



ARANGKADA PHILIPPINES

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TABLE OF CONTENTS

I. INTRODUCTION	4
II. TOURISM PERFORMANCE	5
III. THE APPROACH	7
IV. SUSTAINABLE AND INCLUSIVE TOURISM	7
1. Resource Management	8
2. Destination Stewardship	13
3. Workforce Development	14
V. SEAMLESS TRAVEL	15
1. Mobility Improvement	16
A. Transport Infrastructure	17
1) Air Infrastructure	17
2) Seaport Infrastructure	19
3) Land Transport Infrastructure	19
4) Inter-Modal/Multi-Modal Mobility	20
B. Travel Facilitation	21
1) Visa Facilitation	21
2) Border Control Services	23
3) Route Development	23
C. Electronic Mobility	23
2. Data Integration and Sharing	24
3. Workforce Readiness	26
VI. CONCLUSION	27
LIST OF ORGANIZATION ACRONYMS	28
BIBLIOGRAPHY	29
LAWS AND ISSUANCES	30
RESOURCES	30
ROUNDTABLE DISCUSSION PARTICIPANTS	31

LIST OF TABLES & FIGURES

Figure 1. United Nations Sustainable Development Goals	5
Table 1. Examples of sustainable and inclusive tourism projects in Asia	6
Table 2. Actionable items tracker	6
Table 3. Most and least important factors for growth of Philippine tourism	7
Figure 2. Priority strategic action areas for sustainable tourism	7
Table 4. Facts on environmental damage	8
Table 5. Overtourism beach destinations in Asia and South America	9
Table 6. UNESCO World Heritage sites in the Philippines	10
Table 7. Tourism laws	11
Table 8. Recommendations for resource management	12
Table 9. Recommendations for destination stewardship	13
Table 10. Recommendations for workforce development	14
Figure 3. Main points in a traveller's journey	15
Figure 4. Priority strategic action areas for seamless travel	15
Box 1. The seams and the seamless	16
Box 2. Seamless travel initiatives in the Philippines	16
Table 11. Developments in airport infrastructure	18
Box 3. Progress in global visa facilitation 2008-2018	21
Table 12. Countries with eVisa policies and systems	22
Table 13. Recommendations for mobility improvement	23
Box 4. Steps to file travel tax exemptions	25
Table 14. Recommendations for data integration and sharing	26
Table 15. Recommendations for workforce readiness	27

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A POLICY BRIEF ON TOURISM IN THE PHILIPPINES

I. INTRODUCTION

When published in December 2010, *Arangkada Philippines* included Tourism as one of the Seven Big Winner Sectors that formed the core of the 470-page document. The sector has not disappointed in terms of growth and should reach over 8 million international visitors in 2019, an annual growth rate above 10%.

Rather than updating the numerous recommendations in *Arangkada* and in a subsequent policy note, the *Arangkada Philippines* Project decided to produce a policy brief focused on two key aspects of the challenges for the country's tourism future. These are Sustainable and Inclusive Tourism and Seamless Travel. Two roundtables involving public and private sector stakeholders were held in May 2019 to discuss each of these key topics, and the policy brief is divided into discussion of the same two.

Tourism in the new millennium is regarded not only as a powerful economic activity but also as a vital force to alleviate poverty, protect the environment, preserve culture, and promote intercultural understanding.

In recent years, the World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC) have collaborated to become the industry's voice in advocating an important change in assessing performance of the global tourism industry. Both organizations encourage destinations to look beyond the normal measurement of tourism in terms of its economic value and to ascertain its invisible cost related to socio-

cultural and environmental dimensions of tourism growth.

Supporting this thrust, the UNWTO released a report that outlines tourism indicators that achieve sustainable development. The WTTC has published reports to address key challenges to growth, such as cities readiness, jobs for the future, talent management, and megatrends. The Organization for Economic Cooperation and Development, the Asia Pacific Economic Cooperation, and the Association of South East Asian Nations have each released publications that emphasize the vital role of tourism in global and national development agendas.

The objective of this policy brief is to assist the Philippine Government and its tourism stakeholders to take a fresh look at how to measure tourism growth in the era of digital information and increased globalization. The document encourages a change in mindset among policy makers, program implementers, and tourism enterprises. The current growth momentum of the sector must not just bring greater economic prosperity but should also contribute to achieving the UN Sustainable Development Goals (SDGs).

The policy brief also supports the unlearning-and-learning principle to allow a differentiated and holistic view of tourism growth. This puts emphasis on having a deeper understanding and meaning of how various data and research can be analyzed, correlated, and utilized to bring about better policies and programs. The key message is to view tourism not only as a purely economic activity but also as a significant force for positive change.

II. TOURISM PERFORMANCE

The global travel and tourism industry is widely recognized as one of the fastest growing economic sectors in the world. According to the UNWTO, in 2018, global tourism reached its 9th year of sustained growth. Export revenues from tourism of US\$ 1.7 trillion grew by 3.9%, faster than world merchandise exports as well as overall economic growth of 3.6%. The record of 1.4 billion international tourist arrivals, representing growth of 5%, was reached two years ahead of the UNWTO forecast. Even stronger growth rates occurred in the ASEAN region at 7% and in the Philippines at 7.7%.

The WTTC also reported that in 2018 the tourism sector had a 10.4% share of the global GDP or US\$ 8.8 trillion. In ASEAN, total visitor receipts estimated by the WTTC were US\$ 135 billion, while international visitor receipts in the Philippines amounted to US \$7.6 billion, which remains to be low compared to leading ASEAN destinations. Nonetheless, tourism provides an share of GDP in the country and accounts for 12.7% of Philippine GDP.¹

Tourism has contributed substantially to employment at the global and local level. The WTTC reported that tourism accounted for one in 10 jobs or 319 million jobs around the world. In the Philippines, the tourism sector contributed one in 8 jobs, or 5.4 million Filipinos employed in the industry. Additionally, the WTTC reports that one in every five new jobs was created by the tourism industry over the last five years. Even with technology replacing jobs, the industry will remain a strong contributor to job growth, compared to other industries that are declining in new job creation.

Tourism growth drivers in recent years include: (1) increasing global production, (2) an expanding middle class, especially in emerging countries, (3) advances in technology that facilitate the sourcing and flow of information, (4) greater affordability in travel costs brought about by competition, and (5) travel facilitation initiatives, particularly implementation of e-visas and visa on arrival policies.² Most of these are applicable to the Philippines. Another important driver for the country includes the increased priority that national and local governments are giving the tourism industry.

Figure 1: United Nations Sustainable Development Goals



Source: UNDP

In another noteworthy development in the global landscape, going beyond the economic valuation of tourism, policymakers and international organizations are redefining the industry model to measure the carbon footprint of the industry, its impact on poverty reduction, and its contribution to building pride of place and culture. These are embodied in the 17

1 PTSA, June 2019

2 UNWTO, 2019

SDGs adopted by all United Nations member states in 2015 as a universal call to action to end poverty, protect the planet, and ensure that all people enjoy peace and prosperity by 2030. These aspirations basically seek to “balance the

dimensions of economic growth, environmental sustainability, and social inclusion”.

Table 1 lists some successful cases on sustainable tourism efforts in Asia.

Table 1. Examples of sustainable tourism projects in Asia

Economy	Organization	Project	Highlights	Related SDGs
Viet Nam (Danang)	Danang City Government	Coastal Tourism: Promoting and Achieving Conservation, Economic, and Social Goals	Implemented coastal use zoning in line with planning and investment priorities for tourism development. Issued legislation for protection of coastal and marine resources. Rehabilitated coastal areas and maintained environmental quality http://pemsea.org/sites/default/files/KP%2013_0_0.pdf	SDG 14 – Life Below Water
Cambodia (Sihanouk)	Sihanouk Provincial Government	Participatory Beach Management for Improved Tourism	Engaged public and private sectors. Zoned beach area for primary and compatibility use. Identified opportunities for public and private sector shared investment. http://pemsea.org/sites/default/files/KP%209%20200116.pdf	SDG 14 – Life Below Water
Sri Lanka	Ceylon Chamber of Commerce	Greening Sri Lankan Hotels	Improved energy, water, and waste management systems, and reduced hotel operating costs. Developed online carbon footprint calculator for hotels. http://greeningsrilankahotels.org/	SDG 12 – Responsible Consumption and Production
Philippines (Palawan)	SME Hotels and Resorts and the Palawan Council for Sustainable Development	Zero Carbon Resort	Designed and constructed carbon neutral cottage. Reduced resource use and waste outputs. Developed indicators for energy and resource efficiency and integrated them into the monitoring system of the SEP for hotels, resorts, or other tourism projects. www.switch-asia.eu/projects/zcr-for-sustainable-tourism/	SDG 12 – Responsible Consumption and Production

Sources: PEMSEA and SWITCH-Asia- EU

In discussing the performance of Philippine tourism, Table 2 shows results of the survey and focus group discussion conducted among

industry stakeholders by the *Arangkada* Project to determine actionable items that have progressed the most and the least.

Table 2. Actionable items tracker

Rank	Most Improved	Least Improved
1	Visa policies	Technology use in ports outside Manila
2	Road infrastructure	Technology use to book tourism sites
3	Visa application	Technology support of MSMEs
4	Conservation program at facilities	Technology use in hospital documentation
5	Priority for tourism at national level	Custom policies
6	Conservation program at destination	Ease of importing materials
7	Technology use in immigration	Ease of securing permits
8	Airport facilities outside of NAIA	Level of priority for tourism research
9	Priority for tourism at the local level	Ease of hiring personnel
10	Security procedures	Ease of securing incentives

Table 3 shows a similar survey and focus group discussion conducted to determine what stakeholders consider the most and least important factors impacting the growth of

tourism in the Philippines. The table is divided into factors for (1) international travel and (2) domestic travel, since they are different markets.

Table 3: Most and least important factors for growth of Philippine tourism

	Rank	Most Important	Least Important
International Travel	1	Safety concerns	Transport costs from foreign markets to Philippines
	2	Health concerns	Seaport infrastructure in Manila
	3	Availability/quality tourism workforce	Availability of tour guides
	4	Road infrastructure	Immigration policies/procedures
	5	Travel advisories	Internationally accredited medical facilities
	6	Flights/seats to Manila	Customs policies and procedures
	7	Level of awareness about the Philippines	Transport costs within the Philippines
	8	Quality of accommodation	Airport taxes
	9	Accommodation availability	Tax refund
	10	Flights/seats to airports outside Manila	Communication barriers
Domestic Travel	1	Safety concerns	Availability and quality of tourist transport services
	2	Airport infrastructure outside of Manila	MICE facilities
	3	Road infrastructure	Health concerns
	4	Availability of flights/seats in Manila	Transport costs within the Philippines
	5	Airport infrastructure in Manila	Accommodation standards and accreditation
	6	Availability of tour activities	Availability and quality of medical facilities
	7	Accommodation availability	Seaport infrastructure outside of Manila
	8	Availability of quality tourism workforce	Seaport infrastructure in Manila
	9	Airline ticket prices	Airport taxes
	10	Availability of flights and/or seats in airports outside Manila	Availability of tour guides

III. THE APPROACH

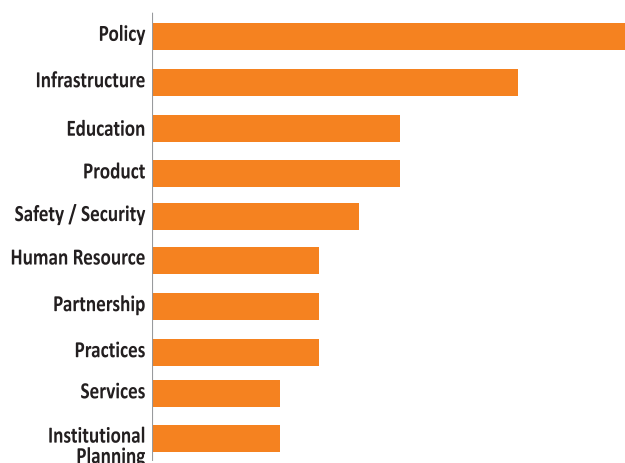
As an outcome of surveys and discussions, this policy brief is divided into two major sections: (1) Sustainable and Inclusive Tourism and (2) Seamless Travel. The section on Sustainable and Inclusive Tourism refers to recommendations that ensure the long-term viability of tourism by aligning with such guidelines as the UN SDGs, among others. The section on Seamless Travel refers to the continuous flow of tourism activity.

IV. SUSTAINABLE AND INCLUSIVE TOURISM

Ten priority strategic action areas that should be taken for sustainable and inclusive tourism

were identified in a survey undertaken for this policy brief. They are listed in Figure 2.

Figure 2. Priority strategic action areas for sustainable and inclusive tourism



Source: The Arangkada Philippines Project Survey (May 2019).

These action areas will be discussed under the three following categories: (1) resource management, (2) destination stewardship, and (3) workforce development.



Algae infested Boracay beach
Source: Vladimir Bunoan, ABS-CBN News

1. Resource management

The closure of Boracay to clean the island is a prime example of the pressure of a high volume of tourists on a beautiful natural environment ill-equipped and poorly-managed to accommodate visitors. To underline the importance of resource management, the partnership of the New Economic Foundation³ and Global Footprint Network⁴ has launched an annual campaign for the “Earth Overshoot Day.” This campaign is intended to increase awareness on human consumption of the earth’s resources vis-à-vis its ability to regenerate resources and how consumption is exceeding regeneration. For 2019, the campaign announced that the Earth Overshoot Day was July 29, two months earlier than in 2018. While this is just an approximation, it underlines

the danger of excessive human pressure on the resources of our planet and alerts us to everyone’s role in ensuring that these resources will be around for future generations. Accordingly, a calculator to learn one’s contribution to resource depletion is part of the #MoveTheDate campaign. National comparisons are also available on the website (<https://www.footprintnetwork.org/licenses/public-data-package-free/>).

Table 4 lists similar facts.

Table 4. Facts on environmental damage

Organization	Facts
World Economic Forum	<ol style="list-style-type: none"> 1. As the number of beachgoers increases, so does the use of sun protection products. 14,000 tons of toxic sunscreen make their way to the underwater world each year. 2. As many as 82,000 kinds of chemicals from personal care products end up in the ocean. By 2050 it is projected that 90% of the world’s coral reefs will die as ocean biodiversity is degraded due to tourism and human activities.
UN SDGs and World Bank	<ol style="list-style-type: none"> 1. Thirty percent of human carbon emission affect oceans, 40% of our oceans are polluted. 2. Eight million tons of plastic end up in the oceans annually. 3. Unmanaged production and consumption practices result in 1.3 billion tons of food being wasted yearly.

It is especially important for the tourism industry to promote a balance between economic growth and conservation objectives. Tourism development must respect the natural and cultural assets of

3 The New Economics Foundation is a British think-tank that promotes “social, economic and environmental justice.” (source Wikipedia).
 4 Global Footprint Network, founded in 2003, is an independent think tank originally based in the US, Belgium and Switzerland. It develops and promotes tools for advancing sustainability, including the ecological footprint and biocapacity, which measure the amount of resources we use and how much we have. These tools aim at bringing ecological limits to the center of decision-making. (source Wikipedia).

a destination. This attracts more quality visitors. Strict enforcement of existing policies and regulations is necessary to prevent further degradation of physical and socio-cultural attributes of an attraction.

The main obstacle for free, loose, and unfettered tourism development is the deficiency in carrying capacity which limits visitor growth and physical expansion.

Currently, there are no set guidelines in determining the carrying capacity of destinations. It is very important that policy makers and stakeholders formulate guidelines and criteria to better account for allowable tourist volume at major destinations.

Overcrowding is becoming a growing concern as a result of increasing mass tourism in several popular beach destinations in the Philippines, including Boracay, El Nido, Puerto Gallera, and Panglao.

A rigid planning process emphasizes the respect for time and space at a destination, to allow it to recover, breathe, and improve as more economic activities and facilities are introduced. Sadly, this is not happening in many destinations in the Philippines. An increase in the quantity of visitors does not necessarily translate to higher yield and greater revenue for local businesses and communities. More people and better development can even place more pressure for the use of limited and scarce resources, which may contribute to economic losses in the future.

Table 5. Overtourism beach destinations in Asia and South America

Country	Destination	Issue
Indonesia	Bali	<ul style="list-style-type: none"> • Uncontrolled development; large hotels and shopping malls continue to be built. • Congested roads and traffic; pollution in Denpasar. • Crowded beaches. • Insufficient garbage disposal and recycling in Kuta beach.
Philippines	El Nido, Palawan	<ul style="list-style-type: none"> • Rampant tourism development in the poblacion. • Not enough local food. • Mass conversion of farmland into resort sites. • No wastewater management system. • Sewage from hotels goes straight into ocean.
Thailand	Maya Bay, Koh Phi	<ul style="list-style-type: none"> • Hordes of tourists during mid-day, rowdy and drunk. • Widespread litter and garbage.
Vietnam	Halong Bay	<ul style="list-style-type: none"> • Irresponsible tour operators focused on profits. • A boat sank in 2011 killing 12 tourists. • Poorly managed tourism development.
Colombia	Cartagena	<ul style="list-style-type: none"> • Local beaches swamped with tourists; expensive for locals. • Prostitution catering to foreigners.

Source: Green Globe Travel



El Nido, Palawan
Source: Lonely Planet

The USAID website cited that the Philippine environment is faced with a serious degradation problem with significant loss of biodiversity assets, water and air pollution levels exceeding generally accepted healthy standards, and high greenhouse gas emissions due to increased forms of transport and power generation. The same source also mentioned that the country’s natural resources are one of the world’s most vulnerable to the impact of environmental disasters and climate change.⁵

The Partnerships in Environmental Management for the Seas of East Asia (PEMSEA) reported that the country’s ocean health index ranked 165th among 221 countries and territories in 2017.⁶ The growing population, fast urbanization, and unregulated development resulted in great amounts of waste and de-sludging of septic tanks that clog many waterways, as well as soil erosion, loss of wetlands, and sedimentation of rivers and streams.

PEMSEA cited that few local government units (LGUs) have established wastewater

systems. There are only 140 sanitary landfills covering 19% of LGUs, while 6,878 illegal dumpsites continue to proliferate. About 8 out of the 17 regions have 10-year Solid and Waste Management Plans. Pollution, over-development, carrying capacity, habitat destruction, and multiple-use conflicts affect coastal and marine tourism.

This challenge to the health of the country’s environment is not without corrective advocacy and programs. Efforts are being taken for better resource management in the country. For example, the Philippines already has six natural and cultural properties included in the UNESCO World Heritage List. Another 19 are in the tentative list for nomination. These properties are in various stages of study, documentation, and profiling. The UNESCO-Philippines, concerned LGUs, and the National Commission on Culture and the Arts (NCCA) are working closely together to accelerate the process.

Table 6. UNESCO World Heritage sites in the Philippines

UNESCO WORLD HERITAGE LIST (6)	
Year	Properties
Cultural (3)	
1999	Historic City of Vigan
1995	Rice Terraces of the Philippine Cordilleras
1993	Baroque Churches of the Philippines
Natural (3)	
2014	Mt. Hamiguitan Range Wildlife Sanctuary
2009/ 1993	Tubbataha Reef Natural Park
1999	Puerto Princesa Subterranean River Natural Park

5 <https://www.usaid.gov/philippines/energy-and-environment>

6 PEMSEA is a Philippine-based NGO. Recognizing the importance and urgency in addressing the environmental challenges and in moving toward sustainable development of the Seas of East Asia, the 2006 Haikou Partnership Agreement established PEMSEA as the region’s coordinating mechanism for the implementation the Sustainable Development Strategy for the Seas of East Asia (SDS-SEA). (www.pemsea.org)

TENTATIVE LIST (19)	
Year	Properties
2015	Mt. Mantalingahan Protected Landscape
2015	Mayon Volcano Natural Park
2015	Turtle Islands Wildlife Sanctuary
2006	The Tabon Cave Complex and all of Lipuun
2006	Kabayan Mummy Burial Caves
2006	Butuan Archeological Sites
2006	Mt. Pulag National Park
2006	Paleolithic Archeological Sites in Cagayan Valley
2006	Baroque Churches of the Philippines (Extension)
2006	Mt. Malindang Range Natural Park
2006	Chocolate Hills Natural Monument
2006	Apo Reef Natural Park
2006	Mt. Iglit-Bacao National Park
2006	Coron Island Natural Biotic Area
2006	El Nido-Taytay Managed Resource Protected Area
2006	Petroglyphs and Petrographs of the Philippines

Source: UNESCO

The Philippines is widely recognized as a center for both terrestrial and marine biodiversity. A large percentage of the world's fauna species - mammals (59%), birds (45%), reptiles (77%), and amphibians (81%) - are present in the country. The country's marine ecosystem is regarded as one of the richest, having been declared as the center for marine biodiversity. In terms of flora, about 60% of the world's plant variety is endemic, and there are 12 different forest formations prevalent throughout the three island clusters of Luzon, Visayas, and Mindanao.

Pursuant to the National Integrated Protected Areas System Act of 1992, 244 protected areas were proclaimed through various laws covering a land area of 7.76 million hectares. In 2017, about 1.4 million tourists visited these sites; domestic travellers were 92% of the total. The most visited areas are in NCR, Regions 1, 7, 12, and 13. These protected areas receive a small combined income of Php 63 million mainly through entrance and use of facility fees. (https://www.bmb.gov.ph/downloads/References/PA_Guidebook_Final.pdf)

The national government has also enacted several laws to ensure that the tourism sector is well-managed and plans are properly implemented. Table 7 describes three of the most relevant laws.

Table 7. Tourism laws

RA 10066, the National Heritage Act of 2009	<ul style="list-style-type: none"> Mandated the NCCA to establish a Philippine Registry of Cultural Property (PRECUP) 258 cultural properties are listed in the PRECUP The PRECUP guides land use planners, property owners, developers, tourism stakeholders, and educators to better understand the diverse national cultural heritage and facilitate the protection, preservation, and conservation of priceless cultural properties.
RA 9593, the Tourism Act of 2009	<ul style="list-style-type: none"> The Department of Tourism in accordance with RA 9593 undertakes various efforts to promote sustainable and responsible tourism. DOT developed a Tourism Guidebook for LGUs to assist in the preparation of local tourism plans. A National Tourism Development Plan (NTDP) was prepared for 2016-2022 highlighting activities to conserve the environment, preserve cultural assets, and create greater economic opportunities for local communities.
National Ecotourism Strategy for 2013-2022	<ul style="list-style-type: none"> Formulated towards a more responsive management of protected and critical habitats through planning, product development, standards, and training. Republic Act No. 10816 or the Farm Tourism Development Act promotes environment-friendly, efficient and sustainable farm tourism practices and activities for foreign and local tourists, while benefitting agricultural communities.

Table 8 contains four important recommendations to further improve tourism resource management, with suggestions for the agencies to be involved.

Table 8. Recommendations for resource management

Programs and Projects	Agencies
<p>A. Establish a destination management system to provide information on carrying capacity, land use, infrastructure, and planning.</p> <p>There is a need for a single source or repository of data and documents related to travel and tourism to bridge the gap for compiling information to help investors, businesses, and sales and marketing agents. The Tourism Knowledge Center under the Rajah Travel Corporation is an innovative endeavour that can help the industry secure and share data and information needed for destination planning, legislation, product development, and marketing.⁷</p> <p>Most tourism enterprises, especially the MSMEs, as well as site managers and administrators for museums, national parks, among others, need to harness the advancement in information, communication, and technology (ICT) to improve their business operation, reach more tourists, and collect systematic count of visitors, including vital data analytics and visitor profiles useful for marketing, designing new products, and planning for expansion. The www.visitfortsantiago.com microsite is an exemplary study for site administrators.</p> <p>In terms of data, emphasis must be given to pollution per capita, which needs to be monitored. There is limited data pertaining to 1) air and water quality, 2) amount of unwanted or unusable materials and substances generated, 3) tourism related crimes against tourists and locals, and 4) endangered flora and fauna exploited in destinations.</p>	<p>DOT, DENR, LGUs, Tourism Councils</p>
<p>B. Conduct comprehensive capacity building on sustainable and inclusive tourism for LGUs, NGAs, businesses and enterprises, and community organizations.</p> <p>There remains a substantial gap in the understanding, appreciation, application, and implementation of sustainable tourism programs at the national and local levels. While the DOT has tied-up with the United Nations Environment Programme, SWITCH Asia, and Global Sustainable Tourism Council to promote</p>	<p>DOT, DENR, DILG, Academe</p>

Programs and Projects	Agencies
<p>sustainable production and consumption through workshops and development of assessment tools, standards, and award system, there is also a need to monitor these programs to assess how these have improved LGU and business compliance.</p>	
<p>C. Invest in low carbon and resource efficient tourism infrastructure, such as waste treatment, water, power, among others.</p> <p>Growing piles of garbage, increase in algae in beach areas, flooding in major streets and coastal areas, power shortages, and water scarcity are the most common issues that confront major and upcoming tourism destinations.</p> <p>Currently there too is no proper monitoring and specific data on pollution per capita or - at the very least - plastic pollution per capita. Resource recovery, smart modern facilities, and new and clever management systems will be practical in addressing these concerns.</p> <p>It is very important to invest in these areas and to be proactive in addressing them and not wait until the problem becomes so great as to require extreme mitigation of the impact of tourism growth when visitor volume has reached unprecedented numbers, tourists complain, social and environmental problems escalate, and media and advocates decry its ill effects.</p>	<p>DOT, DILG, Private Sector</p>
<p>D. Integrate tourism in land use plans at the provincial and municipal/city levels.</p> <p>A tourism plan provides for proper zoning, designation of sites for accommodation, facilities, and activities, and identification of critical spots where strict protection and conservation must be enforced. The plan likewise identifies the infrastructure to support sustainable tourism growth, such as roads, airports, seaports, waste management and treatment facilities, water, power, and telecommunications. It also outlines the mechanism to protect the environment, preserve culture, and support micro, small, and medium-sized tourism enterprises.</p> <p>This should also take into consideration the identification of the country's natural assets and ensure that these are protected and preserved for their outstanding universal value before any other economic considerations.</p>	<p>DOT, DILG, HUDC</p>

⁷ The Tourism Knowledge Center partnered with the *Arangkada* Philippines Project to organize and conduct two roundtables with public and private sector stakeholders on May 10 and May 15, 2019 to discuss the challenges and solutions for the issues addressed in this policy brief. Further the authors of the policy brief are affiliated with the center.

2. Destination Stewardship

Destination stewardship is the heart and soul of the destination. As provided in RA 9593, national and local governments have a shared responsibility to ensure the holistic management of destinations. Better organizational collaboration, evidence-based legislation, and effective monitoring should be established.

RA 7160 or the Local Government Code mandated the LGUs to formulate local tourism development plans. However, only a handful of LGUs have prepared their tourism plans. Thus uncoordinated, unregulated, and uncontrolled tourism development especially in coastal and mountain areas has been the norm.

Those LGUs that do have tourism development plans in place have a poor record in executing their plans.

It is important as well to align local tourism development plans to the NTDP so that they are cohesive with national government goals. Further, the cluster approach in the NTDP encourages open and coordinated development of Tourism Development Areas. However, LGUs, national government agencies, and tourism enterprises continue to think in siloed terms rather than maximizing collaboration and partnership towards their greater and equal benefit.⁸

Most if not all LGUs and tourism businesses, in developing and marketing their tourist sites and products, do not regard their

neighbouring or adjacent tourist areas as partners in destination development. Based on the latest Philippine Tourism Satellite Account of the Philippine Statistics Authority, while foreign and domestic expenditure increased in 2018, growth rates for most major expenditure items declined. Foreign tourist spending on shopping decreased by 25%. The slowdown may be due to limited attractions, lack of souvenir and other products, and an inadequate menu of tourism activities.

Table 9 describes four important recommendations to further improve destination stewardship, with suggestions for the agencies to be involved.

Table 9. Recommendations for destination stewardship

Programs and Projects	Agencies
<p>A. Strengthen convergence on sustainable tourism at national and local levels. Following the Tourism Road and Infrastructure Program and Leveraging Infrastructure for Airport Development Program, the adoption of the Transforming Communities towards Resilient, Inclusive, and Sustainable Tourism Destination Program (TouRIST) by the national government <u>through a presidential executive order</u> will provide a strong signal towards directing national and local governments to fortify the current efforts towards safeguarding the natural and cultural resources, while at the same time rehabilitate and restore tourist destinations. This will also boost the shared responsibility as outlined in RA 9593 in the management of destinations.</p>	DOT, DILG, DENR
<p>B. Convene the regular or annual meeting of the TCC. The Tourism Coordinating Council (TCC)⁹ is the perfect platform to ensure coordinated and</p>	DOT

⁸ Siloing occurs when departments or management groups do not share information, goals, tools, priorities and processes with other departments. The silo mentality is believed to impact operations, reduce employee morale and may contribute to the overall failure of a company or its products and culture. (www.yourdictionary.com)

⁹ The TCC is a 25-member agency body created under the Tourism Act of 2009 to serve as the coordinating body for national tourism development efforts including the NTDP. Among its members are heads of concerned national agencies and government offices, DOT-attached agencies, non-governmental organizations and the Tourism Congress of the Philippines representing the private sector. (source Philippine Star, August 24, 2019).

Programs and Projects	Agencies
consistent efforts to promote efficient and effective destination management through sharing of common objectives on sustainable tourism and capacitating the local governments as stewards of the destination. The TCC can consistently monitor compliance with sustainable standards and encourage collaboration among stakeholders.	
<p>C. Promote sustainable consumption and production. Renewable sources of energy and more efficient production should be discussed, evaluated, regulated, and even incentivized.</p> <p>Data collection from enterprises and local governments is needed to better analyze, evaluate, and assess efforts to aid destination decision making.</p>	DOT, DENR, PCEPSDI
<p>D. Encourage innovation in the management of tourism enterprises to ensure competitiveness. National and local governments can implement incentive programs to boost the use of green technologies, practices, and products and services in the tourism industry. An award and labelling system can stimulate greater interest from enterprises, suppliers, and tourists to engage in sustainable tourism.</p>	DOT, DOST

3. Workforce Development

Job creation is the bottom line of inclusive tourism, and tourism in the Philippines is an enormously positive job creator. Tourism accounts for one in every 10 jobs across the economy. For every five new jobs, one job is due to tourism. While job titles may remain the same, evolving technology means the tasks performed are continuously being redefined. Development and transformation are key to consistently having a competent and professional workforce. It is essential that the workforce is prepared for future jobs through manpower planning, talent management, reskilling, and upskilling. At the same time, MSMEs must also be assured of support for their growth through innovation, technology, and capacity building.

Most importantly, through strong public-private partnerships (PPP), we share and learn to promote and implement green, sustainable, and environment-friendly practices.

Table 10 contains four important recommendations to further improve workforce development, with suggestions for the agencies to be involved.

Table 10. Recommendations for workforce development

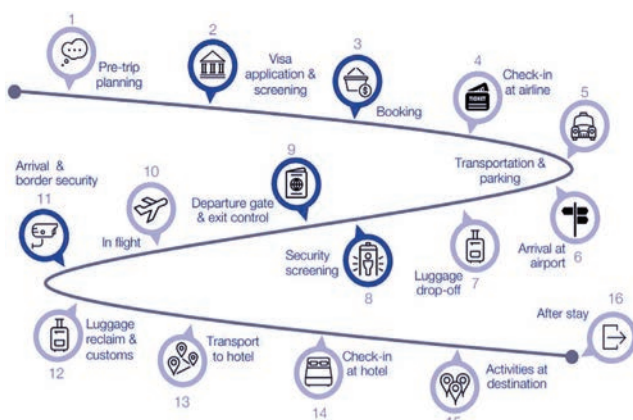
Programs and Projects	Agencies
<p>A. Conduct regular review of tourism and hospitality courses. As digital technology is shaping practices in the tourism industry, the skills and competences of the tourism workforce and allied workers would need re-alignment and re-focusing. Existing curriculum must be updated, training modules made relevant, and an industry-academe partnership must be harnessed. The link between K12 and higher education and training should be appraised to promote greater linkages and pathways for a tourism career.</p>	CHED, DOT, DOLE
<p>B. Institutionalize policies for the reskilling, upskilling, and training of tourism workforce for the future. The qualification framework for tourism education and training needs to be reviewed, assessed, and modernized as the tourism industry focuses on new skills relating to sustainable tourism and better management of destinations. Investment in re-tooling the competencies of current industry workers needs to be undertaken to ensure a holistic development and management of the destinations.</p>	DOT, TESDA, CHED, TIBFI
<p>C. Strengthen research and data monitoring on new skills and jobs for the future. A study to address skills development and mismatch throughout the tourism industry needs to be pursued to formulate progressive workforce policies. Furthermore, a tracker among graduates and professionals can be made to ascertain skills demand from the industry, re-evaluation of curriculum, and</p>	DOT, DOLE, TESDA

Programs and Projects	Agencies
development of new training modules to improve the capacity of workers.	
D. Strengthen industry, academe, and government linkages. To ensure high employability and workforce career development, tourism enterprises and education institutions need to have regular dialogue to discuss the skills set needs, work policy, and work environment. Re-integration of faculties and professors into the tourism workplace will be necessary towards their engagement with the students and updating their course outlines, methods, and delivery.	DOT, CHED, TESDA, TIBFI

V. SEAMLESS TRAVEL

This section considers the end-to-end journey of each traveler and how behavior and technology play a major role in whether the journey is smooth or stressful. The World Economic Forum (WEF) has identified 16 main steps in the traveller’s journey – from pre-trip planning to after-stay activities, five of which have been identified as causing the most aggravation including: (1) visa application and screening, (2) booking, (3) departure gate and exit control, (4) security screening, and (5) arrival and border security. Figure 3 shows all 16 steps from pre-trip planning to activities at destination.

Figure 3. Main Points in a Traveller’s Journey



Source: World Economic Forum, *The Known Traveller Unlocking the potential of digital identity for secure and seamless travel.*

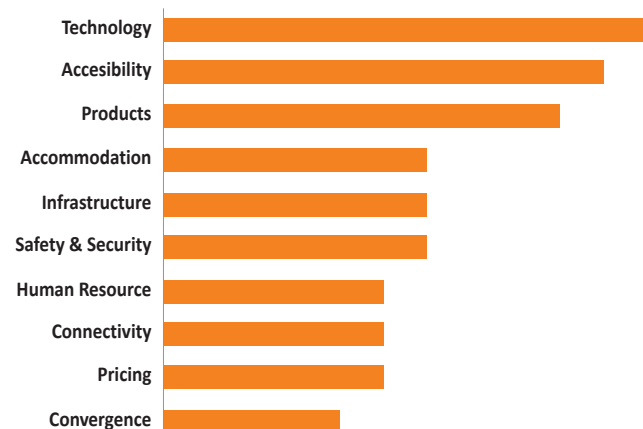
Equally important to improving the efficiency of each different step in a journey is that all that undergirds and operates in the background must be efficient and effective. For example, data necessary to make informed decisions must be present, which means essential training programs must be available and implemented. And IT hardware and networks must be affordable, modernized, efficient, and maintained to support processing and accessing the data.

To further analyze seamless travel, the survey and focus group discussions conducted in conjunction with the policy brief roundtables revealed 10 priority strategic action areas.



Fast and Seamless Travel program in Singapore Changi Airport
Source: Airline Passenger Experience Association (APEX)

Figure 4. Priority Strategic Action Areas for Seamless Travel



Source: The Arangkada Philippines Project Survey (May 2019).

Similar to the previous section, these priority action areas will be discussed in each of the three parts of this section: (1) mobility improvement, (2) data integration and sharing, and (3) workforce readiness.

1. Mobility Improvement

The movement, relationship, and interaction among functions, systems, and networks in the physical and virtual realm is key in having a smooth flow of travel.

Lifelong memories are not created when you repeatedly present travel documents, boarding passes, and booking confirmations numerous times to multiple stakeholders at different stages of a journey, as highlighted by the WTTC. Ideally travellers should be able to use a single ticket journey or door-to-door service by simply confirming their identities from booking their tickets to check-in at the airport and onward to their destinations. Increasingly, modern technology is making this ideal more and more possible.

There are quite a number of seamless travel initiatives happening worldwide. Some countries are good at providing seamless journey across transportation modes. Some destinations use technological solutions – biometrics, artificial intelligence, and blockchain technology - to fast track border control processes, provide security, and enhance customer experiences (see boxes 1 and 2 for examples).

Box 1. The seams and the seamless

Enhancing Airport Experience

- **Singapore Changi Airport.** The FAST initiative offers passengers self-service options at various stages of departure - check-in, bag drop, immigration, and

- **Dubai Airport.** Use of the eye iris for border clearance biometrics.
- **IATA's One ID.** IATA's One ID initiative seeks to introduce a streamlined, friction-free, and passenger-centric process that allows an individual to assert his identity, online or in person, to the required level at every process step in the end-to-end passenger journey, while maintaining the privacy of personal data. The concept relies on a single capture and controlled distribution of passenger data among the various stakeholders on an authorized-to-know basis.
- **Known Traveler Digital Identity.** Vision-Box and partners have signed an agreement to launch the "Known Traveler Digital Identity service, which will facilitate paperless border clearance between Canada and The Netherlands. The Known Traveller Digital Identity project is a World Economic Forum initiative that brings together a global consortium of individuals, governments, authorities, and the travel industry to enhance security in world travel. In January 2018, the governments of Canada and the Netherlands committed to piloting the concept in an international cross-border context in collaboration with Air Canada, KLM Royal Dutch Airlines, Amsterdam Airport Schiphol, Toronto Pearson International Airport, and Montréal-Trudeau International Airport.

Enhancing Destination Experience

Fly and Ride. Partnership between airlines and land transport providers that is meant to provide customers with seamless travel experiences when traveling to the airport in some countries, As part of the partnership, both parties may integrate their mobile apps, allowing airline customers to book rides days prior to their scheduled flight.

Here are some seamless travel initiatives being implemented in the Philippines:

Box 2: Seamless travel initiatives in the Philippines

- Unified toll collection system ensures seamless travel for motorists.
- Inclusion of travel taxes and terminal fees in airline tickets, other discounts.
- Integration between transport modes. Philippine Airlines is venturing into ferry services through its subsidiary Mabuhay Maritime Express, giving tourists an option to travel from Kalibo, Aklan straight to Boracay Island.
- Using RORO, travellers can now move from Luzon by bus to another area in Visayas or Mindanao by buying

tickets and reserving seats online. Such is the case for transport service consolidators www.pinoctravel.com.ph or www.biyaheroes.com. Biyaheroes has 30 partner bus and sea transport companies.

- Consolidators/Integrators: These companies coordinate the various providers along the traveller's journey with its products i.e. flights, flights + hotel, airport transfers, and experience using 15 payment partners – both online and offline partners. The airlines also provide some level of consolidation through their offers of accommodation.

A. Transport infrastructure

The most obvious and critical for mobility is transport infrastructure - air, sea, land and their combinations (inter-modal/multi-modal), along with the efficient and effective management and regulation of these.



Developments in airport infrastructure
Clockwise from top-left: Proposed Bulacan airport; New Clark International Airport terminal building perspective; Mactan-Cebu International Airport Terminal 2 perspective; Bohol-Panglao Airport
Sources: San Miguel Corporation; BUDJI+ROYAL Architecture+Design; Megawide website; Good News Pilipinas

1) Air Infrastructure

As an archipelagic destination, the Philippine tourism industry heavily depends on air travel to secure tourism market access, particularly overseas. More than 95% of international tourists

entered the country by air in 2018, a decrease from 99% due to the increase of cruise passenger arrivals.

Over the years, the number of incoming air seats has greatly increased as a result of liberalized air policies, especially for secondary destinations. The DOT recognized that improved access stimulated growth in passenger traffic at 10%, higher than the 6.3% growth for international passenger traffic in Southeast Asia during the same period.

In 2018, the Philippines welcomed 40 new international flights mounted by both foreign and local carriers in Australia, China, Japan, Hong Kong, Macau, South Korea, and Taiwan, producing a total of 1.6 million new international air seats to the Philippines. Other drivers of this growth include (1) rapid expansion of low cost carriers (LCCs), particularly Cebu Pacific, (2) higher utilization of secondary airports i.e. Cebu, Clark, Davao, Iloilo, and Kalibo for new flights to and from highly travelled routes such as Hong Kong, Incheon, and Singapore, and (3) conversion of charter flights (introduced under CAB Resolution 23 s. 2005) in Clark and Kalibo into regular scheduled commercial services.

Consequent to growing tourist arrival volume is corresponding airport development. The NTDP 2016-2022 advocates the expansion and improvement of international airport gateways and domestic airports that support the tourism value proposition of destinations. As of October 2019, airport projects have been completed in Bohol, Cebu, and Palawan to provide better

convenience among the travellers. Table 11 maps out these completed as well as ongoing projects under the Build, Build, Build program.

However, the table also demonstrates the length of time it has taken to proceed with these improvements.

Table 11. Developments in airport infrastructure

Airport	Milestones	
<p>Clark International Airport Hybrid PPP</p> <ul style="list-style-type: none"> The new passenger terminal will accommodate additional 8 million passengers, increasing operational capacity to 12.2 million passengers annually. A second runway will be built, per DOTr 	<p>First proposed</p> <p>NEDA Board approved</p> <p>Award of construction contract to GMR-Megawide Consortium</p> <p>Implementation</p> <p>O&M awarded to North Luzon Airport Consortium</p> <p>O&M consortium take-over</p> <p>Target completion</p>	<p>Ramos administration (1992-1998)</p> <p>June 2017</p> <p>December 2017</p> <p>2017-2020</p> <p>December 2018</p> <p>August 2019</p> <p>2020</p>
<p>New Manila International Airport (NMIA) unsolicited PPP</p> <ul style="list-style-type: none"> Signing of contract between DOTr and San Miguel Corporation September 2019 to develop of a Php 735 billion NMIA. NMIA will accommodate 100 million passengers annually. 	<p>San Miguel Infrastructure submits unsolicited proposal to DOTr</p> <p>Original proponent status awarded by DOTr</p> <p>Approved by NEDA Board December 2018</p> <p>Invitation for comparative proposals (Swiss challenge)</p> <p>Deadline for Swiss challenge expired with no competing bids</p> <p>Notice to proceed with project</p>	<p>2016</p> <p>October 2017</p> <p>December 2018</p> <p>April 2019</p> <p>July 2019</p> <p>September 2019</p>
<p>Ninoy Aquino International Airport unsolicited PPP</p> <ul style="list-style-type: none"> Upgrade, rehabilitation, and expansion of NAIA by improving and expanding the terminals in the current NAIA land area and developing additional runway, taxiways and passenger terminals. 	<p>Original proponent status awarded by DOTr and MIAA</p> <p>Approved by Neda-ICC</p> <p>Target completion of review process and Swiss challenge</p>	<p>September 2018</p> <p>September 2019</p> <p>end-2019</p>
<p>Puerto Princesa Airport Korea ODA</p> <ul style="list-style-type: none"> The new passenger terminal expands airport capacity from 350,000 passengers to 1.9 million passengers annually. 	<p>Opening of construction bids</p> <p>Notice of award</p> <p>Contract Signing</p> <p>Notice to proceed issuance</p> <p>Implementation period</p> <p>Completion</p>	<p>October 2013</p> <p>May 2014</p> <p>May 2014</p> <p>June 2014</p> <p>August 2014 - January 2017</p> <p>May 2017</p>
<p>Mactan-Cebu Airport solicited PPP</p> <ul style="list-style-type: none"> The new passenger terminal (PTB) expands capacity of the Mactan-Cebu International Airport from 4.5 million to 12.5 million passengers annually. The concessionaire proposes to build a second runway and 3rd terminal. 	<p>Procurement of PPP concessioner</p> <p>Submission and opening of qualification documents</p> <p>Award of contract to GMR Infrastructure and Megawide Consortium</p> <p>Start of civil works/groundbreaking</p> <p>Inauguration of new PTB</p>	<p>December 2012-13</p> <p>November 2013</p> <p>April 2014</p> <p>June 2015</p> <p>June 2018</p>
<p>New Bohol Panglao Airport Japan ODA</p> <ul style="list-style-type: none"> New airport It can accommodate 2 million passengers annually 	<p>Submission and opening of construction bids</p> <p>Award of contract</p> <p>Start of civil works</p> <p>Completion of construction</p> <p>Inauguration of new airport</p>	<p>June 2014</p> <p>March 2015</p> <p>June 2015</p> <p>June 2018</p> <p>November 2018</p>

Airport	Milestones	
<p>Davao Airport unsolicited PPP</p> <ul style="list-style-type: none"> • The original proponent status was granted to Chelsea Logistics Holdings. • Project covers operation, maintenance, and expansion of the airport. • Concession period is 30 years. 	<p>Original proponent status awarded by DOTR Approved by NEDA-ICC Implementation</p>	<p>September 2018 September 2019 2019-2025</p>

2) Seaport Infrastructure

Implementation of the national cruise tourism strategy focuses on key ports of call that cruise lines determined were ready for marketing and promotions. These are Boracay, Manila, and Puerto Princesa, belonging to the so-called “Turquoise Triangle.” The development of cruise tourism has triggered improvement programs for some ports of the country. The Philippine Ports Authority is receiving appropriated funds to improve the cruise ports of Coron, Currimao, Iloilo, Salomague, and Tagbilaran to support the targets of the national cruise tourism strategy.

Inter-island connections are primarily served by motorized boats (especially to connect over short travel distances), fast craft vessels, and RORO ships. About 14 companies provide inter-island connectivity across the archipelago. 2Go and Ocean Jet account for 39% of the total schedules published. Some routes continue to be monopolized. Terminal facilities need improvement.

While the infrastructure is being readied, there are still issues with acquiring permits to dock and similar requirements, that need to be addressed.

3) Land transport infrastructure

In 2018, the Philippine government through the Department of Public Works and Highways (DPWH) was appropriated Php 31 billion to improve roads in support of tourism under the DOT-DPWH Tourism Road Infrastructure Program convergence project. In 2019, the budget was less than in the prior year at Php 17 billion but still substantial. Direct benefits for tourists include reduced travel times and faster mobility. The improved roads also facilitate the mobility of local residents for their regular activities – schooling, work, etc. Likewise, development of integrated bus terminals for provincial transport is expected to improve the travel experience of both passengers and tourists, particularly individual travellers who seek to experience how locals live.

RA 11311, also known as “An Act to Improve Land Transportation Terminals, Stations, Stops, Rest Areas and Roll-On / Roll-Off Terminals,” requires land transport terminals, stopovers, rest areas, as well as RORO terminals to improve their facilities. This includes better sanitary facilities, designated lactation stations, and Wi-Fi access for passengers, all free of charge.

Apart from this, traffic management systems are discontinuous and do not allow fluidity of travel. Technology is available and recommended to be adopted across several localities to more effectively manage the flow of traffic. LGU ordinances are also inconsistent from one locality to the next, thereby creating confusion rather than order.

Coinciding with road improvements, softscape infrastructure is also vital to make travel safe, secure, and satisfying. More clean rest areas/stops are needed, especially outside metropolitan areas. Other elements include drainage systems and proper road maintenance to be done by local government units for local roads.

4) Inter-modal/multi-modal mobility

Seamless travel is challenged by the pursuit of commercial interests of individual businesses along a traveler's journey that are not coordinated to produce mutual benefits. Providers focus on their own offerings while coordination is left to others. Coordination failure exists but also provides opportunity for global companies to solve the failure by interacting with multiple providers – big and small – to achieve scale and scope. Such is the approach taken by coordinators or integrators such as Traveloka, Klook, among others. However, these coordinators are still unable to link various transportation modes in one platform. For example, a traveler still has to shift platforms to book fast craft tickets between destinations.

As part of product development initiatives, the NTDP 2016-2022 aims to pursue development of tourism circuits and corridors by linking tourism development areas via road and sea connectivity (if applicable) emphasizing existing public transport routes linking tourism sites, urban service centers, and accommodation facilities of varying categories. The concept is to develop Tourism Circuit Development Task Forces comprised of DOT, DPWH, and DILG to establish 6 preliminary tourism circuit trunk routes (Northern Luzon, Southern Luzon, East-Center Visayas, West-Center Visayas, Northern Mindanao, and Southern Mindanao) and eventually to expand these task forces to include transport companies, petrol companies, automobile and biking associations and to map out tour itineraries. This proposal requires interchange within transportation modes and/or across transportation modes. Without the aid of ICT and an integrator, these interchanges generate transfer penalties making the cost of travel high – in terms of money, time, labor, discomfort, and inconvenience, as the traveller transfers from one vehicle to another between the same or different modes. Any reduction in the various costs of these interchanges leads to an increasingly seamless journey.

Such circuits, to be successful, will need scale and the support of ICT infrastructure that allows tourists to search information, book, and pay for the transactions with minimal or zero pain. Coordination failure risks exist at each of the steps due to the number of players operating across the traveller's journey requiring coordination. A coordinator is essential for seamless travel.

B. Travel facilitation

Travel facilitation is a broad term that defines all services and facilities related to getting the potential visitor from his point of origin to his destination. Already a global agenda item, several international organizations have issued declarations reflecting a goal of their members to cooperate in removing barriers to mobility in order to harness better the economic potentials of tourism.

The Philippine tourism industry has placed travel facilitation at the heart of the NTDP implementation, focusing on three major elements namely: (1) visa facilitation, (2) border control services, and (3) route development.



Philippine visa extension sticker
Source: Visa Traveller

1) Visa facilitation.

While visa policies across states vary depending on how each state exercises its sovereignty in restricting entry of foreign nationals, several nations are slowly implementing more liberal policies due to technology improvements. Some nationals enjoy visa-free status, while 15% can enter destinations using visa on arrival policies. Based on visa policies of the

ASEAN member states in 2013, out of the 89 million tourists expected to travel to ASEAN destinations in 2013, only 9.7% or 8.6 million would need to obtain a traditional visa. From 2013 to 2018, e-visas and visa on arrival were introduced by ASEAN destinations to facilitate tourism growth.

Case studies show substantial and, in some cases, very significant increases in visitation when visa related policies and processes are improved. Box 3 shows progress in visa policies in the last 10 years and some notable impacts.

Box 3. Progress in global visa facilitation 2008-2018

2008-2013

Improvements of visa requirements were made in 5,930 destination-source market country pairs between 2010 and 2013. A total of 44 destinations significantly facilitated the visa process for citizens of 20 or more countries between 2010 and 2013, by changing their visa policies from “Visa required” to either “eVisa,” “Visa on arrival,” or “no Visa required.”

- Destinations, when reviewing their visa policies, tended to thoroughly review and introduce changes. Out of the 5,930 total improvements, 5,180 were done by those countries that changed their visa policies significantly.
- The most popular facilitation measure was the introduction of “Visa on arrival.” Nearly 60% of all improvements done between 2010 and 2013 were from “Visa required” to “Visa on arrival.” Table 12 maps out the initiatives of some countries particularly those in ASEAN in this area.
- The reason for this remarkable and substantial improvement to facilitation between 2010 and 2013 was the determined action taken by governments.

2013 to 2018

From 2013 to 2018, an additional list of countries, particularly in Asia, liberalized their visa policies by introducing visa on arrival and/or eVisa, shifting from single entry to multiple entry visa, increasing the period of visa validity, and expanding the list of vassa-free nationalities. However, in 2018 half of the world population still needed a traditional visa.

As mentioned above, the more popular visa reform came in the form of eVisa and visa on arrival as in the case of most ASEAN economies:

Philippine Case. The Philippines grants visa-free entry to 157 nationalities for maximum of 30 days, from 21 days prior to the issuance of Department of Foreign Affairs Foreign Service Circular No. 95-2014 and EO No. 408.

Two major source markets, China and India, are currently excluded from the existing policy. These are the second and tenth largest source markets for tourism based on January–June 2019 data of international tourist arrivals. The Philippine government has granted visa-free entry to the Philippines to Indian nationals with valid and current American, Japanese, Australian, Canadian, Schengen, Singapore, or United Kingdom visa or permanent residence permit. In the case of the China market, the visa on arrival policy applies as described in Table 12.

ASEAN Common Visa. In line with the ASEAN Tourism Strategic Action Plan 2016-2025, the Philippines supports the ASEAN Common Visa initiative.

Except for the Philippines, all ASEAN countries provide eVisa facilities to grant visa prior to arrival or to support visa on arrival for citizens of some countries not currently granted visa free entry.

It is important to note that the Bureau of Immigration, its structure, and most policies are still governed by CA 613 or the Immigration Law of 1940. Thus, the agency and its structure are poorly equipped to respond to the dynamic changes in global travel and tourism brought about by advancements in technology.

Table 12. Countries with eVisa policies and systems

	Features	Validity	Cost
Cambodia	EVisa also available on iOS and Android.	Valid for 30 days	US\$30 visa fee + \$6 processing fee
Egypt	EVisa for citizens from 46 countries across Europe, Asia, and Australasia. At least seven days in advance of departure.	EVisas valid for maximum of 3 months.	A single-entry tourist visa costs US\$ 25 while multiple-entry tourist visas costs \$60 payable by credit or debit card.
Indonesia	EVisa on arrival in Indonesia at 20 airports and 23 seaports for citizens of 61 countries	Valid for 30 days only, can be extended only for another 30 days	USD \$35 for visa on arrival (cash only) Extension of stay for up to 30 days = US\$ 35
Malaysia	EVisa for citizens of China, India, Sri Lanka, Nepal, Myanmar Bangladesh, Pakistan, Bhutan, Serbia, Montenegro.	EVisa valid for 3 months up to a maximum of 30 days for each visit in Malaysia.	US\$ 45 for single or multiple entry. Additionally, there is a service fee of US\$ 35 for standard processing.
Thailand	EVisa on arrival facility available for nationals of 18 countries at 24 designated international entry points	15 days	2,000 Thai baht credit/debit card or WeChat or Alipay.
Vietnam	Transit eVisa Tourist eVisa Business eVisa for 80 countries and 33 ports of entry in Vietnam	Valid for maximum of 30 days, single entry.	EVisa fee is paid via electronic payment gateway as prescribed by Immigration Department. Fee varies depending on type of visa, validity
Philippines	No eVisa Facility Visa upon arrival program for Chinese nationals arriving in NAIA, Clark, Mactan-Cebu, and Kalibo and ports of Caticlan, Laoag, Manila, Puerto Princesa, and Subic	Initial authorized stay of 30 days with extension up to maximum period of six months.	Each visa cost US\$25

2) Border control services

The Bureau of Immigration has installed 21 E-gates in arrival areas of 3 NAIA terminals, and the Clark, Davao, and Mactan-Cebu airports to facilitate faster immigration processing. The E-Gates enhance the agency's security capability through additional security checks, facial recognition, biometric scanning, bar code reader, and smart card recognition rolled into one system. Philippine passport holders are the major beneficiaries of the E-gates intended to reduce processing time from 45 seconds to 8 to 15 seconds only. E-gates are also installed in departure areas of NAIA Terminal 2.

3) Route development

This program is intended to further reduce the general costs of travel to the Philippines and decongest the NAIA by inviting and incentivizing carriers to provide direct flights to airports outside of NAIA. The NTDP 2016-2022 advocates for the provision of airport-related incentives to support the development of charter flights. In other countries, the incentives programs are time-bound and performance-based. Currently, the

Mactan-Cebu Airport Corporation and Clark International Airport Corporation provide incentive schemes to airlines.

C. Electronic mobility

A large number of destination facilities are unable to secure broader tourism market access due to poor internet connection at their destination. Accommodation units, especially SMEs in the countryside, lack strong online and mobile platforms.

Seamless travel also includes easy payment for goods and services. Adaption of electronic payments by most establishments in the Philippines is relatively low, especially outside metropolitan areas. Availability of banks and financial institutions and even foreign exchange dealers in these areas is limited. Having a wide acceptance of e-payments provides several benefits including economies of scale, greater transparency, and security. More initiatives towards this are essential to reap higher economic benefits as sales grow with higher levels of effective consumption of goods and services.

Table 13 provides 15 recommendations to be undertaken for mobility improvement:

Table 13. Recommendations for mobility improvement

Programs and Projects	Agencies
<p>A. Legislation to separate conflicting functions of transport agencies. This involves:</p> <ul style="list-style-type: none"> (1) creation of the Philippine Transportation Safety Board for independent investigations and promotion of safety across transportation modes, (2) amendment of the Civil Aviation Authority of the Philippines Act to strengthen regulatory and oversight functions, (3) creation of a national airport authority to handle all commercial and developmental functions, and (4) amendment of the Philippine Ports Authority charter to shift its regulatory functions to a new agency with Marina 	DOTr, Houses of Congress
<p>B. Develop common transport terminal facilities close to airports and seaports.</p>	DOTr, PPA, Private Sector

Programs and Projects	Agencies
C. Sustain the development of airport infrastructure , prioritizing the night rating of airports to aid decongestion of NAIA and study the proposal to grant conditional incentive programs for the development of new routes especially in secondary airports.	DOTr
D. Upgrade of sea vessels to promote safety of passengers.	DOTr
E. Improve monitoring of licenses for all types of transport.	MARINA
F. Lift moratorium and open new franchises for transport buses.	LTFRB
G. Adopt low carbon and resource efficient transport (e-vehicles).	DOTr, LTO, DOT, LGUs
H. Expand options of travelers and provision of softscape infrastructure to enhance mobility and sustain investments in product development programs particularly tourism circuits within TDAs and across TDAs to enhance tourism experience in the Philippines.	DICT, DOT, DPWH, LGUs
I. Adopt 24/7 operation of all major airports, seaports, and transport terminals.	DOTr, Airport Authorities, BI,
J. Amend the 1940 Immigration Act to professionalize and make the organization responsive to needs of the State for border protection, while at the same time enabling the growth of tourism and investment.	BOC, DOH, Private Sector BI, Houses of Congress
K. Improve quality of passports.	DFA
L. Increase bilateral and multi-lateral agreements on visa relaxation and adoption of common visa (e.g. ASEAN).	DFA, DOT, BI, NSC

2. Data integration and sharing

As the WTTC envisions, a Seamless Traveller Journey is one where travelers need not present the same documents at multiple parts of their journey. To make this possible, data sharing is essential. Ideally, a traveller’s data should be safely stored in one central system that all relevant government agencies and stakeholders can access in a secure manner. This will entail that the data storage system has integrity and possible data breaches are minimized.

The use of biometric technology is one of the most common practices in the implementation of seamless travel. When airports, airlines, and border control collaborate, the time for the passenger journey can be reduced by a third. Self-check-in kiosks at airport terminals and enrollment at home through a mobile app are examples of employing biometric-enabled self-service.

Heathrow Airport in London plans to deploy facial recognition biometrics at multiple stages of the passenger journey through the airport. This includes check-in, bag drop, and boarding. Facial biometrics are more accurate than manual checks. It also offers increased security and potential to allow for greater personalization of passenger services.

Dublin Airport in Ireland already uses integrated data and advanced analytics to improve accuracy of forecasts, enable predictive security screening, reduce the risks of flight delays, and help transfer passengers to connect with their flights.

Technology needed to deliver truly connected traveler experience is already available. The challenge will be how both the private and public sectors will employ these available technologies to provide travelers a truly seamless journey.



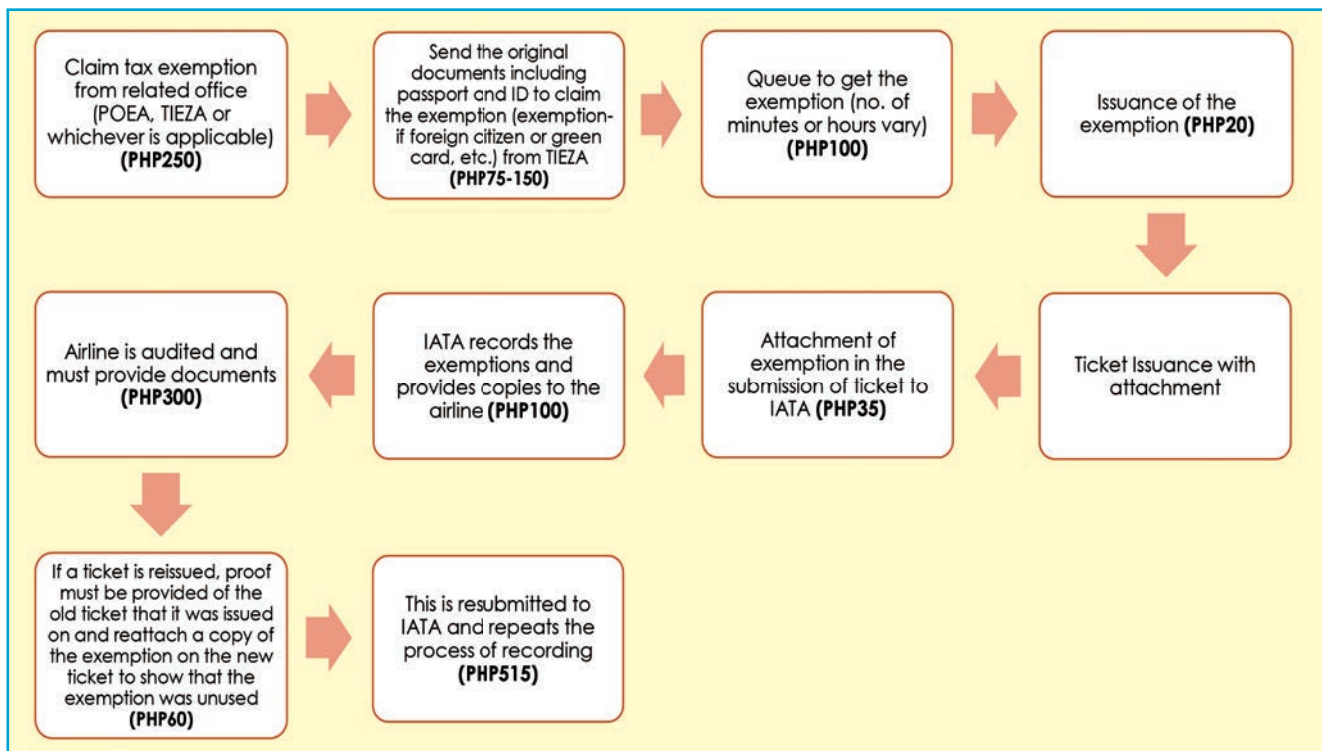
It's more fun in the Philippines logo
Source: DOT

Digital technology has shifted current promotions and marketing programs from traditional norms, such as travel fairs, brochures, and print materials, to direct and interactive customer centric modes. This is exemplified by some ASEAN countries minimizing their attendance

at trade events but engaging themselves in increased multimedia and digital promotions.

An integrated processing of travel tax exemption will be crucial to increase the mobility of Filipinos for outbound travel. At present, a minimum of 10-15 steps need to be hurdled by a traveler or travel agency to secure the appropriate exemption from the authorized government agencies. The constraint does not include hours spent to procure the exemption. An average of Php 1,455 would be spent for a single transaction which is more or less similar to the travel tax being paid.

Box 4. Steps to file travel tax exemptions



Recording and maintaining historic data is also vital for disaster risk reduction management, resource efficiency, and trend monitoring. Attention to data gathering in various dimensions needs to

be established and institutionalized.

Table 14 offers 6 recommendations related to data integration and sharing.

Table 14. Recommendations for data integration and sharing

Programs and Projects	Agencies
A. Integrate data gathering protocols at various levels of government and move to almost real-time levels of reporting.	All
B. Promote the use of technology for better data management and facilitate business transactions.	DOTr, DICT, NPC, DOT
C. Implement the Advance Passenger Information System (APIS) that will allow for transmission of necessary data elements of a traveller in advance of arrival of an aircraft or ship to the destination state for proper clearance or vetting especially for immigration and border control purposes.	BI, DOT, DFA
D. Implement reforms in visa processing for foreign tourists, such as eVisa and third party processing agent through streamlining and enhancement of visa processing, including simplified procedures, shorter and/or translated application forms, consistent implementation of regulations, online application, automated and/or faster processing, improved customer service and capacity at consulates, outsourcing, and mobile biometric capture. If an entry visa cannot be avoided, eVisa is the option preferred over the traditional paper visa. It can be more easily obtained and requires neither the physical presence of the applicant nor the presence of the passport. These considerations are especially important for destinations without a widespread network of embassies and consulates.	DFA
E. Implement reforms in the Travel Tax through process simplification to address the efficient processing of Travel Tax payment and administration of exemptions and audit of airlines. In the short term, the amendment or abolition of RA 1478 on Travel Tax is necessary in compliance with RA 9593 and the ASEAN Agreement, and possibly adoption of better fee imposition that will support the development and promotion of Philippine tourism.	TIEZA, DOT, BI, Congress, Private Sector (airlines)
F. Enhance current tourism marketing and branding activities taking stock of big data, digital penetration, and multimedia platforms.	DOT, TPB, LGUs, Private Sector



NAIA immigration e-gates
Source: The Philippine Star

3. Workforce readiness

Technology is fast changing the rules of the game in the transportation and allied services of the tourism industry. To promote seamless travel, the sector

and its workforce need to adapt to a new paradigm of work efficiency, delivery, and preparedness to provide the utmost quality and total visitor experience.

While the workforce was previously discussed under the section on sustainability, this portion discusses the need for the right balance of manpower and technology that would ensure a sufficient supply to handle the influx of tourists.

More so, if there is a forecast of growth of tourists, there should be a measurement of productivity to estimate the needs of the destination.

Table 15 provides 4 recommendations related to workforce readiness:

Table 15. Recommendations for workforce readiness

Programs and Projects	Agencies
A. Ensure that technology across education institutions is updated and kept relevant to better prepare the future workforce in the tourism and hospitality industry.	CHED, DOT, DOLE
B. Embark on a comprehensive study of the impact of technology and innovation on the tourism industry as guidepost for manpower planning and formulation of curriculum.	DOT, TESDA, CHED, TIBFI
C. Identify critical jobs which skills and competencies can be immediately developed, most especially in new and emerging forms of tourism activities.	DOT, DOLE, TESDA
D. Strengthen industry, academe, and government linkages.	DOT, CHED, TESDA, TIBFI

VI. CONCLUSION

Philippine tourism, in line with global trends, is expected to sustain its positive growth path as domestic tourism and international visitor volume continue to expand, new markets are developed, more diverse products introduced, and new destinations unveiled. National and local policies should not hinder growth but rather nurture and facilitate progress towards achieving the vision in the NTDP.

Throughout this policy brief we have argued for respecting the precious environment of the country's many premier current and future tourist destinations from the negative impact of more tourists than they are equipped to handle. They must be better equipped in a sustainable and inclusive manner to avoid more damage to prime destinations.

We have argued for using technology, data, coordination of public and private sectors,

and proposed a series of reforms to facilitate seamless travel in the future.

To achieve a progressive tourism industry, policy makers and program implementers need to harmonize and work within the various ecosystems prevailing at each destination, including urbanization, overbuilding, and crowding out at destinations, greater use of renewable energy, and development of intelligent land use.

Our goal is to best ascertain and then implement sustainable, inclusive, resilient, seamless, and competitive growth for the future.

Relatedly, national and local authorities should formulate, implement, and assess policies that stimulate innovation through use of digital technology, investing in low carbon infrastructure through public financing and incentives, and raise resource efficiency through agenda setting and governance.

LIST OF ORGANIZATION ACRONYMS

ASEAN	Association of Southeast Asian Nations	NMIA	New Manila International Airport
BI	Bureau of Immigration	NPC	National Privacy Commission
BOC	Bureau of Customs	NSC	National Security Council
CHED	Commission on Higher Education	PCEPSDI	Philippine Center for Environmental Protection and Sustainable Development, Inc.
DENR	Department of Environment and Natural Resources	PEMSEA	Partnerships in Environmental Management for the Seas of East Asia
DFA	Department of Foreign Affairs	PRECUP	Philippine Registry of Cultural Property
DICT	Department of Information and Communications Technology	TCC	Tourism Coordinating Council
DILG	Department of Interior and Local Government	TESDA	Technical Education and Skills Development Authority
DOH	Department of Health	TIBFI	Tourism Industry Board Foundation Inc.
DOLE	Department of Labor and Employment	TIEZA	Tourism Infrastructure and Enterprise Zone Authority
DOT	Department of Tourism	TPB	Tourism Promotions Board
DOTr	Department of Transportation	UNESCO	United Nations Educational, Scientific, and Cultural Organization
DPWH	Department of Public Works and Highways	UNWTO	United Nations World Tourism Organization
GSTC	Global Sustainable Tourism Council	USAID	United States Agency for International Development
HUDC	Housing and Urban Development Company	WEF	World Economic Forum
IATA	International Air Transport Association	WTTC	World Travel and Tourism Council
LTO	Land Transportation Office		
LTFRB	Land Transportation Franchising and Regulatory Board		
MARINA	Maritime Industry Authority		
NCAA	National Commission on Culture and the Arts		

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UNESCO website - <https://en.unesco.org/>

LIST OF PARTICIPANTS AT ROUNDTABLE DISCUSSIONS ON TOURISM IN THE PHILIPPINES

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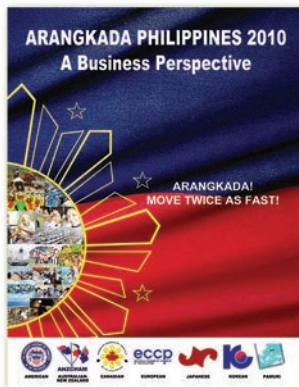
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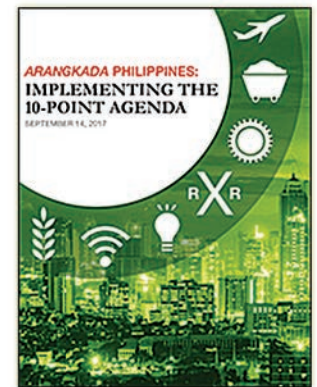
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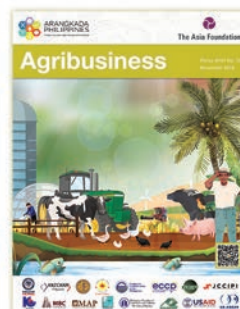
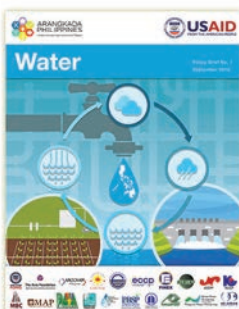
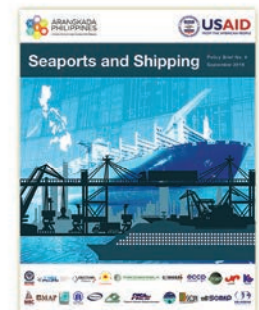
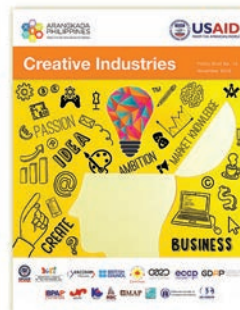
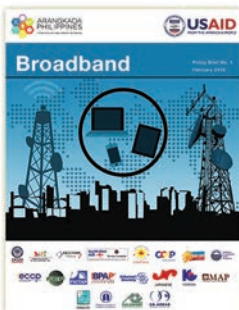
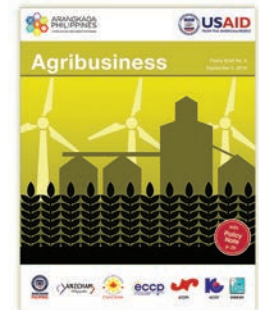


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