeted, relevant and impactful and ensures that customer experience is amplified.</p> <p>Tourism products and customer services is improved across ASEAN through AI / machine learning</p>		<p>Identify AI and machine learning opportunities across ASEAN and establish relevant partnerships.</p> <p>Partner with private tech companies, OTAs and the tourism industry to capitalize on big data to refine and increase digital marketing activities.</p>	<p>Provide training to tourism business in AMS</p>	<p>Provide training to tourism business in AMS</p>	<p>Provide updated training to tourism business in AMS</p>		51
<p>B. Implementing technological solutions to support environmental and social sustainability</p>	<ul style="list-style-type: none"> • Number of events and campaigns supported by NTOs (directly or indirectly) promoting technological solutions for sustainability 		<p>Tourism business across ASEAN use tech solutions to improve environmental and social performance</p>		<p>Commence mapping of tech solutions which support sustainability in the tourism sector across ASEAN. Share best practices amongst AMS. Identify opportunities for priority application and testing</p>	<p>Develop a working group focussed on identifying opportunities, application of tech solutions. Share best practices amongst AMS.</p>	<p>Share best practices amongst AMS.</p>	<p>Share best practices amongst AMS.</p>		52



Next steps

As mentioned at the start of this Report, the proposed recommendations are to serve as a guide for ASEAN Member States only as they may not be applicable for all ASEAN Member States. This is due to the recommendations being subject to respective ASEAN Member States' national readiness and plans to manage COVID-19 situation. In addition, some recommendations are better engaged cross-sectorally as those issues are not under ASEAN NTOs' purview.

For the recommendations that ASEAN Member States decide to implement at the regional level, the following actions could eventually be undertaken by ASEAN NTOs outside of this technical assistance, as a separate policy-level process to be led by the ASEAN Secretariat for ASEAN Tourism Recovery, such as:

- a) Some Lead Countries have already been identified by ASEAN Secretariat's ICT and Tourism Division and provided to Greenview and hence have been included in this Final Study Report. However identification of Lead Country for all relevant actions and outlining their roles (e.g. monitoring implementation, coordinating with other parties, seeking funding, etc.) could be a good follow-up.
- b) Assigning actions to relevant tourism working groups
- c) Identifying which actions would require working or coordinating with other ASEAN bodies, and which bodies these are
- d) Identifying which actions require technical assistance and possible sources of external funding support

Appendices

Appendix 1: Key bibliography

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- [ASEAN Business Advisory Council: A Pathway Towards Recovery and Hope](#)
- [ASEAN Clean Tourist City Standard](#)
- [ASEAN Community Based Tourism Standard](#)
- [ASEAN Comprehensive Recovery Framework](#) and its [Implementation Plan](#)
- [ASEAN Declaration on Digital Tourism](#)
- [ASEAN Declaration on Digital Transformation of Education Systems](#)
- [ASEAN Declaration on Human Resources Development for the Changing World of Work](#)
- ASEAN Development Fund – Terms of Reference
- ASEAN Gender and Development Framework on Tourism
- [ASEAN Green Hotel Standard](#)
- [ASEAN Homestay Standard](#)
- [ASEAN MICE Venue Standard \(Category Exhibition Venue\)](#)
- [ASEAN MICE Venue Standard \(Category Meeting Room\)](#)
- [ASEAN Mutual Recognition Arrangement on Tourism Professionals Workplan 2019-2023](#)
- [ASEAN Plus Three Framework on Environment Management Standards for Tourism Destinations](#)
- [ASEAN Public Toilet Standard](#)
- [ASEAN Spa Services Standard](#)
- ASEAN Tourism Crisis Communications - Terms of Reference (2005)
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- [ASEAN Tourism Strategic Plan 2016-2025](#) and ATSP update
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- [Phnom Penh Declaration on a more Sustainable, Inclusive and Resilient ASEAN Tourism](#)
- Strategy on the participation of local communities and private sectors in tourism development
- [The Regional Strategic and Action Plan for ASEAN Vaccine Security and Self Reliance \(AVSSR\)](#)

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Appendix 2: Executive Summary of Desk Study Report

The Desk Study report is part of the technical assistance “*Study to Inform the Post- COVID-19 Recovery for ASEAN Tourism*” provided by the Canadian Trade and Investment Facility for Development (CTIF) to the Association of Southeast Nations (ASEAN) Secretariat’s ICT and Tourism Division and ASEAN National Tourism Organizations (NTOs) to aid the development of a climate-smart and gender and socially inclusive ASEAN Post-Pandemic Tourism Recovery Plan. This Desk study identifies the impact of the COVID-19 pandemic on the ASEAN tourism sector that may be relevant for ASEAN Tourism Recovery policy development.

All ASEAN countries have felt the socio-economic impact of Covid-19, with IMF estimating a GDP reduction of 3.4% for the region for 2020⁴⁴. According to WTTC, in 2019 the tourism industry contributed 12.1% of Southeast Asia’s GDP, equivalent to US\$380 billion, and the sector’s contribution to GDP in the region grew by 4.6%.⁴⁵ As a major source of jobs and revenue in Southeast Asia where tourism accounted for over 14% of total employment for the region in 2019⁴⁶, the COVID-19 induced collapse of the tourism sector is an important factor behind the IMF projections of stalled economic growth for 2020. In Southeast Asia, the ILO estimated in April 2020 that the jobs and livelihoods of at least 15.3 million workers in the tourism sector were at risk due to the COVID-19 pandemic, with 6.4 million of these at-risk workers estimated to be women and 8.9 million men⁴⁷. For some countries, such as Cambodia, the Philippines, and Thailand where tourism’s share of total GDP is higher (c.20-25%) as well as sector employment contribution stands at a significant 20-26%⁴⁸ in 2019, the impact made them particularly vulnerable to the economic and social implications of the pandemic effects.

ASEAN as a region has been badly hit by the pandemic, with more significant decreases in key tourism indicators than the world’s average⁴⁹. As of October 2020, international tourism arrivals and actual air reservations into the region had decreased by 98% compared to a 83% global reduction, occupancy rates by 39% supported in part by domestic tourism but still below the 44% global average, and hotel bookings had decreased by 68% from 2019 values, compared to the 48% global decrease in hotel bookings.

The region has contained the Covid-19 virus spread much better than most other regions globally. The strategy behind the success of many countries in the region has been mainly based on prioritizing health above economic concerns, producing excellent public communications, enforcing early border controls, and mandating behavior change: a strict lockdown, widespread use of masks and physical barriers, and avoiding indoor or confined spaces.

After analyzing the impact of the pandemic on the tourism sector as well as the policy responses and recovery measures undertaken by ASEAN Member States, it is clear that much effort is already underway within ASEAN to proactively respond to the pandemic with policies and initiatives. The crisis has created a number of opportunities that should be capitalized on. Moving forward, seven areas of opportunity may be explored in further detail, specified regional application, and best practice for ASEAN to take the lead on recovery:

⁴⁴ IMF (October 2020), “Regional Economic Outlook for Asia-Pacific: Navigating the Pandemic: A Multispeed Recovery in Asia”

⁴⁵ WTTC (March 2020), “2020 Annual Research: Key Highlights”

⁴⁶ WTTC (March 2020), “2020 Annual Research: Key Highlights”

⁴⁷ WTTC (March 2020), “2020 Annual Research: Key Highlights”

⁴⁸ ILO (April 2020) Thematic brief: COVID-19 and employment in the tourism sector: Impact and response in Asia and the Pacific

⁴⁹ WTTC (March 2020), “2020 Annual Research: Key Highlights”

⁴⁹ UNWTO Tourism Dashboard

- 1. Embracing digital technology & innovative solutions** to provide reliable and easily accessible information on ASEAN common health & safety requirements, visas, tests, quarantines, etc. This is key to enabling an efficient approach to developing the ASEAN region as a ‘single destination’. Some tourist destinations and wild parks have embraced digital technology, virtual meetings and video streams to hold would-be tourists’ attention from afar. This may be a route to new revenue opportunities in the future. In addition, the pandemic has accelerated digitization across the industry, from booking and check in systems, to cashless payments and a global move towards remote working and online or hybrid events. All of these require significant improvements in digital infrastructure and skills in order for their potential to be maximized.
- 2. Ensuring common health protocols for safety of travelers and host countries** in order to attract regional tourism and promote safe destinations. Harmonization of standards and health regimes that build upon recognized international practices can help create an easily understood, common approach and a regional Hub that provides clarity to the sector in terms of requirements and confidence to travelers, thus boosting regional tourism. Accurate contact tracing and reliable testing is amongst the critical solutions for the region to build quarantine-free travel bubbles in order to facilitate controlling flows and reduce the amount of time tourists would need to spend at destinations.

The preparedness of the health system in terms of number of physicians, nurses and hospital beds will be an important health factor to be accounted when restarting tourism, as travelers need to be assured about their safety and tourism providers need a health system to support destinations to provide quick responses when needed during this pandemic or future health crises.

- 3. Communication and collaboration across countries, sectors and public-private sector partnerships** has proven effective and can further strengthen ASEAN’s coordination in sharing knowledge, information, best practices and lessons learnt. Examples may include online and messaging spaces for providing regional-level information on restrictions and requirements to facilitate itinerary planning and update dynamically; engagement of residents in recovery planning so their voice is heard/considered and offering positive reception for restart of tourism.
- 4. Tourism services reinvention** offers an opportunity to build on tourism assets of the region. Stimulating awareness that the experiences are not diminished because of COVID-19 is key to maintaining engagement with the potential visitors: attractions can still be visited, venues can be utilized, accommodation options are open, itineraries are still possible, segments and experiences such as cruise and adventure travel are still open. Some important trends to take advantage of include:
 - maximizing **natural experiences** and remote places to meet the increasing demand for nature-based open space visiting.
 - increased and encouraged **domestic and regional travel**, with appropriate product development to support it.
 - remote working becoming a “new normal” which opens up scope for **lifestyle destination tourism**. ASEAN countries might need to consider how they might support and capitalize on these changes
 - **rethinking target tourist segments**, for example high end and eco-conscious tourists in smaller numbers rather than mass low cost tourists. It will be important to consider the

financial and infrastructure impacts of the different tourist categories to ensure that tourism revenues are managed, the local economy at various levels is supported and environmental impacts are managed sustainably.

5. There may be various ways to fund **preparedness and resilience for future crises** through tourism. For example, enabling contributions from international visitors and other donor sources which provide funds at the local level to support health infrastructure, vaccine delivery etc. An important consideration is the implication of the geographical and infrastructure conditions in the region on ability to reach dispersed, effective engagement across the population of the ASEAN region and delivery of COVID-19 immunization across ASEAN countries. The transportation and storage of the vaccines, and their delivery to the remote communities will require a particular logistical effort in a coordinated and well planned approach. Any funds raised from visitors should be clearly channeled towards appropriate usage and not subsumed into general finances.
6. **Enabling a sustainable and inclusive recovery** is a crucial policy aspect. The pandemic shone a light on the significance of the environmental damage in the region and possibilities of environmental regeneration with reduced human involvement. It has created a unique opportunity to address the environmental risks and impacts of the way sector has been operating. It is important to ensure that any investments have appropriate “green requirements” attached and are directed at the important infrastructure to support longer term recovery such as waste management systems, water, transport and energy infrastructure for tourism reinvigoration as well as systems for managing better the tourism flows. Without government level action, once borders open key tourism destinations in the region could be flooded which will not be compatible with long-term environmental preservation if not planned carefully. This could be controlled through pricing as a way of managing numbers of tourism as well as environmental and community conditions placed on the tourism value chain and the visitors. Tourism growth goes hand in hand with infrastructure growth, and it is critical for green finance to fill infrastructure investment gaps in the region, which have been widened by the pandemic, but with robust sustainability conditions attached to them to keep the wider impacts in sight.
7. It is important to ensure the right levels of **support for the sector** as it continues to weather the storm **and adapt to the requirements of recovery** by providing them with tools, training and financial support mechanisms.

The impact of the COVID-19 pandemic has been devastating to ASEAN countries and their tourism sectors. The region has managed to contain the virus effectively but at considerable cost to economic activity and tourism. Before the world was hit by COVID-19, the countries of Southeast Asia were amongst the most popular and fastest-growing tourism destinations globally. This is a strong position from which to base future success. It is critical that any recovery plans and policies going forward not only build on this strength but take into account lessons learned from the pre-pandemic “business as usual” and take this moment as an opportunity to rebuild with sustainability and more regenerative practices in mind. ASEAN, as the regional coordinator of ten countries, can play an extremely valuable role in ensuring that these countries work together to build a strong and mutually supportive tourism sector.

Building on the findings of this Desk Study report, the next steps will include the development of recommendations for the medium and long-term recovery strategy, leveraging insights and inputs from key tourism stakeholders and ASEAN NTOs.

Appendix 3: Methodology

This Final Study Report builds on the findings outlined in the **Desk Study report**, integrating the analysis of national, regional and global policies and best practices currently underway, planned, or proposed within ASEAN countries and global entities, with a focus on needs and challenges relating to health and security, capacity-building, technology, sustainability, and cooperation efforts.

Furthermore, it integrates the findings of the **Draft Policy Recommendations report**, which comprised a series of virtual consultations conducted through individual qualitative in-depth interviews with tourism businesses, tourism associations, multilateral banks, international organizations, and non-governmental organizations. These consultations ensure that the recommendations reflect the views and interests of the industry stakeholders from across ASEAN and as such that business and consumers from across the region will have confidence in the Recovery Plan, as well as considering the ASEAN region's preparedness for future similar crises. The policy recommendations also take into account the inputs from the *two ASEAN NTOs virtual workshops* held on February 18th and 19th, 2021, outlining the main themes and key areas of focus for the policy recommendations, and reflecting insights on current policies, challenges and priorities for tourism recovery plans at an individual country level. The preparation of the recommendations included a review by a medical expert to account for COVID-19 or potential health-related requirements and considerations to enable ASEAN region's preparedness for future similar crises, and a gender expert review to ensure that the recommendations are gender-sensitive, gender-responsive and socially inclusive.

The Final Study report builds upon the updated **Draft Action Plan report**, which has been structured around the five recovery pillars that comprise recommendations related to (1) supporting tourism businesses with recovery and adaptation to requirements of recovery, (2) enabling the safe and seamless restoration of intra-regional and international travel, (3) ensuring that recovery is underpinned by principles of sustainability and inclusivity, (4) reinventing tourism services to drive competitiveness, and (5) underpinning recovery with long-term resilience and crisis preparedness of the tourism sector. Each recommendation includes a brief explanation of the rationale behind it and suggested related actions with KPIs, expected output/outcomes, and an indication of activities to be developed during Reopening, Recovery, and Resilience phases for the tourism sector. An additional column to reflect the Lead Country for each action shall be added subject to the consent of ASEAN Member States.

The proposed phased actions for ASEAN tourism recovery provide a high-level overview of the recommended steps, and individual recommendations will require development of a detailed project delivery plan owned and managed by the ASEAN Member State Lead country and responsible individual to ensure that the adequate timelines, resources and roles are reflected and allocated.

It is anticipated that the majority of the recommendations can be delivered with the NTOs existing resources and not require additional funding or resources. There are however recommendations which will necessitate third parties' involvement which may require some budgets, for example commissioning of external digital or marketing experts, facilitation of inputs from private sector industry stakeholders or input from stakeholders across tourism ecosystem representatives. Where possible, collaboration with and building on existing initiatives, strategies and facilities is assumed. Where recommended activities are focused on providing input to represent tourism interests through influencing and supporting other stakeholders and decision makers, the level of resource investment is envisaged to be very low in order to enable progress and limited to time of the relevant stakeholders, individuals and representatives who will be managing the process of



engagement and facilitating required input and discussions with the relevant decision making authorities and bodies.

Appendix 4: Industry stakeholder virtual consultation's key feedback

The policy recommendations drafted in this report have taken into account the views and interests of industry stakeholders from across ASEAN in order to ensure that business and consumers from across the region will have confidence in the Recovery Plan. We have included into our recommendations the views gathered during the first and second phase of the technical assistance with regards to recovery of tourism across ASEAN Member States:

- Asian Development Bank
- Cruise Lines International Association
- ECPAT International
- EXO Travel
- Global Sustainable Tourism Council
- Hilton Hotels
- International Air Transport Association
- International Finance Corporation – World Bank Group
- Intrepid
- Mekong Tourism Coordinating Office
- Pacific Asia Travel Association
- Phuket Hotel Association
- Rajah Travel
- STR
- The Global Association of the Exhibition Industry
- World Bank Group
- World Trade Organization

As noted in the methodology in Appendix 3, extensive consultations with the private sector and other non-governmental entities were undertaken in the preparation of these recommendations.

The key messages emerging from the consultations that are important to inform the NTO plans, and which underpin these recommendations include:

- a) Tourism is incredibly complex, with economic, social, environment, and cultural linkages across nearly all aspects of economies and societies. COVID-19 responses require close coordination at the international, regional, national and community levels.
- b) Businesses require clarity on timelines and actions to support planning and efforts. While everyone understands that the situation is fluid, closer communication and engagement is welcome.
- c) Tourism businesses need to access financing for survival; however, many MSMEs are not able to access loans offered, hence there is a need for support through payroll, tax deduction, utilities cost reduction, etc. In particular, Women-led MSMEs in tourism often have lower cash reserves, inventory levels, and less access to credit, and should be given special consideration in designing relief efforts. Additional thought should be given to how to reach rural unregistered MSMEs as well.



- d) Entrepreneurs and founders that built the travel and tourism industry in Southeast Asia in the last 30 years are now selling out to outside investors, and hence work previously done towards sustainable tourism at the local level might be lost when companies are bought by corporations without local ties, posing a risk to commitments towards the employees and local community, and may potentially change the authenticity of Southeast Asian tourism destinations.
- e) Tourism needs to benefit local communities and recovery should focus on how that can be achieved and measured.
- f) Domestic tourism has become the lifeline of tourism during the pandemic and is likely to be key to recovery in the short term. However, revenues from domestic visitors tend to be less than international visitors and steps need to be taken to increase spend.
- g) In order to advance a sustainable and inclusive recovery there is a need for new ways of measuring tourism success which reflects positive impact on destinations and communities as well as businesses.
- h) The downtime is the opportunity to devote time to changes, particularly approaches towards sustainability and inclusivity, before the tourism flow resumes.
- i) Key assets (including public assets such as protected areas, cultural heritage sites and intangibles) are at risk of degradation or loss through lack of tourism incomes and need to be supported.
- j) There is an anticipation of a strong demand for travel once it is allowed, so it is critical that the sector and the countries are prepared and have a strong management plan when borders re-open.
- k) Coordination and communication are key, especially given the different levels of COVID-19 containment across ASEAN countries.
- l) Once there is a full recovery, Southeast Asia's core markets will not forget about health and safety. There will be a long-term renewed interest in hygiene and cleanliness that ASEAN Member States need to consider in order to meet tourists' expectations.
- m) Southeast Asia has some specific environmental challenges, especially around waste management, which may affect the overall visitor experience.
- n) There is need for further work to ensure that there is a cross-government understanding of the important role of travel and tourism in economies.
- o) Good data is key to good policy and data collection, especially when it comes to understanding visitor behaviour, and it could be improved through partnership with the private sector. For example, using the full range of data available for real-time tracking, monitoring business responses through pulse surveys, and establishing a regional data exchange or peer-to-peer platform for matching demand and supply.



Appendix 5: Alignment of recommendations and action plan with SDGs

Pillar 1: <i>Support tourism businesses with recovery and adaptation to the requirements of recovery</i>	Alignment with SDGs
1.1 Unlock financial support to secure the viability of tourism businesses in the short term	
A. Setting guidelines and defining priorities for the creation of designated National-level Tourism Recovery Funds	8
B. Promoting other available financing facilities by third parties to tourism sector	8, 17
C. Encouraging for setting up and/or continuing relief programs	8
1.2 Provide appropriate training and skills development to serve the recovery-driven needs of tourism	
A. Updating the current Human Resource Development Plan (HRDP)	8,4, 17
B. Fast-tracking region-wide tourism digital skills training with the support of the private sector	8,4, 17
1.3 Develop specific support programs for women	
A. Mapping of all women-owned tourism businesses in Southeast Asia	5, 8
B. Establishing a support mechanism for MSMEs owned by women	5, 8
C. Developing capacity building aimed specifically at women	5, 4, 8
1.4 Establish formal support structures for tourism MSMEs	
A. Supporting the creation of national Tourism MSME networks	8, 4, 10
B. Creating credit and funding facilities with more flexible criteria targeted at MSMEs	8, 10
Pillar 2: <i>Enable the safe and seamless restoration of intra-regional and international travel</i>	Alignment with SDGs
2.1 Promote ASEAN wide alignment for the reopening of travel	
A. Increasing Tourism representation across all existing Reopening Task Force teams and committees to make sure that the tourism sector is represented in health/travel plans and able to inform them accordingly	8
B. Developing a common tourism and health risk assessment methodology in collaboration with national health ministries or agencies.	8, 3
C. Enabling contactless documentation and processes within the tourism ecosystem through digitization	8, 3
2.2 Encourage aligned health and safety standards and protocols across ASEAN	
A. Harmonizing standards and protocols	8, 3
B. Creating and promoting certified tourism 'safe spaces'	8, 3
C. Prioritizing tourism workers for vaccines where relevant in national vaccination programs.	8, 3
D. Establishing relevant health focal points to help visitors and businesses navigate health expectations	8, 3
2.3 Move forward quickly on the establishment of a process to develop and trial travel corridors and bubbles	
A. Adapting and modelling scenarios for travel corridors for tourism taking into account relevant updates phasing out under ATCAF	8
B. Sharing ideas and best practice on initiatives to promote reopening	8, 17
2.4 Establish a mechanism for clear communications with travel businesses, buyers, operators and travellers	
A. Reviewing for regular updates of the existing Visit Southeast Asia website COVID-19 page to better communicate the current status of reopening in ASEAN to consumers and trade	8
B. Delivering a 'Know Before You Go' Campaign to educate travellers on COVID-related issues	8
Pillar 3: <i>Ensure that recovery is underpinned by principles of sustainability and inclusivity</i>	Alignment with SDGs



3.1 Establish new measures of tourism success	
A. Conducting a study to develop a set of tourism KPIs for ASEAN, supplementing visitor numbers with broader social and environmental impact measures	1, 5, 8, 12, 13, 14, 15
3.2 Set foundations for sustainable tourism	
A. Aligning existing ASEAN sustainability standards and guidelines for the tourism sector with predominant frameworks of the GSTC and UN SGDs	1, 5, 8, 12, 13, 14, 15
B. Creating an ASEAN-wide platform for tourism environmental performance data collection, access, benchmarking and analysis	1, 5, 8, 12, 13, 14, 15
C. Enabling awareness of the opportunities for energy efficiency, carbon reduction, and health & safety nexus at tourism business facilities	3, 7, 9, 12, 13
D. Adopting an ASEAN guideline to apply sustainability conditions attached to all public funds in tourism	All SDGs
3.3 Invest in vital infrastructure in tourism destinations	
A. Engaging with municipal authorities to contribute in the development a waste management plans for tourism destinations	12
B. Promoting the Integration of 'green' transportation and renewable energy (RE) considerations in all new destination development plans	7, 9, 11, 12, 13
C. Advocating for improved broadband access for tourism workers and destinations	8, 10
3.4 Promote action against gender-based discrimination, modern slavery and enhance child protection measures	
A. Engaging with organisations already working to eliminate modern slavery in the tourism sector's supply chain	1, 5, 10
B. Raising awareness of gender-based discrimination/harassment through public education programs and training	5
C. Encouraging tourism businesses to sign the ECPAT Code to protect children	1, 5, 10

Pillar 4: Reinvent tourism services to drive competitiveness	Alignment with SDGs
4.1 Promote ASEAN-wide product development to respond to new travel trends	
A. Identifying special start-up funds and capacity building / marketing support for businesses in opportunity sectors such as adventure, wellness, ecotourism, and community-based tourism	1, 4, 8, 10
B. Launching a program promoting 'new' and less explored destinations	1, 4, 8, 10
C. Progressing initiatives to promote cross-ASEAN linkages to encourage longer stays and deeper exploration	8
4.2 Focus on specific segments which will kickstart recovery	
A. Engaging directly with the cruise sector to stimulate the sustainable recovery of cruising	8, 12, 14, 17
B. Developing a blueprint for VFR travel across the region	1, 8

Pillar 5: Underpin recovery with long term resilience and crisis preparedness	Alignment with SDGs
5.1 Set up an ongoing advocacy programme for assuring the importance and interdependence of travel and tourism	
A. Monitoring and advocating the impact of Travel & Tourism in ASEAN through an annual summary report	8
B. Strengthening the ASEAN Tourism Crisis Communications Team (ATCCT) to improve tourism resilience	8
5.2 Centralize resources to support the tourism sector in times of crisis	
A. Undertaking a major risk and readiness assessment to identify gaps and actions to support resilience	1, 8, 13
B. Creating a dynamic and updated ASEAN Tourism Situation Website	8
C. Increasing ASEAN Member States Contribution to the NTOs Fund	8
D. Promoting the establishment of national level Tourism Resilience Funds	8



5.3 Enhance usage and understanding of digital technology in the tourism sector	
A. Using big data, AI and machine learning to refine and increase the impact of digital marketing activities and to improve product offering and experience	4, 8
B. Implementing technological solutions to support environmental and social sustainability	4, 8

Appendix 6: Progress update since the development of the recommendations

This appendix summarizes the feedback that was provided to Greenview beyond the TA Beneficiaries, such as other ASEAN Secretariat's divisions, in order for the beneficiaries of this technical assistance to deliberate internally and update themselves as needed.

ASEAN Transport Division:

- *General feedback on the report:* Under Transport Facilitation and Land Transport, a “COVID-19 Recovery Guidelines for Resilient and Sustainable International Road Freight Transport Connectivity in ASEAN” has been completed and adopted by STOM (<https://asean.org/storage/asean-covid-19-guidelines.pdf>). However, this Guidelines is focusing on road freight transport and not related to passenger transport, and therefore, not directly contribute to the ASEAN Post-COVID-19 Tourism Recovery Plan.
- *Recommendation 2:* ASEAN Transport Division: The first set of ASEAN-wide COVID-19 operational guidelines for the protection and safety of passengers and operational air crew, as well as cleaning and disinfection of aircraft, was endorsed by the 26th ASEAN Transport Ministers Meeting in November 2020. This is a set of broad and non-binding operational guidelines with reference to and in line with guidance developed by the International Civil Aviation Organization (ICAO) Council Aviation Recovery Taskforce (CART). This will benefit the general travelling population including tourists as the guidance was developed to mitigate the risk of COVID-19 transmission, restore passenger confidence, and support the safe resumption of aviation activities in ASEAN recognising over half the world's tourists travel by air.
- *Recommendation 3.3.B:* Promoting green transportation and deployment of clean vehicle is aligned with Sustainable Transport measure under Kuala Lumpur Transport Strategic Plan 2016-2025 (KLTSP) in particular on ST-1.3.3 (Support to the development and adoption of nationally appropriate policies for cleaner fuels and vehicles).

ASEAN CID (Culture & Information Division):

- *Recommendation 1.1.A:* Cultural industries (as part of creative economy) in particular, crafts, artisanal goods and services, performances and exhibitions that are related to tourism, often do not have access to financing. Many rely on public financing, and being small are often seen as risky by traditional financial institutions.
- *Recommendation 1.1.A:* the Strategic Plan for Culture and Arts recognises the potential of creative industries in contributing to economic development. Specifically, it aims to “harness the contribution of the creative industries towards innovations, generating livelihoods and supporting economic development in the ASEAN Member States (AMS)” (p.4). The ACRF Implementation Plan also includes the creative economy as an area to be addressed.
- *Recommendation 3.3.C:* the Framework for Developing Digital Readiness Among ASEAN Citizens adopted by AMRI in March 2021 and to be tabled for notation at 38th ASEAN Summit could provide another framework for this matter. The Framework aims to provide a frame of reference for AMS to take stock, exchange best practices and continually enhance their respective approaches towards digital readiness.

ASEAN Labor & Civil Service Division:

- *Recommendation 1.2.B:* It is suggested that NTOs collaborate with SLOM to identify similar activities within their respective work plan. Moreover, the Roadmap to implement the ASEAN HRD on the Changing World of Work highlights demand-driven competencies and qualifications that meet labour



market needs as one of its outcome. Several action points in the Roadmap can served as entry point for this activity

- *Recommendation 1.2.B:* The digital training and skills development should be implemented through close collaboration with various stakeholders, especially the private sector who will have a practical perspective on which skills are necessary in the New Normal, and should be complemented with job placement and referral programmes/services to ensure digitally trained workers are absorbed in the labour market.
- *Recommendation 1.2.B:* Suggest tying digital training and skills development with the promotion of inclusive business models – e.g. businesses that embed the people at the base of the economic pyramid into their value chain as suppliers, distributors, retailers or consumers. Example of IB model in the tourism sector: In Thailand, the Premier Group sources all food and service requirements for its tourism resorts from social enterprises which in turn engage with small hold farms and other BoP communities. The Urmatt Group has engaged with over 3,000 small hold farmers to produce organic jasmine rice, chicken eggs and coconut water sharing the premium afforded to organic produce in domestic and export markets with the farmers. It recently ventured into Lao PDR exporting its IB model and providing an example of cross country IB activities. <https://asean.org/storage/2020/09/ASEAN-IB-Promotion-Guidelines-Endorsed-at-the-52nd-AEM.pdf>

ASEAN Health Division:

- *Recommendation 2.2:* Regional references: ASEAN Strategic Framework for Public Health Emergencies, ASEAN Health Protocol in Public Places for Pandemic Preventive Measures, and ASEAN Declaration on an ASEAN Travel Corridor Arrangement Framework