Feasibility Study on Southeast Asia Distance Learning Program in Tourism
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Jakarta, Indonesia
2019
FOREWORD

Southeast Asia, an interesting sub-region of Asia continent, is a group of growing nations developing very rapidly in many sectors, including tourism. There are eleven independent countries in Southeast Asia region which has its own enchantment, and blessed with natural flora and fauna. The region is covered with dense jungle, beautiful beaches, and has so many incredible wildlife.

The significance of regional tourism to the Southeast Asia nations is on the rise in recent decades as a development tool at regional and local level. Tourism plays an important role to the regional economic development of Southeast Asian countries. Even most of the countries are heavily rely on tourism for their economies.

As ASEAN countries are in the era of free flow of skilled labor, under the umbrella of the Mutual Recognition Arrangement (MRA), the Tourism sector is considered one of the most ready sectors to face the ASEAN-MRA. It is proven by the availability of the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP), the CATC and the Regional Qualifications Framework and Skills Recognition System (RQFSRS) as the key resources to support MRA framework.

In this case, SEAMEO Regional Open Learning Centre (SEAMOLEC) which focuses in Open and Distance Learning (ODL) considered distance learning approach can be applied to enhance workforce competencies in this area with its ideal attribute in flexibility of learning, especially in several Southeast Asia countries by utilizing the potential area in Common ASEAN Curriculum for Tourism (CATC).

To find out the possibility of conducting a distance learning programme in the tourism sector, SEAMEO SEAMOLEC conducted feasibility study in 6 (six) countries of South Asia; Cambodia, Indonesia, Lao PDR, Philippines, Thailand and Timor Leste. This study aimed to find out the possibility of implementing ODL programme in tourism sector.
I am gladly presenting this book of Report of Feasibility Study: The Use of Distance Learning by Application of Common ASEAN Tourism Curriculum (CATC) Toolboxes in Southeast Asia (Case Study: Cambodia, Indonesia, Lao PDR, Philippines, Thailand, and Timor Leste). Now turn the pages and hopefully you will find the contents in this book as informative, interesting, and educational.

Jakarta, Indonesia

Dr. Alpha Amirrachman
Director, SEAMEO SEAMOLEC
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INTRODUCTION

I. Background and Justification

1. ASEAN countries are in the era of free flow of skilled labour. Under the umbrella of the Mutual Recognition Arrangement (MRA), it is started by understanding the linkages between National Qualification Framework (NQF) and ASEAN Qualification Reference Framework (AQRF) at the skills level. The Tourism sector is the readiest sector to face the ASEAN-MRA. It is proved by the availability of the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP), the Common ASEAN Tourism Curriculum (CATC) and the Regional Qualifications Framework and Skills Recognition System (RQFSRS) as the key resources to support MRA framework. Mutual Recognition Arrangement on Tourism Professional (MRA-TP) that was signed on 2012 and adopted by the ASEAN Tourism Ministers (ATM) is a key of ASEAN tourism initiative to support the establishment of the ASEAN Economic Community.

2. To answer the need of the region in term of capacity building to prepare tourism professionals, distance learning could be seen as one approach that is possibly used during education and trainings. Blended learning as combination between face-to-face tutorials and independent learning could be conducted for workers in tourism sector to improve their knowledges and skills to be ready in the era of free movement of skilled labor. Those workers will get the flexibility in term of time and places to do the learning process without neglecting their jobs. Indeed, the availability of ICT infrastructure will give advance access for them to the learning resources and assistances, but the availability of printed materials and face-to-face tutorials will also support them.
3. To seek possibility on conducting distance learning program for tourism sector by utilization of CATC and RQFSRS, SEAMOLEC as SEAMEO regional centre focusing on open and distance learning, would like to conduct Feasibility Study on Southeast Asia Distance Learning Program in Tourism. This initiative was raised and endorsed during 17th SEAMEO Centre Directors Meeting (CDM) and 40th SEAMEO High Officials Meetings (HOM) in 2017. By conducting this study, SEAMOLEC would like to identify the needs and recommendation for further implementation of this program by conducting meetings with related ministries, schools and hospitality industries.

II. Objectives

The main objective of the feasibility study is to formulate recommendation on the possible implementation of distance learning model in tourism. In detail, the objectives are to:

- Explore and gather information related but not limited to current TVET system and status of CATC implementation in Southeast Asia.
- Seek opportunity for cooperation with educational institutions in Southeast Asia to develop and support open and distance learning implementation.
- Draft a report on the recommendation implementation of distance learning model in tourism.

III. Activities Conducted

Cambodia

Time: 12 – 15 November 2018

Delegation team:
1. D. Bagiono
2. Dona Octanary

Visited Institutions:
1. Embassy of the Republic Indonesia in Cambodia
2. Ministry of Labour and Vocational Training
3. Ministry of Tourism
4. ASEAN Affairs
5. SEAMEO TED
List of Meetings:

1. Embassy of the Republic Indonesia in Cambodia
   - HE Sudirman Haseng, Ambassador
   - Mrs. Made Santi Ratnasari, First Secretary
2. Ministry of Labour and Vocational Training
   - Chan Pheakdey, Deputy Director
3. Ministry of Tourism
   - Mr Try Chhiv, Deputy Director General of Tourism, Director of NCTP Secretariat
   - Dr Chuob Ratana, Chef of Assessment and Recognition of the National and ASEAN TP’s
   - Dr Ith Sreykeo, Deputy Head of Standard and Assessment Division
4. ASEAN Affairs
   - Dr. Bun Rour, Deputy Director of ASEAN Affair Department,
   - Khim Chakriya, Vice Head Office of Vocational Orientation Department
5. SEAMEO TED
   - Dr. Doung Vuth, Director of SEAMEO TED

**Indonesia**

Feasibility study report of distance learning in Tourism for Indonesia is written by SEAMOLEC 2018 research grant receiver, Ir. Suroono. M.Phil, former member of Indonesian TPCB.
Lao PDR

Time : 19 – 22 November 2018
Delegation team :
1. Ilham Penta Priyadi
2. Cahya Kusuma Ratih

Visited Institutions:
1. Institute of Mass Media, Culture and Tourism (IMCT)
2. Department of Technical and Vocational Education, Ministry of Education and Sports (MoES)
3. Pakpasak Technical College
4. Lao National Institute of Tourism and Hospitality (LANITH)
5. Department of Tourism, National University of Lao (NUOL)
6. SEAMEO Community Education Development (CED)
7. External Relations Department, Ministry of Education and Sports Lao PDR

List of Meetings :
1. Institute of Mass Media, Culture and Tourism (IMCT)
   • Darany Phommavongsa (Deputy Director)
   • Phouthone Dalalom (Deputy Director of Hospitality and Tourism Training Division)
2. Department of Technical and Vocational Education, Ministry of Education and Sports (MoES)
   • Somlith Virivong, Deputy Director General of TVET Laos
3. Pakpasak Technical College
   • Duangdy Siribang, Direktur of Department Planning and Cooperation
   • Khampeu Vongsipasom, Deputy Director of Pakpasak Technical College
4. Lao National Institute of Tourism and Hospitality (LANITH)
5. Department of Tourism, National University of Lao (NUOL)
6. SEAMEO Community Education Development (CED)
   • Dr Silinthone Sacklokham, CED Director
7. External Relations Department, Ministry of Education and Sports Lao PDR
   • Mrs. Nouamkham Chanthabouly, Deputy Director General
   • Mrs. Vonevilayhong Thayarath, Deputy Head, Multilateral Cooperation Division

Philippines

Time : 19 – 22 November 2018

Delegation team :
1. Prakaikan Schneitz
2. Arie Susanty
3. Dona Octanary

Visited Institutions:
1. Technical Education and Skills Development Authority (TESDA)
2. Lyceum of the Philippines University

List of Meetings :
1. Technical Education and Skills Development Authority (TESDA)
   • Maria Susan P. Dela Rama, Executive Director, Technical Education and Skills Development Authority (TESDA)
   • Nelly Nita N. Dillera, CESO III, Director, DOT Office of Industry Manpower Development
   • Hessel A. Larcia, Local Chapter President Peninsula Employees Union
   • Paul L. So, Managing Director, Phillipine Travel Agencies Association
2. Lyceum of the Philippines University
   • MA. Christina G. Aquino, Executive Director, Department of Linkages and Standards, Lyceum of the Philippines University
   • Beth Aragon, Dean, College of International Tourism and Hospitality Management, Lyceum of the Philippines University
Thailand

Time : 12 – 15 November* and 7 December 2018**

Delegation team :
1. Prakaikan Scneitz*, **
2. Cahya Kusuma Ratih*, **
3. Aggry Tiharapitra*

Visited Institutions :
1. The Institute for the Promotion of Teaching Science and Technology (IPST)
2. Teachers Council of Thailand
4. Bureau of Vocational Educational Standards and Qualification, Office of the Vocational Education and Training, Ministry of Education Thailand**

List of Meetings :
1. The Institute for the Promotion of Teaching Science and Technology (IPST)
   - Dr. Samart Kongtaweelert- Director of Network and teaching professional development
   - Kanyanat Sawadsawang- Educator Teacher Professional Department
   - Yoottanun Harnarong- Educational Technology
   - Ms. Benjaporn Wattanawaha-Learning Inovation Unit
   - Phenprapa Suetrong- International Relations Officer
   - Nanyarat Wichitpattakarn- International Relations Officer
2. Teachers Council of Thailand
   - Dr. Tinsiri Siribodhi- Deputy Secretary General
   - Miss Angkana- Education Officer
   - Miss Yupadee Rungrueng- Education Officer
• Chantana Potikruprasent- Don Muang Technical College
• Mr. Surachai Preetong- Deputy Director of Kanchanaphisek Technical College Mahanakorn
• Miss Natthanan Benchakul- Kanchanaphisek Technical College Mahanakorn
• Miss Chantana Mecsap- Kanchanaphisek Technical College Mahanakorn
• Miss Yaowapa Srijabok- Minburi Technical College

4. Bureau of Vocational Educational Standards and Qualification, Office of the Vocational Education and Training, Ministry of Education Thailand**

• Ms. Chuenjit Oktun

Timor Leste

| Time |  : 5-8 November 2018 |
| Delegation team |
| 1. Yoni Utomo |
| 2. D. Bagiono |
| 3. Aggry Tiharapitra |

Visited Institutions |

1. National Labour Force Development Institute (INDMO)
3. Human Capital Development Fund (FDCH)
4. The National Centre for Employment and Professional Training of Tibar (CNEFP)
5. East Timor Institute of Business
6. Parlemento Nacional, Democratic Republic of Timor-leste
7. Joao Saldanha University
8. Former Minister of Tourism, Mr Manual Vong
9. Ministry of Higher Education and Culture
10. Indonesian Embassy in Dili
List of Meetings:

1. National Labour Force Development Institute (INDMO) & SEFOPE
   - Dr. Juliao di Silva, Secretary
   - Dr. Paulo A.-DE, PFOPG
   - Dr. Isabel F. de Lima, National Director
   - Dr. Azevedo Marcel, Chief Advisor
   - Dr. Igino Ferreira, National Director F.P
   - Dr. Leonor Bernando, Chief Department of Vocational Training

   - Chan Pheakdey, Deputy Director

3. Human Capital Development Fund (FDCH)
   - Cecilia Assis, Director

4. The National Centre for Employment and Professional Training of Tibar (CNEFP)
   - Dr. Ismenio Martin da Silva, Executive Secretary
   - Dr. Leila Carceres, Coordinator administration
   - Dr. Flemeno R.d.s. Lay, Coordinator Planning Research
   - Dr. Maria Rosa S. Pinto, Chief Dept. Planning Monitoring & Verification

5. East Timor Institute of Business
   - Mr. Simao Tito Bareto, Director
   - Mr. Natalino Leite, Technic Pedagogic
   - Mr. Feliciano Alres, Training Coordinator

6. Parlemento Nacional, Democratic Republic of Timor-leste
   - Dr. Avarow Siaros, Rector
   - Dr. Rui Felix B. Ximenes, Dean of Hotel and Tourism
   - Dr. Antonis S. Martius, Dean of ICT
   - Dr. Adel C.E Xioneras, Vice Chairman of the Foundation
7. *Joao Saldanha University*
   - Dr. Isabel Maria Ximenes, Secretary of the Parliament

8. *Former Minister of Tourism, Mr Manual Vong*
   - Dr. Joaõ Saldanha
   - Dr. Yohanes Usboko, Dean Academic Affairs

9. *Ministry of Higher Education and Culture*
   - Dr. Manual Vong

10. *Indonesian Embassy in Dili*
    - H.E. Sahat Sitorus, Ambassador of the Republic of Indonesia, Timor Leste
    - Dr. Sedercor Melatunan- Attaché, Education and Culture
    - Mr. Vanda - PBI Program Director
CHAPTER 1: PROFILE OF TOURISM SECTOR

Cambodia, formerly the Khmer Empire, is located at the southern region of the Indochina Peninsula in Southeast Asia. Cambodia is currently the 69th most populous country in the world with an estimated 2018 population of 16.25 million, an increase from 2013’s estimation of 14.9 million. Cambodia has an estimated population of 16.25 million, up from the official 2008 census population of 13.38 million. Cambodia has a population density of 82 people per square kilometer (212/square mile), which ranks 118th in the world. The total surface area of Cambodia is at 181,035 square kilometers.
1.1 Economic Conditions and Contribution of Hospitality Industry

Cambodia GDP growth eased to 6.8 percent in 2017 from 7 percent in 2016. Cambodia therefore bucked the regional trend, as most developing countries in East Asia experienced a growth acceleration in 2017. Following some moderation during the first half of 2017, textile and apparel exports rebounded. The tourism and agriculture sectors experienced initial recovery in the last few years after facing gradual moderation. Growth is projected to remain robust, expanding at 6.9 percent in 2018. Downside risks to the outlook include erosion of export competitiveness due to rapidly rising real wages, a buildup of vulnerabilities from a prolonged real estate and construction boom, potential election-related uncertainty, and periodic jolts to the international trade order in the form of protectionism and escalating trade disputes.

The recovery of the tourism sector, which started early last year continued unabated. Underpinned largely by arrivals from China, growth in total tourist arrivals for 2017 reached 5.6 million or 11.8 percent, up from 5.0 percent in 2016. Importantly, tourist arrivals by air have increased significantly, rising by 22.5 percent.

Agriculture, including fishing and forestry, employs approximately 55% of the population. Rice and rubber are the main export crops. Large tracts of cultivatable land are devoted to growing rice and since most villages are close to a water source, fishing is also an important activity. Income is supplemented by raising livestock and growing fruit and vegetables. Production has been hampered by a number of factors including: lack of irrigation, fertilisers and pest control; land-mining of farmland; and flooding.
1.2 Economic Conditions and Contribution of Hospitality Industry

Cambodia has the highest labor force participation rate in the Southeast Asia/Pacific region, with 82.7 percent of the working population aged 16-64 employed or seeking employment. Cambodia’s working-age population is growing faster than its total population — 2.4 percent compared to 1.9 percent over 2007–2015. This is different to many Asian states. It is a good position to be in because it is an opportunity for economic growth. Cambodia adds an average 164,000 people to its labor force each year.

Unemployment is less than one percent and youth unemployment 1.6 percent. Both of these figures are the lowest in the Asia/Pacific region. (The labor force participation rate and unemployment rate do not add to 100 percent.) The biggest change in the labor sector by far has been the decline in the number of people working in agriculture. An Agriculture Ministry study released in June 2017 states that around 80 percent of the population worked in agriculture in 1993, but by 2017 the figure had halved to 40 percent. The fall is comparable with what happened in other Asian countries such as Thailand (77 percent down to 32 percent) and the Philippines (56 percent down to 29 percent). The fall is the result of the move to larger-scale commercial farming, machinery replacing labor, and diversification in the wider economy.

Since 2012, non-agricultural sectors such as services and industry have been the main source of job growth. The percentage of people who are wage or salaried workers (employees) grew from 29.8 percent in 2010 to 48.9 percent in 2014. By contrast, ‘contributing family workers’ fell from 19.4 percent to 3.6 percent over the same period.

In 2015, garment and footwear manufacturing accounted for 7.3 percent of total employment and the construction sector, 6.5 percent.
A Ministry of Tourism official announced that the country would need an additional 200,000 trained tourism professionals if it was to fulfil its target of receiving 7 million international tourists a year by 2020. The assessment of the industry’s needs was announced at a workshop held at the headquarters for the National Olympic Committee of Cambodia. Presently there are 620,000 Cambodians working in the tourism sector who facilitated the 4.8 million international arrivals in 2015.

1.3 Current Situation of Hospitality Industry

Tourism in Cambodia has been greatly increasing in recent years. According to Tong Khon, the country’s minister of tourism, the number of foreign tourists visiting Cambodia in the first nine months of 2010 was 1.8 million, increasing nearly 15 percent compared to the previous year. In the first nine months of the year, more than 400,000 travelers arrived via flights to Phnom Penh International Airport and nearly 500,000 to Siem Reap Airport—increases of 11 percent and 17 percent from 2009, respectively.

CHAPTER 2: CAMBODIA EDUCATION AND VOCATIONAL EDUCATION

The Cambodian formal education structure consists of three years of pre-school education, six years of primary school (grades 1-6), three years of lower-secondary school (grades 7-9), and three years of upper secondary school (grades 10-12). The Education Law adopted in 2007 highlights that the education system also includes two other approaches to learning: non-formal and informal. Lifelong education is encouraged in Cambodia so that its citizens can upgrade the knowledge and skills they need to enhance creativity, productivity, and professional development. Those who drop out of school without completion of the relevant education level still have the opportunity to attend non-formal literacy and
life-skills programs, thus making it possible for them to enroll in vocational training programs offered by various institutions. After completing nine years of basic education, students can either continue to upper secondary education or enter secondary-level vocational training programs. After completing upper secondary education, students may either enroll in university or enter vocational training. Teachers for Cambodian schools are trained either at the National Institute of Education (for upper secondary school teachers), six regional Teacher Training Centers (for lower secondary school teachers), 18 provincial Teacher Training Centers (for primary school teachers), and one pre-school Teacher Training Center.

**Fact of Cambodia Education**

- 4,014 state preschools with 5,084 staffs & 190,158 students
- 7,144 primary schools with 46,149 teachers & 2,022,061 students
- 1,245 lower.sec schools with 28,782 teachers & 585,971 students.
- 486 upper.sec schools with 12,625 teachers & 279,479 students.
- Net enrollment in primary education (2016-2017): 97.7% (lower than target 99.00%)
- Dropout rate (2015-2016): 4.6% (primary edu.), 17.0% (low.Sec) & 19.4% (upper.Sec)
- 121 higher education institutions including 73 are belong to MoEYS (13 state Universities)

Technical and vocational education and training policy vision is to improve people’s livelihood and dignity and to enhance Cambodia’s human resources with knowledge, competency, skills, working attitudes, professional ethics, productivity, and competitiveness for lifelong employability.

Cambodian formal education system including general education and TVET is shown on this diagram.
CHAPTER 3: CURRENT IMPLEMENTATION OF MUTUAL RECOGNITION ARRANGEMENT ON TOURISM PROFESSIONALS (MRA-TP).

Cambodia began applying the ASEAN competency standards and curriculum since 2011, following the signing of the MRA on Tourism Professionals. It began with little or no enabling infrastructure. In just two years, Cambodia has set-up the necessary laws, regulations and required infrastructure, and has been disseminating MRA materials to its 11 VET institutions, industry and key development partners. It has kept pace with the rollout of ASEAN regional resources and training.

In 2011, Cambodia started to establish tourism infrastructure, namely the NTPB (known as National Committee for Tourism Professionals/NCTP with accompanying laws and regulations) and its website (for uploading ASEAN materials and workshop updates, but also as a precursor to/model for an ATPRS – that will support future plans for a Regional Secretariat). It also created a manual, CD and printed versions for the ACCSTP and CATC material (including translations into Khmer): a case study in good practice. To drive awareness of the MRA i.e. ACCSTP and CATC, NCTP has distributed translated materials to training providers, both public-private sectors, and has also held eight workshops in 2012 in four key regions, reaching close to 2,000 people. NCTP’s proactive approach to and engagement with development partners has helped to sustain MRA implementation. Partners such as ILO, SNV and ADB have assisted in applying and rolling out the ACCSTP and CATC. Support from training institutions has also been a key ingredient in Cambodia’s implementation of MRA regional resources. For example, PSE Institute and Sala Bai have been enthusiastic in applying the ACCSTP and CAT. The Secretariat of NCTP is led by Mr. TRY Chhiv, Deputy Director General of Tourism.
Currently Cambodia has 30 ASEAN Master Trainers (MT) and Master Assessors (MA) that distributed in 6 labor division as below:

1. 6 MT/MA for Housekeeping
2. 4 MT/MA for Food Production
3. 5 MT/MA for Front Office
4. 5 MT/MA for Food and Beverage
5. 4 MT/MA for Travel Agencies Division
6. 6 MT/MA for Tour Operation Division

Cambodia also has 600 national master trainers and master assessors.

During the visit, it was identified 10 vocational schools in Cambodia that already implement CATC. Those schools are:

1. ATP School of Hospitality and Tourism
2. Cambodia Tourism and Hospitality School
3. Academy of Culinary Art (ACAC)
4. EGBOK Mission
5. Salabai Hotel School
6. ASEAN Tourism Professionals Consultant
7. Donbosco Hotel and Tourism School
8. Siem Reap Regional TVET Institute
9. NAGA Acedamy
10. Le Tonle Training Center

CHAPTER 4: SUPPORT FOR DISTANCE LEARNING

4.1 Access to ICT devices and Internet

As various forms of ICT (ranging from the Internet and computers to television, radio, video, and mobile telephones) become increasingly accessible and interactive, their role at all levels of education is likely to be all the more significant in making educational outcomes relevant to the labor market, in revolutionizing educational content and delivery, and in fostering “information literacy”. During the
last few years, the Ministry has also developed the use of computers to maintain the vast amount of data that is required to manage its operations. Five key areas have been computerized through an Education Management Information System (EMIS), a Human Resources Management Information System (HRMIS), and a Non-Formal Management Information System (NFMIS), a Financial Management Information System (FMIS), and a Higher Education Information Management System (HEMIS). These systems are independent and maintained by their respective departments. The curriculum for Teacher Training Centers has included training on ICT for all teachers since 2003, but a lack of appropriate equipment has made this training possible only in a few centers. A number of schools received donations of computers and training directly from NGOs and development partners during the last decade. In preparation for the execution of this Master Plan, the Open Schools Program – started in 2007 - has produced textbooks for the ICT “life skill” course (an introduction to ICT provided in grade 10 using Khmer-language software), trained teachers, and worked with the Ministry’s partners to standardize a training course in the use of computers in upper secondary schools.

Current Situation

Data derived from indicators on the current level of use of ICT in Education in Cambodia – a result of the baseline study on ICT in education undertaken in 2009 by the Open Schools Program – is the starting point for this Master Plan. As normal at the early stage of ICT development, the use of computers at MoEYS started independently in the departments that could no longer work without them and also in schools which received donations of computers. The Ministry has now entered a new stage during which ICT policy and management are being more clearly defined, thereby standardizing the use of ICT to make it more efficient for both student training and administration. Development partners and the private sector have been asked to work with the Ministry in the framework of this Plan, which already includes the ICT projects of development partners active at this time and which will guide new programs and joint ventures in the future. One of the major barriers to the use of ICT in Education – the cost of connectivity for education administration as well as for educational purposes – was overcome in 2009 by a private sector donation from Viettel which agreed, at no cost, to permanently connect all administrative offices of the Ministry as well as all public schools, universities, and Teacher Training Centers with access to electricity.

4.2 ICT in Education

Policy for ICT in education focuses on four main areas:

1. The first area is provide access to ICT for all teachers and students, especially at secondary level, ensuring that ICT is used as an enabler to reduce the digital gap between Cambodian schools and other schools in neighbouring countries.

2. The second area emphasizes the role and function of ICT in education as a teaching and learning tool in different subjects, and as a subject by itself. Access to information on the Internet
and increased communication, via email, between schools and individuals can play an important role in the professional development of educators. In addition to radio and television as a teaching and learning tool, this policy stresses the use of the computer for accessing information, knowledge, skills, and communication.

3. The third area is to promote education for all regardless of age, gender, ethnicity, disability or location through distance education and self-learning, especially for deprived children, youth and adults who lack access to basic education, literacy and skill training, by integrating ICT with radio, television, printed materials and other media.

4. The fourth area emphasizes using ICT to increase productivity, efficiency and effectiveness of education management. Through the use of information management systems, ICT will be extensively used to automate and mechanise work such as the processing of student and teacher records, communication between government and schools, lesson planning, assessment and testing, financial management and the maintenance of inventories.

For TVET, ICT-based Professional Skills courses is for grade 10 (as a life skills course) and for grades 11 and 12 as part of the Elective Vocational Training Program (EVEP). The competencies learned (also known as “21st century skills”) will include understanding of, and communication in, the workplace, including skills in administrative assistant tasks (drafting letters, filing, scheduling, communicating, searching for information, preparing budgets). From a more technical standpoint, students will learn how to use Khmer-language computer tools, including a word processor, a spreadsheet manager, a presentation tool, an e-mail program, and an Internet browser. The above mentioned EVEP course is integrated into the curriculum and piloted starting in 2010-2011. For 10th grade the course will remain a more basic life skill, but schools will be authorized to use teaching hours as if it were a curriculum course. Teachers of ICT-based Professional Skills Starting in 2009-2010, the National Institute of Education will train all Math, Physics, English, Economics and Agriculture teachers also as ICT teachers as a second subject. As a result, 40% of all new teachers will be prepared to teach ICT in their schools. All Teacher Training Centers in which computers are available, all pre-service teachers will receive specific training on ICT-based professional competences for teachers, including both educational and administrative tasks. New curricula will be developed for all Teacher Training Centers during the 2009-2010 academic year.

CHAPTER 5: CONCLUSION

- Tourism is one out of four pillars of Cambodian economic growth.
- Started on 2011, Cambodia applying ASEAN Competency standard and curriculum. The National Committee for Tourism Professionals (NCTP) is actively disseminate it as well as conduct various trainings. There are 30 ASEAN Master Trainers and Assessors and around 600 national trainers and assessors.
• TVET Institutes are actively participated also in the CATC implementation. There are 10 institutes that have been identified as implementor of CATC.

• TVET teachers and students started on 2010 is already equipped with the basic ICT skills. With this competency and availability of ICT infrastructures at schools will be main support for TVET institutes to joint online learning

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COUNTRY REPORT: INDONESIA

Reported by: Ir. Surono, M.Phil, surono.ckp@gmail.com

CHAPTER 1 (INTRODUCTION) : COUNTRY PROFILE OF TOURISM INDUSTRY

Indonesian tourism has now become one of the largest economic sectors and has the fastest growth rate and is one of the main sources of national income. Through foreign exchange receipts, the creation of jobs and business opportunities, and infrastructure development make tourism one of the key drivers of a country’s socio-economic progress. However, addressing tourism is not an easy thing because tourism is not a stand-alone sector. Tourism development involves almost all economic sectors both tourism characteristic industries, such as hotels and restaurants, and industries that at first glance are not directly related to the tourism industry, but some of the demand comes from tourism (tourism connected industries) such as business transportation and banking. The number of industries that are related and receive the impact of tourism activities is very large. The inter-sectoral tourism linkages will become a supporting link for moving forward national development.

The government has established tourism as a leading sector in national development. The government hopes that tourism can be a driver of growth in other economic sectors while at the same time increasing community welfare. Through promotions intensified coupled with improved services, and supported by the improved security situation, the number of foreign tourist arrivals is expected to increase. In 2016 the number of foreign tourist visits reached 11.52 million visits, up 10.70 percent compared to the number of visits the previous year1.

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To ensure that tourism programs are successful, the determining factors are tourism human resources that are competent and continue to follow and adapt to technological developments such as developments in the industrial era 4.0. Tourism HR is a factor that greatly determines the success of achieving a country’s tourism goals. Tourism HR is a workforce whose work is directly and indirectly related to tourism activities, can consist of tourism HR at the government level (HR apparatus); and tourism human resources in the business world and society. To build competent human resources, tourism education must also follow the exponential acceleration of tourism development, namely the potential for the development of distance education.

### 1.1 Contribution to GDP

Tourism contributes 10% of national GDP, with the highest nominal in ASEAN. The tourism industry, both directly and indirectly, ranks 3rd in Indonesia’s GDP producer in 2014 9.3% of total GDP. National tourism GDP grew 4.8% with an upward trend of 6.9%, much higher than the agricultural, automotive manufacturing and mining industries. Expenditures of US $ 1 Million in the tourism sector, generating GDP of US $ 1.7 million or 170%, the highest compared to other industries³.

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1.2. Contribution to employment

Tourism contributes 9.8 million jobs, or 8.4% nationally and ranks 4th from all industrial sectors. In job creation, the tourism sector grew 30% within 5 years. Tourism is also the creator of the lowest employment, which is only US $ 5,000 per one job, compared to other industry averages of US $ 100,000 per one job.

Demand for goods and services in tourism activities has an impact on the demand for wages and salaries in every sector of the economy. The role of wages and salaries from tourism activities on the value of labor compensation nationally in 2016, which amounted to Rp 157.01 trillion or 3.86 percent of national wages. As with the impact on GDP, the expenditure of domestic tourists also had the greatest impact on wages and salaries, which is 1.54 percent of national wages, followed by consumption of foreign tourists which accounted for 1.13 percent. Tourism sector investment has an impact on wages and salaries of workers in all sectors of the economy by 0.97 percent of national wages, while the impact given by tourism promotion and pre and post trips from Indonesian tourists abroad has only 0.17 percent and 0.05 percent.

1.3. Current Situation of Tourism Industry.

It is known that the manufacturing industry received the biggest impact reaching Rp. 116.82 trillion or
23.56 percent of the total impact, followed by agriculture and the provision of accommodation. However, if viewed according to the GDP sector, tourism provides the largest contribution to the business of providing accommodation services, where the tourism contribution to the GDP of the accommodation sector reaches 69.20 percent. This means that the business of providing accommodation is highly dependent on tourism activities. Without tourism activities, the business of providing accommodation will not develop or close. This is also in accordance with the theory that the business of providing accommodation is an industry that is characterized by tourism characteristics. Tourism also has a large share of the food supply business (14.76 percent) and railroad transportation (14.36 percent).

CHAPTER 2: TVET System

2.1. Policy of TVET

The Government of Indonesia has identified tourism as one of the priority sectors for economic growth. Likewise, the Ministry of Education and Culture aims to align the development of SMKs with the tourism sector as the core industry focus, alongside the creative arts, hospitality, maritime, agriculture, security and the telecommunications industries as the relevant sub-sectors (Figure 3). Vocational Education Revitalization Policy to improve the qualifications of HR in facing the world of work is manifested in President decree 9 of 2016 concerning Revitalization of Vocational High Schools in the Context of Improving the Quality and Competitiveness of Indonesian Human Resources.

Blueprint for SMK’s Future Development

7 Ibid., p. 61.

8 Agung Budi Susanto, National Policy on Vocational Education in Secondary Schools: SMK Development Strategy to Support the MP3EI Program (Jakarta: Ministry of Public Welfare the Republic of Indonesia, 2012). pp. 7-20
Furthermore, the Ministry of Finance through the 2019 State Budget, encourages Investment and Competitiveness through the Development of Human Resources through: Increasing the competence of vocational educators; Adjustment of vocational education curriculum with industrial and technological needs; Providing scholarships for vocational education through LPDP (Education Fund Management Agency); Vocational policies will be coordinated by the Ministry of Manpower; Non-physical DAK (Special Allocation Fund): Increased BOS (School operational assistance) unit cost for Vocational Education; Tax Incentive Policy; Tax reduction to support R & D and vocational activities.

### 2.2. Overview of Education System and TVET System

Indonesia’s national education system is set forth in Law number 20 of 2003 concerning the National Education System (SISDIKNAS). This system consists of several subsystems or aspects as follows: Basics, Functions and Objectives; the principle of implementing education; rights and obligations of citizens, parents, society and government; learners; path, level, and type of education; language of instruction; compulsory education; national education standards; curriculum; educators and education staff; educational facilities and infrastructure; education funding; education management; community participation in education; evaluation, accreditation and certification; establishment of educational units; conducting education by other state institutions; and supervision. As a system, it can be described as in Figure 4, while the structure of education system from 1st until 23rd school year can be seen in Table 1.

The National Education System is illustrated from Law No. 20 of 2003

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### Table: The National Education System

<table>
<thead>
<tr>
<th>Age</th>
<th>School Year</th>
<th>Education Level</th>
<th>Education Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>Above 22</td>
<td></td>
<td></td>
<td>Centralised</td>
</tr>
<tr>
<td></td>
<td>23</td>
<td>Doctoral (includes general &amp; Islamic, and vocational, academic &amp; professional)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>22</td>
<td>Master (includes general &amp; Islamic, and vocational, academic &amp; professional)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>21</td>
<td>Higher Education</td>
<td>Undergraduate (includes general &amp; Islamic, and vocational &amp; academic)</td>
</tr>
<tr>
<td></td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>19</td>
<td></td>
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<tr>
<td>22</td>
<td>18</td>
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<td>21</td>
<td>17</td>
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<td>20</td>
<td>16</td>
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<td>19</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>14</td>
<td>Secondary Education</td>
<td>Islamic general senior secondary &amp; Islamic vocational senior secondary (MA &amp; MAK)</td>
</tr>
<tr>
<td>17</td>
<td>13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
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<td>13</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>8</td>
<td>Basic Education</td>
<td>Islamic primary (MI)</td>
</tr>
<tr>
<td>11</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>6</td>
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<tr>
<td>9</td>
<td>5</td>
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</tr>
<tr>
<td>8</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>2</td>
<td>Early Childhood Education</td>
<td>Islamic kindergarten (RA)</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table: Education Structure in Indonesia

According to the Higher Education Act, the key differences between the varieties of tertiary institutions lie in the type of education track and the number of disciplines offered.

Academic programs are available only in advanced schools, institutes and universities; vocational programs are available in all tertiary institutions.

**Universities** may offer both academic and vocational programs, as well as professional programs.

Example: Jenderal Sudirman University offers degree programs in agriculture and food engineering, accountancy and management, and dentistry. It also offers vocational programs on industrial engineering, accountancy and secretarial services, as well as professional programs for accountants, doctors, dentists and nurses.

**Institutes** may offer academic and vocational programs from a limited range of disciplines.

Example: Bandung Technological Institute offers different academic programs ranging from agricultural engineering to urban planning—all of which stem from the disciplines of engineering and technology.

**Advanced schools** (sekolah tinggi) may only offer academic and vocational programs on one discipline.

Example: Al-Irsyad Advanced School of Health in Cilacap offers D3 and bachelor programs on nursing, pharmacy, physiotherapy—stemming from the discipline of medicine.

**Polytechnics** may offer vocational programs from across many disciplines.

Example: Jakarta Public Polytechnic offers various vocational programs from the disciplines of engineering, economics and business administration.

**Academies** (akademi komunitas) may offer vocational programs from a limited range of disciplines. Examples: Jayakarta Nursing Academy and Fatmawati Nursing Academy offer only D3 vocational programs which focus on medicine, while all the classes offered by Darma Agung Tourism and Hotel Academy focus on hospitality.

**Community academies** (akademi komunitas) are unique as they offer the least number of courses among all tertiary education institutions. They may only offer D1 & D2 programs which correspond to their prioritized regional economic activities as laid out in the MP3EI.

Example: Nagekeo Public Community Academy only offers D2 vocational programs from the disciplines of chemical engineering and business administration.

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11 Lee Kuan Yew School of Public Policy, Technical and Vocational Education and Training in Indonesia: Challenges and Opportunities for the Future – Microsoft Case Study Series on Technical and Vocational Education and Training (Singapore: National University of Singapore, 2016), p. 44.
Table: Agenda Pengembangan pendidikan Vokasi\textsuperscript{12}

<table>
<thead>
<tr>
<th>Action</th>
<th>2015</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Capacity of Newly Built Community Academies</td>
<td>242,100</td>
<td>499,500</td>
</tr>
<tr>
<td>Number of Newly Built Community Academies</td>
<td>269</td>
<td>555</td>
</tr>
<tr>
<td>Student Capacity of Newly Built Polytechnics</td>
<td>215,000</td>
<td>442,000</td>
</tr>
<tr>
<td>Number of Newly Built Polytechnics</td>
<td>54</td>
<td>111</td>
</tr>
<tr>
<td>Number of Vocational Postgraduate Programs Offered in Polytechnics</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>Student Capacity of Newly Built Universities/Institutes</td>
<td>141,000</td>
<td>300,000</td>
</tr>
<tr>
<td>Number of Newly Built Universities/Institutes</td>
<td>14</td>
<td>30</td>
</tr>
<tr>
<td>Additional Lecturers at Tertiary Education Institutions</td>
<td>53,000</td>
<td>111,000</td>
</tr>
<tr>
<td>Additional Lecturers with a Doctorate Degree</td>
<td>15%</td>
<td>50%</td>
</tr>
</tbody>
</table>

The Multi Entry, Multi Exit System\textsuperscript{13}


\textsuperscript{13} Ibid., p. 31
### Table: SMK’s Curriculum Structure

<table>
<thead>
<tr>
<th>COMPONENTS</th>
<th>INSTRUCTIONAL HOURS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Religious Education</td>
<td>192</td>
</tr>
<tr>
<td>2. Civic Education</td>
<td>192</td>
</tr>
<tr>
<td>3. Bahasa Indonesia</td>
<td>192</td>
</tr>
<tr>
<td>4. English</td>
<td>440 a)</td>
</tr>
<tr>
<td>5. Mathematics</td>
<td></td>
</tr>
<tr>
<td>5.1 Mathematics in SMK which specialize on Art, Tourism and Household Technology (Te-knologi Kerumahtanggaan)</td>
<td>330 a)</td>
</tr>
<tr>
<td>5.2 Mathematics in SMK which specialize on Social Subjects, Office Administration and Accountancy</td>
<td>403 a)</td>
</tr>
<tr>
<td>5.3 Mathematics in SMK which specialize on Technology, Health, and Agriculture</td>
<td>516 a)</td>
</tr>
<tr>
<td>6. Natural Sciences</td>
<td></td>
</tr>
<tr>
<td>6.1 Natural Sciences</td>
<td>192 a)</td>
</tr>
<tr>
<td>6.2 Physics</td>
<td></td>
</tr>
<tr>
<td>6.2.1 Physics in SMK which specialize on Agriculture</td>
<td>192 a)</td>
</tr>
<tr>
<td>6.2.2 Physics in SMK which specialize on Technology</td>
<td>276 a)</td>
</tr>
<tr>
<td>6.3 Chemistry</td>
<td></td>
</tr>
<tr>
<td>6.3.1 Chemistry in SMK which specialize on Agriculture</td>
<td>192 a)</td>
</tr>
<tr>
<td>6.3.2 Chemistry in SMK which specialize on Technology and Health</td>
<td>192 a)</td>
</tr>
<tr>
<td>6.4 Biology</td>
<td></td>
</tr>
<tr>
<td>6.4.1 Biology in SMK which specialize on Agriculture</td>
<td>128 a)</td>
</tr>
<tr>
<td>6.4.2 Biology in SMK which specialize on Health</td>
<td>128 a)</td>
</tr>
<tr>
<td>7. Social Sciences</td>
<td></td>
</tr>
<tr>
<td>8. Arts &amp; Culture</td>
<td>192</td>
</tr>
<tr>
<td>9. Sports &amp; Health Education</td>
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</tr>
<tr>
<td>10. Vocational Subjects</td>
<td></td>
</tr>
<tr>
<td>10.1 Computers &amp; Information Management Skills</td>
<td>202</td>
</tr>
<tr>
<td>10.2 Entrepreneurship</td>
<td>192</td>
</tr>
<tr>
<td>10.3 Basic Vocational Competencies</td>
<td>140</td>
</tr>
<tr>
<td>10.4 Vocational Competencies</td>
<td>1,044 c)</td>
</tr>
<tr>
<td>11. Local Content Education d)</td>
<td>192</td>
</tr>
<tr>
<td>12 Self-Development</td>
<td>192</td>
</tr>
</tbody>
</table>

\[14\] Ibid., p. 43
2.3. Current status: TVET in Tourism

The development of TVET tourism is a top priority based on that Indonesian tourism has now become one of the largest economic sectors and has the fastest growth rate and is one of the main sources of national income. Vocational training in tourism has been encouraged and developed rapidly, it began with the Indonesian government cooperation program with the Australian government in the 2002 IAPSD program that developed competency-based training (CBT), standard of competency, competency assessors, and master competency assessors. Then starting in 2006 the competency standard was developed into the Indonesian National Work Competency Standards (SKKNI) which became a reference for vocational training and vocational education in tourism throughout Indonesia supported by PHRI (Indonesian Hotel and Restaurant Association).

The development of competency-based training (CBT) in the field of tourism is then followed by the demand for competency certification in accordance with work positions in the tourism industry. So that there was a growing demand for tourism Professional Certification Institutions (LSPs) which were accredited by the Ministry of Manpower and Transmigration in 2004. Furthermore, with the new certification authority developed, the National Professional Certification Board (BNSP) in 2005, LSP continued to grow to become 34 third party III LSPs in in 2015.

In December 2014, the Ministry of Tourism and BNSP launched the implementation of ACCSTP and CATC competency standards in the form of the ASEAN Qualification Certification Schemes for 52 qualifications. And in April 2015, the Ministry of Tourism and BNSP launched a certification scheme for 32 ASEAN MRA Occupations. With this disbursement, the community is increasingly confident to implement ASEAN competency standards to gain mutual recognition among ASEAN countries.
The implementation of ACCSTP and CATC on vocational education ranging from Vocational High Schools (SMK) to Diploma Programs in the field of tourism is still facing some problems, because it cannot yet be integrated into the curriculum. The curriculum in SMK is developed based on competency standards developed in the form of a spectrum divided into core competencies and basic competencies, this results in Vocational High Schools facing problem in tracing the competency standards including their qualifications and occupations. To overcome this, BNSP, together with the Directorate of Vocational School, developed a Professional Certification Body (LSP) 1st party with a qualification certification scheme in accordance with ASEAN standards. In its development, it was responded very well by the Vocational School and until the end of 2018 it was identified that more than 60 SMKs had successfully developed LSP 1st party in the tourism sector. With the scheme adopted from ACCSP and CATC, teachers and schools can provide context curricula that can set learning objectives that are in accordance with ASEAN standards.

Similar conditions also occur with the implementation of certification schemes with ASEAN standards applied to vocational higher education, including the implementation of the ASEAN tool boxes. The obstacles faced by some schools are mastery of English, so it is expected that education technologist can find strategies to improve English language skills better.
CHAPTER 3: CURRENT STATUS IMPLEMENTATION OF MRA-TP

Mutual Recognition Arrangement (MRA) is an arrangement designed to facilitate the free movement of employment with qualified and certified personnel between ASEAN Member States. MRA-TP is seen as one essential requirement of the ASEAN Community as stated in the Bali Concord II at the Ninth ASEAN Summit (2003) calling for completion of MRA for qualifications in major professional services by 2008 and confirmed through the Cebu Declaration on the Establishment of the ASEAN Community by 2015 adopted at the 12th ASEAN Summit in January 2007. The objectives of the MRA-TP is to facilitate mobility of Tourism Professionals, to exchange information on best practices in competency-based education and training for Tourism Professionals, and to provide opportunities for cooperation and capacity building across ASEAN Member States.

3.1. ASEAN Tourism Professional Monitoring Committee (ATPMC)

The committee has the overall responsibility for the operation of the MRA, including monitoring of on-going performance of the mechanism. In practice, the committee would become a component part of the greater MRA mechanism. The ATPMC will review, adjudicate and resolve disputes, as well as monitor the operation of the TPCBs and the conformity equivalents being issued. When the Agreement on establishment the Regional Secretariat for the implementation of ASEAN MRA-TP was signed in December 2015, the ATPMC has been appointed as the Governing Council to oversee and provide guidance to the Regional Secretariat.

Table: The ATPMC responsibilities.

<table>
<thead>
<tr>
<th>ATPMC responsibilities</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>• create awareness and disseminate information about MRA-TP within ASEAN;</td>
<td>v</td>
</tr>
<tr>
<td>• promote, update, maintain and monitor the ACCSTP and the CACT;</td>
<td>limited</td>
</tr>
<tr>
<td>• upon receipt of feedback from NTPBs, to notify promptly the concerned TPCB in case foreign tourism professionals are no longer recognized by the host country;</td>
<td>limited</td>
</tr>
<tr>
<td>• facilitate the exchange of information concerning assessment procedures, criteria, systems, manuals and publications relating to ASEAN MRA-TP;</td>
<td>limited</td>
</tr>
<tr>
<td>• report its progress of work to the ASEAN NTOs;</td>
<td>v</td>
</tr>
<tr>
<td>• formulate and update necessary mechanisms to enable the implementation of ASEAN MRA-TP; and</td>
<td>limited</td>
</tr>
<tr>
<td>• such other functions and responsibilities that may be assigned to it by the ASEAN NTOs in the future.</td>
<td>limited</td>
</tr>
</tbody>
</table>
3.2. National Tourism Professional Board (NTPB)

The NTPB refers to the Board for Tourism Professionals which shall be composed of representatives from the public and private sectors including the academia and other relevant tourism stakeholders, to be determined by the respective ASEAN NTOs. Each country is required to establish the NTPB as one important component to support and promote the ASEAN MRA-TP implementation.

Table: The NTPB of each ASEAN Member State responsibilities:

<table>
<thead>
<tr>
<th>NTPB responsibilities</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>• create awareness and disseminate information about the ASEAN MRA-TP;</td>
<td>-</td>
</tr>
<tr>
<td>• promote, update, maintain, and monitor the ACCSTP and the CATC;</td>
<td>-</td>
</tr>
<tr>
<td>• facilitate the exchange of information concerning assessment procedures, criteria, systems, manuals and publications relating to the ASEAN MRA-TP;</td>
<td>-</td>
</tr>
<tr>
<td>• report its work progress to the ASEAN NTOs including actions taken on cases referred to it by the TPCB and/or ATPMC;</td>
<td>-</td>
</tr>
<tr>
<td>• formulate and update necessary mechanisms to enable implementation of the ASEAN MRA-TP;</td>
<td>-</td>
</tr>
<tr>
<td>• facilitate the exchange of best practices and prevailing developments in tourism sector with the view to harmonizing and updating regional and/or international tourism competencies and curricula; and</td>
<td>-</td>
</tr>
<tr>
<td>• such other functions and responsibilities that may be assigned to it by the ASEAN NTOs in the future.</td>
<td>-</td>
</tr>
</tbody>
</table>

3.3. Tourism Professional Certification Board (TPCB).

Each Member State has established a TPCB. The TPCB would function to support the ATPRS by providing in-country qualification endorsements on existing professional qualifications by applying the template established by the RQFSRS. In some countries, a TPCB or equivalent already exists and this development presents a further indicator of the country’s readiness to proceed. For example, the Government of Viet Nam with assistance from the EU established a working TPCB named the Vietnam Tourism Certification Board, which functions in support of the Viet Nam National Authority on Tourism.

Table: The TPCB of each ASEAN Member State responsibilities.

<table>
<thead>
<tr>
<th>TPCB responsibilities</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>• assess qualifications and/or competencies of tourism professionals as specified in the ACCSTP;</td>
<td>✓</td>
</tr>
<tr>
<td>• issue certificates to tourism professionals whose qualifications and/or competencies have met the standards specified in the ACCSTP;</td>
<td>✓</td>
</tr>
<tr>
<td>TPCB responsibilities</td>
<td>Status</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>• develop, process and maintain a registry of certified tourism professionals and job opportunities on the ATPRS; and</td>
<td>Wait facilitation from ATPRS</td>
</tr>
<tr>
<td>• notify the NTPB promptly in the event that foreign Tourism Professionals are no longer qualified to provide a particular service or have violated technical, professional or ethical standards.</td>
<td>-</td>
</tr>
</tbody>
</table>

Indonesia assigned BNSP (Indonesian Professional Certification authority) as a Tourism Professional Certification Board (TPCB) in 2014. BNSP is an independent body established to implement the certification of competence. The TPCB have function supporting the ATPRS by providing in-country qualification endorsements on existing professional qualifications by applying the template established by the CATC Regional Qualifications Framework. The Schematic Outline of ASEAN MRA-TP Mechanism is as follow.

The BNSP as TPCB apply national competency standards and assess and certify tourism professionals with an National Qualification Framework which traceable to CATC and ACCSTP in order that they can be registered on the ATPRS. One of the primary functions of the TPCB is to manage the day-to-day operation of the ATPRS. The Indonesian TPCB is rooted firmly at the Member County level. The main functions of Indonesian TPCB are:

- Assess qualifications and/or occupation competencies of tourism professionals as specified in the ACCSTP and SKKNI (Indonesia National Competency Standard);
- Issue certificates to tourism professionals whose qualifications and/or Occupation competencies have met the standards specified in the ACCSTP and SKKNI;
- Develop, process and maintain a register of certified tourism professionals and job opportunities onto the ATPRS; and
- Providing information to other Member Countries TPCBs.
The TPCB Indonesia developed Strategic Action Plan Implementing the MRA-TP since 2014 for increasing the quality of services and human resources in Indonesia referencing to ASEAN MRA-TP Handbook and its time frame. Table 8. illustrates the steps of implementing TPCB Indonesia responsibilities in certification of tourism professional development. The program is collaborated to the Ministry of Tourism program as part of responsible and sustainable tourism development.

Table: Work plan of TPCB implementing certification program of MRA-TP

<table>
<thead>
<tr>
<th>TPCB responsibilities</th>
<th>Status</th>
<th>Target Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Identification coordination of institutions related to ASEAN MRA-TP.</td>
<td>done</td>
<td>Sep 2014</td>
</tr>
<tr>
<td>• Adoption of ACCSTP Qualifications Equivalency Matrix to SKKNI</td>
<td>done</td>
<td>Oct 2014</td>
</tr>
<tr>
<td>• Development of Certification Schemes/Standard of Occupation (32) and Qualification (52) based on ACCSTP, CATC and SKKNI.</td>
<td>done</td>
<td>Nov 2014</td>
</tr>
<tr>
<td>• Dissemination and Implementation the certification schemes to TVET.</td>
<td>done</td>
<td>Dec 2014</td>
</tr>
<tr>
<td>• Dissemination and Implementation the certification schemes to LSP (PC-B=Professional Certification Body)</td>
<td>done</td>
<td>Dec 2014</td>
</tr>
<tr>
<td>• Soft Launching and Promotion of the implementation of The ASEAN MRA-TP</td>
<td>done</td>
<td>Des 2014</td>
</tr>
<tr>
<td>• Implementation of Certification of Occupation (32) and Qualification (52) based on ACCSTP, CATC and SKKNI.</td>
<td>done</td>
<td>Feb 2015</td>
</tr>
<tr>
<td>• Registration of Certified Tourism Professionals to the ATPRS</td>
<td>Waiting for the ASEC readiness</td>
<td>Mar 2015</td>
</tr>
</tbody>
</table>

ASEAN Secretariat, ASEAN MRA-TP Handbook. (Jakarta: ASEAN, 2013), p.8
### 3.3.1. Mapping of occupations within qualification framework of ASEAN MRA-TP.

The ASEAN MRA-Tourism Professional and the Handbook of ASEAN MRA-TP have provided broad insight into providing direction for developing national tourism development human resource planning. Based on the above documents, Map of Occupation within Indonesian National Qualification Framework in the area of Tourism Professional was developed traceable to CATC and ACCSTP (Fig 9.). Of the 230 number of occupations identified by the Handbook MRA-TP, only 32 occupational standards were ready for the implementation of ACCSTP, THE REMAINDER 198 needs to be packaged.

This map is useful for reference development of human resource development planning of tourism; the development of the profile of the middle and high education graduates especially the vocational education; reference to the development of apprenticeship programs; reference of competency-based training programs; and development of professional certification schemes.

In its implementation since 2013, an evaluation by stakeholders, including TVET, PCB, and Industry, has been proposed for revision. These recommendations are responded well by BAPPENAS (National Planning Body), KADIN (Chamber of Commerce), professional associations, Ministry of Tourism, and BNSP for immediate revision of both occupation and its descriptions due to the development of business demands. Even now this mapping is extended to destination development, SPA and MICE.
<table>
<thead>
<tr>
<th>Functional Area of Business Purpose</th>
<th>Key Functional Area</th>
<th>Occupations aligned to Qualification Framework</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOOD PRODUCTION</td>
<td>COOKERY</td>
<td>Kitchen Hand, Buscher, Baker, Pastry Cook</td>
</tr>
<tr>
<td></td>
<td>OPERATION</td>
<td>Kitchen Hand, Confectioner, Pastry Cook</td>
</tr>
<tr>
<td></td>
<td>PATISSERIE</td>
<td>Kitchen Hand, Confectioner, Pastry Cook</td>
</tr>
<tr>
<td></td>
<td>WAITING</td>
<td>Busboy; Trainee Waiter; Trainee Server; Restaurant and Bar Service Agent</td>
</tr>
<tr>
<td></td>
<td>BEVERAGE</td>
<td>Busboy; Trainee Waiter; Trainee Server; Restaurant and Bar Service Agent</td>
</tr>
<tr>
<td></td>
<td>HOUSE KEEPING</td>
<td>Junior Cleaner; Assistant Cleaner; Assistant Public Area Cleaner; Cleaner; Public Area Cleaner; Attendant; Room Maid; PA Attendant</td>
</tr>
<tr>
<td></td>
<td>FRONT OFFICE</td>
<td>Junior Bell Boy; Assistant Porter; Bell Boy; Porter; Bellhop</td>
</tr>
<tr>
<td></td>
<td>RESERVATION AND TICKETING</td>
<td>Trainee Ticketing Officer; Trainee Reservations Clerk; Trainee Ticketing Clerk; Clerk</td>
</tr>
<tr>
<td></td>
<td>GUIDING</td>
<td>Camp Assistant; Assistant Camp Cook; Assistant Guide; Guide; Trainee Tour Guide; Trainee Tour Leader; Trainee Local Guide; Trainee Eco-Tour Guide; Trainee Driver Guide</td>
</tr>
<tr>
<td></td>
<td>SALES AND FINANCE</td>
<td>Junior Office Assistant; Trainee Ticketing Officer; Trainee Reservations Clerk; Trainee Ticketing Clerk</td>
</tr>
<tr>
<td></td>
<td>ECO TOUR</td>
<td>Trainee Travel Advisor; Trainee Domestic Travel Consultant; Trainee Domestic International Consultant; Trainee Corporate Travel Consultant; Trainee Ticketing Officer; Trainee Reservations Clerk; Trainee Ticketing Clerk</td>
</tr>
<tr>
<td></td>
<td>RESERVATION AND TICKETING</td>
<td>Trainee Travel Advisor; Trainee Domestic Travel Consultant; Trainee Domestic International Consultant; Trainee Corporate Travel Consultant; Trainee Ticketing Officer; Trainee Reservations Clerk; Trainee Ticketing Clerk</td>
</tr>
<tr>
<td></td>
<td>TRAVEL AGENT</td>
<td>Trainee Travel Advisor; Trainee Domestic Travel Consultant; Trainee Domestic International Consultant; Trainee Corporate Travel Consultant; Trainee Ticketing Officer; Trainee Reservations Clerk; Trainee Ticketing Clerk</td>
</tr>
</tbody>
</table>

Map of Occupation within National Qualification Framework in Tourism (adapted from Handbook of MRA-TP, 2013)
3.3.2. Development of certification scheme/certification standard.

Certification Scheme is a package of competency and specific requirements related to categories position or certain skills of a person. There are three kinds of certification scheme, i.e.: Certification Scheme of National Qualification Framework, Certification Scheme of Occupation, and Certification Scheme of cluster. For the purpose of ASEAN MRA-TP, Certification Scheme of Qualification Framework and certification Scheme of Occupation will be the criteria for implementation whilst the Certification Scheme of cluster will be used for specific purpose.

3.3.2.1. Certification Schemes of Qualification Framework

Certification Scheme of Qualification Framework is developed based on CATC and ACCSTP which consists of five qualification levels across all six Labor Divisions providing vocational streams within each Labor Division that reflect the stated needs of AMS, the needs of industry, and also National Qualification Framework. In all cases Certificate II incorporates Certificate I on the advice of participating countries. Table 9., gives an overview of the level at which each of the five qualifications in the Framework is set.

Table: The breakdown of the 52 qualifications across six labor division17.

<table>
<thead>
<tr>
<th></th>
<th>Certificate II</th>
<th>Certificate III</th>
<th>Certificate IV</th>
<th>Diploma</th>
<th>Advanced Diploma</th>
<th>Sub-Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Beverage</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>9</td>
</tr>
<tr>
<td>Food Production</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>10</td>
</tr>
<tr>
<td>Front Office</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Housekeeping</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td>Tour Operation</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>12</td>
</tr>
<tr>
<td>(Management)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Agencies</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>11</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>52</strong></td>
</tr>
</tbody>
</table>

3.3.2.2. Certification Scheme of Occupation

Certification Scheme of Occupation is developed based on ACCSTP that reflect the stated needs of AMS, the needs of industry, and also National Qualification Framework. For the start of MRA-TP implementation, certification scheme is limited to 32 occupations identified by Handbook of MRA-TP which limited to only 32 occupations. Table 10 gives an overview of the occupation are set.

17 Ibid., p. 22.
Based on table above, Certification was developed for six Labor Divisions providing vocational streams. The structure of certification scheme is as follow: scopes; normative references; description; package of unit of competencies; package of competency units; Pre-requisite of the candidate; right of applicant and certification participant; certification fee; and certification process.

### 3.3.2.3. Implementation of toolboxes as tools of assessment

Assessment is the process of identifying a participant’s current knowledge, skills and attitudes sets against all elements of competency within a unit of competency. PCB develop assessment tools by adopting and adapting the ASEAN toolbox especially the Assessor Manual. However, due to the Assessor Manual are still limited, the PCB still have to develop the assessment tools based on ACCSTP.

As identified by ASEAN Guiding Principles for Quality Assurance and Recognition of Certification System, AMS should develop assessment standard, so it would be grateful if the ATPMC could have program to develop toolbox for all of unit in ACCSTP. This will be able to accelerate the implementation of ASEAN MRA-TP throughout ASEAN members.

After three years Indonesia implementing the certification program both qualification and occupation, TPCB evaluate the implementation and some recommendation are suggested:

- The need of ASEAN occupational standard competency assessor and Master Assessor.
- The need of moderation of assessment competency standard and its toolbox.

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18 Ibid, p.16.
3.3.2.4. Development of professional certification body in tourism professional.

To accelerate the implementation of MRA-TP, TPCB Indonesia encourages the acceleration of the growth of PCBs licensed by BNSP in accordance with the National Professional Certification System (Fig 10.) and the ASEAN Guiding Principles for Quality Assurance and Recognition of Certification System. With the rapid growth of Indonesian tourism development, gives the large impact of labor force who has worked as a tourism profession and the growth of education and vocational training in the field of tourism integrated with ASEAN Tourism. This impacts the demands of rapidly growing demand for certification of professional competence, thus encouraging the growth of Professional Certification Institution. Until 2018 the number of LSPs has reached 94 both PCB First Party 1 and PCB 3rd Party.

![Diagram of Indonesian National Professional Certification System.](image)

3.3.2.5. Development of Assessor Of Competency.

In developing competency assessors TPCB Indonesia harmonizes the requirements in the Indonesia competence assessor certification scheme with competence requirements on the competence unit of ASEAN competency assessor. In the scheme of national competence assessors, there are three units of competence i.e: Planning and Organizing; Develops assessment tools; and Conducts Assessment. While the ASEAN Assessor is identified only at the level of Element 4: Implementation of an ASEAN Competency Standard which includes the Plan and prepare for assessment of an ASEAN Competency Standard; Conduct assessment of an ASEAN Competency Standard; and Evaluate ASEAN assessment, so the standard components are very limited. So it would be better if the competence units are created and prepared for assessment of an ASEAN Competency Standard; Conduct assessment of an ASEAN Competency Standard; and Evaluate ASEAN assessment.
3.3.2.6. Link and Match Between Certification Of Tourism Professional Program, Standard, Curriculum And Standard Implementation In Tourism Business.

Certification is the final part of the implementation process of ACCSTP and CATC within the framework of the ASEAN MRA-TP, so for its implementation there is a need for collaboration with the world of work and education and training institutions especially TVET. In the early stages TPCB have initiated for collaboration with 9 training providers by disseminating Handbook of ASEAN MRA-TP especially on vocational training and education institution, at this stage hence link and match between competency standard and curriculum as shown in Figure 11., which compare competency standard with curriculum and show linkage between both methods of learning and assessment. This model give direction to understand how ACCSTP and CATC are implemented.

Standard of Competency versus Curriculum\(^{19}\). (ASEC, 2013).

The next stage of dissemination was to the tourism industry and tourism professional certification bodies. At this stage, many obstacles were faced to ensure that this standard can be useful to be developed in the tourism business to develop, ensure and maintain the competence of human resources. This also occurred in early introduction to professional certification bodies. From the evaluation and analysis of the application of competency standards in industry and certification institute, an interface model was developed between competence standard, SOP in industry, curriculum on TVET and competency assessment in professional certification institution as shown Figure 12. below.

\(^{19}\)Ibid., p.30.
Model of interface between Competency Standard, SOP in industry, Curriculum of TVET and Assessment in PCB

With the model of interface above, the dissemination of MRA-TP especially the ACCSTP and CATC are easier in understanding these implementation principles of standards in the industry, TVET, certification bodies and competence assessors. The progress of the development of PCB proposed the certification schemes are based on ASEAN Qualification and also occupations.

3.3.3. Registration Of Tourism Professionals Onto ATPRS

As the ASEAN MRA states,

“A foreign tourism professional may be recognized as eligible for a certain tourism job title in the labor divisions as specified in APPENDIX III in a host country provided that he/she possesses tourism competency qualification/certificate in a specific tourism job title as specified in the ACCSTP, issued by the TPCB in an ASEAN Member Country, provided further that he/she shall comply with the prevailing domestic laws and regulations of the host country.”

Based on the evaluation and comparing ACCSTP and CATC with Indonesian National Competency Standard, Ministry of Tourism and BNSP adopted the ACCSTP and CATC to be developed as Certification Schemes for 52 National Qualifications Framework and 32 occupations and implementing the toolboxes. This ensure that the certification by TPCB confirms with ACCSTP, CATC and AQRF.

Although the recognition of skilled labor is voluntary and governed by each ASEAN Member State’s domestic regulations, laws, and policies, ATPRS (ASEAN Tourism Professional System) is one of key component of the MRA-TP, This serves as a job-matching platform between industry and ATPs across ASEAN.
The TPCB is responsible for the registration of applicants onto the ATPRS. However, the program will be promoted jointly with the Ministry of Tourism to TVET and PCB by mid 2018. It is expected that the ASEAN Secretariat can facilitate the registration of tourism professionals to register in the ATPRS.

CHAPTER 4: DISTANCE LEARNING POLICY

4.1. Policy of Distance Learning program.

4.1.1. Ministry of Education and Culture,

The Indonesian Distance Education policy for primary and secondary education is regulated by Minister Regulation of Education and Culture of the Republic of Indonesia, Number 119 of 2014, concerning the Implementation of Distance Education for Primary and Secondary Education. Distance education in this policy is education that students are separated from educators and their learning uses a variety of learning resources through the application of the principles of education / learning technology. The policies of the DL include:

DL levels of primary and secondary education can be held in the scope of: a) programs that include: subjects; expertise, expertise program and/or expertise package; or educational unit. DL in the scope of subjects is only held in 1 (one) subject according to the applicable curriculum. DL in the areas of expertise, program expertise, and expertise packages are held at 50% more than the number of subjects. DL held at an education unit is held in an education unit whose subjects are carried out remotely. Distance education with expertise, expertise programs, and/or expertise packages is organized by regular Vocational / Technical Schools.

The school / madrasah management structure for DL organizers consists of at least: the principal/madrasah; tutor/teacher; the manager of the school/madrasah organizers of DL and TKB (place of learning activities); and education staff.

MANAGEMENT. Organizing distance education can be held in single mode, dual mode, or consortium mode. Organizing single mode distance education in the form of an education unit that organizes educational programs only with remote modes. Organizing dual mode in the form of an educational unit that organizes educational programs both face to face and remotely. While organizing the consortium mode in the form of a network of cooperation in the implementation of distance education across education units with national and / or international scope.

LEARNING LOADS. The learning burden of students to complete each level held in DL is the same as the learning burden in accordance with the Content Standards.
LEARNING MANAGEMENT SYSTEM, Learning in DL is carried out using Learning Management Systems which include administrative processes, learning planning, implementation of learning, assessment of learning outcomes, and supervision of learning.

LEARNING PROCESS, Self-learning is carried out by individual students or groups by utilizing various learning resources and receiving guidance and learning assistance or tutorials as needed. Tutorials are carried out by tutors / teachers and students to interact with each other in the form of:

- online tutorials carried out through learning management systems;
- face-to-face tutorials held at the main school, TKB (place of learning activities) or educational unit and according to the whereabouts of students.

EDUCATOR AND EDUCATION MANAGEMENT PERSONEL, Educators in DL include: tutors and / or teachers. Educators have at least functions as: learning program designers, compilers and / or developers of teaching materials and media, widespread disseminators and / or uploaders of teaching materials and media, authors of questions, assignments, and / or evaluation of learning outcomes; and tutor. Whereas the education staff at DL at least include: managers in the main school / madrasah, and TKB (place of learning activities) or education units administering DL; and administrator. Surono20 identify 16 occupations/ job titles required by online educational programs/institutions as shown in Table 11, and 160 units of competency. However, the occupation/job titles and 160 units of competency have not been provided with the standards of competency. However, the occupation/job titles and 160 units of competency have not been provided with the standards of competency.

Table: Potential occupation /job title in three primary function in online education21.

<table>
<thead>
<tr>
<th>Content Creation Tools (CCT)</th>
<th>Learning Management System (LMS)</th>
<th>Student Management System (SMS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Subject Matter Expert</td>
<td>• Director of Online Education</td>
<td>• Online Learning Coordinator</td>
</tr>
<tr>
<td>• Online Instructional Designer</td>
<td>• Distance Learning Project Manager</td>
<td>• E-Learning Quality Assurance</td>
</tr>
<tr>
<td>• Instructional Support Specialist - Distance Education</td>
<td>• Coordinator of Online Education Distance Programs</td>
<td>• Quality Assurance online Education Coordinator</td>
</tr>
<tr>
<td></td>
<td>• Dean of Online Education and Learning Resources</td>
<td>• ELearning Coordinator</td>
</tr>
<tr>
<td></td>
<td>• Web Developer</td>
<td>• Online Admissions Associate</td>
</tr>
<tr>
<td></td>
<td>• Designer (Specialist)</td>
<td>• Online Student Transfer Advisor</td>
</tr>
<tr>
<td></td>
<td>• Programmer and Multimedia Author</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Graphic (Visual) Designer</td>
<td></td>
</tr>
</tbody>
</table>


21 Ibid., 56-57.
SUPERVISION AND EVALUATION, DL supervision is the responsibility of the Government and regional government in accordance with their authority. Coaching includes fostering students, educators and education staff, learning processes, and institutions. Evaluation of the implementation of DL is carried out by the Government and regional governments in accordance with their authority with the principles of transparency and public accountability.

4.1.2. Policy of DL by Ministry of Research and Technology and Higher Education.

Indonesia’s distance education policy for higher education is regulated through Law No. 12/2012 concerning Higher Education and followed up with Ministerial regulation of Education and Culture Regulation number 109/2013 concerning the Implementation of Distance education in Higher Education. The Higher education distance learning include:

The definition of Distance learning in this policy is:

- organized educational processes that bridge the separation between students and educators and are mediated by the use of technology, and minimal face-to-face meetings.
- Distance education is offered across space and time so students get the flexibility to learn in different times and places, and use a variety of learning resources.
- Usually in the form of massive education

Distance education aims: to provide Higher Education services to groups of people who cannot attend face-to-face or regular education; and expanding access and facilitating higher education services in education and learning. Distance education is held in various forms, modes and scopes that are supported by learning facilities and services as well as a scoring system that guarantees the quality of graduates in accordance with the National Standards for Higher Education. Distance Education evolved from the form of correspondent education to education through e-learning across space and time.

Understanding of E-Learning:

- Individual / independent learning or groups using ICT and networking.
- Provide flexibility for students to study anytime, anywhere, and with anyone.
- Can be combined with face to face a blended learning, but has innovative values because it provides a new nuance in the teaching and learning process that is different from ordinary face-to-face learning
4.2. **Infrastructure to Support DL Program**

Distance education infrastructure covers a) the Internet Network which can consist of School Information Network (JIS), City WAN (Wide Area Networks), ICT Center (Information and Communication Technology Center), and Intranet / Internet Networks; b) The TV Education program includes: 1) TVE Receivers: receiving live broadcasts, 2) TVE Receivers and Relays: receiving TVE broadcasts, 3) Mini TVE Receivers, Relays and Studio: receiving TVE broadcasts, Disseminating TVE broadcasts, broadcasting independent Local TV broadcasts; c) Integration of Educational TV and ICT Center.

The Ministry of Communication and Information welcomes the digital industry revolution by focusing on leveling telecommunications access throughout Indonesia, this is because Indonesia strength lies in human resources, Indonesia commit continue to build the internet infrastructure so that it can be utilized by the education and health sectors in the 3T (Outermost, Disadvantaged, Leading) and Indonesian borders, the Ministry of Communication and Information of the Republic of Indonesia targets broadband or broadband to all regions of Indonesia can be completed in 2019. Through the Telecommunications and Information Accessibility Agency (BAKTI), the Ministry of Communication and Information seeks to strengthen network integration that already exists first through the provision of internet access, BTS, and Palapa Ring Fiber Optic Backbone in villages. villages that have not been reached by telecommunications signals. In the Program Towards an Independent Indonesia Signal 2020, BAKTI targets the population in 5000 points in the foremost, outermost and disadvantaged (3T) and border (lastmile) areas to use telecommunications access.

The TV education program is a television station specifically aimed at disseminating information in the education sector and serves as a media for community learning. The system used is mainly a closed broadcast system through the use of Telkom-1 satellite dish owned by PT. Telkom. Thus TV Education broadcasts can be freely accessed by viewers in all regions of Indonesia, using television sets that are easily equipped with satellite dish (TVRO). To provide easy access for the community and schools that do not have TVRO, TV Education has collaborated with TVRI and several local television stations. Thus, TV Education can also be enjoyed by people who are within the radius of local TV broadcasting using ordinary television sets.

**TV Education networks**, TV Education Collaboration in the form of relay programs have been established with several local television stations spread throughout Indonesia. Among others are as shown below:

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CHAPTER 5 : CONCLUSION AND RECOMMENDATION

5.1. Feasibility Conclusions

Based on the discussion presented in this feasibility study, it is safe to conclude that implementation of Open and Distance Learning in Tourism is ready and favorable, and will be highly beneficial to the tourism TVET development and has a high probability of success. The findings of this feasibility study show that the Key findings are as follows:

- Tourism as one of the priority sectors for economic growth, both the Contribution to GDP, and Contribution to employment.

- Vocational Education Revitalization Policy to improve the qualifications of HR in facing the world of work is manifested in President decree 9 of 2016 concerning Revitalization of Vocational High Schools in the Context of Improving the Quality and Competitiveness of Indonesian Human Resources.

- Education System and TVET System provide multi exit multi entry.

- The development of TVET tourism is a top priority based on that Indonesian tourism has now become one of the largest economic sectors and has the fastest growth rate and is one of the main sources of national income.
Vocational training in tourism has been encouraged and developed rapidly, it began with the Indonesian government cooperation program with the Australian government in the 2002 IAPSD program that developed competency-based training (CBT), standard of competency, competency assessors, and master competency assessors.

Indonesia has implement MRA-TP include the starting implementation of ACCSTP and CATC into curriculum development; implement the ACCSTP and CATC into certification schemes; with facilitation from Ministry of Tourism, the industry implements the ACCSTP and CATC, all institution for MRA-TP implementation (NTPB and TPCB) has been developed.

The Indonesian Distance Education policy for primary and secondary education has been regulated by Minister Regulation of Education and Culture of the Republic of Indonesia, Number 119 of 2014, concerning the Implementation of Distance Education for Primary and Secondary Education.

Indonesia’s distance education policy for Higher Education has been regulated through Law No. 12/2012 concerning Higher Education and followed up with Ministerial regulation of Education and Culture Regulation number 109/2013 concerning the Implementation of Distance education in Higher Education.

Infrastructures (the Internet, The TV Education program, ICT Center)

to Support DL Program has been developed widely both by the government (Ministry of Communication and Information, Ministry of Tourism, Ministry of Education and Culture, and Ministry of Research and Higher Education) and also private.

5.2. Recommendations

To be able to accelerate the program of the implementation of Open and distance learning, several constraints that have been discussed in this study need to be addressed immediately. These recommendations include:

- it is expected that education technologist and English Scientist can find strategies to develop strategy and program to solve the problems in developing mastery of English both student and the teacher.

- Development of occupational standards, and competency standards in the field of distance learning development, so as to accelerate the application of distance learning in tourism TVET development.
REFERENCES


CHAPTER 1 : PROFILE OF TOURISM SECTOR IN LAO PDR

Lao PDR is located in the center of the Greater Mekong and Southeast Asia region. The country is surrounded by other countries, Myanmar and China in the northwest, Vietnam in the east, Cambodia in the south, and Thailand in the west. The government places tourism as one of the important national economic sectors of eleven priority development sectors. The country benefits from its location, political stability and abundant natural, cultural and historical resources. In addition, ethnic diversity and hospitality of the locals is also a major attraction for tourists. The arrival of foreign tourists has increased from 2.5 million in 2010 to more than 4.2 million visitors in 2014 - growing by 65.5%. The Ministry of Information, Culture and Tourism (MICT) target of 4.5 million international visitors in 2020. Domestic tourists account for 33% of all tourists. This sector experienced a minimum growth of 2.08 million in 2014 and 2.03 million in 2013.
In 2014, the direct contribution of Travel and Tourism to GDP was LAK4,628.4bn (5% of total GDP) and is expected to increase by 8.1% in 2015. Despite all this growth tourism Laos continues to compete with its regional competitors to want to stay long in this country. Laos is considered an additional destination: 70% of international visitors visit other countries on their trips to Laos such as Thailand (60%), Cambodia, China or Vietnam (53%) or other Southeast Asian countries (18%). 75% of all international visitors come from Thailand and Vietnam, with Thailand accounting for 52% of all international visitors. Most Thai visitors are afternoon travelers (they come to the store) to Vientiane from Thanaleng and Savannakhet Border Posts on Friendship Bridge II. These two border crossings cover 55% of all international arrivals. Although the number of Thai visitor arrivals is highest, their actual expenditure is very low (27% of total revenues). They spend very little to rent accommodation and transportation because of the length of their average stay, which is relatively more on food and beverages and retail trade. (Lao PDR Destination Management Plan 2016-2018, 2016)

Many of the visitors from China are business travelers who are followed by tourists who are packaged tours or ‘Amateur’ tourists (by air, bus or caravan). Its extensive growth is due to increased trade relations between Laos and China, flexible Chinese government restrictions on overseas travel, government policies to increase leisure time in China and rising middle class Chinese with higher incomes. European markets (France, Germany, UK, etc.) are relatively small (amounting to 121,007 arrivals in
2015) - but this is a potential market for shopping enthusiasts and is a priority market for Laos. Backpackers and budget travelers are the majority of Laos visitors.

The input of most workers in hospitality industry comes from secondary school, both vocational or non-vocational. The paradigm of the community still sees better work as an office employee, both in government and the private sector. The government began trying to encourage public awareness to choose technical and vocational schools. In 2017, the total contribution of Travel & Tourism to jobs, including jobs indirectly supported by industry, was 11.9% of total jobs (383,500 jobs). This is expected to increase by 0.3% in 2018 to 384,500 jobs and increase by 1.1% per year to 428,000 jobs in 2028 (10.7% of the total). Travel & Tourism directly accounts for 114,000 jobs (3.5% of total work in Laos). Even though it is estimated to decline 0.6% in 2018, but after 2028 it is expected to increase by 0.7% annually to 121,000 jobs (3.0% of total employment).

CHAPTER 2: VOCATIONAL EDUCATION SYSTEM AND TRAINING

A National Action Plan (EFA - NPA, 2003-15) has been developed to encourage educational development activities that make it possible to achieve Government of Lao’s (GoL’s) commitments and objectives. The (EFA-NPA) establishes three main objectives: equal access, improvement in quality and relevance, and strengthening education management for formal and non-formal education at all levels. Steps taken to achieve this goal through: implementing universal basic and basic education; reach out to disadvantaged population groups in rural and urban areas; encourage community participation in basic education and literacy at the grassroots level; and improve the relevance and quality of basic education through learning opportunities for children, adolescents and adults.
High economic growth over last ten years in Lao PDR (on average 7%), increasing demand for workers at all skill levels. Particularly in urban areas employers face the challenge to find qualified workers. At the same time, disadvantaged groups in remote areas have difficulties to access TVET and employment due to the lack of economic activities, as a result, the labour market is characterized by the coexistence of underemployment and lack of qualified workers. To specifically address the challenges of disadvantaged groups in rural areas, the GoL has elaborated the Integrated Vocational Education and Training (IVET) Framework.

There are three main integration under IVET. First is the comprehensive governance by aligning vocational training policy with other relevant education policies as well as needs from socio-economic targets. Second is ensuring the vertical and horizontal integration of vocational education processes, organizations and institutions. Recognition of learning outcomes and certification is pathway to enable permeability during education process. The last is integrating the concept and approach of vocational training by ensuring any formal or non-formal training is running under one roof of training institution and holding the practical oriented learning as the major organisational principal.

As Lao PDR Prime Minister’s decision on TVET and Skills Development (2010) clearly mandated cooperation between the main TVET ministries; MOES and the Ministry of Manpower and Social Welfare (MOLSW), the decision identified synergies and complementarity between ministries and provided a basis for stronger cooperation. Under the MOES, there were 22 TVET institutions and 13 institutions belonging to other Ministries (in 2013-14).

At present, there are only 2 private TVETs that provide several programs such as TVET diploma level.
courses in learning English, Information Technology (IT), business, automotive and electrical engineering. It is found that coping with the learning needs of young people and adults in the context of lifelong learning is generally enhanced greater access to post-basic education.

Technical and Vocational Education and Training (TVET) was established as one of the four sub-sectors of the education system in the revised version of the Laos Education Act which was announced in July 2007. TVET is divided into three levels: primary or first level (at the upper secondary level), middle and high level (at post-secondary level). So TVET is included in part for senior secondary education and partly for post-secondary education, which is formally part of higher education in accordance with the definition.

Meeting the learning needs of young people and adults in the context of lifelong learning is generally enhanced through easy access to post-basic education. The transition rate from primary to high school level has increased from 78.8% in 2007/08 to 89.4% in 2013/14 (Men - from 80.3% to 90.7% and women - from 76.9% to 88.1%). Of the 37 vocational & technical schools in 2013/14 (22 under the Ministry of Religion, 2 under the Ministry of Agriculture and Irrigation, 4 under the Ministry of Information & Culture, 5 under the Ministry of Public Health, 2 under the Ministry of Justice and 2 private schools), students registered at Moes’s 22 TVET appear to have increased in the past 5 years. The annual growth rate, does not increase significantly. In addition, the proportion of registration for women is around 37% of the total registration during that period.

In general, education and training provided in TVET institutions of Lao PDR are still generally inadequate, in terms of quality, due to several factors of the shortage of qualified and trained teachers, lacking of textbooks and teaching aids and limitation of facilities such as laboratories and modern equipment while it is one of the fields in education that must be strengthened. The main problem is that even though several strategies and policies have been developed, most of them have not yet materialized. To achieve expectations related to TVET, detailed action plans including special annual interim targets need to be prepared in the near future.

CHAPTER 3: CURRENT IMPLEMENTATION OF MRA-TP

Under the Ministry of Information, Culture and Tourism, Institute of Mass Media, Culture and Tourism (IMCT) acts as NTPB as well as TPCB in Lao PDR. Various activities have been done by this institute such as: creating awareness and disseminate information about MRA-TP, conducting Training-of-Trainee (ToT) program for national master trainer and assessor, preparing need assessment research of labor market. As a result of ToT program, currently they have around 60 ASEAN master trainers and assessors as well as 120 national master trainers and assessors. Those ToT programs, currently is limited only for competencies for housekeeping and front office, but on the following year it will be ToT for national master trainer and assessor also for food& beverage and also food production.
In Lao, stakeholders have stated that inadequate funding is a major barrier in implementing tourism MRA. For example, the budget for conducting training sessions and publishing training handbooks and other material is very limited. Since the ASEAN tourism curriculum is in English, IMCT initiated the translation of CATC toolboxes into local languages.

Tabel: Key Milestones Achieved in Implementation of the Mutual Recognition Arrangement on Tourism Professionals

<table>
<thead>
<tr>
<th>Milestones</th>
<th>Cambodia</th>
<th>Lao PDR</th>
<th>Philippines</th>
<th>Thailand</th>
<th>Viet Nam</th>
</tr>
</thead>
<tbody>
<tr>
<td>National tourism curriculum is in place</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>National tourism curriculum is aligned with CATC</td>
<td>No</td>
<td>No</td>
<td>Ongoing</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Education and training providers have aligned their curricula with CATC</td>
<td>Ongoing</td>
<td>Ongoing</td>
<td>Ongoing</td>
<td>Yes</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Toolboxes for all labor divisions have been implemented</td>
<td>Yes</td>
<td>Ongoing</td>
<td>Yes</td>
<td>Ongoing</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Labor divisions for which ASEAN master trainers have been trained</td>
<td>Housekeeping, front office, food and beverage, and food production</td>
<td>Housekeeping, front office, food and beverage, and food production</td>
<td>Housekeeping, front office, food and beverage, and food production</td>
<td>Housekeeping, front office, food and beverage, and food production</td>
<td>Housekeeping, front office, food and beverage, and food production</td>
</tr>
</tbody>
</table>

Source: ADB-MPI Questionnaire – MRA Implementation, August 2015–February 2016, Cambodia, Lao PDR, Philippines, Thailand, and Viet Nam.

During this study, there are 3 institutions that have been visited: Department of Tourism, National University of Lao PDR (NUOL), Pakpasak Technical College and Laos National Institute of Tourism and Hospitality (LANITH). The CATC contents used in LANITH and Pakpasak College and it has been translated into Lao. On the other hand, at NUOL, tourism lecturers acknowledged the availability of CATC but they still could not access CATC toolboxes and still use the national curriculum.

In LANITH competency based training courses delivered by experienced trainers. Development of new facilities is also currently under progress. Initiated by the support from European resources, student learning and outcomes are greatly developed. Delivery of courses is also conducted in combination by foreign and local trainers. The construction of a new campus is planned to provide quality both in practical and theoretical training facilities.

CHAPTER 4: CURRENT CONDITIONS OF ICT UTILISATION

The GoL’s and MoES has commitment to support ICT for education by launching ICT for Lao Education (ICT4LE). This policy will focus on primary and secondary education to enhance the education access, quality and management. ICT has been integrated as a subject into the new Continuing Education curriculum starting in 2010 and in the 2013 Junior High School Teacher Education Program (STEP) curriculum.
In terms of increasing access, the Center for Education and Sports Statistics (ESSC) provided a School Network Mapping system (SNM). Currently school data is available online and offline in order to manage the education sub-sector effectively both at the primary and secondary levels. Furthermore, a solid and constantly updated school network mapping system must be able to guide related decisions about school investment.

On the other hand, to increase quality of teaching and learning, the Education Technology Center (ETC)/ Research Institute for Educational Sciences (RIES) has begun producing videos to support change to a student-centered approach. The videos were brought by pilot pedagogical advisors in 5 districts to support teachers’ learning and teaching, moving from the traditional approach to the student-centered approach. A culture of sharing best practices among teachers and education managers including the best lessons and teaching demonstration videos must be available online or offline via DVD to widely reach schools who do not have internet connectivity.

Directorate of Teachers Education (DTE) MoES that responsible for pre-service teachers education also already equipped Teacher Training Centers (TTC) with computers, LCD, smartboard and also internet connection. Those teachers are familiar with Facebook group to share various information.

In general, ICTs have been introduced to secondary schools, but only a few of them have computer laboratories. Until now, only 180 out of 1,500 secondary schools have computer laboratory spaces which are mostly established with the support of parents and the community.

CHAPTER 5: CURRENT IMPLEMENTATION OF MRA-TP AND POSSIBILITY TO CONDUCT DISTANCE LEARNING PROGRAM

Currently IMCT have trained 2,000 people related to CATC and produced 12 trainers, 26 ASEAN assessors, 25 national assessors. IMCT works together with Department of Technical and Vocational Education MOES is trying to integrate the CATC with the current tourism curriculum.

CATC manuals have been translated into Lao. 74 out of 120 competencies have been successfully translated and printed. CATC has been applied in the fields of F & B, accommodation and Travel and Tourism. CATC is being implemented starting on level 4, although there are challenges related to English proficiency.

Although ICT infrastructure is quite challenges in many schools, but on the Vientiane capital, internet connections is working well through mobile phone. Based on the visit, Pakpasak Technical College and LANITH is expected to be pilot schools for future online learning program in tourism.
CHAPTER 6: CONCLUSION

- In principle, concept of open and distance learning in Tourism in Southeast Asia this program is well received among related institutions since it is mutually beneficial and considered as enormous contribution to country benefits. Although it is quite challenged heavy to carry out on a large scale, it is necessary and possible to get start with a trial in one school or college.

- SEAMOLEC suggested to present this plan on the next ATPMC meeting.

- In order to carry out online CATC curriculum among ASEAN countries, issues related to the sharing mechanism of narrators, resource persons, interest in distance learning, cost, targets groups for pilot projects, and certificate system still need to come to agreement

REFERENCES


CHAPTER 1: PROFILE OF TOURISM SECTOR IN THE PHILIPPINES

The Philippines’ largest city is Quezon City, which contains 2,936,116 people. It forms a part of the wider Metropolitan Manila area, which is comprised of 17 cities and municipalities and has an overall population of 12.8 million people. The entire Greater Manila urban area spills out beyond the boundaries of Metro Manila and is reported to contain around 22.7 million people, which is a quarter of the Philippines’ entire population.

Other major cities include Manila itself (pop: 1,780,148), Caloocan (pop: 1.5 million) and Davao City (pop: 1.6 million.) Of these, only Davao City is outside of the Metropolitan Manila area.
1.1 Economic Conditions and Contribution of Hospitality Industry

The Philippines’ economy has strengthened in recent years and remains dynamic. In 2016, the economy grew by 6.8%, the fastest in Asia, and 6.7% in 2017. The growth was mainly due to a surge in investment and consumption, as well as the reconstruction and public-private partnerships (PPP) in the infrastructure sector. Domestic consumption is expected to remain the main driver of the economy, accounting for 70% of GDP. Even though China is the third most important recipient of Philippine exports, the Philippines are expected to be only little affected by the Chinese slowdown due to a high demand for its electronic products. During 2017, the current account balance fell into negative range, the first time since the 2009 global financial crisis, in part due to an ambitious new infrastructure spending program. GDP is expected to grow 6.6% in 2018 and 6.5% in 2019. The new administration wants to reduce the poverty rate to 17% and graduate the economy to upper-middle income status by 2022. On the social level, the country faces several challenges: The population living below the poverty line has increased in recent years (33% of the population and 75% in some areas of the southern Philippines). Despite the low unemployment rate (5.3% in January 2018), the inequality in wealth distribution keeps increasing and underemployment hovers at 18% of the employment population.

In 2017, the tourism industries contributed 12.2 percent to the economy (Figure 1). It is measured by the share of Tourism Direct Gross Value Added (TDGVA) to the Gross Domestic Product (GDP). The TDGVA amounted to PhP 1,929.3 billion at current prices in 2017. This is higher by 24.2 percent than the previous year’s record of PhP 1,553.7 billion. The TDGVA is estimated using the benchmark 2012 Input-Output (I-O) table. The latest results of the Philippine Tourism Satellite Accounts (PTSA) provide information on tourism expenditure and employment. Other key results from PTSA were:

- Inbound tourism expenditure, which refers to the expenditure of non-resident visitors (foreign visitors and Filipinos permanently residing abroad) within the Philippines, grew by 43.9 percent in 2017, amounting to PhP 448.6 billion from PhP 311.7 billion in 2016. Compared to the country’s total exports, the share of inbound tourism expenditure was 9.2 percent. Inbound tourism ranked third among the biggest export items in 2017, after semiconductors at 21.9 percent and miscellaneous services at 15.7 percent.
• Domestic tourism expenditure, which includes expenditure of resident visitors within the country either as domestic trip or part of an international trip, grew by 25.5 percent, from PhP 2,108.2 billion in 2016 to PhP 2,644.8 billion in 2017. Domestic tourism expenditure represents 22.8 percent of the household final consumption expenditure (HFCE) in 2017.

The PTSA is compiled by the Philippine Statistics Authority (PSA) based on the international recommendations for tourism statistics and tourism satellite accounts of the United Nations World Tourism Organization.

1.2 Demographic Characteristic, Labour Force and Employment in Hospitality Industries

Preliminary results of the July 2018 Labour Force Survey of the Philippine Statistics Authority (PSA) showed that the total household population of 15 years old and over in the country was estimated at 71.560 million wherein about 42.982 million persons were in the labour force. This placed the labour force participation rate (LFPR) at 60.1 percent, a decrease of 0.5 percentage point from the 60.6 percent registered in July 2017 despite the increment of 438,000 (1.0%) in the labour force for the period. This is due to the household population 15 years old and over growing at a faster pace than the labour force (2.0% vs. 1.0%, respectively).

The total number of employed persons in the country was estimated at 40.659 million, an increase of 488,000 (1.2%) from the 40.171 million posted in the same period last year. The increase in employment is attributed to the increments posted in industry and services sectors of 172,000 (2.2%) and 1.052 million (4.7%) respectively, which negates the decrement suffered by the agriculture sector (-737,000 or -7.3%).

All of the industries in the services sector, except for accommodation and food service activities, posted increases in employment. The wholesale and retail trade; repair of motor vehicles and motorcycles accounted for the biggest slice (239,000 or 3.2%) of the 488,000 increase in employment for the period. This was followed by administrative and support service activities which recorded an increment of 192,000 (13.7%).

In the same manner, employment in all sub-sectors under industry grew except for water supply, sewerage, waste management and remediation activities which went down by 5,000. Manufacturing accounted for the biggest increase of 142,000.
Employment in tourism characteristic industries was estimated at 5.3 million in 2017, higher by 0.9 percent compared to 5.2 million in the previous year. Share of employment in tourism industries to total employment in the country was recorded at 13.1 percent in 2017.

1.3 Current Situation of Hospitality Industry

Ranked 90 out of 177 countries in the United Nations Human Development Index (UNDP, 2008), the Philippines is placed 37 in the list of 108 developing nations with regard to human poverty. Per capita income averaged US$5,137 in 2005, but there are great disparities in the distribution of wealth socially and geographically and Mindanao has the worst indicators. Nationally, an estimated 44% of the population live on less than US$2 a day, the proportion of families ranging from 47% in rural districts to nearly 20% in cities. The causes of poverty are ‘weak macroeconomic management, employment issues, high population growth rates, an underperforming agricultural sector and an unfinished land reform agenda, governance issues including corruption and a weak state, conflict and security issues particularly in Mindanao, and disability’ (ADB, 2005a, p. xvii). The list illuminates the country’s formidable difficulties (Human Development Network, 2009) which impinge on tourism directly and indirectly

International tourism has expanded rapidly throughout Asia Pacific in recent decades, often at a faster pace than in other regions of the world, although the global recession which commenced in 2008 has depressed demand and investment. However, the pattern in the Philippines was irregular prior to the current slowdown and does not conform to general trends. A record one million arrivals in 1980 was followed by a decline and numbers peaked at 2.2 million in 1997, falling after the Asian financial crisis of that year. Recovery was underway by the beginning of the new century and there were just over three million arrivals in 2007 when earnings reached US$4.8 billion (TTG Asia, 2008; UNWTO, 2007). There was an increase in visitors of 1.53% in 2008 (DOT, 2009a) and a goal has been set of five million tourists from overseas by 2010 when it is hoped that tourism employment will have doubled to six million and tourists will constitute 13.6% of GDP (NEDA, 2004) in contrast to 7% in 1998 (NSCB, 2008).

Asia supplies the highest proportion of visitors, led by South Korea and Japan which together with the USA accounted for almost half of the total in 2008. The importance of Philippine passport holders permanently residing abroad, excluding overseas workers, should not be overlooked (DOT, 2009a).

About 45% of all tourists travel for holiday purposes, 26.5% to visit friends and relatives and 16.9% for business. There is an uneven spread and Metro Manila, Tagatay on the island of Luzon, Cebu Province and Boracay Island are the preferred destinations (Virola, 2006). It should be noted that domestic tourism is also growing (Euromonitor, 2008; NSODOT, 2005), although such trips are beyond the remit of this study.
Tourism is recognised as an economic sector of significance which has excellent prospects. It is a core component of the Medium Term Philippine Development Plan (MTDP) 2004-2010, dedicated to fighting ‘poverty by building prosperity for the greatest number of the Filipino people’ (NEDA, 2004, p. 1), and presented in the document as a top priority because of its many social and economic advantages. Some analysts claim that tourism has already helped certain of the poorest rural areas to improve living standards (Euromonitor, 2008). A national tourism strategy for expanding markets and tourist centres is proposed with an ambitious agenda to remove barriers.

The Department of Tourism (DOT) oversees the industry and is charged with promoting it as a ‘major socio-economic activity to generate foreign currency and employment and to spread the benefits of tourism to both the public and private sector’. A Tourism Planning, Product Development and Coordination Sector deals with the ‘formulation and updating of the Tourism Master Plan’ and a Tourism Promotions Sector handles domestic and international marketing (DOT, 2009b). The Philippine Tourism Authority was created in 1973 as the DOT’s ‘implementing arm’ with a mission ‘to develop identified priority areas; to operate, maintain and promote facilities in pioneering capacity; to provide technical and financial assistance to qualified tourism projects; and to generate revenues to fund national and corporate development undertakings’ (PTA, 2009).

CHAPTER 2: PHILLIPINES EDUCATION AND VOCATIONAL EDUCATION

Education in the Philippines is provided by public and private schools, colleges, universities, and technical and vocational institutions. Funding for public education comes from the national government. At the basic education level, the Department of Education (DepEd) sets overall educational standards and mandates standardized tests for the K–12 basic education system, although private schools are generally free to determine their own curriculum in accordance with existing laws and Department regulations.

On the other hand, at the higher education level, the Commission on Higher Education (CHED) supervises and regulates colleges and universities, while the Technical Education and Skills Development Authority (TESDA) for technical and vocational institutions regulates and accredits technical and vocational education programs and institutions. For the academic year 2017–2018, about 83% of K–12 students attended public schools and about 17% either attended private schools or were home-schooled.

At present, TVET provides education and training opportunities to prepare students and other clients for employment. It also addresses the skills training requirements of those who are already in the labour market and would need to upgrade or develop new competencies to enhance employability and improve productivity.
There are four basic modes of training delivery. In the year 2005, 24.68% of TVET graduates came from the formal school-based programs, 4.82% was contributed by center-based non-formal training programs, a large 41% came from community-based programs leading to livelihood and self-employment opportunities and enterprise-based programs like apprenticeship, learner ship and dual training programs contributed a 7.5% to the total annual output. Other government

“TESDA (Technical Education and Skills Development Authority) is mandated to provide relevant, accessible, high quality and efficient technical education and skills development in support of the development of high quality Filipino middle level manpower responsive to and in accordance with the Philippine development goals and priorities”. Given its mandate, TESDA envisions to be the leading partner in the development of the Filipino workforce with world-class competence and positive work values. Its mission on the other hand is to provide direction, policies, programs and standards towards quality technical education and skills development. TESDA has also a quality policy which states that, “We measure our worth by the satisfaction of the customers we serve.” To facilitate the delivery of its mandate, TESDA defines its Core Business which is comprised of three planks: Direction Setting, Standard Setting and Systems Development and Support to TVET Provision.
CHAPTER 3: CURRENT IMPLEMENTATION OF MUTUAL RECOGNITION ARRANGEMENT ON TOURISM PROFESSIONALS (MRA-TP).

3.1 Institutional Mechanism for MRA Implementation in The Philippine

The ASEAN MRA for Tourism Professionals was signed by the leaders of the AMS in 2009 and completed in 2012 is handled by a different government agency as there is no license needed to work in the various sectors of the tourism industry. There are three lead agencies in the Philippines to implement this MRA: The Department of Tourism (DOT), Tourism Industry Board Foundation Inc. (TIBFI), Technical Education and Skills Development Authority (TESDA).

The DOT is the National Tourism Organization (NTO). It is the government mandated agency responsible for the promotion and development of tourism as a major socio-economic activity that will generate employment and economic initiatives that will spread the benefits to both private and public sector. As the designated NTO, it is tasked to do the following: develop, coordinate and implement work programmes/plans to enhance cooperation in tourism; provide a mechanism to promote participation from the private or business sector and non-government organizations; establish working groups to assist in the development and implementation of policies and work programmes and represent the Philippines in the ASEAN Tourism Professional Monitoring Committee (ATPMC).

The TESDA is the designated Tourism Professional Certification Board (TPCB). It is the agency authorized by the government of each ASEAN Member State primarily responsible for the assessment and certification of tourism professionals. As the TPCB, TESDA tasked to assess qualifications and/or competencies of tourism professionals as specified in the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP); issue certificates to tourism professionals whose qualifications and/or competencies comply with the ACCSTP; develop, process and maintain a registry of certified tourism professionals and job opportunities and notify the National Tourism Professional Board (NTPB) when foreign tourism professionals are no longer qualified or have violated any technical, professional or ethical standards.

The TIBFI is the designated National Tourism Professional Board (NTPB) and refers to the Board for Tourism Professionals composed of representatives from the public and private sectors including the academia and other relevant tourism stakeholders as identified by the ASEAN NTOs. As the NTPB, it is tasked to create awareness and disseminate information about the ASEAN MRA; promote, update, maintain and monitor the ACCSTP and the Common ASEAN Tourism Curriculum (CATC); facilitate the exchange of information on assessment procedures, criteria, systems, manuals and publications relating to the MRA; report its work progress to the ASEAN NTO; formulate and update necessary mechanism to enable implementation of the MRA and facilitate the exchange of best practices in the tourism sector.
TIBFI has various industry and academic professional organizations as members but not limited to the Hotel and Restaurant Association of the Philippines (HRAP), Philippine Travel Agencies Association (PTAA), Philippine Tour Operators Association (PHILTOA), Association of Human Resource Managers in the Hospitality Industry (AHRM), Hotel Sales Managers Association (HSMA), Executive Housekeepers Association of the Philippines (EHAP), Philippine Bartenders’ League (PBL); Hotel Restaurant Chefs Association of the Philippines (HRCAP), Philippine Association of Convention, Exhibition Organizers and Suppliers (PACEOS), Council of Hotel and Restaurant Educators of the Philippines (COHREP), Association of Administrators in Hospitality, Hotel and Restaurant Management Educational Institutions (AAHHRMEI) and National Union of Workers in the Hotel and Restaurant and Allied Industries (NU-WHRAIN). All the professional organizations are represented by their current president or their designated representatives.

ASEAN Tourism Professionals (ATPs) may register and promote their competencies through ASEAN Tourism Professional Registration System (ATPRS). ATPRS is a web-based facility that serve as a job-matching platform between industry and ATPs across ASEAN. It is important to note that the recognition of skilled labour is voluntary and governed by each ASEAN Member State’s domestic regulations, laws, and policies. This includes visa, employment, and working permit requirements. The main page of web-based facility of ATPS as shown below.

3.2 Institutional Mechanism for MRA Implementation in The Philippine

Compared to the current qualifications by several trainings/course providers, the CATC equivalence are described below.

<table>
<thead>
<tr>
<th>Qualification and Provider</th>
<th>Equivalence</th>
<th>Soft Infrastructure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialisations nested in Degree Courses, delivered as CBT in:</td>
<td>Strong equivalence between the courses through to Degree level with ASEAN Diplomas and Advanced Diplomas and the Certificate courses nested in them. Areas of delivery match up with ASEAN qualifications in:</td>
<td>CBT delivered by industry experienced trainers in exemplary facilities. High uptake of graduates into industry locally, elsewhere in AMS, and across the globe. The tourism training facilities within the campus itself are the equal of the best anywhere in the world, and the campus building incorporates the Bay Leaf Hotel giving students real time experience under the supervision of their trainers in delivering the full range of high-end guest services. CBT and CBA strongly evident throughout all areas of training.</td>
</tr>
<tr>
<td>• Hotel and Restaurant operations</td>
<td>• Food and Beverage Services</td>
<td></td>
</tr>
<tr>
<td>• Culinary Arts</td>
<td>• Food production – Cookery and Patisserie</td>
<td></td>
</tr>
<tr>
<td>• Cruise Line Operations – Accommodation/ Food &amp; Beverage</td>
<td>• Front Office</td>
<td></td>
</tr>
<tr>
<td>• Cruise line – Culinary.</td>
<td>• Housekeeping.</td>
<td></td>
</tr>
<tr>
<td>• Diploma in Culinary Arts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Diploma in baking &amp; Pastry Arts.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lyceum of The Philippines University, College of International Tourism &amp; Hospitality Management.</td>
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</table>

Diploma in Baking & Pastry Arts

Diploma in Culinary Arts & Technology Management Center for Culinary Arts.

Strong equivalence between these Diplomas and the ASEAN Diplomas in Food Production, both Cookery and Patisserie.

CBT delivered by trainers with strong industry experience in great facilities. Strong employment outcomes and opportunities for graduates to work abroad. The training kitchens and associated food and beverage training facilities are exemplary, and the CCA’s strong links with industry locally and internationally keep them at the forefront in terms of relevance and currency in culinary trends and practices. CBT and CBA strongly evident throughout the programs.
<table>
<thead>
<tr>
<th>Qualification and Provider</th>
<th>Equivalence</th>
<th>Soft Infrastructure</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Certificate II courses in:</td>
<td>Equivalence between these National Certificate II courses and the corresponding ASEAN Certificate II courses in Front Office, Travel Agencies and Tour Operation Equivalence between some areas of the National Certificate III in Events Management Services and parts of the ASEAN Certificate III in Food and Beverage Services</td>
<td>CBT delivered by experienced trainers in facilities which simulate industry but are in need of upgrading to maintain currency. Training kitchens, restaurant areas, housekeeping and laundry facilities are all heavily utilised in providing students with smooth transition from the simulated training environment into industry employment. Maintenance plans should be developed and implemented to ensure that the useful life of the facilities can be extended</td>
</tr>
<tr>
<td>• Front Office Services</td>
<td></td>
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<td>• Travel Services</td>
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<tr>
<td>• Tour Guiding Services</td>
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<tr>
<td>• Tourism Promotions Services</td>
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<tr>
<td>• National Certificate III in Events Management Services</td>
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<tr>
<td>• Diploma in Tourism &amp; Travel Management Services.</td>
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<tr>
<td>TESDA</td>
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</tr>
<tr>
<td>Short course including internship component in Food and Beverage Magsaysay Center for Hospitality and Culinary Arts</td>
<td>Certificate II in Food and Beverage</td>
<td>From its background in the training of staff to work in maritime services, Magsaysay has built a strong reputation for its culinary training, and has impressive facilities and well experienced trainers.</td>
</tr>
<tr>
<td>Short course including internship component in Culinary Arts Magsaysay Center for Hospitality and Culinary Arts</td>
<td>Certificate II in Food Production</td>
<td></td>
</tr>
<tr>
<td>Short course including internship component in Housekeeping Magsaysay Center for Hospitality and Culinary Arts</td>
<td>Certificate II in Housekeeping</td>
<td></td>
</tr>
<tr>
<td>Foundation and management courses in Travel and Tourism Magsaysay Center for Hospitality and Culinary Arts</td>
<td>• Foundation = Partial equivalence to Certificates II, III in Travel Agency</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Management = Partial equivalence to Diploma in Travel Agency</td>
<td></td>
</tr>
</tbody>
</table>

Notes on Equivalence with:

1. ACCSTP – Competency Standards have been developed by TESDA, and are used by TESDA. There is no evidence to suggest that they are used by others, including all higher education delivers under CHED, or the private providers with which the project team has engaged.

2. RQFSSRS – TESDA have a skills recognition system, use of which appears to be confined to TESDA clients/students.
3.3 ASEAN Master Trainers and Assessors

As part of the ASEAN MRA for Tourism Professionals, DOT recommended seven participants to attend the ASEAN Master Trainer and Assessor Training, conducted in Bali Indonesia last 2012. There were three participants who attended the 3-week Master Trainers workshop, and four who attended the 2-week Master Assessor training workshop. These nominees were endorsed by TESDA and/or TIBFI. Part of their return service is an undertaking to conduct a similar program in the Philippines. The trainers for the ASEAN Master Trainer and Assessor Training program evaluated the performance of the participants, which had Levels 1 to 4, with Level 1 as the highest.

The levels and their description are as follows:

- **Level 1: (25-30) Outstanding Master Trainer/Assessor** — This Master Trainer/Assessor has demonstrated. In-depth understanding of the background to vocational training in the ASEAN context, the MRA and the toolbox project; In-depth understanding of the structure, purpose and application of CBT/CBA; In-depth understanding of the ASEAN context and the MRA; A high level of English language (listening, speaking, reading, writing); Ability to train and assess trainers and assessors at the ASEAN level and able to assess the competencies of other Master Trainers and Assessors.

- **Level 2: (19-24) Competent Trainer/Assessor** — All of the above but at a reduced level of ability and experience. Able to train and assess trainers and assessors at a National level but not yet able to assess the competencies of other Master Trainers and Assessors.

- **Level 3: (15-19) Competent Trainer/Assessor** — Has many of the skills and abilities mentioned above but needs further development in: English, CBT, CBA, Developing an assessment schedule; Suitable to conduct training and assessment of trainers and assessors at a Regional level but not yet able to assess the competencies of other Master Trainers and Assessors.

- **Level 4: (0-14) Not yet Competent Trainer/Assessor** — Unsuitable to perform the role of Master Trainer or Assessor either due to certain character faults or lack of knowledge, ability, aptitude, attitude or communicative ability (in English and/or native language) or requires more intensive study and vocational experience in order to be able to assess other trainees or assessors.

There were also six competencies that Master Trainers/Assessors need to learn and demonstrate competency during the assessment. These are:

- **C1 Can conduct training/assessment in English**
- **C2 Demonstrates ASEAN competency-based training/assessment knowledge**
- **C3 Demonstrates application of an ASEAN Toolbox in the design of a competency-based learning and/or assessment program**
- **C4 Demonstrates the ability to conduct training/assessment independently**
• C5 Has sufficient ability to support experienced trainers/assessors
• C6 Demonstrates knowledge of and has the ability to implement the ASEAN competencies of the CATC to conduct training/assessments in at least one specialist area (e.g., English, housekeeping or in the common core)

The Philippine delegation for the ASEAN Master Training had five participants who received Level 1 and two participants who received Level 2 rating. Of these delegations, four were involved in the cascade training for the National Master Trainer and Assessor workshop.

In the National Master Training and Assessment Workshop, out of the 37 participants 35 participants were able to complete the program. They were also rated by the trainers from Level 1 to Level 4, however descriptors were modified in the coverage area. Level 1 can train/assess Nationally, level 2 can train/assess Regionally, level 3 can train/assess Provincial and level 4 is the same. Assessment and evaluation is still being finalized by the trainers. With additional 35 possible trainers/assessors, who represent various regions in the country, there would be more possible speakers in ASEAN MRA Awareness seminars as the awareness module was part of the training program.

CHAPTER 4: TVET EDUCATION IN THE PHILIPPINES

The inputs of tourism and hospitality education in the Philippines came from various enrolment system, starting from the secondary education as a part of the technical vocational tracks that accommodate grade 11-12 students to take the program, which at the end will make them job ready. Tertiary education on technical education and skill development, as well as baccalaureate program, post-baccalaureate, and post-doctoral/professional as advanced study. The Philippines education system as shown on picture below.

TESDA formulates technical education and skills development plans, sets appropriate skill standards and tests, coordinates and monitors technical education and skills development policies and programs, and provides policy directions and guidelines for resource allocation for the Technical-Vocational Education and Training (TVET) institutions in both the private and public sectors. TESDA consist of private sector which including labour, employer, TVET pro-
By law, TESDA Board has 22 members, 14 are from representatives of the private sector, and 8 are from the government sector namely; the Department of Labor and Employment, The Department of Education, the Commission of Higher Education, the Department of Trade and Industry, the Department of Science and Technology, the Department of Agriculture, the Department of the Interior and Local government, and the TESDA Secretariat.

<table>
<thead>
<tr>
<th>TESDA Board Members</th>
<th>Government Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Sector</td>
<td>Government Sector</td>
</tr>
<tr>
<td>Labor</td>
<td>DOLE</td>
</tr>
<tr>
<td>Employer</td>
<td>CHED</td>
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<tr>
<td>TVET Providers</td>
<td>DOST</td>
</tr>
<tr>
<td>Investor Groups</td>
<td>DILG</td>
</tr>
<tr>
<td>14 Representatives</td>
<td>8 Representatives</td>
</tr>
</tbody>
</table>

The TVET can be delivered through Institutions with registered programs, Enterprise Community based organizations, the TESDA Online Program (TOP). Institution-based refer to the delivery of training programs by public and private training institutions. Enterprise-based training programs are implemented within companies/firms or through dual training arrangements and apprenticeship schemes. Community-based training delivery is conducted at the local/ community level, mostly in partnership with the local government units (LGUs) and the non-government organizations (NGOs); any individual of any level or age 18 years old and over can join these programs.

In formulating plans to enhance and develop the delivery of technical-vocational education skills in the country in a more effective and efficient way, the TESDA launched its Tourism Online Program (TOP) in 2012. The TOP utilizes open education resource framework that aims to make technical education accessible and inclusive using Information and Communication Technology (ICT). To simply put, the TOP process is the free online access for TVET education (MOOC), to practice the skills anywhere anytime.
TOP has become an initiative to reach the unreached through Information and Communication Technology (ICT), by providing more technology-driven learning services and technology managed teaching and learning tools. TESDA adopted alternative learning delivery from traditional classroom based ‘Face-to-Face Learning Model’ into the online program hybrid learning model or the ‘Learn to Work’ Model. The trainees access the free online TVET education (MOOC), practice the skills anywhere or at home, be a certified worker and get the job. The online program requires no fees when taking the courses. Once the participants finish the online course, they may opt to take the face-to-face assessment for National Certification at TESDA. The assessments for certification can also be managed by TESDA accredited assessment centre or venue that are located close to the trainees’ residence.

Visit [www.e-tesda.gov.ph](http://www.e-tesda.gov.ph) and register!
The Assessment and Certification System is the process of evaluating the TVET graduates and skilled workers to determine if they have acquired the level of competence to perform jobs in the workplace. It provides evidence of whether compliance and competency have met standards and have been achieved. The assessment and certification system involves the accreditation of assessors, the development of assessment tools, the qualification of TVET trainers as assessors, and the recognition/accreditation of National Assessment Boards across various sectors. All programs with TRs are provided with competency assessment tools. Concerning issuing certificates, the qualifications are aligned with specific skill levels as defined in the PNQF, which includes four certificate levels for TVET—National Certificate Levels I, II, III, and IV.
Competency Based Training (CBT) and Competency Based Assessment (CBA) are all about preparing graduates who are job ready. Specialisations nested in Degree Courses managed by Lyceum of The Philippines University, College of International Tourism & Hospitality Management, delivered as CBT in:

- Hotel and Restaurant operations
- Culinary Arts
- Cruise Line Operations – Accommodation/ Food & Beverage
- Cruise line – Culinary.
- Diploma in Culinary Arts
- Diploma in baking & Pastry Arts.

Diploma in Baking & Pastry Arts and Diploma in Culinary Arts & Technology Management, managed by Centre for Culinary Arts. As well as the National Certificate II courses managed by TESDA, in:

- Front Office Services
- Travel Services
- Tour Guiding Services
- Tourism Promotions Services
- National Certificate III in Events Management Services
- Diploma in Tourism & Travel Management Services
CHAPTER 5: SUPPORT FOR DISTANCE LEARNING

5.1 Access to ICT devices and Internet

The Philippines along with other developing countries in Asia, Africa, and South America are generally interested in educational technology, particularly in ICT, hoping that their educational systems reap the pedagogical benefits associated with it. Drill and practice or tutorial software, for example, individualizes instruction and provides students with immediate feedback. Students can proceed at their own pace. Internet connectivity enables students to access remote sources of information. It exposes them to diverse expert opinions and makes them aware that they are part of a global community. There is evidence that multimedia learning environments, simulations, and computer-based laboratory analysis tools foster superior math, science, and language skills. Researchers characterize the ICT-infused classroom as highly interactive learning environments. Communication and collaboration between and among students, teachers, and outside experts occurs through formal presentations, cooperative

5.2 ICT in TVET Education

From the TESDA experience in implementing online program for TVET able to reduce the training duration more than 50%. Number of training hours spent by the trainees show that on the average, the trainees spent 213 hours or 26.6 days (46%) only to complete the blended Food and Beverage Service NC II compared to 472 hours or 3 months nominal duration of the regular Food and Beverage Service NC II.

The TESDA Online Program (TOP) is handled by the eTESDA Project Monitoring Unit (PMU). eTESDA PMU is currently managed by an Executive Director on a concurrent basis. The Executive Director is
assisted by two (2) permanent staff alongside eight (8) other staff hired on a Job-Order or Contract Service Worker basis. One permanent staff acts as the focal person for TOP while the other permanent staff is in-charge of the system, customer relation and data collation. The non-permanent staffs include one (1) project developer and training manager, one (1) executive producer, two (2) writers, one (1) research associate, one (1) multi-media developer, one (1) administrative assistant, and one (1) technical staff. The staff that manages the day to day operations have changed more often, moving to more permanent job opportunities when these come along.

5.3 Distance Learning Policy

In 2002, the Department of Education started to implement the Basic Education Curriculum (BEC) where ICT was integrated. The BEC encourages ICT to focus on the following areas: school computerization, teacher training, IT curriculum development, multimedia content development, financing, and monitoring-evaluation. Thus, latest movement in the Department of Education, ICT is introduced as a subject Home Economics and Livelihood Education (HELE) in the elementary levels, and as Technology and Home Economics (THE) in the secondary level (Magno, 2006).

The policies on the use of ICT in education managed by the Department of Education are as follows;

- Technology must be studied as a separate subject, and then applied to other learning areas as a tool for learning how to learn.

- Teaching-learning must not be textbook-driven but should include the application of ICT, whenever appropriate.

- An education modernization program will equip schools with facilities, equipment, materials and skills, and introduce new learning and delivery system, capitalizing on recent technological developments.

ICT is also a powerful mean to increase access to quality and lifelong TVET and enhance the relevance and authenticity of learning, and it enables workplaces to be brought into learning. The TVET can be delivered through Institutions with registered programs, Enterprise Community based organizations, or TESDA Online Program (TOP). Institution-based the delivery of training programs by public and private training institutions. Enterprise-based training programs are implemented within companies/firms or through dual training arrangements and apprenticeship schemes. Community-based training delivery is conducted at the local/community level, mostly in partnership with the local government units (LGUs) and the non-government organizations (NGOs); any individual of any level or age 18 years old and over can join these programs.

The TESDA TOP for TVET launched in 2012. TOP has become an initiative to reach the unreached through Information and Communication Technology (ICT), by providing more technology-driven
learning services and technology managed teaching and learning tools. TESDA adopted alternative learning delivery from traditional classroom based ‘Face-to-Face Learning Model’ into the online program hybrid learning model or the ‘Learn to Work’ Model. The trainees access the free online TVET education (MOOC), practice the skills anywhere or at home, be a certified worker and get the job. The online program requires no fees when taking the courses. Once the participants finish the online course, they may opt to take the face-to-face assessment for National Certification at TESDA. The assessments for certification can also be managed by TESDA accredited assessment centre or venue that are located close to the trainees’ residence.

CHAPTER 6: CONCLUSION AND RECOMMENDATIONS

- The Philippines has a well-structured implementation of vocational programs. TESDA as the main leader of vocational education is also a forerunner on the implementation of online learning for vocational education.
- MRA-TP is implemented well by the Philippines through TESDA and TIBFI as TPCB and NTPB.
- Being the nation with English as a language of communication has given advantages of skilled labours to enhance their career overseas, especially in the Tourism sector.
- The opportunity of cooperation to enhance vocational program especially in tourism through distance learning is opened in many ways.
- TESDA has the intention to create Open Academy for vocational programs. They expected more intensive collaboration with SEAMEO and Southeast Asia member countries to share best practices in various vocational program through distance learning.

REFERENCES

- https://www.researchgate.net/publication/228655099_Promoting_ICT_education_in_developing_countries_Case_Study_in_the_Philippine
CHAPTER 1: PROFILE OF TOURISM SECTOR IN THAILAND

The Kingdom of Thailand is located in the mainland of Southeast Asia. Thailand that covers 513,119 km² is divided into 77 provinces (National Statistical Office, 2016). A six (6) region system: North, Northeast, East, South, West, and Central is also commonly used to divide the nation for tourism purposes by The Tourism Authority of Thailand (TAT). Thailand shares border with Lao PDR in the Northeast, Cambodia to the East, Malaysia in the South, and Myanmar to the West and North.
1.1 Economic Conditions and Contribution of Hospitality Industry

Based on Statistical Yearbook Thailand 2016, GDP Thailand in 2014 is 13,132,241 million baht. Services are main sector that contribute to the 39% of country economy, followed by manufacturing (36.8%), agriculture (10.2%) and others (14.0%). 37% of service sector is supported by wholesale and retail trade, 19% by financial intermediation, 17% by transport, 17% by renting and business activities, 10% by hotels.

Although from the data above, contribution from hotels is only 3% to the GDP, tourism is an activity that cannot be measured alone from the hotel contribution. Based on World Travel and Tourism Council report, there are direct, indirect and induced contributions of travel and tourism to the GDP as described on Figure 1 (World Travel & Tourism Council (WTTC), 2018). Direct contribution means any residents or non-residents spending for any business or leisure purposes and also government spending on tourism services directly linked to visitors. Any spending for accommodation, transportation, entertainment, attraction, accommodation services, food and beverage services, retail trade, and transportation services are included in the direct contribution of tourism industries to the GDP. Meanwhile, any investments activities such as construction of new hotels, any government spending related to tourism for example tourism marketing and promotion, and any domestic purchases by the sectors dealing directly with tourists such as purchase of food by hotel are included as indirect contribution of tourism sector to the GDP. The last, induced contribution means any direct or indirect spending by employee of tourism industries.

In case of Thailand, based on WTTC report shown in the diagram above, direct contribution of travel and tourism in 2017 was 9.4% of the GDP or 1,433,5 billion baht as shown in Figure 2 and it is forecast to rise by 7.8% in 2018. In the next 10 years, it is predicted to reach 12.8% direct contribution to the Thailand GDP. The total contribution including wider impact of travel and tourism was 21.2% of GDP or 3,229,8 billion baht in 2017 and expected to reach 22.1% in 2018. 2017 total contribution was com-
posed by 44.4% of direct contribution, 38.1% indirect contribution, and 17.5% induced contribution. Supply chain (29.3%), investment (6.9%) and government collective (1.9%) are support the indirect contribution. Total contribution of travel and tourism in 2017 was almost twice of direct contribution.

In detail, 88.2% of direct contribution of travel and tourism in 2017 was coming from leisure travel compared with 11.8% from business travel spending. Leisure travel is forecast to grow by 8.4% in 2018, while business travel is only rise by 5.1%. Foreign visitors spending are also higher (79.4%) rather than domestic (20.6%). In 2018, visitor exports are growing by 8.9% more than domestic travel (4.3% growth).

1.2 Demographic Characteristic, Labour Force and Employment in Hospitality Industry

The population is 69.1 million in 2017 (Trade, 2018). More than 50% population is living in the urban area with more than 130 people per km2. Only 0.3% population is living under 1.25 USD per day (2010) and more than 90% has access to improved water resources and sanitation (2015).

Most of the population is Thai nationality, only 5.6% is foreigners in 2013. Buddhism is the major religion in Thailand (93.4%) then followed by Muslim (5.2%) and Christian (1.4%).

Total labour force on the 3rd quarter in 2015 is 387.665.000 with 98.9% employment (National Statistical Office, 2016). Private sectors and entrepreneurship (own account workers) support more than 70% of employment. The rest are working as government officials, member of cooperatives producers and also unpaid family worker. Only 5% of those employees are unskilled workers, others are attending more than 6 years education or any vocational short courses.

Based on WTTC report, direct contribution of Thailand travel and tourism sector in 2017 is 6.2% of
total employment or equal with 2,336,500 generated jobs as shown in Figure 3. It is forecast to grow by 5.2% to 2,457,500 in 2018. Including wider impact of the hospitality industries there were 5,834,000 generated jobs in 2017 or 15% of total contribution to the employment. It will rise to 5.5% in 2018 and generate 6,154,000 jobs (World Travel & Tourism Council (WTTC), 2018).

Direct (left) and total (right) contribution of travel & tourism industries to the employment in Thailand

1.3 Current Situation of Hospitality Industry

Figure 4: Overview of 2017 Tourism in Thailand
In 2017, Thailand received 57.585,81 million USD from tourism sector (Figure 4). It was 7.99% higher than the previous year. There were more than 27 million international visitors coming by airplane and most of them (94%) are tourists (staying more than 24 hours). This number is 5.4% higher than previous year and obtained more than 37 billion USD tourist receipts. Tourists from East Asia (including Southeast Asia) are mainly dominated the flight arrival then followed by tourists from Europe and South Asia, but the domination of receipts were coming from East Asia, Europe and The Americas tourists. Based on the region, Bangkok shared most (39% or >22 billion USD) of tourist receipts with more than 9% annual growth and then followed by Southern region (33%). Although Eastern part is only contribute >7 billion USD but this region has the highest growth (>10%).

Ministry of Tourism and Sports Thailand also develop various tourism product and services based on the areas and also issues. There are 8 tourism development clusters: 1) Cluster Andaman, 2) Cluster Active Beach, 3) Cluster Lanna Culture, 4) Cluster Royal Coast, 5) Cluster South I-San, 6) Cluster Chao-Praya River, 7) Cluster Cultural World Heritage, 8) Cluster Khong River. Cluster Andaman has the highest investment but cluster active beach has highest growth. There are also distributions of tourist receipts to the secondary tourist destination: 12 hidden gems provinces (60.7 billion baht) and 12 hidden gem plus provinces (56.5 billion baht). Medical and wellness tourism, aging tourism, MICE, green tourism, sport tourism, river based and maritime tourism, gastronomy tourism, wedding and romance tourism, cultural event tourism, night tourism, entertainment tourism and also Muslim friendly tourism are developed in Thailand.

Based on Travel and Tourism Competitiveness Report 2017 that successfully assessed 136 countries based on the World Economic Forum’s Travel and Tourism Competitiveness Index (TTCI), Thailand is ranked 34th (World Economic Forum, 2017). This report evaluated four enabling factors of each country travel and tourism: 1) environment of travel and tourism, 2) policies and its enabling condition, 3) availability and the quality of infrastructure, as well as 4) its natural and cultural resources. Based on this report, Thailand has advantages on its natural resources and also various enabling environments such as ICT readiness and the availability of human resources to support these industries. Competitive price of goods and services as well as government prioritization of travel and tourism is also enabling policies that support the development of this sector. Although Thailand has quite good tourist service infrastructure, but it is still need improvement mainly on the ground and port infrastructure. Other sectors that need more improvement are safety and security, policies to support environment sustainability, as well as development variety of cultural resources and business travel. Overview of Thailand performance on Travel and Tourism Competitiveness Index is shown in Figure 1.
Based on Thailand Tourism Development Plan 2017 – 2021, Thailand has tourism vision towards 2036 to be “a world leading quality destination, through balanced development while leveraging Thainess to contribute significantly to the country’s socio economic development and wealth distribution inclusively and sustainably”. In the past few years, there were great increases in the number of tourists as well as its receipts then the current challenges are the ability to derive greater economy benefit of the tourism industry while maintaining sustainability of the national resources. To achieve this vision, collaboration among public sectors, private and local communities are needed. In line with Travel and Tourism Competitiveness Report 2017, there are five strategies on the Thailand Tourism Development Plan 2017-2021:

- **Strategy 1**: Development of tourism attractions, products and services including the encouragement of sustainability, environmental friendly, and Thainess integrity of attractions.
- **Strategy 2**: Development and improvement of supporting infrastructure and amenities without inflicting negative impact to the local communities and environment.
- **Strategy 3**: Development of tourism human’s capital potential and the development of tourism consciousness among Thai citizens.
- **Strategy 4**: Creation of balance between tourist target groups through targeted marketing that embraces Thainess and creation of confidence among tourists.
- **Strategy 5**: Organization of collaboration and integration among public, private sectors and general public in tourism development and management including international cooperation.
CHAPTER 2: THAILAND EDUCATION AND VOCATIONAL EDUCATION

Thailand National Education System

In accordance with Thailand National Education Act 2002, Thailand has 12 years basic education system (figure 8) that consist of six (6) years primary education, three (3) years lower secondary and another three (3) years upper secondary education. In 2016, government extended free basic education from 12 to 15 years by adding three (3) years of pre-primary education (Office of the Education Council, Ministry of Education Thailand, 2017). Children are expected to be in primary education on age 6 and then graduated when they are 17 or 18 years old. In the higher education associate degree or diploma and also degree level are provided in various universities as well as colleges.

Mobilisation of resources and budget allocation is mandatory to consolidate reformation of education. Compared to another sector, budget allocation for education was third after general public services and economic affairs budget. 531,044,8 million baht or 20.6% of the country budget in 2015 is allocated for education. To ensure the equal access to education, government run financial support for 15 years basic education. Expenditure funded by government comprises of: tuition fee, textbook, uniform, learning equipment and activities for student quality improvement (Office of the Education Council, Ministry of Education Thailand, 2017).
In 2015, overall percentage of students enrolled in basic education compared to population age 3-17 is 95.2% and it is quite stable on the past five years. Enrolment ratio on compulsory education is 96.5% but on the upper secondary education is decreased into 72.7% (Office of the Education Council, Ministry of Education Thailand, 2017). After compulsory education, students have opportunity to take non-formal vocational education/training or they may work as unskilled labour.

Within the formal system, general education is provided at all levels from pre-primary to higher education, while vocational stream is provided from upper secondary education until higher education. Currently teaching and learning on general stream of basic education (K 1-12) follows 2008 curriculum. In general that curriculum aims to equip students with knowledge and skills necessary for their further education and carrier through 8 subject areas: mathematics, science, social studies, career and technology, Thai language, foreign languages, physical education and art. Meanwhile in vocational education follows 2013 curriculum (including 2014 revised version) for the certificate level and 2014 curriculum for diploma level. These updated curricula are being implemented as response of technology enhancement and the skills needed by manpower on 9 fields: industry, commerce, arts and crafts, home economics, agriculture, fisheries, tourism, textiles and information and communication technologies. The Vocational Education Act was enforced nationwide in 2008. According that Act, there are three types of vocational education and training:

1. Formal technical and vocational education and training,
2. Non-formal technical and vocational education and training, and
3. Dual-vocational training program with intensive collaboration among educational institutions and public/private enterprises.

Those educational administration and management at the central level is under responsibility five bodies of Ministry of Education: 1) Office of Permanent Secretary, 2) Office of the Education Council, 3) Office of the Basic Education Commission, 4) Office of the Vocational Education Commission, and 5) Office of the Higher Education Commission. Office of the Vocational Education (OVEC) is a main vocational education management function to produce and develop skilled manpower at three levels:

1. Upper secondary (leading to the lower certificate of vocational education): 3 years,
2. Post-secondary (leading to the diploma or vocational associate degree): 2 years,
3. University level (leading to a degree in technology or operation field): 2 years.

Formal TVET education is provided in these types of public institution:

1. 141 Industrial and community college,
2. 113 Technical college,
3. 52 Polytechnic college,
4. 43 Agricultural and commercial college,
5. 39 Vocational college,
6. 10 Technology and management college,
7. 5 Commercial college,
8. 3 Industrial and ship building college,
9. 2 Arts and Crafts college,
10. 1 Royal goldsmith college,
11. 19* + 4** Vocational Education Institutions.

*19 institutions were established comprising of 161 vocational and technical colleges from 19 province cluster.

** 4 agricultural institutions comprising of 41 regional institutions.

Based on their study field from the 2018 data, industry and business administration majors are the most popular and attended by more than 86% of current vocational schools students. Only 6% or around 60,000 students choose to be professional in tourism and culinary.

**Table: Number of Thai Vocational Students Academic year 2018**

<table>
<thead>
<tr>
<th>Major</th>
<th>Public Vocational Schools</th>
<th>Private Vocational Schools</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>26,542</td>
<td>24</td>
<td>26,566</td>
</tr>
<tr>
<td>Culinary</td>
<td>23,163</td>
<td>861</td>
<td>24,024</td>
</tr>
<tr>
<td>IT and communication</td>
<td>9,870</td>
<td>2,629</td>
<td>12,499</td>
</tr>
<tr>
<td>Fishery</td>
<td>1,772</td>
<td>44</td>
<td>1,816</td>
</tr>
<tr>
<td>Business Administration</td>
<td>201,213</td>
<td>186,251</td>
<td>387,464</td>
</tr>
<tr>
<td>Art</td>
<td>14,980</td>
<td>4,764</td>
<td>19,744</td>
</tr>
<tr>
<td>Industry</td>
<td>383,745</td>
<td>103,624</td>
<td>487,369</td>
</tr>
<tr>
<td>Tourism Industry</td>
<td>25,812</td>
<td>14,537</td>
<td>40,349 (4.03%)</td>
</tr>
<tr>
<td>Garment Industry</td>
<td>294</td>
<td>-</td>
<td>294</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>687,391</strong></td>
<td><strong>312,734</strong></td>
<td><strong>1,000,125</strong></td>
</tr>
</tbody>
</table>

**source: Center of Information and technology and manpower, OVEC**

Number of public vocational institutions 428 (As of January 2018).

Number of private vocational institutions 484 (As of January 2018).
To be teachers or trainers in TVET, they required to attend TVET training programs at the teacher colleges, especially 2 years programme organised by OVEC (UNESCO-UNEVOC International Centre for Technical and Vocational Education and Training, 2015). After graduated, they receive higher diploma in technical education that equal to bachelor degree.

CHAPTER 3: CURRENT IMPLEMENTATION OF MUTUAL RECOGNITION ARRANGEMENT ON TOURISM PROFESSIONALS (MRA-TP).

Mutual Recognition Arrangement on Tourism Professionals (MRA-TP) is an arrangement to facilitate mobility among qualified professionals between ASEAN Member States (AMS) that was signed on November 09, 2012. MRA-TP is also seen as platform for sharing best practices and strengthens cooperation among AMS. In order to make it operational in the national level, establishment of National Tourism Professional Board (NTPB) and Tourism Professional Certification Board (TPCB) is required. NTPB has main responsibility to create awareness as well as recognise the implementation of common curriculum at the institutional level. On the other hand, TPCB responsible assess qualification as it specify on ASEAN Common Competency Standards for Tourism Professionals (ACCSTP). Any certified professional may register themselves in ASEAN Tourism Professional Registration System (ATPRS). ATPRS is a web based information system to disseminate the list of ASEAN certified tourism professionals. Besides ATPRS, in regional level, there is also ASEAN Tourism Professional Monitoring Committee (ATPMC) that consists of NTPB representative and has objective to monitor the implementation of MRA-TP.

Components of Competency Based Training (ASEAN Secretariat, 2018)

In order to prepare implementation of MRA, specifically related to the development of Competency Based Training (CBT) for tourism professional, ASEAN got support from ASEAN-Australia Development
Cooperation Program (AADCP) to establish:

1. ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) as minimum competency standard for each job title identified in MRA-TP. Currently, there are 32 job titles and 6 common labour division available standards.

2. Common ASEAN Tourism Curriculum (CATC) is working together with RQFSRS. CATC contributes to the harmonization of tourism education and training across the region.

3. Regional Qualifications Framework and Skills Recognition System (RQFSRS) contribute to the implementation of MRA-TP to facilitate mobility of skilled labours.

4. 242 training and assessment toolboxes for 6 labour division. These toolboxes were being used during master trainers and assessors training in each ASEAN country and it will be reference to deliver standardized CBT.

### 3.1 Gap Analysis on the Implementation of MRA-TP

A gap analysis research on the implementation of MRA-TP was conducted by William Angliss Institute 2013 under ASEAN Australia Development Cooperation Program (AADCP) Phase II (Irwin, 2013). In Thailand, this study was taken place in Dusit Thani College and Burapha University. Dusi Thani College offers bachelor degree in management of hotel, kitchen & restaurant, tourism, resort & spa and convention & event. Burapha University also offers bachelor degree in hotel management and tourism. There are vocational courses in the bachelor degree offered by both institutions. There is also much equivalence with ASEAN courses from certificate II through to diploma/advance diploma. Competency-based trainings (CBT) with competence teachers and well suited facilities are provided also in both institutes. Dusit Thani College has advantage of seamless connection with Dusit Thani group hotel chain for direct employment or internship opportunities. Burapha University also has good connection with various hotels, but it will be always challenges when university crosses over into vocational trainings.

Furthermore this research also found that there are five identified gaps need to be address by 10 ASEAN Member Countries (AMS) and require regional approach. Those gaps are:

1. National Tourism Professional Body and Tourism Professional Certification Body

   MRA-TP is a new initiative and the establishment of new body often experience tardiness as they are set out on the unchartered path. Development of guidelines, not only for establishment but also for operational is important. This 2013 research identified small gap in term of establishment, but larger in term of operation effectiveness. When the ASEAN regional tourism secretariat is established, these two bodies at AMS will have strong role to build rich databases and continues improvement process on the development of tourism professional competencies and qualifications.
These two bodies are basic infrastructure of the MRA-TP.

2. Awareness of MRA-its principle and benefits

Around 240 stakeholders from government, industry and also education providers participated in this research, but only less than 30% of them is familiar with MRA. It is important for all stakeholders to remember at least two main objectives of MRA-TP that may beneficial for them in the future. Mobilization of tourism professional among ASEAN is the first objective that maybe happened when the MRA-TP is taken place. Second, MRA-TP may act as platform of sharing, benchmarking and also driving continuous development of tourism professionals.

3. Coordination of government impetus to assist in the implementation of the MRA on tourism professionals

The MRA impacts on broad area: tourism, education, labour and immigration. At least four ministers (or department in ministries) from those areas need to have mutual perception and then work together to implement successful MRA. Unfortunately, without any shared issues, among ministries do not work closely as expected.

4. Competency based training in vocational education and training

In this research, there was still finding of perceptions that to be professionals in tourism area is related to certain degree in higher education. But in hospitality industries, competency of tourism professional is more important than academic degree that contained too much theory and less time for practices. Competency Based Training (CBT) is important to prepare students to be competence to perform their tasks and do their jobs at certain level.

5. Awareness and use of ASEAN Tourism Toolboxes

In this research, awareness of existence of these toolboxes as well as its utilization is low. There are 46 toolboxes that each of them consists of a set of training and assessment resources, as well as its trainee manuals. Since these toolboxes are reflection of many years tourism training and assessment practices, these toolboxes are valuable resources.

Specifically for Thailand, there are four gaps that need to be addressed namely:

1. Regulatory Framework for MRA Implementation

In national level, necessary regulatory framework will need to put in place and genuine commitment is needed to support MRA through that framework.

2. English language communication for tourism

English is the international language that will be mainly used within ASEAN mobility. Huge challenge of communication in English is a consistent message that was identified in this research.
3. Attracting and retaining suitable tourism trainers

Before becoming trainers, they must be trained, qualified and certified. There were several master trainers and master assessor training conducted by ASEAN Secretariat. ...

4. Training facilities

Appropriate training facilities are vital for the successful of CBT. As support of HRD in tourism, it needs to have plan of construction, commissioning and life span of training facilities.

3.2 Implementation of ASEAN Toolboxes at Vocational Schools

At the moment, OVEC is under the first 5 years stage of vocational curriculum development (2014-2019). Specifically speaking about professional Tourism education, the curriculum is still not entitled nor taken MRA of ASEAN standard curriculum into account.

For professional education in Tourism, there are 2 tracks that students can obtain certificate in Tourism for their career domestically which are vocational colleges and higher education institutions (university). The difference is that ones who graduate from higher education institution where Tourism studies are offered will automatically get license in Tourism while ones who are from vocational institutions will still need to take a standard test from Department of Tourism in order to get the license. In case of MRA and international standard and license, person needs to take additional course from Department of Tourism and pass the standard test to be internationally qualified.

From 2017 evidence-based study on the implementation of MRA-TP in six (6) universities in Thailand, only two universities are implementing those ASEAN common standard and curriculum (Sjarief, 2017). Other two universities have not yet implemented MRA-TP, one university is set in the understanding level and one university implemented only in some selected subjects. From this study it was concluded that the MRA-TP understanding in higher education is still considered low. The main challenges are availability of resources and the language barrier. Based on the interview, university (faculty level) also considered that MRA-TP required higher budget allocation to be implemented.

CHAPTER 4: SUPPORT FOR DISTANCE LEARNING

4.1 Access to ICT devices and Internet

From the 2015 national data of mobile phone users, 79.3% of population aged 6 years and over having mobile phone. People in the central region, especially Bangkok, more than 90% of them are having mobile phone and the lowest mobile phone users are in the North part (76.5%). Only 32.4% users are able to use internet, email and social media through mobile phone. Based on the household numbers, 52% or 10.768 out of 20.643 households have internet connection, although the ownership of
computers are 29.5% and telephone lines are only 12.3%. It is predictable that most of them connect through mobile phone. In Bangkok are, these numbers are higher. 77.5% of households are connected with internet, although only 50.7% of them are having computers at home (National Statistical Office, 2016).

4.2 ICT in TVET Education

IT2000 is the first national policy on IT that aimed for utilization of ITC to achieve economic prosperity and social equity (Makaramani, 2013). Then it was followed by the second national ICT Policy that was called IT2010. By implementing this policy, Thailand is expected to move into knowledge-based society and economy by exploiting the benefit of ICT. E-education including life-long learning, computer literacy and virtual education is one of the flagships.

Initiative of ICT in Education reflected also from MoE ICT Master Plan. During implementation of master plan 2000-2002, MoE successfully set up the internet backbone among schools within Schoolnet Thailand project. This project has successfully initiated the various content creations and utilized it for teaching and learning. Awareness the need of ICT integration into teaching and learning was promoted also on the next master plan 2004-2006. The next strategies were also conducted to equip schools with relevant hardware, software and also educational contents.

Office of Vocational Education (OVEC) realized the importance of ICT in vocational education. Under the umbrella of ICT master plan (2009-2013), OVEC encouraged development of ICT infrastructure at vocational institutes, utilization of ICT to increase quality and efficiency of learning in vocational institute, development ICT-based vocational education management and conducted personnel development on ICT.

Based on 2010 study from OVEC that participated by 178 vocational teachers throughout the country, most teachers are familiar with basic applications such as word processing, spreadsheet, presentation, browser, email, and chatting. But they have fewer competencies in creating web pages; educational games; as well as editing multimedia. When those teachers asked related to teaching method applied in their classroom by utilizing ICT, more than 80% respondents answered that they invited students to use ICT for seeking and applying knowledge. Most of teachers (69.1%) prepared offline learning resources rather than online resources (49.1%). More than 50% teachers gave online assignments for their students, but only less of them were using learning management system and conducted online exams. More than 60% teachers also used ICT to conduct student-centred learning. (Jantrakool, 2010)

Office of the Permanent Secretary, MoE conducted survey on 2011 related to the used of ICT application in basic education. It found out that most schools have high speed internet connection (57%). Only 75% of them equipped with computers and on average, every school had 50 computers. In 2011, ratio of students and computers were 21:1, decreasing from 40:1 in 2008. Utilization of computer at
school was 26-50 hours per week. 93% students used computers when they learned ICT subject and 90% of them claimed they had ICT competency.

In case of teacher, that study also found out 83.34% teachers had their own computers and 82% was connected to internet. Various activities by utilizing computer were conducted by teachers. 69.83% claimed they use it to produce teaching materials, 84.45% to enhance traditional learning activities and 81.75% of them using ICT to create and manage innovative teaching.

4.3 Distance Learning Policy

To improve access to education, Distance Learning Technology (DL) has been provided for students in remote areas. DL is seen as an alternative solution to lessening problems related to teacher shortage and also inequality of education. The Ministry of Education through Office of the Basic Education Commission (OBEC) run the Project on Distance Learning Technology for Educational Quality Development or DL Thailand Project (Office of the Education Council, Ministry of Education Thailand, 2017). This project utilizes two types of technologies: Distance Learning Television (DLTV) and Distance Learning Information Technology (DLIT).

1. Distance Learning Television (DLTV)

DLTV is the expansion of previous project from the late King Bhumibol Adulyadej. There are 15,396 small-sized schools involved in this project. The positive result is seen on 2014 Ordinary National Education Test (ONET) when they were slightly increment in the student performance. OBEC also found out 97% improvement in the teacher performance in the DLTV schools. According to study conducted by Suan Dusit University, 98.45% of teachers, students, parents and people involved in DLT is satisfied and got the benefit from the extension of this project.

2. Distance Learning Information Technology (DLIT)

DLIT has been introduced to the 15,553 medium and large schools under supervision of OBEC. In the DLIT project, various learning media are produced and broadcasted through the website www.
Feasibility Study on Southeast Asia Distance Learning Program in Tourism

dlit.ac.th including: 1) DLIT media warehouse as storage of all digital resources according to the current curriculum, 2) DLIT Digital Library where all digital media available to be accessed for public, 3) DLIT remote-sensing classroom where teachers from well-known academic schools share teaching and learning in difficult lessons to other teachers, 4) DLIT assessment as warehouse of examinations from primary to upper level secondary schools, and 5) DLIT Professional Learning Community (PLC) as a ‘share’ and ‘learn’ platform among teachers to enhance their professionalism.

CHAPTER 5: ANALYSIS OF CURRENT IMPLEMENTATION OF MRA-TP AND POSSIBILITY TO CONDUCT DISTANCE LEARNING PROGRAM

Thailand ranked 34 based on the World Economic Forum’s Travel and Tourism Competitiveness Index (TTCI) 2017. In Southeast Asia, Thailand Tourism ranked 3 after Singapore (13) and Malaysia (26). Since, tourism direct contribution in Thailand GDP is almost 10% and more than 20%, if it is added with indirect and induced contribution, tourism is one of main important service sector for the country. Total contribution of tourism to the employment is more than 5 million jobs in 2017. It means to maintain and enhance excellent quality service by the tourism industry, any trainings/ education/ professional developments are needed by those workers to make them stay competitive. Based on the latest Thailand National Tourism Development Plan 2017-2021, Thailand is currently trying to increase their competitiveness by increasing safety and security for tourists, developing various tourism products and services as well as eco-friendly tourism, and also enhancing infrastructure and tourism facilities.

Development of TVET is closely support to the development of human resources in Tourism area. Contents taught in TVET institutes need to be relevant with the current industry need. Among ASEAN member countries (AMS), to facilitate mobility professionals in Tourism, six years ago MRA-TP was signed. Although MRA-TP envisioned the regional recognition but many components are still missing (Sugiyarto, 2017). The ATPRS is not operational yet and it means there is still no tourism professional registered in that system. Toolboxes have been developed as reference for training and assessment by utilizing ASEAN standard and curriculum. By utilizing those toolboxes, AMS may develop its own national competency standard, curriculum, and tools based on the ASEAN standard.

In case of Thailand, Office of Vocational Education Commission (OVEC) needs to work with Department of Tourism to develop standard curriculum in Tourism that will match and in line with ASEAN common standard and curriculum to upgrade workforce competency in Tourism as well as certification for students to get ready to pursue careers in tourism domestically and internationally. Currently those ASEAN standard and curriculum not yet included into the national TVET Tourism curriculum. Even though in the national standard there are several courses and subjects that already match with the basic requirements in ASEAN curriculum, but on the next stage of 5 years vocational development (2019 onwards), OVEC is planning to include international standard curriculum and certification protocol to be more effective and enhance workforce competency in tourism to international level. Major
obstruction for teachers and students to reach standard and quality of vocational education in tourism is English proficiency. One of the course related in tourism is logistics that still lacking of experts and teachers who can supervise and conduct quality classes.

ICT infrastructure in Thailand is quite good and from 2015 data almost 80% population equipped themselves with mobile phone. Based on ICT Master Plan, OVEC also equipped public colleges with ICT infrastructures. From 2010 study, teachers also experienced to utilize some basic ICT tools and invited students using ICT to gather knowledge and implement it. Since it was only less than 40% of those teachers are familiar with learning management system (Jantrakool, 2010), ICT trainings for utilization of the learning platform and also strategy to conduct blended learning.

Further study will be needed to identify the content from ASEAN Toolboxes that will be beneficial for the college to be delivered through distance learning. Potential schools where further study can be implemented are:

1. Inthrachai Commercial College, Bangkok
2. College of Business Administration and Tourism, Bangkok

CHAPTER 6: CONCLUSION

- Tourism is one important service sector for Thailand that has direct contribution to the GDP and employment.
- Thailand is an active implementor of MRA-TP. Ministry of Tourism and Sports is the main coordinator of the dissemination of CATC and its toolboxes in Thailand.
- OVEC as the main institution to coordinate public TVET institutes sees that in the current national curriculum, several courses and subjects already match with the basic requirements in CATC, but on the next stage of 5 years vocational development (2019 onwards), OVEC is planning to include international standard curriculum and certification protocol to be more effective and enhance workforce competency in tourism to international level.
- English proficiency is currently one of the major challenges for teachers and students to reach standard and quality in CATC.
- In terms of planning on the implementation of online learning, ICT infrastructure in Thailand TVET colleges are quite ready. TVET teachers and students also have sufficient capability on basic ICT utilization.
- Inthrachai Commercial College, Bangkok and College of Business Administration and Tourism, Bangkok are recommended schools by OVEC that will be piloting online learning by utilizing CATC Toolboxes.
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COUNTRY REPORT: TIMOR LESTE

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CHAPTER 1: PROFILE OF TOURISM SECTOR IN TIMOR LESTE

In Timor Leste, agriculture and fisheries have traditionally been the backbone of the economy, oil and gas become the major export earners. Tourism was not yet taken into account as one of the source of economic pillar. Governments may change from time to time according to political situation, but every new government consistently respects, adopts, continues and improve the implementation of programs priorities which has been started by the previous ones in an efficient and effective manner.

To have a picture of what have been undertaken, the followings are snapshot of what happened.
The first Constitutional Government (20 May 2002 - 10 July 2006) in 2002 endorsed and the Timorese parliament adopted a 2020 Vision for Development, which represents a genuine attempt by Timor-Leste to define a program for nation building while defining economic growth and poverty reduction as its development priorities. Finalized in May 2002, the National Development Plan is built upon five priority sectors:

1. education,
2. health,
3. agriculture,
4. economy and employment, and
5. infrastructure

and five crosscutting themes

1. helping the poor,
2. empowering women and helping youth,
3. peace and reconciliation,
4. cooperation among people, and
5. democracy and good governance.

Each sector and theme is presented in terms of goals, challenges, what people say they can do, what people say civil society can do, what people say the government should do, and indicators of progress.

The National Development Plan’s objectives and indicators are closely aligned with the Millennium Development Goals and its indicators.

Timor-Leste’s social and economic policies of the First Constitutional Government have focused on alleviating poverty responding the immediate and complex needs of the people, balancing the pace of social and economic development, consolidating the most pressing priorities of security and stability, and providing a foundation for nationhood through building institutions of State.

Having to deal with so many urgent matters, tourism was not yet considered as an urging priority to support the economic development.

During the services of 2nd Transitional Government of East Timor, (14 July 2006 – 19 May 2007), and the 3rd Constitutional Government (19 May, 2007 – 7 August 2007) no significant progress can be noted.

Based on the experiences gained from the implementation of the first National Development Plan, the 4th Constitutional Government of Timor Leste, (8 August 2007- 8 August 2012) developed in 2010 and endorsed the Strategic Development Plan (SDP) 2011 – 2030, with a long-term economic vision
for Timor-Leste:

By 2030, Timor-Leste will have joined the ranks of upper-middle-income countries, having ended extreme poverty, eliminated the economic gap with the emerging economies of ASEAN, and fostered a democratic and environmentally sustainable society.

The first decade (2011-2020) will be focused on creating the basic conditions for development in all areas: infrastructure, education and training, health, agricultural productivity and food self-sufficiency, sustainable urbanization, and development of key industrial and service sectors.

While on the second decade (2021-2030), built on these foundations, all efforts will be put to ensure that Timor-Leste is globally competitive, part of the global information economy, and building a quality of life and environmental sustainability for all future generations.

The SDP acknowledged that Timor-Leste being a low income country with an emerging private sector, limited economic diversification and a concentration primarily on agricultural production, it has significant economic opportunities and strong potential to become a middle income nation.

Their vision for 2030 is that Timor-Leste will have a modern diversified economy, with high quality infrastructure including roads, power, telecommunications. and ports. Timor-Leste economic development will be built around the growth of three critical industries: agriculture including fisheries, tourism and petroleum. In these industries, Timor-Leste has significant advantages due to their natural resources, geographic location and economic profile.

It was this 4th Constitutional Government that considers tourism development as being one of the important factor for the economic development of the country, not only due to the revenues it generates, it also has the role of the prime movers of the absorption of manpower as well as for the development that is associated to it: restaurants, hotels, entertainment, the airports (Díli and Baucau), transports and other varied infrastructures. This Government also started to draft National-Tourism-Policy.

The 5th Constitutional Government (8 August 2012 – 16 February 2015) has the intention over the next five years to continue facilitating the growth of the Tourism industry by rehabilitating infrastructure, including the Díli airport roads and, tele-communications on key routes, building a Tourism and Hospitality training centre, establishing Tourism Information Centres, expanding tourist promotion marketing activities internationally, including an annual calendar highlighting special events and attractions. It is expected that these international events not only bring tourists to Timor-Leste but elevate the profile of the country internationally.

A new Timor-Leste Technical and Vocational Education and Training Plan has been endorsed to guide the development of this sector to support the development of the three critical industries: agriculture including fisheries, tourism and petroleum.

The 6th Constitutional Government (16 February 2015 – 15 September 2017) declared that their programme is not new, but rather the continuation of the policies set in the Strategic Development Plan
2011-2030 which began with the Programme of the 5th Government. Since the priorities for the country have already been determined, it is not what will be implemented, but rather how to implement those priorities in an efficient and effective manner.

In March 2017, this Government promulgated Timor Leste-National-Tourism-Policy 2017 – 2030 (which was initiated by the 4th Government) with the objective of providing a clear path forward for the Government, private sector and civil society to work together towards developing a sustainable Tourism sector.

The key headline goals of the Tourism Policy are that, by 2030:

- Revenue from overseas Tourism, excluding carrier receipts (air fares and ferry charges) will be US$150 million per year (at 2016 prices i.e. adjusted for inflation between now and 2030).
- Employment in Tourism will reach 15,000 (approximately 4,300 at present).
- 200,000 international tourists will visit Timor-Leste annually with an average stay of 5 the days.

Five over-arching themes guide the policy, an understood sense of purpose, commitment to improved prosperity, a spirit of stewardship focused on protection of the nation’s natural and cultural resources and visitor safety, partnership where all stakeholders have a voice and shared responsibility, and an acknowledgment that people are at the core and must acquire appropriate knowledge, skills and attitudes.

Another legal product issued in June 2017 by the Sixth Constitutional Government is the National Employment Strategy 2017 – 2030, in which productive employment shall be a central means of nation building and wealth creation, and where Tourism is one the five (5) pillars of economic growth. The Tourism sector, still in a very early stage of development, has the potential to become an important source of employment; although high quality and competitive Tourism products and niches need to be developed.

The 7th Constitutional Government of Timor-Leste (15 Sept 2017 - 22 June 2018), led by Mari Alkatiri, based on the parliamentary elections on July 22, 2017, was sworn in on September 15, 2017. The fact that Alkatiri, who is Muslim, appointed for the second time as the prime minister of a predominantly Roman Catholic country, is a strong indication of how Timorese value their differences. It is a pity that due to the political situation, this Government did not serve too long, so that no significant progress can be noted.

The 8th Constitutional Government (22 June 2018 – present) program is a five-year policy instrument that reflects the aspirations of the Timorese people and the priority sustainable development measures, as defined in the Strategic Development Plan 2011-2030. During this tenure, the new Executive will continue to contribute to transform Timor-Leste, a low-income country into a medium-high income country where the population lives in safety and is healthy, educated and prosperous.
Although much progress has been made, Timor-Leste must continue to invest in strategic planning for a modern and diversified economy, through empowering the productive sectors around three essential industries - agriculture, tourism and oil.

The Government considers that job creation and the promotion of entrepreneurship are both a factor and an outcome in the pursuit of this economic development goal. To this end, the Government shall make a big effort to create conditions involving the young, while promoting the private sector, resources which are key to increasing national productivity and creating opportunities for sustainable economic growth, by introducing legal and political mechanisms to stimulate creativity, innovation and diversification of the national economy.

The above mentioned were the intentions of governments successively. It can be very well understood that not all programs can be implemented, but the system is there, which may be reviewed from time to time, according to the new challenges faced by the country, as a result of the rapid growth of Timor-Leste, as well as the latest development of science and technology.

### 1.1 Economic Conditions and Contribution of Hospitality Industry

#### a. Economic Conditions

Total Gross Domestic Product (GDP) in current prices for Timor-Leste in 2015 was $3,102 million. Of this:

- The oil industry accounted for $1,496 million (48.2% of total GDP).
- The non-oil industry accounted for $1,607 million (51.8% of total GDP).
The GDP per capita in current prices was $2,619 in 2015. Of this:

- The oil industry provided $1,262
- The non-oil industry contributed with $1,356 ($1,254 in 2014)

In constant prices, total GDP rose in 2015 by 20.9% (compared with negative growth of 26.0% in 2014) of which:

- The Oil sector rose by 46.4% in 2015 (in contrast to the negative growth of 48.6% in 2014). Volumes extracted in the Oil sector were considerably higher than those of 2014 (13.8% in Oil Output). The increase in the Oil sector was mainly as a recovery from the fall in 2014 (-26.8%) in a context where intermediate consumption decreased by 19.6%, mainly by the Upstream Operative Costs, in contrast with the big increase in 2014 (+34.1%)
- The Non-oil sector grew by 4.0% in 2015 compared with 4.3% in 2014. This recovery was result of the increase of consumption and investment of the private sector (3.9% in constant terms).

Non-Oil GDP Components in 2015:

- Non-Oil GDP in constant prices, by the expenditure approach, grew by 4.0% in 2015, compared with a 4.3% growth in 2014.
- Non-Oil GDP production approach at factor cost, or Gross Value Added, grew +6.0% in 2015 (4.5% in 2014). But, at constant prices, the Non- Oil GDP production approach, at market prices, grew +4.2% in 2015, compared to a growth rate of +4.4% in 2014, according to the reviewed registers. The difference in growth at factor cost and at market prices is due to the fact that the Tax less Subsidies contribution to GDP at market prices declined, given the rise of the Electricity subsidy between 2014 and 2015 at constant prices (2015=100).
- Coffee is the only significant non-oil export product of Timor-Leste. Export values and volumes fell from US$18.8 million (34m kg) in 2012 to US$13.8 million (10.2m kg) in 2014 with production recovering in 2015 to US$15.2 million (19.2m kg). Overall, the current account surplus has declined along with falling oil exports, from 44 per cent of GDP in 2013 to 13 per cent in 2015.

According to the World Bank Timor-Leste Economic Report, March 2018, Gross domestic product (GDP) growth is expected to have fallen sharply in 2017 to a projected -1.8% from 5.3% the year 2016. This contraction is driven by a reversal of trend in government spending. In the last six months of 2017, the political impasse has worsened, with the President declaring a ‘serious institutional crisis’ and dissolving Parliament in January 2018. The current government has not been able to pass its rectification budget for 2017 nor a budget for 2018 to date. The resulting tight budget envelope has led to a sharp reduction in government expenditure of some 24% year-on-year, especially felt in the last three months of the year. With government expenditure making up about 75% of GDP, weakening expenditure has had a significant downwards impact on growth in 2017.

Offshore petroleum production has continued to gradually decline over 2017 as existing fields are steadily de-
pleted, while coffee exports were lower in 2017 due to poor weather conditions. International arrivals by air continued to grow, suggesting that the international visitor market has held up. Private consumption has been more robust in 2017, but investment, both public and private, has declined and foreign direct investment (FDI) has dried up. There remains an urgent long-term agenda of development in Timor-Leste which a new government program could focus on. Key priority reform areas include addressing the multi-sectoral challenge of severe malnutrition, improving systems of public service delivery, supporting a broadening and diversification of the economy, and putting environmental and fiscal management back on a sustainable path. Existing fiscal reserves provide a golden opportunity to achieve these reforms, but only if they are utilized to support a transition to a long-term sustainable economic and fiscal model.

b. Contribution of Hospitality Industry

Estimates from the Business Activities Survey conducted by the General Directorate of the National Statistics Department suggest that in 2015 Timor-Leste received US$14 million from 55,000 visitors and that the Tourism sector directly employed some 4,300 people in the accommodation, food sector, and other Tourism related services. However, Tourism’s contribution is not confined to directly generating employment, economic activity and exports. It also contributes by enhancing social inclusion and access to the labour market by the women and youth. Tourism has the potential to eradicate poverty and promote entrepreneurship, which will provide much needed opportunity to the people.

While the economy is still predominated by oil and gas revenues, declining prices and production is compelling the Government of Timor-Leste to diversify its economy and Tourism is viewed as a high potential substitute. These key economic indicators lead to the question of how Timor-Leste nurtures the Tourism sector as a key economic driver for the country. This Tourism Policy aims to provide answers and direction for this pivot away from a reliance on oil and gas to greater diversification in which Tourism is at the centre of economic activities and growth.

1.2 Demographic Characteristic, Labour Force and Employment in Hospitality Industry

a. Demographic Characteristic

According to World Population Review, the population of Timor Leste in 2015 was 1,184,765. Population Density: 79.67 person/km2. As per June 2018 is 1,339,878, an increase of 13% as compared to 2015.

The graph shows that the potential workforce amounted to 63% of the total population.
b. Labour Force and Employment in Hospitality Industry

The Labour Force Survey (LFS) 2013 is the second such survey that has been carried out in Timor-Leste since 2002. Similar to the first survey in 2010, the LFS 2013 was conducted in close collaboration between the Secretariat of State for Professional Training and Employment Policy (SEPFOPE) and the General Directorate of Statistics, Ministry of Finance. The primary objective of LFS 2013 was to provide current data on the employment and unemployment situation at national and sub-national level. A particularity of the present survey is the use of the new international standards concerning the statistics of work, employment and labour underutilization adopted by the 19th International Conference of Labour Statisticians (Geneva, October 2013).

The main results show that in 2013 the economically active population comprised of 213,000 employed and unemployed persons that translates to a labour force participation rate of 30.6%. A total of 189,800 people from the labour force were employed. The employed are— defined as those working for pay or profit.

A look at the employment to population ratio reveals that just 27.3% of the population (15 years and older) were employed in 2013. At the same time, 23,400 people could be classified as unemployed, in the sense that they had no job during the survey reference period but were available and actively looking for work. The unemployment rate was estimated to be 11%.

Among the employed, some 1,400 persons were in time-related underemployment, and of the people outside the labour force, 7,700 persons were on the margins of the labour and what is termed as potential labour force. The working-age population outside the labour force was estimated at 483,000.

In terms of broad economic sector activity (excluding subsistence foodstuff producers), the LFS results for 2013 show that the service sector employed most of the people with a relative employment share of 45.1%. The agriculture sector ranked second in terms of employed with a relative share of 41%. Only 13% of workers were employed in industry.

Another main result of the 2013 survey is the identification and quantification of a substantial number of subsistence foodstuff producers (178,900) who were not considered employed according to the new international labour statistics standards. Only a few subsistence foodstuff producers were engaged in labour market activity, either as unemployed—i.e. seeking work for pay or profit—or as employed, having a secondary job.

The 2013 LFS also provided results concerning occupations, mismatch between occupation and education, status in employment, informal and vulnerable employment, income from employment, youth, education and training, as well as working children. The results show that there was a high degree of occupation concentration in Timor-Leste. The top 12 occupations covered more than 60% of the employed population. The top five the occupations were mainly in agriculture and sales and services. In the non-agricultural sector, the main occupations were security guards, car, taxi and van drivers, and con-
crete placers and concrete finishers, all of which were largely male-dominated. There was no industrial occupation in the top twelve occupations, except possibly one related to construction, “concrete placers, concrete finishers, other”.

Tabel: Employment by sector and sex

<table>
<thead>
<tr>
<th>Employment by sector ('000s)</th>
<th>Male</th>
<th>Female</th>
<th>Both sexes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, forestry and fishing</td>
<td>46.9</td>
<td>30.0</td>
<td>76.9</td>
</tr>
<tr>
<td>Mining and quarrying</td>
<td>1</td>
<td>0.2</td>
<td>1.2</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>6.0</td>
<td>4.4</td>
<td>10.4</td>
</tr>
<tr>
<td>Electricity, gas, steam and air conditioning supply</td>
<td>0.3</td>
<td>0.0</td>
<td>0.3</td>
</tr>
<tr>
<td>Water supply; sewerage, waste management and remediation activities</td>
<td>0.5</td>
<td>0.5</td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>11.3</td>
<td>0.4</td>
<td>11.7</td>
</tr>
<tr>
<td>Wholesale and retail trade; repair of motor vehicles and motorcycles</td>
<td>7.5</td>
<td>8.4</td>
<td>15.9</td>
</tr>
<tr>
<td>Transportation and storage</td>
<td>11.2</td>
<td>0.6</td>
<td>11.8</td>
</tr>
<tr>
<td>Accommodation and food service activities</td>
<td>0.2</td>
<td>1.1</td>
<td>1.3</td>
</tr>
<tr>
<td>Information and communication</td>
<td>2.2</td>
<td>1.7</td>
<td>3.9</td>
</tr>
<tr>
<td>Financial and insurance activities</td>
<td>2.0</td>
<td>1.7</td>
<td>3.7</td>
</tr>
<tr>
<td>Real estate activities</td>
<td>0.0</td>
<td>0.0</td>
<td></td>
</tr>
<tr>
<td>Professional, scientific and technical activities</td>
<td>3.1</td>
<td>0.9</td>
<td>4.0</td>
</tr>
<tr>
<td>Administrative and support service activities</td>
<td>9.6</td>
<td>4.1</td>
<td>13.7</td>
</tr>
<tr>
<td>Public administration and defense; compulsory social security</td>
<td>6.3</td>
<td>1.2</td>
<td>7.6</td>
</tr>
<tr>
<td>Education</td>
<td>8.2</td>
<td>4.0</td>
<td>12.2</td>
</tr>
<tr>
<td>Human health and social work activities</td>
<td>1.9</td>
<td>1.8</td>
<td>3.7</td>
</tr>
<tr>
<td>Arts, entertainment and recreation</td>
<td>0.3</td>
<td>0.2</td>
<td>0.5</td>
</tr>
<tr>
<td>Other service activities</td>
<td>3.5</td>
<td>2.8</td>
<td>6.3</td>
</tr>
<tr>
<td>Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use</td>
<td>0.4</td>
<td>0.5</td>
<td>0.9</td>
</tr>
<tr>
<td>Activities of extraterritorial organizations and bodies</td>
<td>0.0</td>
<td>0.0</td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>1.8</td>
<td>1.4</td>
<td>3.2</td>
</tr>
<tr>
<td>Total</td>
<td>124.5</td>
<td>65.3</td>
<td>189.8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sector employment shares (%)</th>
<th>Male</th>
<th>Female</th>
<th>Both sexes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, forestry and fishing</td>
<td>37.9</td>
<td>46.3</td>
<td>40.8</td>
</tr>
<tr>
<td>Mining and quarrying</td>
<td>0.9</td>
<td>0.0</td>
<td>0.6</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>4.8</td>
<td>6.9</td>
<td>5.5</td>
</tr>
<tr>
<td>Electricity, gas, steam and air conditioning supply</td>
<td>0.2</td>
<td>0.0</td>
<td>0.2</td>
</tr>
<tr>
<td>Water supply; sewerage, waste management and remediation activities</td>
<td>0.4</td>
<td>0.0</td>
<td>0.3</td>
</tr>
<tr>
<td>Construction</td>
<td>9.2</td>
<td>0.6</td>
<td>6.2</td>
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<tr>
<td>Wholesale and retail trade; repair of motor vehicles and motorcycles</td>
<td>6.1</td>
<td>12.8</td>
<td>8.4</td>
</tr>
<tr>
<td>Transportation and storage</td>
<td>8.9</td>
<td>0.9</td>
<td>6.1</td>
</tr>
<tr>
<td>Accommodation and food service activities</td>
<td>0.1</td>
<td>1.6</td>
<td>0.7</td>
</tr>
<tr>
<td>Information and communication</td>
<td>1.8</td>
<td>2.6</td>
<td>2.1</td>
</tr>
<tr>
<td>Financial and insurance activities</td>
<td>1.6</td>
<td>2.6</td>
<td>1.9</td>
</tr>
<tr>
<td>Real estate activities</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Professional, scientific and technical activities</td>
<td>2.4</td>
<td>1.4</td>
<td>2.1</td>
</tr>
<tr>
<td>Administrative and support service activities</td>
<td>7.7</td>
<td>6.2</td>
<td>7.1</td>
</tr>
<tr>
<td>Public administration and defense; compulsory social security</td>
<td>5.0</td>
<td>1.9</td>
<td>3.9</td>
</tr>
<tr>
<td>Education</td>
<td>6.5</td>
<td>6.0</td>
<td>6.3</td>
</tr>
<tr>
<td>Human health and social work activities</td>
<td>1.5</td>
<td>2.8</td>
<td>1.9</td>
</tr>
<tr>
<td>Arts, entertainment and recreation</td>
<td>0.2</td>
<td>0.3</td>
<td>0.3</td>
</tr>
<tr>
<td>Other service activities</td>
<td>2.7</td>
<td>4.3</td>
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<td>Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use</td>
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<td>0.8</td>
<td>0.5</td>
</tr>
<tr>
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<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>N/A</td>
<td>1.4</td>
<td>2.1</td>
<td>1.7</td>
</tr>
<tr>
<td>Total</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Timor Leste's Labour Force Survey 2013
The analysis of occupation and education attainment shows that about 7.5% of the employed population had skill-mismatch in their main job. Mismatch refers to where the worker’s educational attainment is above the skill requirement of his or her job. Skill mismatch was found to be slightly higher for women (8.9%) than men (6.9%). But the percentage of people with occupation education mismatch and high educational attainment was nearly the same for men and women at 60%.

In terms of employment status, just 4 out of 10 employed people are wage and salaried workers (41%), followed by own-account workers (36.7%) contributing family workers (18.8%) and employers (2.7%). The combined proportion of own-account workers and contributing family workers in total employment–often considered as a measure of vulnerable employment–was 55%. The majority of vulnerable workers were women (70%) when compared to men (48%).

Further results show that there were 136,600 people in informal employment, representing more than 71% of the employed population. In addition to informal own-account workers (36.7%) and contributing family workers (18.8%), informal employment included many informal employees (25.1%) and informal employers (1.9%). Informal employees are those who do not benefit from paid sick leave and paid annual leave. Employers and ownaccount workers in informal sector enterprises are those operating economic units engaging less than five workers and are not registered under specific forms of national legislation.

Timor-Leste has made significant progress in establishing regulatory and policy frameworks for the university and TVET sector. This includes the development of

1. the National Qualifications Framework (TLNQF) in 2010,
2. the National Education Strategic Plan in 2011–2030,
3. the TVET Plan in 2012 (ADB, 2015), and
4. the National Employment Strategy 2017–2030

However, there are significant gaps in implementation, coordination, monitoring of outcomes, and budgetary commitment. These gaps diminish the quality, utilisation and relevance of the sector’s institutions and their contribution to developing a competent workforce. Outcomes for this sector continue to be constrained by poorly resourced basic education, with Timor-Leste spending a significantly smaller (and declining) percentage of its budget on education than other countries in the region (Inder & Cornwell, 2017).

Timor-Leste’s workforce training is carried out by a large and varied range of public and private providers and includes secondary schools, both technical and general; post-secondary technical and vocational education and training organisations; and higher education institutions. There are 31 technical secondary schools, of which 12 are publicly managed. In 2014, the World Bank SABER report noted these schools lacked connections to industry; instructors lacked professional qualifications, under-
standing of pedagogy, and fluency in the official languages of instruction; and opportunities for professional development were few (World Bank, 2014). In 2015, the ADB reported that technical secondary schools suffered from an outdated curriculum, poor infrastructure and equipment, lack of quality assurance, were not covered by the Timor-Leste National Qualifications Framework (TLNQF), and were critically underfunded. All of these factors contribute to the production of students who are not work ready.

The post-secondary TVET sector is comprised of approximately 100 training organisations providing technical and vocational education. Two of these are public institutions – the Centro Nacional de Emprego e Formação Profissional (CNEFP Tibar) and the Centro Nacional de Formação Profissional – Becora (CNFP SENAI) – and the remainder comprise non-government organisations (NGOs), churches and donor-funded organisations. Fifty-six training providers are registered with the Secretariat of State for Youth and Labour (SEJT) and are eligible to receive funding, and 25 are accredited to deliver national-level qualifications. Completion of secondary school is a requirement of entry to an accredited training centre.

The TVET sector is often cited by GoTL and international sources as having great potential for facilitating improved economic outcomes in Timor-Leste (Inder & Cornwell, 2017). Several donors, including DFAT, ADB and the Deutsche Gesellschaft für Internationale Zusammenarbeit (German Development Agency – GIZ), have invested in TVET institutions. However, there are challenges to TVET institutions developing a competent workforce. These include the large number of institutions, low levels of funding, limited effective reach and capacity of the National Institute for Labour Force Development (INDMO), inadequate engagement with employers, low levels of enrolment, and perceived low status of TVET qualifications.

The two public TVET centres are funded directly from the State Budget, with a total allocation in 2017 of US$673,000. The main funding for the private or community training centres comes from the Human Capital Development Fund (HCDF), but does not appear to be allocated to all centres (GoTL, 2017b). Interviews with training centres reveal that SEPFOPE always reduced the budget they requested, by amounts that varied greatly from year to year, but often to below basic operating costs. This is a barrier to paying the statutory minimum wage to trainers.

With INDMO’s quality assurance limited to accredited institutions, comprising less than 25% of the total, approximately 75% of the sector is not quality assured according to national standards. The importance of training centres being accredited to international standards, in order to facilitate improved Timorese access to international labour markets, is explicit in the National Employment Strategy. Unfortunately, it became apparent to the review team that there was a mistaken belief within INDMO that Timorese national qualifications are equivalent to Australian qualifications and likely to receive international recognition, when in general this is not the case; future labour mobility will suffer if this misconception is not addressed. It is noted, however, there is a case of a Certificate III in the Timor-Leste National Qualification Framework that is of a higher level than the Australian equivalent.
Although INDMO has established sector-specific industry sub-commissions to provide input into the national training system, there is a weak link between TVET institutions and employers. Whereas donor-funded training and qualifications are demand driven, other qualifications tend to be supply driven. A focus on the supply side has produced a TVET system with low relevance. In interviews the review team frequently heard from employers that they would prefer to carry out their own training, or employ qualified foreign workers, rather than rely on Timor-Leste’s TVET system, which was seen as being of low relevance and quality, with little opportunity for students to practice technical skills. Some employers noted that they recruited for attitude over skills, emphasising that soft skills, as well as technical skills, are critical to employability.

Two tracer studies further illustrate these weak links between the TVET system and employers. The 2014 SEPFOPE system-wide survey of TVET graduates showed that only 27% were in employment at the time of the survey (SEPFOPE, 2014); the employment rate for graduates of the better-resourced ADB MLSTP over several years was 41–46% (Francis, 2016). This is further demonstrated by the Enterprise and Skills Survey (ESS) data for 2016 and 2017, which shows that TVET graduates from training centres only accounted for 6% of all employees hired for the period 2015 to June 2017. The employers who do recruit TVET training centre graduates focus on just a few TVET training centres, with 85% being recruited from Don Bosco (47%), CNEFP Tibar (16%), Salele (12%) and CNFP SENAI (9%) (SEJT, 2018a; SEPFOPE, 2016).

Lack of engagement with the TVET sector is not confined to employers. Only 12% of Timorese progress from secondary school to TVET training, which compares unfavourably with Indonesia’s 41% and Thailand’s 34%. Lack of uptake is in part due to a belief that TVET training does not lead to employment, but also due to the low status of TVET training (Francis, 2014). However, data from the SEJT Labour Market Information System database indicates that of those that are unemployed, 67% are looking for opportunities to do vocational training.

High-performing TVET programs that respond to employer requirements can be supported through setting up enterprise-based training. Flexible training delivery modes could respond to employer needs for specific skill sets and link with Australian institutions and qualifications where appropriate. The current WDPTL program has achieved positive outcomes through supporting the development of hospitality qualifications and partnering with Charles Darwin University for up skilling trainers and developing learning resources. DFAT is currently investing in a hospitality training centre in partnership with CNEFP. Donor-funded support for enterprise-based training offers the opportunity to demonstrate the value of demand-focused TVET.
The National Employment Strategy (NES) 2017 - 2030

Timor-Leste needs to address several challenges in order to provide the required employment opportunities to achieve inclusive growth. Therefore, the National Employment Strategy (NES) 2017 - 2030 focuses on the need of creating new jobs to reduce unemployment and provide employment opportunities for the large population of young people entering the labour market in the next years; increasing formal jobs and addressing current productivity. The productivity of high numbers of working poor will have to be significantly increased to allow them to increase their income and escape poverty, either through increased productivity in their current jobs or by shifting to more productive jobs. The NES is not a national development plan, an industry policy, a sector policy nor an action plan. It is formulated to serve a set of purposes as described above and guide action plans. A strategy sets a broad direction of actions, which is different from an action plan that guides actors with specific tasks, timeframes, and deliverables.

Timor Leste has 25 CNEFPs or Centro Nacional de Emprego e Formação Profissional (National Center for Employment and Vocational Training). 3 important CNEFP, namely CNEFP Tibar and CENAOP Bekora, which are public, and a private one, CNEFP Don Bosco, and some 22 small private CNEFPs.

CNEFP Tibar conducts the following specialisations:
1. Civil trades (building construction, plumbing, electrical, woodworking, masonry, welding)
2. Hospitality (F&B, housekeeping, FO). There are about 15 CNEFP throughout the country which conduct hospitality services.
3. Agriculture
4. Maritime trades
5. Clean energy. In 2017 there were some 800 houses built equipped with solar energy. It was planned that another 84 houses being built in 2018.

6. Oli and gas

7. Project management

8. Heavy equipment (being prepared)

They do have a national curriculum, competency standards and evaluation.

1.3 Current Situation of Hospitality Industry

Timor-Leste Tourism is at an early stage of development and, following its recent long struggle for independence, receives extremely low numbers of international visitors. The development of an artificial Tourism industry was contributed by previous presence of the United Nations Peace Keeping Mission in Timor-Leste, where the restricted mobility of the international staff created a captive market and a false impression that tourist volume is achievable with little or no effort. Since the departure of the mission in December 2012, the occupancy rate of Dili’s hotels and visitors to the districts in general has declined substantially.

It will take time to (re-)build up international visitor arrivals through a combination of targeted Tourism marketing development and ensuring those few visitors that are arriving receive a satisfying, good value holiday experience, thereby generating positive ‘word of mouth’ recommendations in the market place. In addition, it is likely to take time for other countries to soften their travel advisories on Timor-Leste, an important step in making the country more attractive for holidaying.

Given Timor-Leste’s position as a small island economy, the Government of Timor-Leste’s goal, as set up in the Timor-Leste National Tourism Policy, is that by 2030 revenue from international tourists and visitors, will reach US$150 million and employment in the sector will reach 15,000. This will be underpinned by 200,000 international visits per year by 2030.

“Taking into account the growth of Tourism in the South-East Asia region, and the high priority that the Government of Timor-Leste (GOTL) is attaching to Tourism development, the new National Tourism Policy will certainly be a very important document to further guide the growth of Tourism in Timor-Leste in a sustainable and inclusive manner”. (UNWTO 2017)

Data on income from paid employment or earnings of employees were collected as part of the LFS 2013. It covered wages and salaries for the main and any secondary activities, after tax deductions, if any, but before any other deductions. According to the survey results, the average monthly wage and salary of employees was 530.8 USD in 2013 (the median was 272 USD). However, more than one quarter of the employees, were low pay workers, their pay being less than 181 USD per month—i.e. less
than two-thirds of the median earnings of all the employees.

It is to be noted that within the Labor Force Survey 2013, accommodation and food service activities represent only a very small figure: 1,000 out of 189,800, or 0.7% of the total employment share. It means that Tourism and hospitality industry is still at their early stage of existence.

CHAPTER 2 - EDUCATION AND VOCATIONAL EDUCATION

2.1 Education in Timor Leste

In Timor-Leste, the academic year begins in January and ends in December. The official primary school entrance age is 6. The system is structured so that the primary school cycle lasts 6 years, lower secondary lasts 3 years, and upper secondary lasts 3 years. Timor-Leste has a total of 373,000 pupils enrolled in primary and secondary education. Of these pupils, about 223,000 (60%) are enrolled in primary education.

National education system

According to the Decree-Law No. 14/2008 concerning the Education Framework, Ministry of Education (MoE) is responsible for developing and implementing education policy at all levels of formal education, as well as for providing infrastructure and ensuring teaching at public schools. It oversees the entire financial and management aspect of the education system, which promotes basic education for all.

Timor-Leste’s formal education system consists of the following levels (Table 1) (A. Cabral, personal communication, June 14, 2018):

- ‘Basic Education’ constitutes primary and pre-secondary schooling, which is compulsory and free for all at public schools; meanwhile private school fees range between US$5-US$10 per month. Still other costs are associated with sending a child to school that particularly relate to books, uniforms etc.

- ‘Secondary Education’ consists of general high schools and technical high schools; and

- ‘Post-secondary Education’ refers to tertiary or higher education. This is divided into two streams:
  - University Education, which includes baccalaureate, masters, and doctoral degree courses as well as postgraduate diplomas
  - Technical Higher Education, which includes short-term courses (1-2 years) in specialized and technological areas that are provided by polytechnics and several training institutes
Table: Education Level and corresponding average age of students

<table>
<thead>
<tr>
<th>Level of Education</th>
<th>Students’ Age in Years</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Level 1: Basic School Clustered (Grades 1-9; Age: 6-14) - Mandatory</strong></td>
<td></td>
</tr>
<tr>
<td>Pre-Primary/Pre-School</td>
<td>4-5</td>
</tr>
<tr>
<td>Primary School (Grades 1-6)</td>
<td>6-11</td>
</tr>
<tr>
<td>Pre-Secondary (Grades 7-9)</td>
<td>12-14</td>
</tr>
<tr>
<td><strong>Level 2: Secondary school (10-12) - Non-mandatory</strong></td>
<td></td>
</tr>
<tr>
<td>General</td>
<td>15-17</td>
</tr>
<tr>
<td>Technical</td>
<td>15-17</td>
</tr>
<tr>
<td><strong>Level 3: Tertiary or Higher Education - Non-mandatory</strong></td>
<td></td>
</tr>
<tr>
<td>General</td>
<td>18-22</td>
</tr>
<tr>
<td>Technical</td>
<td>18 and over</td>
</tr>
</tbody>
</table>

National Qualification Framework of Timor-Leste Note - Diploma I and above are equivalent to Level V- Level X in Vocational Education Pathways (A. Cabral, personal communication, June 14, 2018).

2.2 Education in Timor Leste

Non-formal vocational training sector continues to play a valuable and varied role particularly in providing practical skills and literacy and numeracy learning for out-of-school youth and marginalized
groups. Given the important role played by this sector, a new formal and regulated TVET system that works in conjunction with the non-formal sector has been established.

While formal TVET is the driver of the new system, transformation from non-formal to formal sector is aided by preparatory and substitutionary education delivered by non-formal and informal training agents.

The new TVET system:

- fosters a market-oriented specification of standards and competency-based training and assessment, together with industry sub-commissions, which advise on competency standards and qualifications;
- allows for those already in employment to upgrade their skills and receive national skills recognition; and
- provides minimum standards for all training providers in Timor-Leste whether they are civil society, Government, Church, or private enterprise based, to deliver quality training.

**Formal TVET System**

Formal TVET education can begin after nine years of basic schooling. A two-layered formal system is in place in which technical education is offered at secondary, post-secondary and higher education levels.

**TVET at secondary level**

TVET at secondary level is provided by ‘Technical Secondary Schools’. The main objective of these schools (under the auspices of MoE), is to equip students with technical skills to help them gain early entry into the labour market, while still enabling their access to higher education. Entry into Technical Secondary Schools is subject to successful completion of Junior High School. However, high school drop-outs are still eligible for Foundation Courses (A. Cabral, personal communication, June 14, 2018). These schools offer courses in specific technical areas, such as agriculture (Technical School for Agriculture) and construction (Technical School for Construction). The TLNQF does not cover qualifications issued by secondary schools (both general as well as technical). These qualifications are issued under the Base Education Law 14/2008.

Secondary education is skewed towards General Secondary Education with only 14% of the total number of students opting for STVE in 2016. Not all municipalities have these schools (A. Cabral, personal communication, June 14, 2018); Dili and Baucau, the two largest cities of Timor-Leste, house seven and five schools respectively. 2016 school year recorded 7,938 students and 771 teachers in the 32 private and public STVE schools.

With most students lacking basic literacy, numeracy and soft skills, the quality of secondary education and graduates is viewed as substandard and is major a concern for employers.
TVET at post-secondary and higher levels

TVET at post-secondary and higher levels follows competency-based accredited training and quality assurance procedures based on the Timor-Leste National Qualifications Framework (TLNQF). TLNQF enlists all post-secondary school qualifications under a single framework (see fig. 1). It establishes ten levels of qualifications. While levels one to four (including foundation certificates) fall under INDMO’s mandate, levels five to ten including qualifications undertaken at universities are under the regulation of the ANAAA.

Pathways and Eligibility

Under the formal system, successful completion of secondary studies or High School allows students to pursue tertiary and higher studies (technical as well as general).

High School graduates who wish to pursue vocational education pathways, can only be eligible for level I and Level II entry; they cannot gain direct entry to Level III or above under the vocational streams. Furthermore, in order to be certified for certificates levels, Diploma I and above, graduates have to be assessed by Vocational Education system policy called Recognised Prior Learning (RPL). Graduates cannot receive certificates instantly. Experienced workers lacking prior qualifications can gain entry into Certificate Level III & IV in specific qualification areas, if they possess extensive field experience in their areas (A. Cabral, personal communication, June 14, 2018).

In general, each training provider sets its own recruitment and selection process, which is usually determined by the type of course and the location of the training center.

Training Providers

Public as well as private technical and vocational training institutions including Polytechnics offer courses under the TLNQF. Over 100 private training providers comprising donor, church, civil society, community-based and non-government organisations exist today and are spread across the country. However, only very few have the capacity and the ability to deliver training programmes effectively, and thus do not meet the requirements of accreditation.

By December 2017, 25 training providers have already been accredited to deliver 107 different courses. Meanwhile, 37 training providers have been registered and established successfully with INDMO Registration Standards. In addition, 23 training providers’ applications are under review to be established as registered providers (A. Cabral, personal communication, June 14, 2018).

Accredited and registered post-secondary institutions under the ANAAA and INDMO are required to submit data to the respective agencies, which are used for decision-making purposes on renewal of accreditations, re-sanction of public funding and more.

Key training centres are:
• **Tibar Training Centre** (est. 2002): empowers young people to rebuild Timor-Leste; became public training institute under decree law in 2007; offers courses in construction, hospitality and agriculture; 3,300 students have been trained so far

• **The National Industrial Training Service in Becora (SENAI-Becora)** (est. 2002): became nation’s second public training institute in 2014; offers a wide range of courses including construction, baking and tailoring

• **The Dili Institute of Technology (DIT)** (est. 2005): offers civil construction training to youths and veterans; one of the nation’s five accredited construction training providers

• **Don Bosco-Comoro Training Centre** (est. 1991): provides skills development opportunities to disengaged and unemployed youth; offers courses in administration, construction and Timor-Leste’s only accredited automotive training in light vehicles

• **Claret Training Centre in Salele (CTC-Salele), Cova Lima** (est. 2005): provides skills development to youth without access to formal education

Almost all municipalities have vocational training providers. Polytechnic, however, is located in the capital. Recently, GoTL launched the ‘Polytechnic Institute of Betano’ in Betano, Viqueque; its primary focus is Construction. Establishment of two more polytechnics viz. ‘Polytechnic Institute for Hospitality and Tourism’ in Lospalos and ‘Academy for Fisheries and Marine Studies’ in Manatuto, is in the pipeline.

With respect to traineeships/apprenticeships, presently training providers find work placements lasting a few days or weeks for their graduates. However, a more formal system needs to be established.

**Courses and Curricula**

With the recent decline in oil production, the GOTL is working towards diversifying the economy. It has identified commercial forestry, fisheries, mining and construction as significant potential areas of expansion. Tourism in particular has been nominated as a priority sector in the SDP; the minimum target is to increase visitors from the current 55,000/year to 200,000/year by the year 2030. Apart from this, agriculture, mostly subsistence farming, continues to be the main livelihood activity for 70% of Timorese, and is therefore regarded as the only field worthy of study particularly in rural areas.

TVET education must create a workforce that is skilled in jobs-in-demand and training must be geared towards benefitting these professions.

Current formal TVET courses are designed to impart job-specific skills in specialized areas. According to the Labour Force Survey (LFS, 2010), formal training was sought mainly for office or white collar jobs, with 49% ‘clerical’ staff, 47% of ‘professionals’ and 43% of ‘managers’ having gained skills via formal courses. In general, TVET is focused on the following six training areas: (i) administration and finance, (ii) construction, (iii) tourism and hospitality, (iv) education, training and assessment, (v) agriculture
and (vi) automotive mechanics. Gender segregation is seen in course selection. Most women opt for ‘female skill areas’ such as administration, finance, and tourism and hospitality as opposed to technical trades such as carpentry, masonry, mechanics etc.

In addition to this, formal Foundation Courses have been introduced for school drop-outs, out-of-school-youth, marginalised and vulnerable groups to obtain an entry level certificate. These courses act as gateways to higher level vocational training by offering a combination of soft skills, life skills and basic functional skills specific to certain industry areas such as construction, automotive, agriculture, administration and finance, or tourism. The timing and delivery of particular Foundation courses is also tailored to meet the specific needs of female participants to create a gender inclusive environment.

In order to create a formal entry into employment, more emphasis needs to be placed upon the practical aspects of courses and training delivery. The National Training Commitment, through its two streams viz. the ‘National Training Ticket’ and the ‘National Traineeship Programme’, proposes inclusion of workshop training (in conjunction with classroom training), paid/unpaid work experience and on-the-job training for students.

Non-Formal & Informal TVET System

Despite continued efforts to formalise TVET, a sizeable segment of the marginalised population and a high number of young people still remain unemployed and outside the formal education system. One of the contributory factors is the lack of quality education that worsens especially when the official language of instruction changes from Tetum to Portuguese in the later years of basic education leading to high drop-out rates. [According to LFS (2010), only 37% of respondents were literate in Portuguese as compared to 96% in Tetum]. Another important factor is the existence of a rural-urban divide in access to education with rural areas faring poorly, compounded by the gender divide that expects women to assume traditional household roles [about 58% of women aged 25 years and above have never been to school (versus 43% of men), and only 52% of women aged 15 years and older are literate (versus 63% of men)].

Non-formal and informal vocational training continue to play a valuable and distinct role in addressing these issues. A high reliance is still placed on community-based systems in delivering livelihoods skills, small business and entrepreneurship training, and important social and community development programmes.

A considerable proportion of Timorese rely on self, family or friends to acquire skills. According to the LFS (2010), almost half of those employed (47.7%) were self-taught as compared to only 13.6% who had pursued a vocational training program (fig. 2). Family and relatives play an important role in skill-acquisition; certain occupations such as ‘craft and related trades’ in particular are learnt from them.6(p41)
While on the one hand, foundation courses are helping in transitioning into the formal TVET system, on the other hand, non-formal and informal training too is working towards bringing the academically and socio-economically disadvantaged population back into the education and workforce system.

Several international as well as local organisations have been providing non-formal preparatory and informal education via onshore and distance-learning modes. Programmes range from 21st Century transferrable skills like ICT that appeal to various groups of learners to specialised training courses like public administration targeted at specific groups like civil servants.

A few notable initiatives are, a) ‘Science of Life Systems’, a self-funded social enterprise that work towards 16-25 year olds’ employability and further education; it offers two-year full time courses (with part-time option for all ages) on English, computer literacy, personality development and more including provision of boarding facility at 47 centres covering all districts; b) ‘InfoTimor’, a not-for-profit social enterprise, which focuses on advancing ICTs within Timor-Leste’s economy and fostering partnerships with Dili Institute of Technology, Infoxchange Australia, and GoTL to expand education and employment opportunities for young people; and c) ‘Empreza Diakis’, a Timorese NGO that engages in capacity-building for entrepreneurship and assists innovative businesses by promoting local products, supporting vulnerable women, and collaborating with public/private organisations and business partners.

Moreover, National Directorate for Recurrent Education (DNER) under the auspices of MoE is supporting the illiterate section of society to achieve high school equivalence by means of substitutionary non-formal education. It has opened ‘community learning centres’ in eight districts to equip people with skills that are in demand at local level; the centres are managed by local committees and funded by the MoE.
The 4th Constitutional Government issued in 2011 the National Education Strategic Plan (NESP). It was the first attempt to comprehensively analyse the situation of education in Timor-Leste. The NESP identifies challenges that affect the Ministry of Education’s (the Ministry) ability to meet the country’s obligations to education as stated in the Timor-Leste Constitution, as well as its commitment to the Millennium Development Goals (MDGs) for 2015, the Sustainable Development Goals (SDGs) for 2030 and other National Priority targets.

This NESP outlined the Ministry’s intent to promote its new vision for the whole of the education sector in the long and medium terms. It provided the basis for substantive discussions with national and international development partners to better link, co-ordinate and finance interventions in the sector, and contribute to improved aid effectiveness. It took account of the past and present as it looks towards the future.

A sector-wide national plan, the document will guide implementation of education reform throughout the country. It has been developed through a consultative process involving staff at all levels within the Ministry, and including the regions, districts and schools, as well as its international development partners and other key stakeholders.

It set up the following priority programs:

**LONG TERM GOAL (2030)**

By 2030 all children, boys and girls alike, will be able to complete a full course of quality Basic Education

**SHORT TERM GOAL (2015)**

By 2015 95% of eligible students will be enrolled and receive quality Basic Education, and student retention to Grade 9 will be significantly improved.

Timor-Leste needs to address several challenges in order to provide the required employment opportunities to achieve inclusive growth. Therefore, the National Employment Strategy (NES) 2017 - 2030 focuses on the need of creating new jobs to reduce unemployment and provide employment opportunities for the large population of young people entering the labour market in the next years; increasing formal jobs and addressing current productivity. The productivity of high numbers of working poor will have to be significantly increased to allow them to increase their income and escape poverty, either through increased productivity in their current jobs or by shifting to more productive jobs. The NES is not a national development plan, an industry policy, a sector policy or an action plan. The NES is formulated to serve a set of purposes as described above and guide action plans. A strategy sets a broad direction of actions, which is different from an action plan that guides actors with specific tasks, timeframes, and deliverables.
It seems that the short term goal of the NES was almost achieved.

Source: Fact Sheet of 2015 Census

The TVET Plan 2011-2030

Timor-Leste is taking determined steps towards human resource development and inclusive economic growth and diversification. This document details the Technical and Vocational Education and Training Plan 2011-2030 (TVET Plan) and is aligned with the initiatives outlined in the Timor-Leste Strategic Development Plan 2011-2030. The Plan is consistent with the principles and methods of a Sector-wide Approach (SWAp) and is uniquely positioned to implement a national TVET plan that improves training efficiency and responsiveness and drives new skills development to address the challenges related to training culture, education to training to work transition and building a sustainable training sector.

Timor-Leste SDP Plan
Professional Training in Timor-Leste

Professional training is one of the commitments of the Government of Timor Leste.

The State Secretariat for Professional Training and Employment (SoSPTE), which is the central organ of the government whose mission is to design, implement, coordinate and evaluate the policies for this area, is committed to ensuring access of the Timorese to professional training, enabling everyone to acquire and constantly update knowledge and skills to enter and / or remain working.

The SoSPTE has three directorates, according to the Government’s priorities and policies for professional training, namely

1. the National Directorate of Professional Training,
2. the National Directorate of Work Relations, and
3. the National Directorate of Employment.

Within the National Directorate Professional Training, three bodies of indirect State administration were created:
1. the National Centre for Employment and Professional Training of Tibar (CNEFP),
2. the National Center for Industrial Learning (SENAI), and
3. the National Institute for Hand Work Development (INDMO).

The CNEFP, in cooperation with the Government of Portugal, and the SENAI, in cooperation with the Government of Brazil, support the creation and implementation of national training and employment programs.

The INDMO defines the competence standards and establishes a professional training certification system, according to national and international standards.

Under the responsibility of the latter, four subcommittees were developed to encompass the priority areas of professional training.

In 2008, the Government created the FEFOP (Fund for Employment and Professional Training) that supports initiatives to generate immediate employment through professional training, entrepreneurship training, and partnerships with micro-credits institutes, on-the-job training and support to their first job.

Since 2008 the Government has undertaken efforts to conduct the professional training system in order to meet the needs and demands not only of Timor-Leste but also in other countries. Since then, the Government has trained more than 7000 workers in several areas.

The CNEFP develops training in the areas of construction, carpentry, electricity, plumbing and masonry. The SENAI also focus on training in the same areas but also in information technology, sewing, industry, bakery and hydraulics. This year trainers are being prepared so that next year training can be given on refrigeration, motorcycle mechanics and computer maintenance.

These are the key areas for the country’s development, to meet the priority job demands in what concerns professional training policy in Timor-Leste.

It is the Government’s constant concern to provide capacity to its citizens so they can have skills that allow them entry into and actively participate in the labor market. Worker training makes them competitive within the company and increases their value professionally.

With the existence of Decree Law No. 14/2008 and the Timor-Leste National Qualifications Framework (TLNQF), MoE is very supporting in developing the education system at all levels and especially in the vocational field in Timor-Leste. MoE also continues to develop resources and economic growth that are inclusive and diversified in order to succeed in the 2011-2030 Technical and Vocational Education and Training Plans. as an initial preparation or piloting of the Common ASEAN Tourism Curriculum (CATC) it is very possible to apply it in Timor-Leste with the existence of training providers who can be said to have adequate infrastructure.
CHAPTER 3: TOWARDS THE IMPLEMENTATION OF MRA-TP

As far as Timor Leste is concerned, Timor Leste has been applying for ASEAN membership since 2011. The ASEAN Coordinating Council Working Group, which was held on 5 December 2017 in Bali, Indonesia,” making it the last opportunity for Timor-Leste’s accession in ASEAN under the Philippines’ chairmanship which technically ends on December 31. The Philippines made a last bid to declare Timor-Leste as an ASEAN member state, but failed after 6 (Singapore, Myanmar, Laos, Malaysia, Brunei, and Vietnam) blocked the proposal, while only 4 (Philippines, Indonesia, Thailand, and Cambodia) approved of it. The proposal needed a unanimous vote (10) for it to pass. In 2018, the Philippines was in talks with Brunei, Myanmar, Laos, and Vietnam regarding the approval of Timor-Leste’s accession to ASEAN. Talks were also set with Malaysia and Singapore, but both nations rejected the proposal again. Singapore, as the ASEAN chair for 2018, noted that Timor-Leste’s membership will be tackled during the year, but its accession as a member state would not be approved, pushing the possible approval of Timor-Leste’s bid to 2019, where Indonesia will be chair.

This situation does not discourage Timor Leste. On the 7th of March 2017 the Government approved the National Tourism Policy, developed to provide the clear public policy framework needed to ensure effective, efficient and sustainable growth in Tourism, one of Timor-Leste’s five Priority Sectors for growth and economic diversification. Prime Minister, H.E. Dr. Rui Maria de Araújo explained that the Tourism Policy for Timor-Leste entitled Growing Tourism to 2030 – Creating a Sense of National Identity” is a call to action for all stakeholders to work collectively towards achieving the true potential of the country as an international tourism destination.”

The policy document begins with a frank assessment of Timor-Leste’s current travel and tourism competitiveness across four areas: enabling environment, policy and enabling conditions, infrastructure, and natural and cultural resources. It then sets out a path for Timor-Leste’s tourism development emphasizing “sustainability, community, quality, and business competitiveness.”

The National Tourism Policy sets the framework. It has to be elaborated by working collectively, collaboratively, step by step, and with energy and determination, to realize this ambition for the benefit of the Nation.

With the existing conditions, and a great desire to become a pioneer institute in the field of tourism that uses The Common ASEAN Tourism Curriculum (CATC) on MRA-TP. The results of discussions with the leaders of the Institute of Business Affairs (IoB), they have a hospitality and tourism program at the level of D2, D3, D4 that applies the National Curriculum Framework (NQF), onwards IoB hopes to be able to use CATC on its tourism program as a piloted.
CHAPTER 4: SUPPORT FOR DISTANCE LEARNING

4.1 Access to ICT devices and Internet

The first Internet connection in Timor Leste was made by the United Nations APDIP Programme in 1999 to support UNTAET, the UN Transitional Administration. This consisted of a C Band link to Singapore Telecom. The initial bandwidth was 256kbit/s.

The Internet country code for Timor Leste is .tl. This code was officially changed from .tp (for Portuguese Timor) when the country achieved its independence on 20 May 2002.

There was only one ISP in Timor Leste, Timor Telecom. Two-way Satellite Internet is in theory available, as the country falls within the Australian and Asian footprints of several satellites offering this service, however in practice licences are not granted for use of non-Timor Lesteese Telecom services. Therefore, internet services include landline ADSL connections, dedicated line infrastructure and 3G cellular internet.

As of 2015, 13.4% of the population were connected to the internet with the vast majority of users using cellular internet. According to Timor Telecom about 94% of the population is able to access cellular phone and internet services.

Timor Telecom has sought to block some Voice over IP services on its network such as Skype. As a result, some such services may not function. Timor Telecom offers mobile GSM services covering approximately 92% of the population, 100% of the districts, and 57% of the sub-districts.

On January 17, 2013, the Prime Minister of Timor Leste, Mr Xanana Gusmao, launched Telkomcel as the second telecommunication operator in Timor Leste with three main services: (1) Mobile Services, (2) Corporate Solution dan, (3) Wholesale & International Services. Telkomcel is 100% owned by PT Telekomunikasi Indonesia International (TELIN). Telkomcel 3G Data Network is supported by the latest 3G technology called High Speed Download Packet Access (HSDPA), that allows transmission up to 21Mbps. With this technology, Telkomcel make sure a fluent and fast access to large data file in short period of time.

Since February 2018, Telkomcel has provided 4G mobile broadband to be accessed by customers. The 4G network initially covers major areas of Dili, giving the customers internet connection 3x faster than its predecessor. Starting November 2018, Telkomcel has expanded the 4G coverage to cover most areas of Dili.

At present, there are several ISP operating in Timor Leste, namely Viettel Timor Leste, Timor Telecom SA, Telkomcel SA, National Directorate of Information and Technology, Elite Computer, LDA, and Gardamor, LDA.

Timor Leste has one national public broadcaster, Televisão Timor Leste or Televisao Timor Lorosae, which broadcasts local programming in Tetum and Portuguese, as well as retransmissions of RTP Inter-
nacional from Portugal.

In May 2007, RTTL’s television and radio services became available via satellite, using a transponder leased from Telkom Indonesia.

### 4.2 Distance Learning

Distance Learning is not implemented in Timor Leste, neither using ICT nor Television (DLTV). Not even blended learning. But from the several talks with high officials in Dili, there is a strong willingness to conduct blended learning, mainly for remoted districts.
### ACCRONYMS / ABBREVIATIONS

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
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<tbody>
<tr>
<td>ABS</td>
<td>Australian Bureau of Statistics</td>
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<td>ADB</td>
<td>Asian Development Bank</td>
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<td>ALMPs</td>
<td>Active Labor Market Programmes</td>
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<tr>
<td>ANAAA</td>
<td>Agência Nacional para a Avaliação e Acreditação Academica (National Agency for Academic Assessment and Accreditation)</td>
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<td>AusAID</td>
<td>Australian Agency for International Development</td>
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<td>BAS</td>
<td>Business Activity Survey</td>
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<tr>
<td>CCI</td>
<td>Chamber of Commerce and Industry</td>
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<tr>
<td>CEOPs</td>
<td>Centro de Emprego e Orientação Profissional (Center for Employment and Professional Guidance)</td>
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<tr>
<td>CNEFP</td>
<td>Centro Nacional de Emprego e Formação Profissional (National Center for Employment and Vocational Training)</td>
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<td>CNFP</td>
<td>Centro Nacional de Formacao Profissional (National Center for Vocational Training)</td>
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<td>CTC-Salele</td>
<td>Claret Training Centre in Salele</td>
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<td>DFAT</td>
<td>Department of Foreign Affairs and Trade</td>
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<td>DIT</td>
<td>Dili Institute of Technology</td>
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<tr>
<td>DNAFOP</td>
<td>Direcção Nacional para Formação Profissional (National Directorate for Vocational Training Policy)</td>
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<td>DNAPE</td>
<td>National Directorate of Employment Policy</td>
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<tr>
<td>DNER</td>
<td>Direção Nacional de Ensino Recorrente (National Directorate for Recurrent Education)</td>
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<td>DNEST</td>
<td>Direcção Nacional do Ensino Superior Técnico (National Directorate For Higher Technical Education)</td>
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<td>DNESTV</td>
<td>Direção Nacional do Ensino Secundário Técnico-Vocacional (National Directorate for Secondary Technical-Vocational Education)</td>
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<td>DNFP</td>
<td>Direcção Nacional de Formação Profissional (National Directorate for Vocational Training)</td>
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<td>DNIMT</td>
<td>Direcção Nacional de Informação do Mercado de Trabalho (National Directorate of Labour Market Information)</td>
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<td>DNPMA</td>
<td>National Directorate for Planning Monitoring and Evaluation</td>
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<td>ESS</td>
<td>Enterprise and Skills Survey</td>
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<td>FDCH</td>
<td>Fundo de Desenvolvimento do Capital Humano (Human Capital Development Fund)</td>
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<td>FEFOP</td>
<td>Fundo de Emprego e Formação Profissional (Employment and Vocational Training Fund)</td>
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<td>GAP</td>
<td>Gender Action Plan</td>
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<td>GoTL</td>
<td>Government of Timor-Leste</td>
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<td>Acronym</td>
<td>Full Form</td>
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<tr>
<td>ICTs</td>
<td>Information and Communications Technologies</td>
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<td>ILO</td>
<td>International Labour Organization</td>
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<td>INDMO</td>
<td>Instituto Nacional de Desenvolvimento de Mão de Obra (National Institute for Labor Force Development)</td>
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<td>INFORDEPE</td>
<td>Instituto Nacional de Formação de Docentes e Profissionais da Educação (National Institute for Training of Teachers and Education Professionals)</td>
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<td>ISCs</td>
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<td>Labour Market Information System</td>
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<td>MLSTP</td>
<td>Mid-Level Skills Training Project</td>
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<td>MOE</td>
<td>Ministry of Education</td>
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<td>MOF</td>
<td>Ministry of Finance</td>
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<td>NES</td>
<td>National Employment Strategy</td>
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<td>NESP</td>
<td>National Education Strategic Plan</td>
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<td>NGO</td>
<td>Non-governmental Organization</td>
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<td>NHDR</td>
<td>National Human Development Report</td>
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<td>PP</td>
<td>Priority Programmes</td>
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<td>PROFEP</td>
<td>Programa de Formação de Professores do Ensino (Training Programme for Teachers)</td>
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<tr>
<td>RDTL</td>
<td>República Democrática de Timor Leste (Democratic Republic of Timor-Leste)</td>
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<td>RPL</td>
<td>Recognised Prior Learning</td>
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<td>SDP</td>
<td>Strategic Development Plan</td>
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<td>SDG</td>
<td>Sustainable Development Goal</td>
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<td>Secretária de Estado da Formação Profissional e Emprego (Secretariat of State for Employment and Training)</td>
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<td>SEPFOPE</td>
<td>Secretária de Estado para a Política de Formação Profissional e Emprego (Secretariat of State for Vocational Training Policy and Employment)</td>
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<tr>
<td>SENAI-Becora</td>
<td>National Industrial Training Service in Becora</td>
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<td>SWAp</td>
<td>Sector-wide Approach</td>
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<td>TESP</td>
<td>Training and Employment Support Project</td>
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<td>TLCE</td>
<td>Timor-Leste Coalition for Education</td>
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<td>TLNQF</td>
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<td>Technical and Vocational Education and Training</td>
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<td>United Nations Development Programme</td>
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<td>WDPTL</td>
<td>Workforce Development Programme Timor-Leste</td>
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<td>YEPP</td>
<td>Youth and Employment Promotion Programme</td>
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