



End-Term Review of the Master Plan on ASEAN Connectivity 2025

Executive Summary



one vision
one identity
one community

The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand, Timor-Leste and Viet Nam.

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1. ASEAN – MPAC 2025 – Sustainable Infrastructure – Digital Innovation
2. Seamless Logistics – Regulatory Excellence – People Mobility

ASEAN: A Community of Opportunities for All

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FUTURES



End-Term Review of the Master Plan on ASEAN Connectivity 2025

The ASEAN Secretariat
2026

MPAC 2025 key achievements

1 STRATEGIC AREA 1 Sustainable Infrastructure



Establishment of **a new ASEAN body**, Lead Implementing Body for Sustainable Infrastructure (**LIB-SI**)*

Development of **a Pipeline of ASEAN Infrastructure Projects: 21 projects** in the current pipeline

Development of **8 City Technical Proposals**, with 15 more to follow

2 STRATEGIC AREA 2 Digital Innovation



Development of **a self-diagnostic tool** to support MSME's digital adoption

Over **18,000 registered users** after the enhancement of the ASEAN SME Academy and ASEAN Access

Development of **Guidance Notes on Digital Financial Services (DFS)** to encourage wider adoption

Development of **the ASEAN Open Data Development Framework**

Development of **Framework on ASEAN Digital Data Governance**

3 STRATEGIC AREA 3 Seamless Logistics



Development of ASEAN Database on Trade Route which compiled information and statistics on:

- **10 priority trade routes**
- **55 priority product groups**

Conduct of Supply Chain Analysis on 10 Specific Product Groups for:

- **COVID-19 response**
- **Food security and energy resiliency**

Development of Framework on ASEAN Supply Chain Efficiency and Resilience and its Implementation Plan: First regional cross-sectoral plan on supply chain coordination and collaboration

*LIB-SI has been renamed as the ASEAN Committee on Sustainable Infrastructure (ACSI)

4 STRATEGIC AREA 4 Regulatory Excellence



Establishment of

2 Working Groups under ACCSQ to share good practices on standards and identify standards for harmonisation

- Building and Construction Materials (BCM)
- Digital Trade Standards

Development and signing of the

Mutual Recognition Agreement of Building and Construction Materials

Development and delivery of the **Work Programme for DTSCWG** (2021–2025), including

12 activity programmes to build capacity in setting digital trade policies and standards

5 STRATEGIC AREA 5 People Mobility



Sharing of content from Southeast Asia Tourism Chinese website on Chinese social media platforms, promoting ASEAN as a single tourist destination

9 ASEAN Member States to introduce e-visa application systems

Undertaken 2 studies on:

- Enhancing Intra-ASEAN University Student Mobility
- Report on Graduate Employability in ASEAN

Facilitation of Intra-ASEAN TVET exchanges of **492 TVET students** and faculties along with capacity training for **89 TVET personnel** on five identified TVET priority sectors

The Master Plan on ASEAN Connectivity (MPAC) 2025, adopted by ASEAN Leaders at the 28th ASEAN Summit in Vientiane, Lao PDR, in September 2016, aims to achieve a seamlessly and comprehensively connected and integrated ASEAN to promote competitiveness, inclusiveness, and a greater sense of Community. It comprises 15 Initiatives in the five Strategic Areas of: (a) Sustainable Infrastructure; (b) Digital Innovation; (c) Seamless Logistics; (d) Regulatory Excellence; and (e) People Mobility.

This End-Term Review (ETR) of MPAC 2025 aims to provide a comprehensive assessment of the implementation of the Master Plan, with particular attention to progress and developments since the Mid-Term Review (MTR). It evaluated the outcomes and impact of MPAC 2025, including the relevance and effectiveness of its Initiatives in advancing the Strategic Objectives and contributing to the broader ASEAN Community Vision 2025. It also identifies key success factors and constraints encountered during implementation. These findings will guide the development of recommendations to inform the design and effective implementation of the ASEAN Connectivity Strategic Plan (ACSP), in support of the ASEAN 2045: Our Shared Future endorsed at the 46th ASEAN Summit on 26 May 2025.

MPAC 2025 HAS DELIVERED MEANINGFUL CONTRIBUTIONS TO ASEAN CONNECTIVITY, WITH GROWING RELEVANCE AMID EVOLVING REGIONAL CHALLENGES

MPAC 2025 initiatives have generated meaningful outcomes in advancing physical, institutional, and people-to-people connectivity across ASEAN. Achievements differ across Strategic Areas and Initiatives, reflecting variations in scope, implementation arrangements, and national contexts, but together they have strengthened regional integration, supported capacity development, and laid foundations for sustained connectivity.

The ETR is conducted against a backdrop of structural shifts affecting ASEAN's connectivity landscape. These include the lasting impacts of the COVID-19 pandemic, accelerated digitalisation, heightened focus on supply chain resilience, growing urbanisation pressures, and widening development gaps within and across ASEAN Member States (AMS). These trends have reinforced the importance of connectivity as a strategic enabler of resilience, inclusiveness, and sustainable growth, while also underscoring the need for adaptive, cross-sectoral, and results-oriented implementation approaches.

SUBSTANTIAL PROGRESS HAS BEEN ACHIEVED UNDER MPAC 2025, WITH VARYING LEVELS OF COMPLETION AND IMPACT ACROSS INITIATIVES

By the end of the implementation period, MPAC 2025 recorded substantial progress across its 15 Initiatives, with 83.21% of Key Implementing Measures (KIMs¹) completed and 2.1% still ongoing, reflecting concerted effort by ASEAN Sectoral Bodies (SBs), Lead Implementing Bodies (LIBs), and national stakeholders.

Progress and outcomes vary across Initiatives, influenced by factors including: (i) the extent to which MPAC 2025 added clear value to sectoral and national priorities; (ii) the strength of ownership and alignment among LIBs, ASEAN SBs, and national implementers; and (iii) the effectiveness of coordination, resourcing, and capacity to operationalise outputs. Initiatives that were closely aligned with existing sectoral work plans or supported by dedicated institutional arrangements tended to demonstrate stronger outcomes and sustainability, while others faced challenges translating outputs into sustained impact.

Progress on Key Implementation Measures across Initiatives

Initiative 1: Establish a rolling priority pipeline list of potential ASEAN infrastructure projects	11 out of 11 KIMs completed
Initiative 2: Establish an ASEAN platform to measure and improve infrastructure priority	7 out of 11 KIMs completed
Initiative 3: Develop sustainable urbanisation strategies in ASEAN cities	8 out of 8 KIMs completed
Initiative 4: Enhance the MSME technology platform	8 out of 8 KIMs completed
Initiative 5: Support the expansion of digital financial services	6 out of 6 KIMs completed
Initiative 6: Establish an ASEAN open data network	9 out of 12 KIMs completed
Initiative 7: Establish an ASEAN Digital Data Governance Framework	11 out of 12 KIMs completed
Initiative 8: Enhance the MSME technology platform	7 out of 9 KIMs completed
Initiative 9: Enhance supply chain efficiency through addressing key chokepoints	5 out of 8 KIMs completed
Initiative 10: Complete harmonisation of standards, mutual recognition, and technical regulations	8 out of 8 KIMs completed
Initiative 11: Increase transparency and strengthen evaluation to reduce trade-distorting effects with NTMs	7 out of 14 KIMs completed
Initiative 12: Enhance ASEAN travel by making finding information easier	10 out of 10 KIMs completed
Initiative 13: Ease ASEAN travel by facilitating visa processes	2 out of 2 KIMs completed
Initiative 14: Establish new vocational training programmes and common qualifications across AMS	11 out of 11 KIMs completed
Initiative 15: Support higher education exchange across AMS	9 out of 14 KIMs completed
Total	119 KIMs completed

¹ KIMs are activities that are carried out (such as projects, trainings, etc.) to produce outputs in the forms of, for example, a study/review of certain policies, pipeline of infrastructure projects, new vocational training programmes, etc. to support the implementation of MPAC 2025 Initiatives.

While MPAC 2025 has delivered meaningful progress across its Strategic Areas, the ETR indicates that implementation performance has been shaped by a combination of enabling factors and recurring challenges. As Initiatives progressed from planning through implementation and utilisation, the analysis identified several cross-cutting issues that influenced the pace, consistency, and sustainability of delivery across AMS and ASEAN SBs. These findings

provide important insights to inform the implementation of the ACSP. The review highlighted the following key challenges:

- **Difficulties in sustaining sectoral-level alignment and coordination.**

Many MPAC 2025 Initiatives were inherently cross-cutting, requiring sustained coordination across multiple ASEAN SBs, ministries, and national institutions. Differences in sectoral mandates, institutional arrangements, and evolving national priorities influenced the ease and consistency of coordination, especially when National Coordinators had limited ability to convene or drive action across multiple ministries. These dynamics were more pronounced for Initiatives spanning multiple policy domains (e.g., supply chain efficiency, visa facilitation, and certain digital innovation initiatives), where extensive consultations and joint implementation decisions were required.

- **Uneven levels of stakeholder ownership and continuity.**

Levels of ownership varied across Initiatives and stakeholders, depending on how clearly each Initiative's benefits were understood and its alignment with national priorities and sectoral work plans. Where Initiatives closely matched existing mandates, ownership and follow-through were generally stronger. In other cases, changes in leadership and personnel, uneven clarity on roles (particularly at the National Focal Point level), and assumptions about the ASEAN Secretariat's role in driving implementation affected continuity. Turnover and handovers also contributed to loss of context and reduced consistency of engagement, particularly for Initiatives that required sustained national participation beyond one-off consultations.

- **Inconsistent awareness of ASEAN Connectivity.**

Awareness of the broader ASEAN Connectivity agenda was uneven across implementers and stakeholders. While stakeholders directly involved in MPAC 2025 were generally more familiar with Initiative-level activities, broader visibility into how specific projects contributed to the wider connectivity agenda was not always consistent - both among national stakeholders and, in some cases, among project consultants supporting delivery. Limited visibility into overarching Initiative objectives and the underlying Theory of Change could affect how activities were prioritised and resourced. Outreach through public-facing communication products was not always sufficiently sustained or tailored to build stronger understanding of MPAC 2025's tangible benefits across different audiences.

- **Gaps in depth and effectiveness of stakeholder reporting and engagement.**

Reporting mechanisms to the ASEAN Connectivity Coordinating Committee (ACCC) and through annual monitoring, review and evaluation (MRE) meetings were in place, providing a structured channel for oversight. However, the depth, quality, and consistency of reporting varied across Initiatives and implementers, which affected how far discussions could support strategic course-correction and problem-solving. Coordination on partner mobilisation could also be strengthened: while engagement with ASEAN Partners was active, LIBs and ASEAN SBs were not always positioned to provide the ACCC with sufficiently targeted inputs on technical needs, funding gaps, and partner-fit. Private sector engagement occurred at project level in some Initiatives, but overall participation was low.

- **Variations in capacity of stakeholders.**

Differences in technical expertise and institutional capacity across regional and national stakeholders influenced both implementation quality and the extent to which output was subsequently utilised. At the regional level, the breadth of MPAC 2025 topics made it challenging for some governance actors to provide targeted technical input across all Initiatives. At the national level, readiness and capacity varied by sector and AMS, affecting the ability to contribute data, identify pipeline projects, or operationalise toolkits and frameworks. Variations in capacity also affected sustained follow-through for Initiatives that required ongoing national coordination, technical adoption, or regular data provision.

- **Availability, timing and flexibility of financial resourcing.**

MPAC 2025 successfully mobilised funding across all Strategic Areas, largely through project-based support from ASEAN Partners. However, the availability, timing, and flexibility of financing differed across Initiatives, reflecting diverse donor priorities, approval processes, and reporting requirements. As connectivity did not have a dedicated fund, financing was often tied to specific projects and could be uneven, which influenced implementation pace. Some activities faced constraints where additional funding was needed to address unforeseen issues (e.g., data gaps) or to extend implementation and capacity building efforts, even where AMS expressed strong interest in deeper engagement.

- **Challenges in effectiveness and practicality of MRE approach.**

The Operational Guide and established reporting routines provided an important foundation for monitoring progress, but several design and feasibility constraints limited effectiveness – particularly at the outcome level. Some outcome indicators lacked baselines or targets, while others depended on data sources that were unavailable, discontinued, or linked to outputs that were not delivered. The Guide also assumed a level of resourcing and data availability that was difficult to sustain in practice, and updates to KIMs and metrics were only initiated later in the implementation period. Secretariat resourcing influenced the intensity of follow-up and the ability to systematically consolidate data across AMS. There remains scope to strengthen MRE design and processes, including clearer baselines and targets, more feasible data strategies, and more systematic integration of cross-cutting considerations such as gender equality, inclusion, and climate action.

RECOMMENDATIONS ARE DEVELOPED TO ADDRESS THE IDENTIFIED CHALLENGES

The review identifies seven recommendation areas, including specific actions to address the challenges highlighted by the ETR. All recommendation areas are complementary and should be considered in combination for maximum effect.

Implementation recommendations and challenges addressed

Recommendation area	Recommendations	Challenge addressed
Sectoral-level alignment and coordination	Enhance cross-sectoral cooperation mechanisms involving ACCC, ACD, LIBs/ ASEAN SBs and national implementers beyond workshops and capacity buildings necessitated by delivery of KIMs	- Difficulties in multi-sectoral coordination and alignment - Reduced relevance/value addition to stakeholders due to shifting priorities - Limited flexibility to realign plans with changing contexts
Ownership of stakeholders	Recognise contributions of implementing stakeholders through clarifying linkages between MPAC initiatives and national or sectoral priorities, enhancing information flow and coordination	- Unclear ownership of initiative outputs when the perceived benefit of utilisation was unclear - Insufficient planning to ensure sustainability of certain outputs post-2025
Awareness of Connectivity	- Develop a communication strategy to showcase outcomes and impacts of ASEAN Connectivity - Incorporate connectivity agenda within existing platforms/meetings	- Limited awareness of ASEAN Connectivity among national implementers - Limited public awareness of ASEAN Connectivity
Stakeholder reporting and engagement	- Improve quality of internal engagements for better accountability and alignment - Amplify private sector engagement by establishing structured and recurring dialogues - Develop a central repository and strengthen information sharing with external stakeholders	- Lack of active communication and alignment between relevant SBs on priorities as well as eligibility for financial support - Lack of engagement with wider stakeholders, especially the private sector
Capacity of stakeholders	- Strengthen knowledge, clarity of roles, and alignment among national implementers - Enhance ACCC technical capacity - Expand capacity of the ACD for planning and management	- Limited internal technical expertise within ACCC and ACD to effectively guide MPAC 2025 implementation - Limited technical know-how among national implementers
Financial resourcing	Diversify funding sources, including tapping on existing funds of external partners	Limited funding options for projects
Monitoring and Evaluation (M&E) effectiveness and efficiency	- Align indicators across ASEAN - Incorporate M&E expertise into the existing ACD structure - Maintain flexibility in the design of Strategic Measures and Activities throughout implementation - Conduct periodic reviews to ascertain continued relevance of the ACSP - Mainstreaming cross-cutting issues (such as gender equality and inclusion, and climate actions) into the ACSP M&E framework - Develop guidance materials to ensure consistent quality and ownership in M&E implementation	- Limited quality of meetings and information shared by implementers - Limitations to the design of the Operational Guide for MRE of MPAC 2025 hindered MRE effectiveness (e.g., no plan to regularly review metrics and indicators, data proposed to be collected were not feasible to obtain) - Measurement gaps on cross-cutting issues in MPAC 2025 MRE framework (for instance on gender equality and inclusion, and climate actions) - Limited resources within the ASEAN Secretariat to follow up with relevant stakeholders

- **Strengthen sectoral-level alignment and coordination.**

Given the inherently cross-sectoral nature of connectivity, effective implementation requires sustained coordination across multiple ASEAN SBs, national institutions, and implementing agencies. While MPAC 2025 established mechanisms for coordination, experience from implementation indicates the need for more structured and institutionalised approaches that support alignment, shared accountability, and joint problem-solving throughout the implementation cycle.

1. **Enhance cross-sectoral cooperation mechanisms** by establishing more regular and structured platforms involving the ACCC, ASEAN Connectivity Division (ACD), LIBs, ASEAN SBs, and national implementers. These mechanisms should move beyond activity-specific workshops and capacity-building sessions to enable sustained collaboration, joint planning, and clearer allocation of roles and responsibilities across sectors.

- **Enhance ownership among stakeholders.**

Levels of ownership among implementing stakeholders varied across MPAC 2025 Initiatives, often reflecting differences in alignment with national and sectoral priorities, clarity of benefits, and availability of resources. Strengthening ownership is therefore essential to sustaining engagement and reinforcing commitment to connectivity initiatives under the ACSP.

2. **Recognise and strengthen ownership among implementing stakeholders** by clarifying linkages between MPAC 2025 and ACSP Initiatives and national or sectoral priorities, improving information flow and coordination during implementation, and formally recognising stakeholder contributions in ways that reinforce long-term commitment and continuity of engagement.

- **Increase awareness of Connectivity.**

Awareness of ASEAN Connectivity and its impact remains uneven across stakeholders, particularly beyond directly involved institutions. Strengthening awareness is important not only for sustaining political and institutional support, but also for reinforcing the relevance of connectivity to broader development objectives and public outcomes.

3. **Develop a targeted communication strategy** to showcase the outcomes, impacts, and value of ASEAN Connectivity to external stakeholders, including ASEAN Partners, the private sector, international organisations, and the wider public, using clear, evidence-based, and accessible messaging.

4. **Incorporate a regular agenda item on Connectivity** within existing ASEAN platforms and meetings to sustain visibility, reinforce cross-sector understanding, and ensure continued attention to connectivity priorities without creating additional institutional structures.

- **Improve stakeholder reporting and engagement.**

Effective reporting and engagement are critical for accountability, alignment, and adaptive implementation. While reporting mechanisms under MPAC 2025 were in place, variations in quality, participation, and depth of engagement limited their effectiveness as strategic decision-making platforms.

5. **Improve the quality of internal engagements for better accountability and alignment** by ensuring the participation of relevant decision-makers, adopting interactive and outcome-oriented formats, and fostering inclusive discussions that strengthen relationships and sustain collaboration beyond individual projects.
6. **Amplify private sector engagement** by establishing structured and recurring dialogues with industry associations, chambers of commerce, and key enterprises, ensuring that private sector perspectives are systematically integrated into the design and implementation of connectivity initiatives.
7. **Develop a central repository or database and strengthen information sharing** with external stakeholders to improve transparency, support knowledge continuity, facilitate coordination, and reduce information gaps across the connectivity ecosystem.

- **Build stakeholder capacity.**

Differences in technical expertise, institutional capacity, and clarity of roles across regional and national stakeholders influenced implementation performance under MPAC 2025. Strengthening capacity at multiple levels is therefore critical to enabling more effective planning, coordination, and delivery under the ACSP.

8. **Strengthen knowledge, clarity of roles, and alignment among national implementers** through clearer role definitions, updated guidance materials, and regular engagement to ensure national stakeholders are well equipped to support connectivity implementation.
9. **Enhance the technical capacity of the ACCC** through targeted learning sessions and briefings that improve understanding of complex and cross-sectoral connectivity issues, enabling more informed oversight and engagement.
10. **Expand the capacity of the ACD for planning and management** by providing additional resources and support to strengthen its ability to coordinate implementation, manage knowledge, facilitate transitions, and support strategic reviews.

- **Diversify and expand financial resourcing.**

The availability and alignment of funding varied across MPAC 2025 Initiatives, reflecting diverse priorities and financing modalities of ASEAN Partners. Strengthening financial sustainability under the ACSP will require broader engagement with potential funders and more flexible financing approaches.

11. **Explore alternative funding structures and diversify funding sources**, including tapping into existing funds from ASEAN Partners, Development Finance Institutions, philanthropic organisations, ESG and social-impact funds, and Corporate Social Responsibility programmes, to improve financial sustainability and address funding constraints for connectivity initiatives.

- **Improve M&E effectiveness and efficiency.**

While the MRE framework under MPAC 2025 provided an important structure for tracking progress, limitations in indicator design, data availability, and resourcing constrained its effectiveness. Strengthening M&E will be essential to support evidence-based decision-making and adaptive implementation under the ACSP.

12. **Coordinate indicators across ASEAN** by leveraging existing indicators tracked by ASEAN Community Pillars, ASEAN SBs, and Implementing Bodies, to streamline data collection and reduce duplication.
13. **Incorporate M&E expertise into the existing ACD structure**, with the potential to evolve into a dedicated MRE unit in the future, to strengthen monitoring, analysis, and reporting capacities.
14. **Maintain flexibility in the design of Strategic Measures and Activities throughout the implementation period**, allowing adjustments to reflect changing contexts and priorities, subject to appropriate approvals.
15. **Conduct periodic reviews to ascertain the continued relevance of the ACSP and its Strategic Measures and Activities**, ensuring alignment with emerging global and regional trends as well as stakeholder priorities.
16. **Mainstream cross-cutting issues such as gender equality, inclusion, and climate action into the M&E framework**, enabling a more holistic assessment of outcomes and impacts.
17. **Develop guidance materials to ensure consistent quality and ownership in M&E implementation**, providing clear methodologies, roles, and processes to support effective monitoring, learning, and adaptive management.



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