



PAPUA NEW GUINEA TOURISM SECTOR DEVELOPMENT PLAN 2022 – 2026



Papua New Guinea
A MILLION DIFFERENT JOURNEYS
Tourism Promotion Authority

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Published by: Papua New Guinea Tourism Promotion Authority
Port Moresby
Papua New Guinea

October 2021

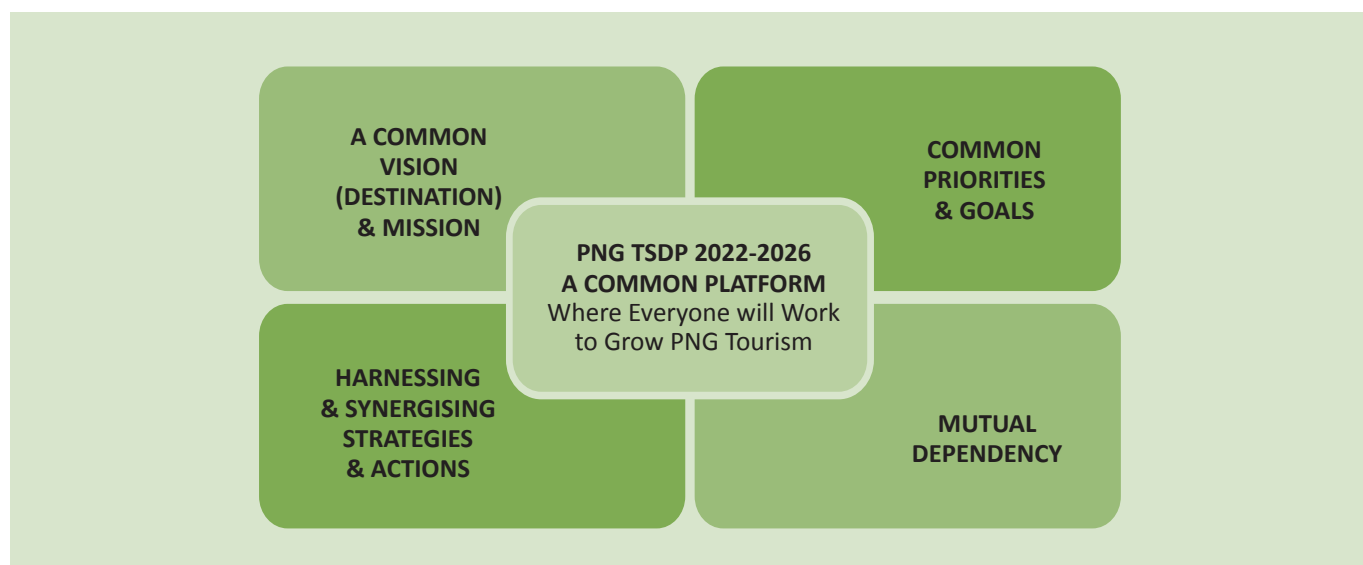
Typesetting: Creative Grafiks

ISBN: 978-9980-915-37-5

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PAPUA NEW GUINEA TOURISM SECTOR DEVELOPMENT PLAN 2022-2026



Wok Bung Wantaim, Kirapim Turisim, Kirapim PNG.

Gaukara Hebou, Turisim Bahatubua, PNG Abiaisi.

The *Papua New Guinea Tourism Sector Development Plan 2022-2026 (PNG TSDP)* is no ordinary document; it is a significant strategy document providing the framework for developing PNG Tourism. It is framed on the recognition that Tourism is a key resource in the renewable sector of the economy and that its contribution to the PNG economy and society needs to be fully tapped based on a strong sector plan.

Covering a five-year time horizon, the framing of the TSDP is home-grown led by the PNGTPA and industry members, and developed from an extensive stakeholder consultation process across the country. The TSDP is therefore a document that is collectively developed and owned by all the stakeholders of the sector. Its success depends on the inclusive participation of all stakeholders, working and supporting each other to develop the Tourism Sector.

The Plan sets out a clear **destination** of where the tourism sector anticipates to be (or arrive at) in five years' time (2026) and beyond, the **direction** or the **path** the sector will take, and the **interventions** or **strategies** the sector intends to undertake in order to reach its **goals**, and ultimately its **planned destination**. It is through this Plan that interventions will be developed and mounted, and efforts of all stakeholders are coordinated and synergised to create the desired impact on the goals and vision of the sector, and ultimately on the PNG economy and society.



FOREWORD BY THE MINISTER FOR TOURISM, ARTS AND CULTURE



As the Minister responsible for Tourism, Arts and Culture, it gives me great pleasure to present to you the PNG Tourism Sector Development Plan (TSDP); a culmination of the collective visions, ideas and consultations from local tourism practitioners, the tourism and hospitality sector, government institutions and the private sector

Against a backdrop of a devastating world-wide pandemic of COVID-19, the Tourism Industry in the country has been hard hit. January 2020 alone has seen significant reductions in travel with over 86% equating to 12,000 fewer international travellers and as international borders remain closed. These figures may continue to negatively impact the industry through the coming months.

The COVID-19 pandemic poses significant industry challenges for us, but it is of my firm belief that we can grow this industry sustainably and equitably through commitment and support from everyone involved in the sector. Moreover, the pandemic presents us with an equally viable opportunity to actively engage in promoting our country's tourism potential domestically.

As a way forward, the TSDP presents a pragmatic and workable approach to tourism development in the country. The Plan sets out a framework for the future development of PNG Tourism, placing an emphasis on an active, determined and holistic approach through strong partnerships and collaboration to help advance the industry. More importantly, this plan will ensure decisions on local tourism development are driven by those within the sector and allow the industry to take responsibility and ownership for its future. The challenge now is to ensure we deliver on these plans and make the most on this opportunity to make Papua New Guinea's tourism industry thrive.

I sincerely thank the Marape-Basil Government for its vision to refocus priorities and resources on the renewable sector of the economy. Tourism, along with Agriculture, Fisheries, Forestry and the like, are the future of this great nation. As alluded to in our National Goals and Directives, the onus is on us to preserve and replenish our natural, God-given resources to ensure we create an economy that is self-reliant; maximizes economic participation by all, and preserves our traditional Papua New Guinea ways.

I remain optimistic for the future of the Tourism industry of Papua New Guinea and know that through collaboration, strong partnership and mutual respect, we will drive tourism development into the next era for the benefit of all and generations to come.

God Bless Papua New Guinea.

A handwritten signature in blue ink, appearing to read 'Isi Leonard'.

HON. ISI LEONARD, MP

MINISTER FOR TOURISM ARTS AND CULTURE

MESSAGE FROM THE PAPUA NEW GUINEA TOURISM PROMOTION AUTHORITY CHIEF EXECUTIVE OFFICER



The tourism industry in Papua New Guinea is a dynamic field that cuts across all other sectors by nature and needs the support of everyone to make the industry succeed. Since 1993, the PNG Tourism Promotion Authority (PNGTPA) has been working tirelessly to provide a positive image to international travellers about the great adventures that our diverse land and people have to offer and at the same time, work with industry stakeholders to meet the needs and expectations of our visitors as they enjoy their stay.

In life, new challenges always present new opportunities for improvement. For two decades, tourism development has been a struggle in increasing visitor arrivals and revenue and we have come to realize that we are desperate for change.

Therefore, in our endeavour to be the best in what we do, the TSDP 2022-2026 has been designed to strengthen the support given by our government, industry and people so that together, we can charter the roadmap for a better PNG tourism industry to serve the world.

As the core implementing agency, PNGTPA has taken the initiative to conduct legislative and policy reforms to support this process to ensure that this plan is effective, realistic and will empower the people of Papua New Guinea to become better in offering tourism and hospitality services to the world.

It has been an unfortunate situation for the country to be affected by the rapid impact of the global pandemic of the Novel Coronavirus 2019 among other common issues such as law and order, bad media publicity, and high costs of travel. Faced with these, we have strategically aligned our priorities in the next five years to provide the necessary rehabilitation mechanisms and development opportunities for recovery, resilience and growth of PNG Tourism.

For the tourism sector to expand as it should, the 'whole of government approach' in developing the sector will be required at all levels. In this regard, we are proud to advise that this plan has captured every aspect of maximizing and synergising efforts of all stakeholders both in its formulation and subsequently in its implementation. This is to ensure that the planned targets contained in the plan are effectively delivered.

This Plan is the culmination of the efforts of many people. Firstly, I would like to thank our Heavenly Father for making this journey possible. I would like to also thank the Government, the Ministry of Tourism Arts and Culture, the tourism and hospitality industry stakeholders, and respective provinces for their contribution to the formulation of this Plan.

As CEO, I look forward to bring this plan to life once financing and other development essentials have been sufficed.

May God bless Papua New Guinea and grant wisdom to those who would labour to deliver the Plan.

MR. ERIC M. UVOVO
CHIEF EXECUTIVE OFFICER



STATEMENT FROM THE PNG TOURISM INDUSTRY ASSOCIATION PRESIDENT



The tourism industry of Papua New Guinea is diverse with no shortage of adventure and unique experiences. Rich with endemic biodiversity, cultures thousands of years old, traditions passed on from generation to generation, and a unique rite of custodianship over the land of our forefathers, PNG truly stands apart from the rest of the region and the world.

The PNG Tourism Industry Association (PNG TIA) is the peak body responsible for private sector engagement in the tourism industry of PNG and recognizes the immense work we all have before us to drive this economic sector into the next era of real, tangible development for all service providers in the supply chain of tourism, travel and hospitality.

The PNG TIA and its members are pleased with the vision of the Tourism Sector Development Plan 2022-2026. The plan sets out a clear pathway, interventions and strategies that will build a sustainable and inclusive tourism industry. We understand and appreciate that the private sector must play an active role in the effective implementation of this plan and stand ready to provide strong collaboration and coordination to create an environment for tourism to thrive.

I confirm that this Tourism Sector Development Plan 2022-2026 has been widely circulated, reviewed and accepted by relevant authorities, individuals and the industry at large – it is therefore time to move forward with the full implementation of the TSDP 2022-2026.

PNG TIA and the industry accept the five-year PNG Tourism Sector Development Plan 2022-2026 and call for all of us to work together to achieve its goals.

Let's work together to Build Back Better.

God Bless Papua New Guinea.

AMATEOS

MR. ALOIS MATEOS

PRESIDENT – PNG TOURISM INDUSTRY ASSOCIATION, INC



LIST OF ACRONYMS

CBO	Community Based Organisation
CEFI	Centre for Excellence in Financial Inclusion
CEPA	Conservation and Environment Protection Agency
DCI	Department of Commerce & Industry
DFAIT	Department of Foreign Affairs and International Trade
DHERST	Department of Higher Education Research Science and Technology
DMR	Destination Marketing Representatives
DNPM	Department of National Planning & Monitoring
DoE	Department of Education
DoT	Department of Transport
DoW	Department of Works
DP	Development Partners
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GOPNG	Government of Papua New Guinea
ICCC	Independent Consumer and Competition Commission
ICSA	Immigration and Citizenship Service Authority
IFC	International Finance Corporation
IFMS	Integrated Finance Management System
IPA	Investment Promotion Authority
MTAC	Ministry for Tourism, Arts and Culture
MTDP III	Medium Term Development Plan III 2018 - 2022
NCC	National Cultural Commission
NGO	Non-Governmental Organisation
NICTA	National Information Communication Technology Authority
NMSA	National Maritime Safety Authority
NTC	National Tourism Council
NTO	National Trade Office
NYDA	National Youth Development Agency
OECD	Organisation for Economic Cooperation and Development
PNGDSP	PNG Development Strategic Plan 2010 - 2030
PNGTIA	Papua New Guinea Tourism Industry Association
PNGTPA	Papua New Guinea Tourism Promotion Authority
SAPNG	Surfing Association Papua New Guinea
SME	Small Medium Enterprise
SWAps	Sector Wide Approach
TSDP	Tourism Sector Development Plan 2022-2026
TWG	Technical Working Group
UNWTO	United Nations World Tourism Organisation



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Independent State of Papua New Guinea
Department of National Planning and Monitoring

I, Mr. Koney Samuel by virtues of the powers vested on me as the Secretary for the Department of National Planning and Monitoring, and in compliance with the Papua New Guinea Planning and Monitoring Responsibility Act 2016, hereby approve the Tourism Sector Development Plan 2022 - 2026 for implementation.

A handwritten signature in blue ink, enclosed within a blue circular stamp.

Koney Samuel

Secretary
Department of National Planning and Monitoring

EXECUTIVE SUMMARY

PNG boasts a diverse contrast of people and living cultures, arts, traditions, tribes, languages, and history. The country's thousands of kilometres of untouched beaches, spectacular wrecks and tropical reefs, contrasting locations in the highlands and the coastal lowlands, and a significant stock of biodiversity and flora and fauna — many endemic to the country — offer a unique and unparalleled potential for sustainable development in the tourism sector. And at less than three percent, PNG has one of the lowest densities of visitors per population globally. All these provide an incredible opportunity and potential for tourism to thrive. Yet PNG's tourism sector remains small by international standards, with the sector contributing 1.4 % of the total economy, which is equivalent to PGK1, 132.0 million (USD326.9 million) GDP in 2020 (World Travel and Tourism Council, 2021). In order for the sector to grow, PNG must maximize the untapped potential of tourism by ensuring that tourism is supported and developed as a key plank of the economy. A thriving tourism sector will in turn contribute to higher foreign exchange earnings, more local business income generation, growth in businesses in the tourism value chain, increased job creation and employment, and an expanding economy.

Developing PNG tourism will be private sector led, but the government will be required to provide the necessary policy framework at the strategic level to steer the sector's development. Working in tandem with the industry, the government will also be required to invest directly on creating the enabling environment for tourism growth. As well, the imposition of the regulatory measures needed to strengthen and facilitate the smooth inflow of visitors and the growth of businesses directly and indirectly involved in the industry value chain, will be required. The GoPNG has taken affirmative action in that regard, albeit more work is required.

In 2007, the GoPNG released the first comprehensive Master Plan on Tourism—Papua New Guinea Tourism Sector Review and Master Plan 2007 – 2017 through the Independent Consumer & Competition Commission (ICCC) and the PNGTPA. The Master Plan had documented extensively the bottlenecks of the tourism sector and calls for concerted action by all parties to develop the sector. It identified several areas that the sector should work towards in growing PNG tourism, however, it fell short of a comprehensive sector-wide approach (SWAp) in planning and deploying critical interventions in key primary and enabling areas. As well, government investment on injecting funding was minimal and more was required in terms of financial investment in the sector. In 2017, the Master Plan expired raising the need for a new comprehensive plan to guide the development of the sector in the next five years. Owing to various reasons, work on the new Tourism Sector Development Plan (TSDP) 2022 – 2026 was stalled until 2021 when the PNGTPA provided leadership on getting industry stakeholders to work together in framing the TSDP 2022- 2026.

The current TSDP replaces the previous Master Plan and is framed following an exhaustive consultative process involving key state actors and industry players. This process began in 2020 where the PNGTPA held various consultative workshops to draw input from all stakeholder to frame the TSDP. This had culminated into a draft TSDP framework in early 2021 which was then validated in a national stakeholder validation workshop in April 2021 to iron out the details of the Plan. In order to comply with the national planning requirement, the TSDP has also undergone a vetting exercise by the Department of National Planning & Monitoring (DNPM) to ensure alignment with the national strategic plans.

For the first time in the history of the sector a comprehensive SwAp was used to frame the TSDP. The approach places emphasis on developing the whole sector through focused and timely interventions on the primary and enabling subsectors of PNG Tourism. This approach is premised on the fact that any viable growth in tourism will be possible only if the primary and enabling subsectors are targeted in a simultaneous and unified fashion. Of the seven subsectors, two constitute the cornerstone of the TSDP: (a) growing international tourism, and b) growing domestic tourism. The other five subsectors provide the critical enabling support without which PNG tourism and certainly the two primary subsectors will not grow.

The implementation of the TSDP will not be without challenges. As the TSDP is being developed, PNG and the rest of the world are facing a major COVID-19 pandemic with over 1 billion slashed arrivals or drop of tourist travels by 80% according to the UNWTO. In PNG, international visitor numbers has been reduced by more than 90 percent and is predicted to remain so until 2023/2024 fiscal year. Without question the drastic down-turn in visitor numbers has had a devastating effect on many tourism businesses: some have closed and many more are facing serious liquidity problems. If PNG is not careful most businesses will die out before they can bounce back in the post COVID-19 environment. This will be dreadful for the whole sector and PNG cannot afford to have that. The TSDP takes cognizant of these issues, in particular the COVID-19 pandemic, and has put in place mechanisms for government support and strategies for mitigating the effects of a heavy reliance on international tourism. On the support for small businesses, various financial support interventions have been planned in the TSDP. In terms of mitigating our heavy dependence on international visitors, the TSDP proposes for a focused investment on developing domestic tourism. And in terms of other internal constraints, various intervention measures have been planned in the TSDP in the enabling sub-sectors. However, for all these to work, government continuous support and financial investment in the sector will be necessary.

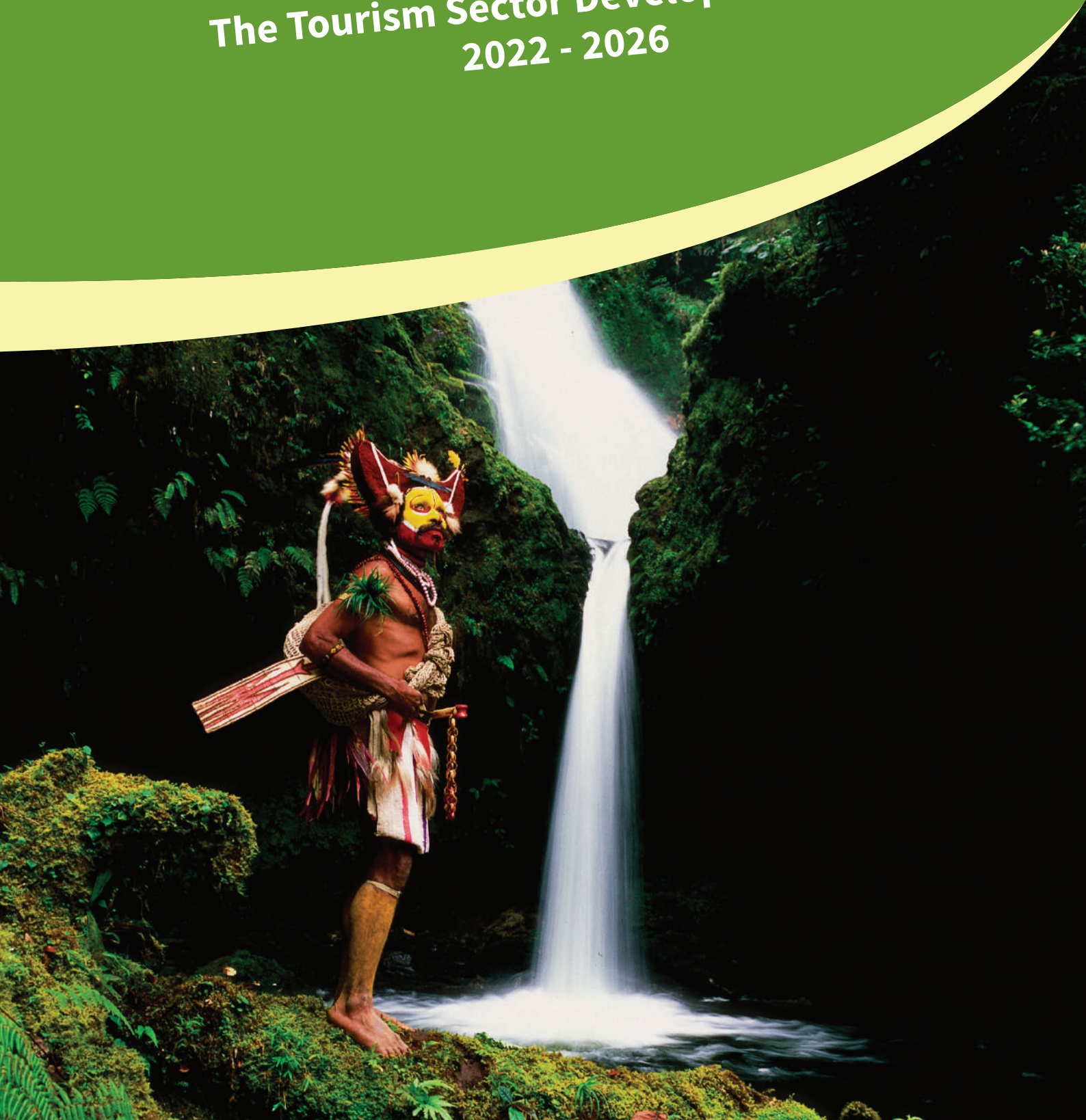
The TSDP 2022 - 2026 is a well-articulated plan, girded on sound principles. It is guided by a clear vision articulating where the sector wants to be in future, a strong mission that defines its purpose, and robust principles guiding its implementation. Its overall goal is to support the national strategic plans of Vision 2050 and the MTDP III, contribute to PNG's overall economic prosperity, and gradually make PNG less dependent on the non-renewable sector. The Plan is inclusive and calls for all partners to participate in developing the tourism sector. While implementation will be predominantly private-sector led, the government's overall leadership will be necessary, and its timely financial investment for business growth and strengthening the enabling subsectors will be needed to provide the necessary impetus for the sector to expand.





SECTION i

The Tourism Sector Development Plan 2022 - 2026



WHERE THE TOURISM SECTOR WANTS TO GO AND THE DIRECTION IT WILL TAKE TO GET THERE

VISION

The future destination of where the sector wants to be or arrive at and may outlive the duration of the Plan.

“To revive and grow a resilient, inclusive and sustainable tourism sector in Papua New Guinea.”

MISSION

The primary reason why the sector exists.

To make the Papua New Guinea tourism sector a lead contributor to the national economy and preserve Papua New Guinea's history, living cultures and natural environment for future generations.

LONG-TERM GOALS

What the sector wants to achieve in the long-term and may outlive the duration of the Plan.

1. To increase the overall economic value of Tourism to the PNG economy, and
2. For PNG to be the lead tourist destination in the Pacific, recognized for offering a range of unique niche adventure tourism experiences.

SECTOR PRIMARY GOALS SUPPORTING THE LONG-TERM GOALS

What the sector wants to achieve now and in the medium term in this plan and will support the achievement of the sector's Long-Term Goals and Vision.

1. Increase international visitor numbers to PNG with the aim of increasing the capital contribution of international visitors to local businesses and the PNG economy.
2. Increase domestic visitor numbers to provinces and local tourism sites with the aim of increasing local capital contribution to local businesses, the provincial economy and the PNG economy.
3. Strengthen (improve) the management, financial and operational capacity of tourism suppliers and operators with the aim of improving their overall efficiency and their capacity to supply high quality tourism services and products.
4. Improve the quality and diversity of tourism products and services provided by suppliers and operators with the aim of creating a niche and attractive market, a competitive advantage for PNG Tourism and raising the overall demand for PNG as a globally [regionally] recognised tourism destination.
5. Strengthen tourism regulations and standards with the aim of improving compliance, service and product quality, and maintaining a high level of hospitality standards.
6. Strengthen key tourism enablers within the economy with the aim of providing critical enabling support to excel the growth of PNG Tourism.
7. Strengthen tourism leadership, synergy and coordination among all sector stakeholders with the aim of improving sector steering and direction, cooperation and performance.

DIRECTIVE PRINCIPLES

Key principles directing the behaviour of sector stakeholders and those who work with them in implementing the TSDP.

1. The development of tourism in PNG will uphold the Five National Goals and Directive Principles enshrined in the National Constitution, namely:

Goal 1: Fostering Integral Human Development

Goal 2: Ensuring Equality and Participation

Goal 3: Maintaining National Sovereignty and Self-Reliance

Goal 4: Conserving Our National Resources and Environment for the Collective Benefit of us all and for Future Generations

Goal 5: Preservation and Maintenance of PNG Ways particularly in relation to our traditional ways of life, culture and traditions, language and the construct of our traditional villages and communities that depend on the land, sea, rivers, and the natural environment for their sustenance.

2. The compliance to the rule of law and key policies guiding national economic and tourism development remains paramount and is observed by all.
3. All tourism stakeholders undertake to maintain the integrity and good name of PNG as a favoured tourist destination through a positive projection of PNG's image, the maintenance of a welcoming and friendly treatment of visitors, and the provision of a high-quality service and hospitable treatment to all visitors.
4. Developing PNG Tourism is inclusive and participatory, and therefore is open to all stakeholders to participate, support, and cooperate with one another in all facets of tourism development.
5. All stakeholders undertake to act ethically and be transparent and accountable in what they do in the sector.
6. Traditional resource owners and custodians of natural resources are given the opportunity to be fully involved in any tourism development relating to their traditional and natural resources.

Introduction

The Tourism Sector Development Plan (hereafter the “TSDP”) is no ordinary document; it is a significant strategy document of the Tourism Sector for developing PNG Tourism and covers a five-year time horizon. As will be evident, some parts of the Plan like the vision and the long-term goals may extend beyond the life of the Plan. The Plan belongs to the Tourism Sector and therefore is collectively owned by all the stakeholders of the sector. It is built after a wide stakeholder consultation and is framed on the understanding that each and every stakeholder will participate on its implementation.

The Plan sets out a clear destination of where the tourism sector anticipates to be (or arrive at) in five years’ time (2025) and beyond, the direction or the path the sector will take, and the interventions or strategies the sector intends to undertake in order to reach its goals and ultimately its planned destination. It is through this Plan that interventions will be developed and mounted, and efforts of all stakeholders are coordinated and synergised to create the desired impact on the goals and vision of the sector.

The framing of the Plan moves away from the traditional approach on planning around focal or programme areas to dissecting the tourism sector into its various sub-sectors and then planning interventions around the priorities and needs of each subsector.

This has been necessary for better planning and implementation. The Plan anchors on and places emphasis on seven tourism sub-sectors forming the core of the tourism sector. Using an extensive consultative process, needs and priorities were identified and then synthesised into a unified plan of action that sets out a clear sector vision, prioritised interventions and their goals, and performance targets, at the sector and subsector levels.

As a sector plan, the TSDP 2022-2026 sits within the overall framework of the national government’s planned development priorities and goals contained in the higher level strategic plans of the MTDP III and the Vision 2050. As such the TSDP will lend weight to and assist PNG to achieve its development priorities and goals contained in the MTDP III and the Vision 2050. The TSDP will be an important conduit for synergizing efforts and actions in growing PNG tourism, and in that regard will be a critical enabler for strengthening PNG’s efforts in developing a national economy that is sustainable and is less dependent on the extractive sector.

Tourism is a sustainable industry and it is everyone’s business to support and play an active role in developing it. In this connection, a unified effort will be required from all parties — product and service providers, key industry stakeholders influencing the supply and demand of PNG tourism, partners in the public and private sectors responsible for creating an enabling environment for tourism to thrive, and finally to those responsible for providing leadership. The TSDP was developed with this important point in mind. Its formulation was made possible through the support and input of all sector stakeholders led by the PNG Tourism Promotion Authority (PNGTPA). And its successful implementation will require the cooperation of all stakeholders acting in tandem and providing support to each other, ensuring that the Plan delivers what it sets out to do.



The Role of the TSDP

The TSDP will play several important roles. Overall, the main purpose of the TSDP is firstly to provide steering and guidance for the sector, and secondly, to serve as a common platform for rallying and unifying national efforts in developing tourism at all levels. The creation of the TSDP recognises that there are many actors responsible for tourism with diverging interests and therefore it is important that these actors work in unison based on a common vision, mission and goals for a holistic development on PNG Tourism.

Within the above context, the TSDP serves to:

- Provide a comprehensive unified national directive for developing tourism,
- Provide a clear set of tourism development goals and the strategies for achieving them,
- Provide a clear and concise direction to all stakeholders in their quest to develop tourism,
- Unify, harmonise and link different national, provincial and local efforts to common aspirations for developing PNG Tourism,
- Be the key platform for synergizing action and for building a broad national coalition for developing PNG Tourism; and
- Be used as a framework to coordinate, monitor and implement measures of tourism development, and for improving such measures as and when necessary.

Linking the TSDP's Goals to their Expected Impact

In principle, every plan, whether they are strategic or tactical, should have a theory of change or intervention logic that shows a logical sequence of the planned action and their resultant planned changes that are likely to take place consequent to the actions taken. A good theory of change ensures that those involved in its execution understand why they do what they do, and what will be the likely outcome or impact derived from their action.

The seven primary goals of the TSDP have been carefully considered in a theory of change framework aimed at bringing about the desired impact to the sector's long-term goals and vision.

Table 1: The Intervention Logic of TSDP's Interventions

Supporting Goals & Strategies		Primary Goals	Outcomes	Impact
	Primary Goal (What the TSDP is currently targeting and plans to achieve) 	Outcome (What the achievement of the Goal is expected to achieve) 	Impact (The long-term desired change on the PNG economy, business and people expected to be created from the achievement of the Outcomes) 	
1	Increased International Visitor Numbers	<ul style="list-style-type: none"> Increased foreign exchange earnings. Increased earnings for PNG business. Increased employment opportunities for Papua New Guineans. Increased demand in tourism products and services. PNG's competitive advantage in product/services niche and visitor experience is developed. Increased reputation of PNG as a preferred tourist destination. 	<ul style="list-style-type: none"> A growing national economy increasingly supported by an expanding tourism sector. Tourism growing support to the transitioning of PNG's economy from being extractive sector dependent to renewable sector dependent. Growth in the number of local tourism businesses and other businesses in the value chain. PNG is recognized globally and regionally as a favoured tourist destination. Increase in the number of local people earning a formal income leading to better support to families and people's livelihood. 	
2	Increased Domestic Visitor Numbers	<ul style="list-style-type: none"> Risk of a heavy reliance on international visitors mitigated. A growing local tourist industry supported by PNG visitors. Increased local business earnings. Increased employment opportunities for locals. Increased demand in products and services. 	<ul style="list-style-type: none"> A growing provincial economy increasingly supported by an expanding tourism sector. Growth in the number of local tourism businesses and other businesses in the value chain. Increased number of people earning a formal income and being able to support families. Development of the competitive advantage in product/services niche and visitor experience. 	
3	Strengthened Productive Capacity and	<ul style="list-style-type: none"> Improved tourism business efficiency and business process. 	<ul style="list-style-type: none"> Growth in the number of local tourism businesses and 	

	Increased Number of Tourism Operators and Suppliers	<ul style="list-style-type: none"> • Business product and service quality and standards are raised. • Resilience of tourism businesses is encouraged. • Increase in the type and variety of services and products offered. 	<p>others in the value chain.</p> <ul style="list-style-type: none"> • PNG is recognized globally and regionally as a favoured tourist destination. • Increase demand for products and services.
4	Improved Quality and Diversity of Tourism Products and Services	<ul style="list-style-type: none"> • PNG's competitive advantage in product/ services niche and visitor experience is developed. • Increased reputation of PNG as a preferred tourist destination. • Increased demand for PNG as a preferred tourist destination. • PNG's cultural heritage and traditions, communities and natural environment are preserved. 	<ul style="list-style-type: none"> • Rise in international and local tourist numbers. • More business for tourist ventures and others businesses in the value chain. • Increased formal employment and income for Papua New Guineans. • Growth in the national and provincial economies.
5	Strengthened Tourism Regulations and Standards	<ul style="list-style-type: none"> • Improved tourism business processes and efficiency. • Improved business products and services. • Rise in the quality of hospitality service standards. • Resilience is encouraged • Stronger governance of the sector. 	<ul style="list-style-type: none"> • More successful tourism businesses. • PNG is recognized globally and regionally as a favoured tourist destination. • Rise in international and local tourist numbers. • Growth in the national and provincial economies.
6	Strengthened Sector Enablers In the Economy and Government	<ul style="list-style-type: none"> • Improved provision and access of tourism products and services. • Improved peace and security. • Improved support to key stakeholders of the sector. 	<ul style="list-style-type: none"> • More successful tourism businesses. • PNG is recognized globally and regionally as a favoured tourist destination. • Rise in international and local tourist numbers. • Growth in the national and provincial economies.
7	Strengthened Sector Leadership, Synergy and Coordination	<ul style="list-style-type: none"> • Improved sector steering and guidance. • Improved stakeholder cooperation and unity. • Effective coordination and improved implementation. 	<ul style="list-style-type: none"> • Strong governance of the sector • A strong whole of government and industry approach in administering the sector • A strong and better performing sector

Sector Values and Directive Principles

Actions of stakeholders can have a defining effect on the health of the sector and therefore it is important that the sector is girded on set of values and guiding principles that uphold and foster the interest of the sector consistent with mission and necessary for the sector to attain its vision, and goals. Without being properly guided, stakeholder behaviour can have a detrimental effect on the work of the sector thus undermining the progress of the sector and its overall growth. It is for this reason the following values and principles have been adopted to guide the behaviour of the stakeholders in the sector.

Values



Assumptions Underpinning the Formulation of the TSDP

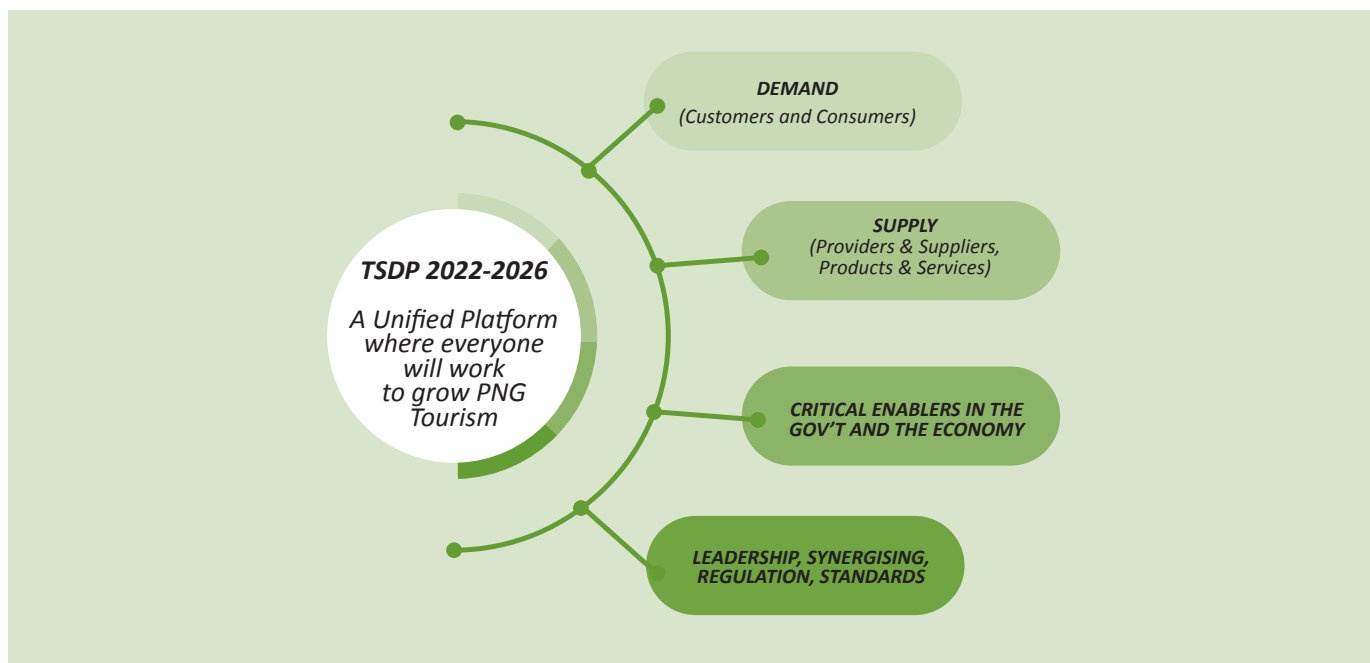
The development of the TSDP and its successful implementation is based on the following assumptions, that:

- The global tourism industry which has a direct impact on PNG Tourism begins to recover from the COVID-19 pandemic by 2023. In this regard, the sector assumes that international travel, which is critical to developing the international tourism subsector, will begin to pick up and will gradually move to normalcy beginning in 2023.
- Where required ample financial support will be provided first by the government and assisted by the private sector to implement the plan.
- Critical sectors of the economy will play their part and lend vital support to the Tourism Sector in pursuing the goals and vision of the sector.
- The government plays an active role in responding to the sector and puts in place the relevant policy and regulatory framework in the economy and more specifically the sector. In this regard, it is assumed that the government will take a lead in ensuring that a conducive environment is set and that specific incentives are provided for the Tourism Sector to thrive.
- With the ravaging COVID-19 pandemic on the sector, financially incentivising the sector will be led by government working in tandem, with financial institutions and the private sector.

Stakeholders, their Roles and the Framing of the TSDP

Understanding the sector and its unique issues is critical to sector planning. At the core of framing the TSDP is the recognition that sector stakeholders have a direct and indirect influence on developing PNG Tourism. The proper development of the sector will have to take into account the different stakeholders, their interests, the untapped opportunities they have, the constraints inhibiting them to develop tourism, and the systems and institutions they rely on or use in contributing to developing the sector. Considering these factors, the TSDP is developed based on this thinking:

Figure 1: The Tourism Sector as a System

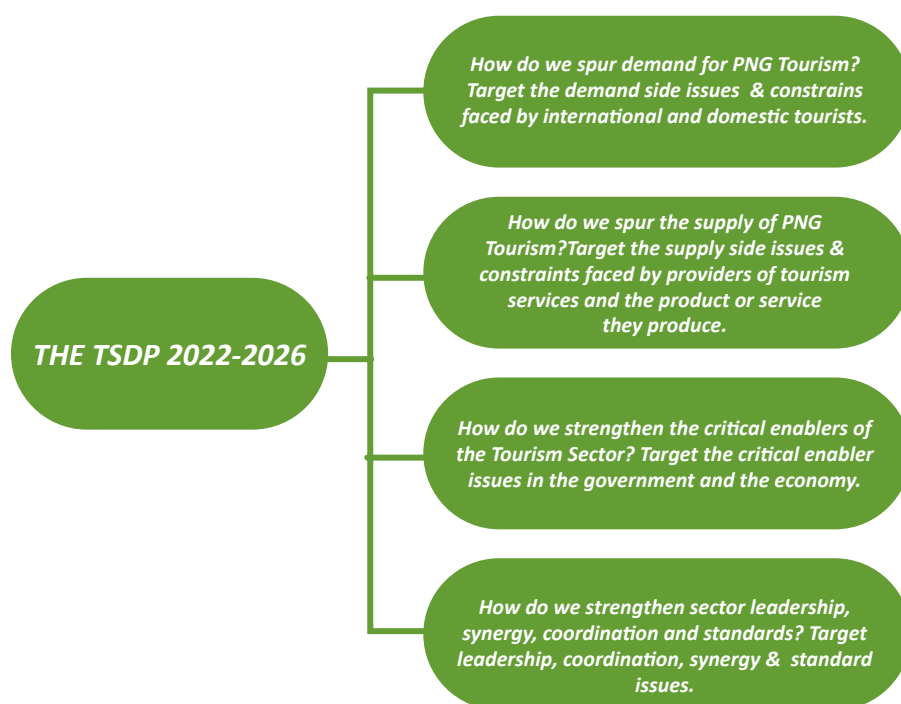


PNG's tourism sector is a systemic whole, functioning as one system but is broadly made up of four interdependent and distinct areas or components, each having its own stakeholders or actors with unique issues that affect PNG tourism. Comprehending this fact and then allowing planning to be influenced by it is important to enable a comprehensive planning of the sector.

There are four main components of the sector. The first component consists of the demand side involving mainly the international and domestic tourists/travellers and therefore should be targeted with relevant interventions if demand is to be influenced so as to raise visitor numbers. Second are those on the supply side consisting of providers and suppliers and the products and services they provide. Both should be targeted with relevant interventions if supply is to be influenced to meet or raise demand. Then there are critical enablers consisting of people, policies and systems that are responsible for creating an enabling environment for both supply and demand to effectively work. Finally, there are people, policies, and systems that are responsible for the governance and integration of the sector, mainly in providing leadership, synergising, coordination and establishing standards and enforcing them.

It will be imperative to target the critical issues and bottlenecks in each of the four areas if the desired impact on PNG tourism is to be realised. After all, the four areas are mutually interdependent. The framing of the TSDP is guided by this thinking.

Figure 2: Thinking Behind the Framing of the TSDP



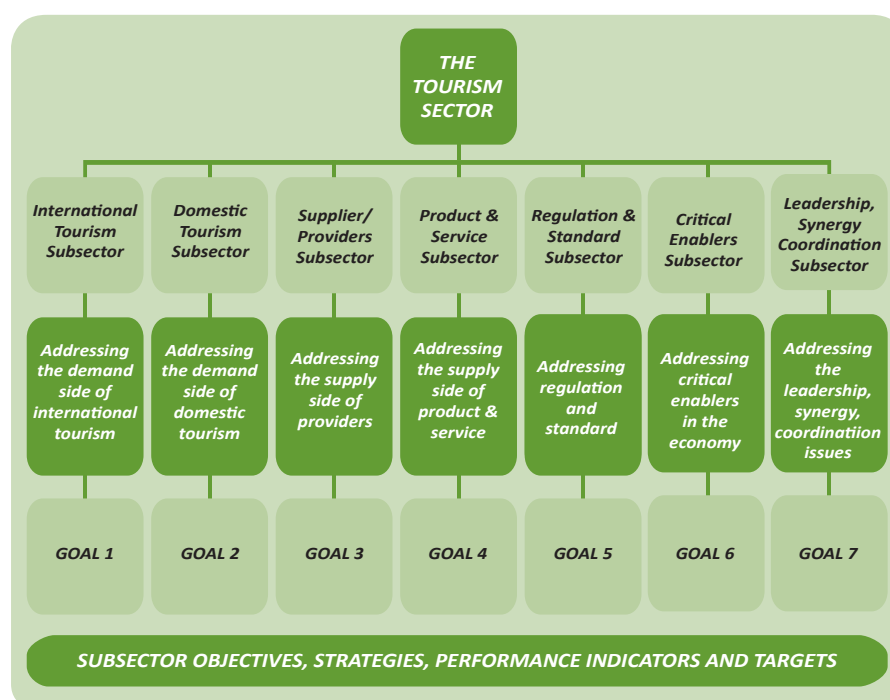
The TSDP 2022 – 2026 Strategic Framework

The TSDP's strategic framework is fairly straightforward. It takes a sector-wide (SWaps) approach to planning and carefully plans respective interventions using a holistic approach. This is a departure from the previous approach in the Tourism Master Plan 2007 -2017 where the focus was on identifying a cross range of thematic issues and constraints, often without really considering the internal dynamics of each sector and their interdependency and relationship to the other subsectors. The risk for not understanding may result in planning gaps where important interventions are missed or some intervention areas are overemphasised.

The TSDP Subsector Planning

The TSDP places emphasis and plans around seven (7) subsectors (Figure 3) that are key to developing the sector. From the original four areas of the sector (Figure 1), these have been extended to seven subsectors. This has been necessary for better focus and emphasis and also to be consistent with the GOPNG sectoral planning approach emphasised by the Department of National Planning & Monitoring (DNPM). While demand and supply side issues have always been the emphasis of the previous sector plans, the current TSDP has taken a bold step in including other subsectors to address the ongoing weaknesses that have plagued the acceleration of the sector over the years. The SWaps approach in this TSDP is evident in the creation of the regulation and standard subsector, the enablers subsector and the leadership, synergy and coordination subsector. It also places a more vigorous attention on building domestic tourism, strengthening the capacity of product and services providers, and in improving the quality and diversification of tourism product and services.

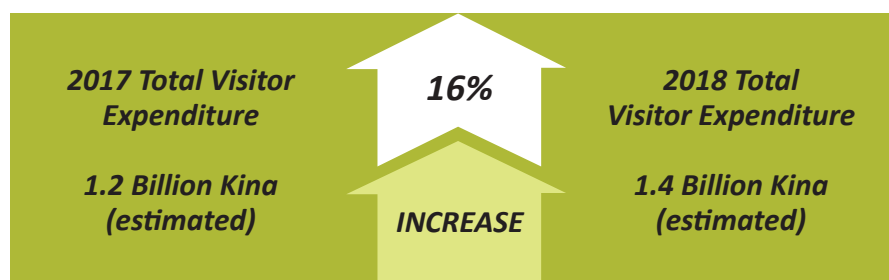
Figure 3: The Subsectors of the Tourism Sector



The Tourism Sector's Role to PNG's Economic and Social Development

The direct capital injection of tourism to the national economy and the resultant growth in the national economy is self-evident which requires no further justification. Global and country-specific experience speak of this truth. In Fiji for example, approximately 34% of the country's GDP comes from tourism. Judging by international and regional experience and going by the current contribution to the national economy, PNG tourism is a critical renewable resource that must be developed for the benefit of its economy and the wellbeing of its people. On this basis alone, the tourism sector plays a direct role to supporting the creation of a national sustainable economy and national economic goals espoused in the PNG Development Strategic Plan (PNGDSP 2010 – 2030 MTDP III and Vision 2050).

Figure 4: Economic Value of Tourism



The potential for tourism to be a leading economic sector contributing directly to national economic growth and for sustaining the wellbeing of thousands of Papua New Guineans for employment and income is immense. To date, this potential is yet to be really tapped with tourism contributing to only approximately 2% of the total GDP. A fleeting look at the contribution of visitors to the PNG economy as shown in the above figure illuminates this point. Of the total expenditure, bona fide tourists have spent a total of USD 205.9 million or K691.3 million (International Finance Corporation, 2018), an increase of USD 1 million or K3 million additional spending into the PNG economy compared to the USD 204.8 million spent by bona fide tourist in 2017 (International Finance Corporation, 2017). This increase in expenditure by tourists is a direct result of the increase in visitor numbers and length of stay in the country.

The TSDP's Role in Attaining PNG's National Development Priorities

The TSDP takes a SWAp approach by planning the sector's program interventions on seven subsectors critical to growing PNG tourism. By delivering its primary and long-term goals and attain its vision, it will enable the sector to contribute to the desired economic, social and sustainability outcomes laid out in the PNGDSP, the MTDP III and Vision 2050.

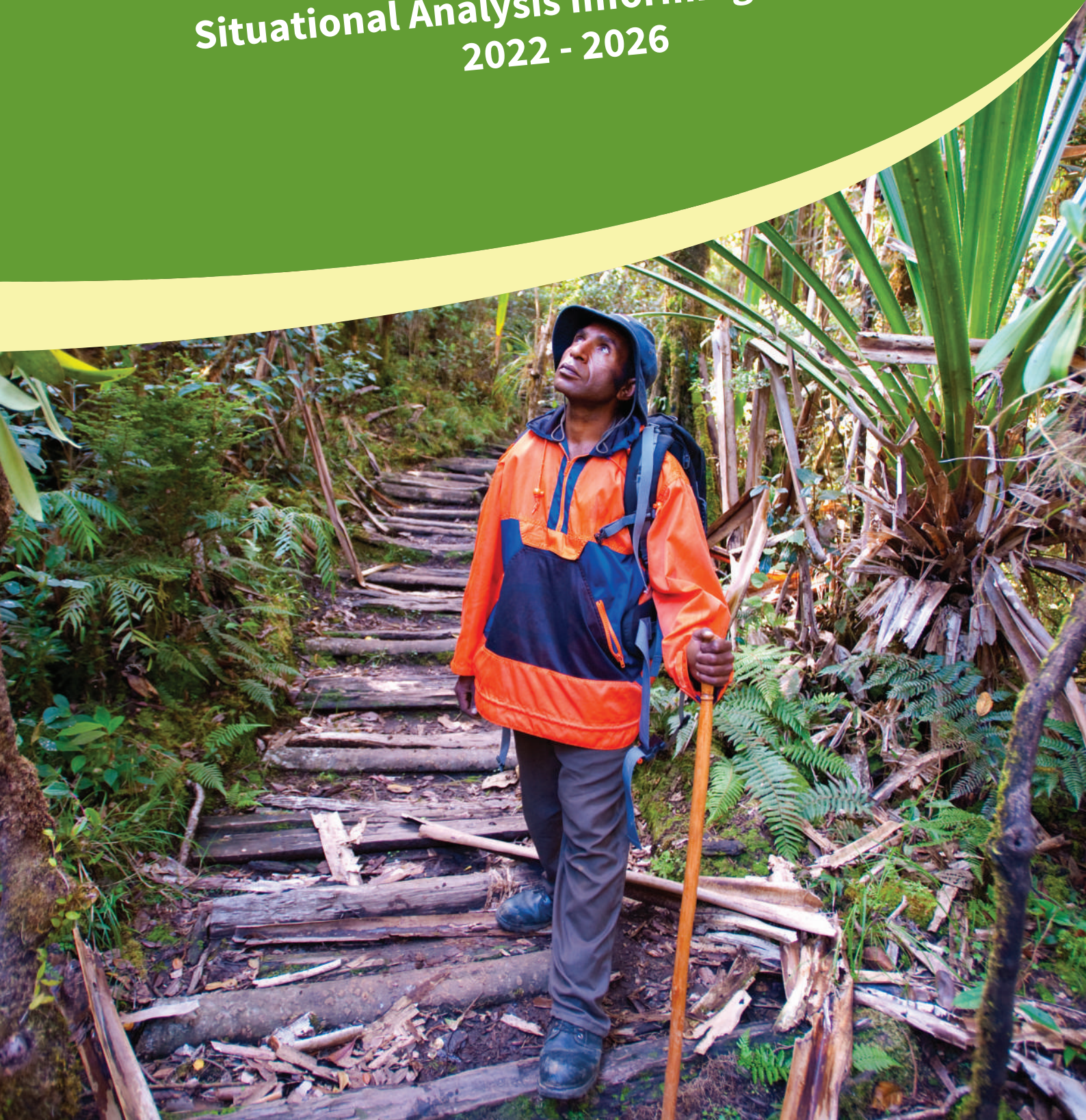
Figure 5: Aligning the TSDP to the MTDP III, the PNGDSP and Vision 2050





SECTION ii

Situational Analysis Informing the TSDP
2022 - 2026



SECTION II: THE GLOBAL AND NATIONAL TOURISM OUTLOOK

Introduction

The Tourism Sector Development Plan 2022-2026 is informed by the global tourism status and outlook and the impact of the COVID-19 pandemic both on international tourism demand and on international arrivals to PNG. The COVID-19 pandemic has had an unprecedented impact on the global Tourism industry, which in turn has affected tourism in PNG like never before. The TSDP envisages a struggling tourism sector in the next two to three years and anticipates a recovery once the travel and border restrictions are lifted. Given the downside on international tourism, the Plan places emphasis on growing domestic tourism and therefore puts in place strategies for growth in this area.

Global Tourism Performances and Outlook

Before the COVID-19 pandemic, global tourism was one of the significant industries fuelling national economic growth, and was a mainstay to the growth of many businesses that depended on it. Countries who have deliberately invested in areas they had comparative advantages in and worked hard at them to attract visitors, have seen phenomenal growth. So the growth in international tourist arrivals from 25 million in 1950 to over 1.7 billion in 2019 is a testament to the importance countries have placed in developing the sector.

Some of the critical factors that drive the phenomenal growth of global tourism and made it one of the key drivers of economic growth and development are efficiencies, both physical and costs, in enabling infrastructures, utilities, hospitality industries, online booking aided by advances in technology, and others. Also factors such as changes to visa restrictions, Effective Targeted Marketing Campaigns, Effective Security and Safety enforcements, and Improved Infrastructure and Connectivity play significant roles in promoting global tourism.

International Tourist arrivals had been growing steadily at an average annual growth of 6 percent. In 2017 global tourist numbers were 1.316 billion, 1.4 and 1.7 billion respectively in 2018 and 2019. A growth of 7 per cent was recorded in 2019. Global tourism receipts grew from US\$1.347 trillion in 2017 to US\$1.478 in 2019.

In 2019 alone, before the COVID-19 pandemic, Global Travel and Tourism direct and indirect industry induced impact accounted for the following as per the Global Economic Impact Trends Report (World Travel & Tourism Council, 2020, p.4):

- US\$ 8.9 trillion contribution to Global GDP
- 10.3% of Global GDP
- 330 million jobs, or 1 in every 10 jobs around the globe
- US\$1.7 trillion visitors' exports (which accounts for 6.8% of total global exports value and or 28.3% of global services exports)
- US\$948 billion capital investment in the Industry (that is 4.3% of total global capital investment)

◀ **Opposite Page:** Trekking in near Kumul Lodge, Enga Province.



Impact of COVID-19 on Global Tourism

The COVID-19 pandemic has abruptly disturbed the growth of the industry and has brought substantial losses to the entire tourism industry all over the globe. According to the United Nations World Tourism Organisation (UNWTO) 28 January 2021 Barometer, 2020 was the worst year in Tourism history with a huge drop of 1 billion international arrivals or a 74% fall. In comparison, international arrivals only dropped by 4% during the 2009 global economic crisis.

The UNWTO estimates that a 74% drop in international arrivals would translate linearly to the following outcome in 2020:

- Loss of US\$ 2 trillion contribution to Global GDP
- Between 100 million to 200 million jobs related to the tourism industry lost or at risk around the globe
- Loss of US\$1.3 trillion visitors' exports. This is more than 11 times the losses recorded during the 2009 global economic crisis.

The Asia-Pacific region was hard hit with an overall 84% decline in International Tourist arrivals compared to 2019 levels while Africa and Middle East recorded a 75% drop respectively, compared to the global decline of 74%. The dramatic decline in global tourist arrivals due to COVID-19 protocols and travel restrictions does have very significant economic implications on countries considering the important role Tourism plays in the modern economy.

Outlook of Global Tourism Beyond 2021

The global Tourism outlook from 2021 onwards has some mix feelings among major industry players according to surveys undertaken by UNWTO. The results will be very much dependent on COVID-19 Travel and border restrictions. Due to the recent surge in the mutated versions of the virus plus increased efforts in immunisation programmes the recovery of the Global Tourist arrivals will be a slow start, with negative consequences on the economies still prolonged.

Basing on the survey perceptions, the UNWTO expects global tourist arrivals to return to the 2019 level within 2 and half to 4 years. Basing on this, and in keeping with the World Bank 3.2% global economic growth forecast for 2021, tourism growth is expected to be around 4% from a low base of 390 million arrivals in 2020 for 2021 as shown on the graph below. From 2022 Global Tourist arrivals is expected to be only at 30% of the 2019 level and by 2025 it should have returned to the 2019 level with an additional growth of 4%.



Figure 6: Global Tourist Arrival Projection to 2025

Source: UNWTO Data and Information Sources

National Tourism Status and Outlook

Historical Performance

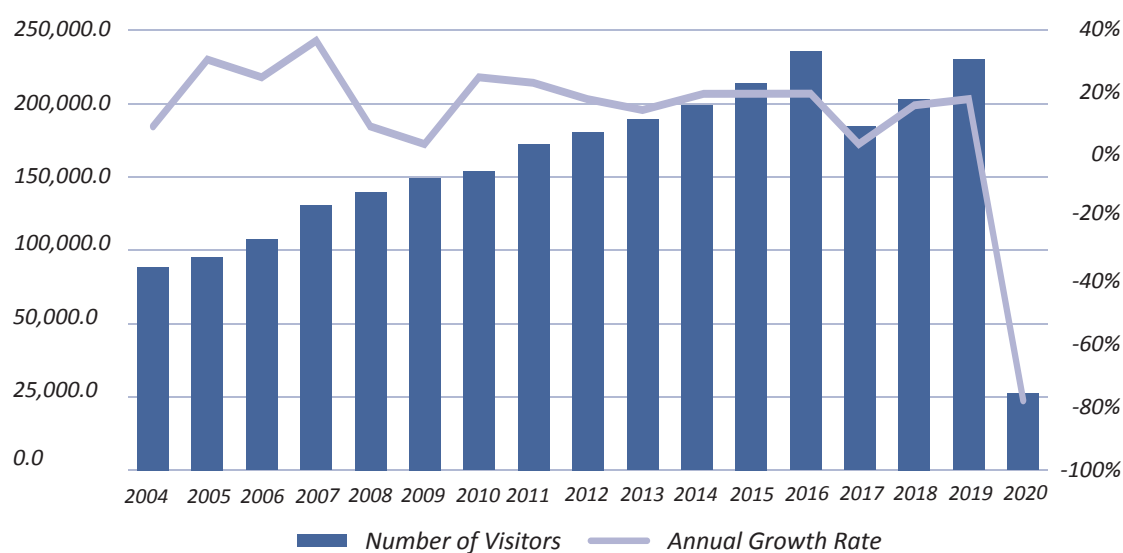
Papua New Guinea's tourism sector has been growing steadily over the last 15 years. Tourism business provides a myriad of opportunities for SME businesses in various sectors, from tour guides, logistics, transportation, accommodation, etc. in PNG. It accounts for over a billion Kina to the economy through direct and indirect contributions. The government receives 122 million Kina tax revenue, provides over 16 thousand jobs for Papua New Guineans from around 100,000 to 200,000 international visitors every year to PNG and growing at an average of 9% annually as depicted in Table 2. The export value of tourism industry in PNG is estimated to be US\$182.94 million or equivalent to 600 million Kina. The historical table on the next page shows the contribution of international visitors to PNG from 2014 to 2020.



Table 2: The Growth of PNG Tourism

	Number of Visitors	Tax Revenue Contributions (US\$ M)	GDP Direct Contribution (US\$ M)	Number of people employed in Tourism Industry	Total Export From Tourism (US\$ M)
2014	182,000	27.10	107.80	16,000.00	180.66
2015	198,685	21.93	117.68	15,000.00	146.22
2016	216,148	20.54	128.47	15,555.00	136.93
2017	181,840	29.34	140.25	16,130.54	195.60
2018	194,876	30.21	153.11	16,727.36	201.37
2019	210,980	32.97	167.15	17,346.28	219.83
2020	38,940	6.09	30.85	3,201.55	40.57

Sources: PNGTPA and Estimates based on World Bank Data

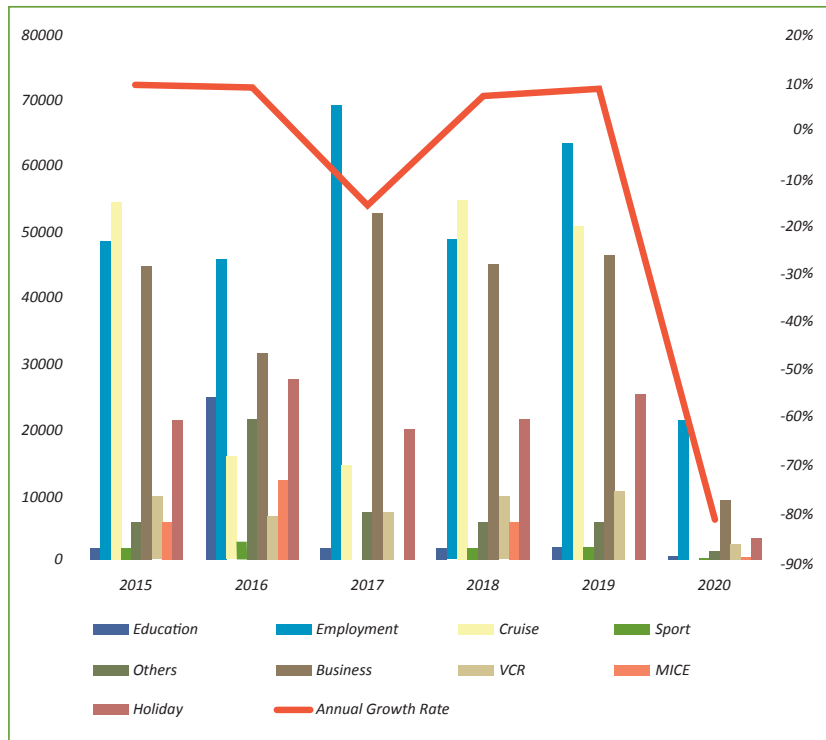
Figure 7: Historical Number of Visitors to PNG

Source: PNGTPA



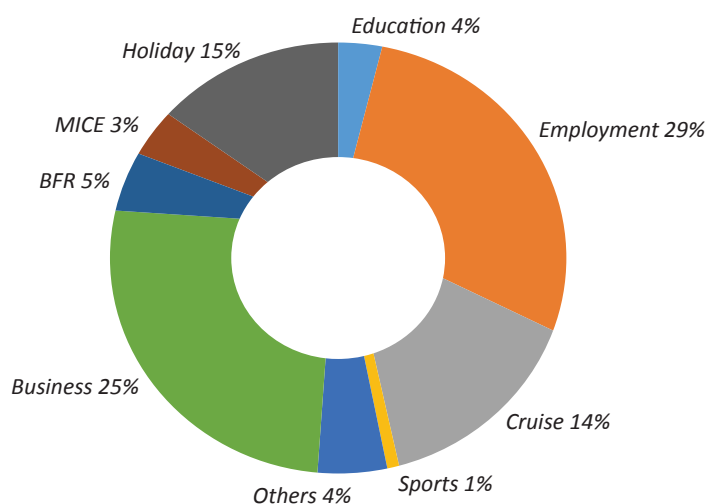
The tourism industry in PNG thrives on visitors from other countries. Between 2015 and 2019, of the average annual total visitors of 172,063, 54% came for business and employment purposes, 15% genuinely came to spend time for leisure and holiday for good number of days in PNG, 14% came by cruise, and the rest came to visit friends and relatives (5%), educational purposes (4%), and others as displayed in Figures 8 and 9.

Figure 8: Number of Visitors by Purpose and Annual Growth



Source: PNGTPA

Figure 9: Visitor Arrival in PNG by Purpose on Average



Source: PNGTPA



Visitors coming in for business purposes fluctuates depending on the growth of enclave activities in the extractive sectors. The main drivers of bonafide tourist visits come from the iconic Kokoda Trail product, mainly from the Australian and New Zealand market. Over the past few years' efforts by the National Government through PNGTPA through aggressive marketing and development of niche products have seen an annual increase in tourist visits by 9%. The target has been to increase the composition of tourist visits from current 15% to at least 50% by 2030 to be at par with other Pacific Island nations.

The sector has grown moderately in tandem with the growth of the extractive industry in mining and petroleum for the business and employment purpose components. Holiday arrival or the Tourist proper component grew at 5% per year from 2011 - 2016 and climbed to an average of 9% per year from 2015 to 2019 due to investment efforts by the Government in niche product development and marketing drive in major overseas markets. It shows promising results and as identified and recommended by the PNG Market Tourism Demand Assessment by the International Finance Corporation in 2018. The Niche markets in areas such as Diving, Surfing, Bird Watching, Historical Tourism, Cultural Tourism, and Soft Adventure Tourism has great potential for development in PNG.

According to the IFC Niche Market Assessment, PNG's potential is subdued with limited benefits being contributed to the industry. Global Niche markets are large and robust to earn up to US\$971.9 billion in tourism dollars while PNG only realizes only US\$93.6 Niche Market potential. To realize the high growth potential in the niche market by 2027 PNG needs to spend over US\$78 million to develop the niche markets concentrating investment in marketing the developed products overseas, product development, developing tourism infrastructure and assets, strengthening regulatory and tourism-savvy capacity building. As IFC study assessed, by 2027 at a high scenario case PNG can attract at most 87,000 additional tourists from such investment to bring the holiday market gap to at least 40% and bring in additional US\$ 219 million tourist dollars by the end of 2027.

The sector has a huge potential to bring in substantial tourist exports from maintaining the existing growing trend as well as making efforts recommended by the IFC study together with the Government deliberately expanding industries in other resources sectors, manufacturing, service sector, etc. that attracts foreign employment and business visitors. If the Government, private sector, and development partners seriously increase the efforts by 2030 tourism dollars should potentially reach the US\$4 billion PNGDSP 2030 target or two times the export value of all PNG's agricultural commodity at current levels.



Impact of COVID-19 on PNG Tourism

The global impact of the COVID-19 pandemic is affecting PNG in a significant way. According to the PNG Tourism Industry Business Impact Survey report of April 2020, 95.35% respondents affirmed that their businesses have been affected by the COVID-19 pandemic with over 90% clients booking cancellation and 100% revenue decline. This is a big blow to the industry that has contributed over a billion Kina in both direct and indirect benefits to the country and earning over K600 million in tourism exports, together with creating over 17,000 direct employment.

Tourism in PNG is greatly affected by the global impact of the pandemic while we have been trying our best to build tourism infrastructure and assets, develop niche products, promoting and marketing our unique products, and aggressively marketing PNG as a tourist destination to be at par with our South Pacific neighbours such as Fiji and Samoa.

Based on the global COVID-19 Impact Assessment by the UNWTO, it was published in three scenarios indicating a decline of 58% to 78% of international visitors as a result of travel restrictions and various dates of gradual openings of national borders (United Nations World Tourism Organisation, 2020). In addition, PNG would have expected a total decline of 164,564 international visitors. This should have resulted in a loss of a total of US\$ 171.47 million in tourism exports and over 13,500 jobs lost.

However, when the final visitors' arrival data for 2020 came out, the drop in visitors' arrival compared to 2019 outcome level recorded a whopping drop by 82%, just in line with an 84% drop for the Asia Pacific Region. International arrival was 210,980 in 2019 but only 38,940 in 2020 due to the impact of COVID-19. International arrivals declined by 172,040, loss of a total of US\$ 179.26 million in tourism exports, and over 14,145 jobs lost.

PNG has suffered a significant loss in the tourism industry as the outcome shown in the Table below now confirmed the industry players' grave concern as indicated in the 2020 data.

Table 3: Impact of COVID-19 on PNG Tourism

Drop in International Visitor Arrival Numbers	Tax Revenue Loss (US\$ Millions)	Loss in GDP CONTRIBUTION (US\$ Millions)	Loss of Employment	Loss of Tourism Exports (US\$ Millions)
-172,040	-26.89	-136.30	-14,145	-179.26

Source: PNGTPA estimates based on World Bank Data sources



National Tourism Outlook Beyond 2021

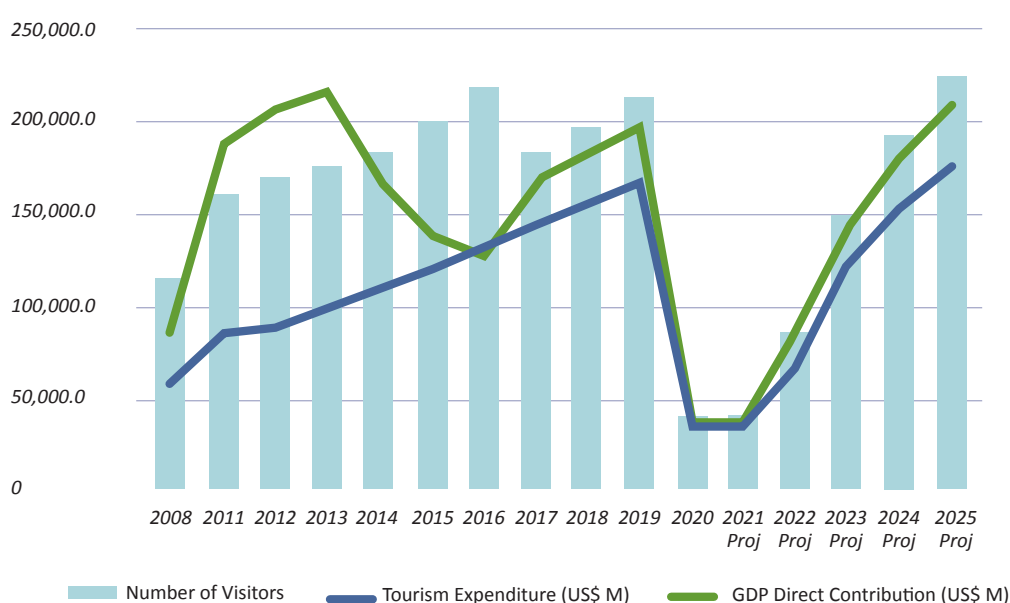
Basing on the global perceptions from the UNWTO Survey that expected global tourist arrivals to return to the 2019 level within 2 and half to 4 years, the figure below projects how PNG Tourism international arrivals should look like. In fact, to get back to 2019 level is akin to a two-step back and one-step forward. Without COVID-19 PNG's international arrivals should have reached a 357,122 by 2025 and should have been on track to reach the PNGDSP 2030 target of 1 million arrivals, growing robustly at 9% per annum, and so forth instead of the 221,529 in tandem with the expected global trends.

Figure 11 below shows a growth of 3.2% from the lower 2020 base of 38,940 for 2021. As expected by the UNWTO Survey results for 2022 we expect to realise only 40% arrival at 2019 level, 70% in 2023, 90% in 2024, and a dismal growth of 5% in 2025.

Our expectation to reach visitors arrival at 2019 level by 2025 may still be ambitious but it is possible due to two main reasons:

1. Improvement in global travel conditions such as removal of travel and border restrictions and accelerating vaccination programmes to give confidence to travellers, and
2. Efforts of Tourism Promotion Authority to aggressively pursue the key programmes under this Plan with Government deliberate investment.

Figure 10: PNG Tourism Targets Beyond 2021



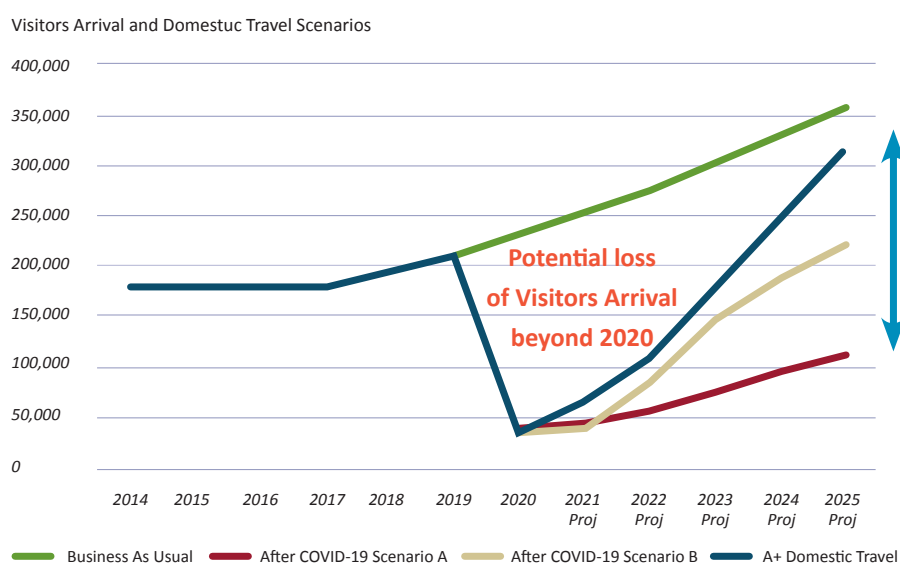
Source: PNGTPA Projections Based on UNWTO Surveys

The tourism sector outlook beyond 2021 as depicted in figure 6 is based on assumptions. What really needs to happen is Government deliberate investment in key programmes identified in this Plan. As pointed out elsewhere, whatever path we choose to bring the international arrivals and all its benefits back to 2019 levels in 2025 the potential loss will be quite significant.

Figure 11 depicts three (3) scenarios due to COVID-19 against a business as usual (bau) case as follows:

- Business as Usual – the normal growth path of PNG Tourism industry without COVID-19 which should attain a 357,123 visitors arrival by 2025
- After COVID-19 Scenario A – A worst case scenario where Visitor arrivals grows at certain arbitrary rates from the lower base in 2020 until 112,147 visitor arrivals is reached in 2025.
- After COVID-19 Scenario B – This is the growth path as depicted in Figure 6 where 2019 Visitors arrival level plus a 4% growth is realized by 2025.
- Scenario A + Domestic Travel – A worst case scenario is mitigated by aggressive marketing to increase domestic travel to keep the industry alive. Here domestic travel need to grow by 20,000 in 2021, 50,000 in 2022, 100,000 in 2023, 150,000 in 2024, and 200,000 in 2025. The combined should result in a total visitor arrivals and domestic travel at 312,147 which is closer to the 2025 visitor arrivals potential.

Figure 11: Travel Scenarios of Visitor Arrivals Pre and Post COVID-19



Source: PNGTPA

The Need for a Strong Tourism Sector in PNG

This Plan is framed at the backdrop of a major COVID-19 pandemic shock on global trends with experiencing 87% fall of international visitors in the beginning of 2021 according to the UNWTO (United Nations World Tourism Organisation, 2021). The TSDP aims to set out the sector's development framework for the next five (5) years to give direction and focus to the government's priorities to grow this sector into an economically viable industry. The focus in the first two years will be to salvage what tourism assets and capacity that were being built for the industry pre-COVID-19, to consolidate the industry's position, and promote more domestic travels while border restrictions are still maintained for international travels. Policy and structural reforms will be required to guide this growth, hence the recommended strategies stipulated in this plan.

Over the recent years Papua New Guinea has been facing economic stress in revenue collections and foreign currency earnings. These have affected government's ability to expand its public expenditure in providing essential goods and services while businesses have waited in queue for clearance for imports orders resulting in declining employment and production. The grim realization is that PNG has not diversified its investment enough into sustainable and renewable sectors, such as Agriculture, Forestry, Fisheries, and importantly Tourism.

The Government has made a bold statement of its intention to accelerate PNG's economic growth and has called for sectors, agencies, and provinces to increase their efforts to increase revenue generation activities and productive activities to make PNG economically self-sustaining and to live within our means.

The Government cannot go wrong in investing significant resources in the Tourism industry because it is a sleeping giant with a huge potential to tap into in generating foreign currencies and billions of revenue in spin-off businesses. Tourism is a luxury where wealthy and well to do foreigners spend substantial amounts of money to see for gratification, inspiration, relaxation, and appreciation of the wonders or thrills of the world. It is believed, just like any consumable product, many tourism destinations or popular and renowned attractions have been over-visited and may lose their interest or what is known in economic terms as utility. As such they will be looking for real adventures and experiences in more authentic or exotic and adventurous places, varied and unique cultures in newer destinations such as PNG, etc.

Positioning the Tourism Industry as One of the Strategic Drivers of PNG's Sustainable Economic Growth

It requires everyone to accept tourism as part of our lifestyle where our societies nurture some of the qualities we always have in welcoming and amusing our visitors with our diverse cultures, heritage, pristine environment that includes the beauty of our land, sea, and the thrilling features they contain. Development of the acumen to complement modern management of hospitality industry together with Government and private sector complementary investment in enabling infrastructure, utilities, and security with safety should solidly ground tourism as the mainstay for PNG beyond the minerals boom.

After recovering from the devastating impact of COVID-19, the TSDP 2022-2026 envisions Tourism to be fully developed into a key Industry that sustains the economy beyond the mineral and resource rent PNG had been heavily dependent on.



The MTDP I 2011-2015 and MTDP III 2018-2022 recognise that addressing the supply side constraints in key enablers will pave the way for a dynamic tourism industry in PNG. The Vision 2050 Wealth Creation of Pillar 2 and the Papua New Guinea Strategic Development Plan 2010-2030 (PNGDSP 2030) elevates tourism as a significant industry under the Economic Sector. PNGDSP 2030 targeted to achieve 1.5 million visitors from a baseline of 200,000 and increasing tourism dollars from US\$500 million in 2009 to US\$4.16 billion in 2030 by using a mix of strategies based around two concepts: (1) increasing the capacity of infrastructure and facilities to cope with the rise in tourists; and (2) increasing the appeal of the PNG experience for the visitor so that more visitors will want to come.

The Government's complementing investment in transport infrastructure, law and order, utilities, skilled manpower, and others in the services sector will boost tourism visitor arrival in PNG. A sustainable and vibrant tourism industry in PNG will bring about the following benefits:

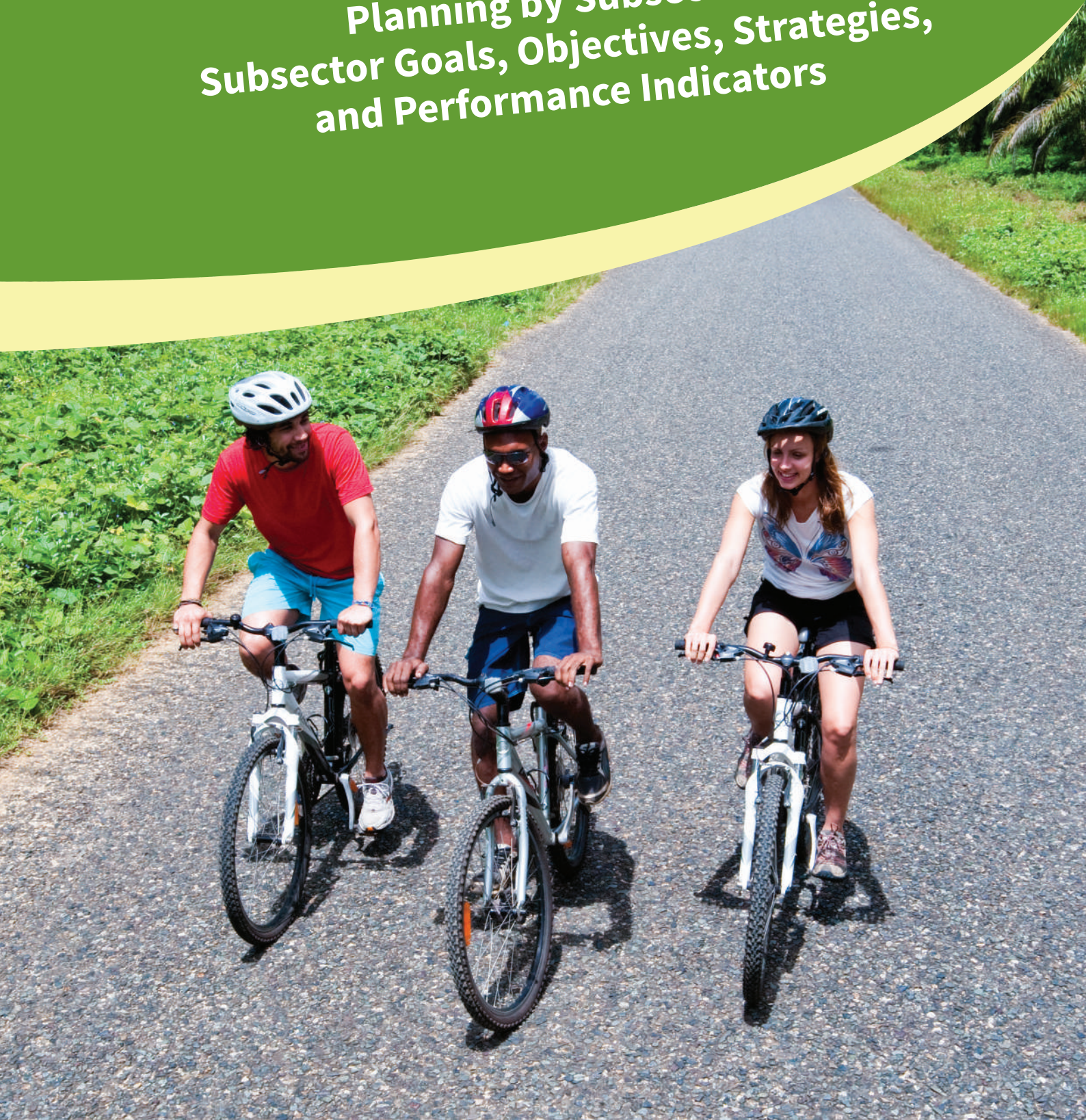
- higher employment opportunities;
- income generation activities which will lead to reduction in poverty levels in law and order problems;
- a decline in rural-urban migration as rural economies become developed through tourism and become part of the mainstream economy;
- a sustainable alternative which contributes to the management and preservation of PNG's natural resources;
- contributing to growth of sectors like agriculture and fishing that provide input to tourism; and
- direct and indirect tax revenue to government.





SECTION iii

Planning by Subsectors Subsector Goals, Objectives, Strategies, and Performance Indicators



SECTION III: SUBSECTOR GOALS, OBJECTIVES, STRATEGIES, AND INDICATORS

International Tourism Subsector

Subsector Focus

The international tourism subsector consists of the international tourists and a myriad of enabling systems and factors existing within the subsector critical to raising the interest of international tourists to visit PNG. Stimulating the demand by targeting various levers important to raising interest on PNG as a preferred tourist destination will be required if this subsector is to contribute to growing PNG tourism. International visitors have been the major income contributor to the sector and the PNG economy and it is pertinent that this subsector be supported and constraints impeding the subsector removed.

The COVID-19 pandemic has greatly affected this subsector and it is important that PNG tourism prepares to get international tourists back in bigger numbers once the COVID-19 situation stabilises, which we predict will be in 2023 onwards.

Our primary goal in this subsector therefore is to increase the number of international tourists to PNG. Starting from 2023, we aim to gradually increase the number of international visitors back to the 2018 numbers. We are projecting a 5% rise in numbers annually. We recognise that the global and regional tourism market is subject to intense competition by countries attempting to maximize the returns from tourism using competitive marketing strategies, advertising, product development, and visitor experience.

In addition, the effects of COVID-19 on international travel have hit PNG badly like the rest of the world. In this connection, we will step-up our efforts to get a bigger segment of the international visitor market. In-country support services also plays a key role in maintaining a competitive advantage and attracting visitors, by offering better returns on visitor spending and experience. We are therefore targeting these in the other subsectors. For our primary goal to be achieved in this subsector, we will use the resources in our global and regional PNGTPA offices in tandem with our individual use of modern ICT and international world-wide web platforms for advertising and reaching our international target audience. Our strategies in this regard will be varied, dynamic and competitive, targeting key areas of the tourism market and showcasing PNG as an unparalleled, on-of-a kind country in the Pacific.

International Tourism Subsector Primary Goal and Expected Outcomes

Subsector Primary Goal	Expected Outcomes What we expect to create in the economy, business and people.
<p>International visitor numbers to PNG are increased with the overall aim of increasing the capital contribution of international visitors to local businesses and the PNG economy.</p>	<ul style="list-style-type: none"> • Increased foreign exchange earnings. • Increased earnings for PNG business. • Increased employment opportunities for Papua New Guineans. • Increased demand in tourism products and services. • PNG's competitive advantage in product/services niche and visitor experience is developed. • Increased reputation of PNG as a preferred tourist destination.

International Tourism Subsector Objectives and Descriptions

There are three objectives to be achieved under our primary goal of increasing the number of international visitors to PNG.

No.	Objectives	Descriptions
1.	Coverage and access to global and regional tourism supply markets with the goal of increasing the potential for new customers/visitors to PNG is increased .	Expanding from the traditional source markets of North America, Europe, United Kingdom, Japan. We will widen our coverage to new countries and regions in our efforts to spur demand for PNG tourism. Using our global positioning in our various international offices and our tourist service providers connectivity to the worldwide internet platforms, we will target new countries and regions to spur visitor demand for PNG.
2.	In tandem with 1 above, global and regional comprehension/awareness and appreciation of PNG as an attractive and viable tourist destination is intensified .	<p>Using a variety of mediums and different marketing/advertising and sales strategies, we will raise global and regional awareness and appreciation of PNG as an attractive and desired tourist destination. We will focus on the niche products of PNG tourism and work on a global brand that sells PNG as a welcoming place.</p> <p>The updated marketing strategy will capture new marketing initiatives in response to the global health pandemic with a focus on domestic tourism.</p>

3.	<p>Focused marketing and awareness of PNG in the traditional supply market of Australia and New Zealand is increased.</p>	<p>Australia and New Zealand will continue to remain as the main suppliers of tourists/visitors to PNG. Recognizing this strategic opportunity, we will intensify our coverage and reach in Australia and New Zealand to spur a renewed and increased interest on PNG as a viable and attractive tourist/visitor destination.</p> <p>We will identify and maximize our reach to different visitor/client segments using innovative marketing and sales strategies ensuring that we positively impact demand.</p>
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Male dressed in Simbu Province traditional attire.

International Tourism Subsector Strategies and Indicators

The following key strategies are central to achieving our subsector objectives under our primary goal of increasing international tourist numbers to PNG.

Key Strategies	
1.1	Strengthen the implementation of the strategies and activities in the PNGTPA Marketing Strategy.
1.2	Develop a new global and regional outreach strategy with TPA international offices aimed at increasing the number of countries covered/reached. Forging strategic partnerships to expand international reach will be vital.
1.3	Expand marketing and advertising and develop a PNG brand for a global and regional audience using different approaches, including using different marketing agents, targeted television advertisement, and travel companies.
1.5	Increased digital transformation of the industry as a whole.



Handicrafts' sellers, Port Moresby.

We will use the following indicators to monitor and guide our performance as we move forward to increase the number of international tourist arrivals to PNG.

Key Indicators	Target (by 2025)	Baseline (2020)
Total Visitor Arrivals <ul style="list-style-type: none"> Increase in the overall number of visitor arrivals. 	50% increase (164,011 visitors)	38,940
Percentage rise in Kina spending in the PNG economy by international tourists.	50% PGK1.64B	PGK0.156B
Market Share Among SPTO Member Countries <ul style="list-style-type: none"> Increase in the PNG market share of visitor arrivals among SPTO member countries. 	16% market share	9% market share
Australian and New Zealand Visitor Arrivals <ul style="list-style-type: none"> Increase in the number of Australia and New Zealand visitor arrivals. 	50,000	10,000 visitor arrivals
Countries Reached <ul style="list-style-type: none"> Increase in countries/areas covered in marketing and advertising. Positive reviews on PNG as an attractive tourist destination. 	>7 international offices >60% positive reviews	7 international offices 60% positive reviews
Increased digital transformation of the industry as a whole. <ul style="list-style-type: none"> Increase industry adoption of present and future technology through training. Digital automation of business processes to add value to various stages of the tourism supply chain. 	10% each year	Not Available

Domestic Tourism Subsector

Subsector Focus

The domestic tourism subsector consists of domestic or local tourists/travellers and the enabling systems and factors existing within the subsector critical to supporting the movement and consumption needs of domestic tourists/travellers. Domestic tourists travel for a variety of reasons, including to engage in short-term employment, sports and recreation, visiting ancestral homes and relatives, leisure and holidaying and to see cultural events. It would be important to target specific segments of domestic travellers, for example those in the leisure and holidaying category, both in the provision of services (supply side) and especially the demand side where the goal will be to spur demand using various incentives.

The prolonged stoppage of international travel owing to the COVID-19 pandemic has exposed a long-standing weakness of the sector: that the heavy reliance on international tourists cannot be relied upon as a guarantee for the sector's long-term growth. Virtually every small business in the sector's value chain were affected and many had gone out of business because of the stoppage in international travel. This situation is already affecting supply in a big way and will take some time for supply to recover.

In view of this, the sector will need to invest on the domestic tourism sector with the aim of increasing the number of local tourists in the medium to long term, not only to counter-balance the negative effects of international tourists from situations such as the COVID-19 pandemic, but it is also the most sensible way of developing the sector. The goal therefore is to place dual emphasis on both international and domestic tourists.

PNG has a huge population in the Pacific Island group of countries that potentially can provide a market for domestic travel but this has not been tapped in a significant way. Indeed, investment in this area has been negligible. Given the inherent risk posed by a significant reliance on international tourism coupled with the opportunity to tap a large domestic tourism market, the time has come to develop domestic tourism.

Our primary goal in this subsector therefore is to increase the number of local tourists with the view of making the domestic tourism market a significant contributor to the sector and the economy. We recognise that there are inherent constraints in raising the number of domestic tourists and that spurring demand will require innovative strategies that will require sustained efforts in implementation. In view of this, we will use our experience in marketing, product development and work with the industry and government to incentivise the domestic tourism subsector. Our strategies in this regard will therefore be innovative, aimed at engendering greater cooperation with Government and industry to address many of the demand-side constraints in order to raise domestic tourist numbers.

Domestic Tourism Subsector Primary Goal and Expected Outcomes

Subsector Primary Goal	Expected Outcomes What we expect to create in the economy, business and people
<p>Domestic visitor numbers to provinces and local tourism sites are increased with the aim of increasing local capital contribution to local business, the provincial economy, and the PNG economy.</p>	<ul style="list-style-type: none"> • A growing provincial economy increasingly supported by an expanding tourism sector. • Growth in the number of local tourism businesses and other businesses in the value chain. • Increased number of people earning a formal income and being able to support families. • Increased competitive advantage in product/services niche and visitor experience. • Greater exposure of tourism products and places.

Domestic Tourism Subsector Objectives and Descriptions

There are three objectives to be achieved under our primary goal of increasing the number of domestic visitors to provinces.

No.	Objectives	Descriptions
1.	Marketing of provinces and local tourism sites as attractive and viable tourist destinations to the local PNG visitor is intensified.	Our strategy will now focus on identifying and promoting suitable tourism packages for Papua New Guineans to learn about and make a decision to travel to desired tourism destinations.
2.	Internal travel and visitation with the aim of raising demand for travel/visitation by local residents is boosted by employing different incentives schemes to encourage travel.	<p>Incentivising demand using a mix of strategies is critical. Current constraints preventing domestic travel prevent local travellers to visit other provinces.</p> <p>Those constraints affect domestic visitor demand and as long as they remain, increase in the number of domestic tourists will remain stagnant.</p> <p>We will employ strategies that target the easing of visiting provinces. We will combine these strategies with our marketing drive alluded to in our first objective in order to get Papua New Guineans to travel and visit more places in PNG.</p>



3	Marketing of niche provinces that already have a high visitor turn-out or have a high potential for rapid growth in domestic tourism is developed and accelerated.	<p>Strong tourism destinations in PNG have a competitive edge due to their diversity in tourism product and friendly environment.</p> <p>Current efforts of showcasing the provinces have been weak due to numerous internal and external factors. Therefore, more is required to ensure such provinces reach their full potential in attracting the local tourist.</p> <p>We recognise this to be a constraint and therefore we will work in tandem with respective provinces and tourist operators in such provinces to raise the awareness and marketing of such provinces.</p>
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Domestic Tourism Subsector Strategies and Indicators

The following key strategies are central to achieving our subsector objectives and to increase domestic tourist numbers in provinces.

Key Strategies	
1.1	Develop a new Domestic Marketing Strategy targeting Papua New Guineans. Step-up marketing and advertising targeting the PNG audience using different approaches, including using different marketing agents, targeted television advertisement, travel companies, and print and digital media.
1.2	Implement strategies that reduce the cost of travel and hospitality, provide value for money to the local tourist, and offer a mixture of unique services and products that will entice the local traveller to travel. Government subsidy to stimulate domestic air travel for bona-fide tourist will be vital to stimulate affordable domestic air travel.
1.3	Implementing incentives such as: <ul style="list-style-type: none"> • Accommodation providers – discounted pricing. • Airline reduction of pricing – incentives. • Pricing structure/strategy. • Budget traveller; mid-range; upper class. • Liaison with superfunds for member incentives.
1.4	Strengthen the capacity of promising provinces especially on the supply side issues and, in the coordination, and management of provincial and community tourism.
1.5	Strengthen the implementation of the strategies and activities in the PNGTPA Marketing Strategy.

We will use the following indicators to monitor and guide our performance as we move forward to increase the number of local tourist arrivals in provinces.

Key Indicators	Target (by 2025)	Baseline (2020)
Local Visitor Arrivals <ul style="list-style-type: none"> Increase in the overall number of local visitor arrivals in provinces per year. 	4% per year 6,000 local visitors per year	Not Available
Percentage rise in Kina spending in the local economy by local tourists <ul style="list-style-type: none"> Increase in visitor spending in each province. 	6% per year PGK56M	Not Available
A domestic marketing strategy for the PNG audience <ul style="list-style-type: none"> Development of strategy targeting domestic market. 	By 2022	Not Available
Local visitor satisfaction on marketing and advertising PNG to the PNG audience <ul style="list-style-type: none"> Qualitative rating on satisfaction. 	>60% positive rating annually	Not Available
Increased Digital and Internet Followings for Destination Information and Marketing Campaigns by Papua New Guineans <ul style="list-style-type: none"> Increase in digital and internet following. 	60% each year	Not Available

Provider and Supply Subsector

Subsector Focus

The supply and provider subsector consists primarily of those who produce and supply goods and services for the tourism market and the enabling systems and factors existing within the subsector that supports the production, supply and movement of goods and services for the international and local traveller. The productive capacity of suppliers — tourist business operators, hoteliers, hospitality and recreation providers of various kinds and traditional resource custodians such as the owners of land and the natural environment, waterways and cultural practices where tourism takes place — to supply high quality services and maintain a welcoming and hospitable environment, is absolutely critical to growing tourism.

The supply side issues and constraints facing the tourism sector have been well documented. Suppliers/producers face various problems that affect their productive capability: high costs of transacting business, inflationary cost of travel, high rates of tariffs on inputs, law and order problems, difficulty in accessing and using modern ICT technology to enable the efficient flow of business, poor marketing and advertising, and the lack of good management, financial and operating capacity, are some examples. Some of the constraints on capability are engendered from the enabling environment, which will be looked at in other subsectors, while some are from within. In addition to strengthening capacity, there will also be a need to increase the number of tourism businesses in terms of local start-ups and high value tourism businesses that require intensive capital investment. This is necessary if there is to be an increase in the variety of tourism services and products that target both the budget and high value tourists. In this connection, an emphasis on foreign direct investment (FDI) in the tourism sector will be necessary together with an emphasis to support the creation of local small medium tourism enterprises (SMEs).

There will also be a need for an effective organisation and governance of the provincial tourism offices to assist in developing and coordinating provincial and community tourism. Provincial tourism bureaus should be self-sustaining entities, being able to function autonomously and manage the supply of tourism at the provincial level. In that regard, there will be a need to build the capacity of provincial tourism bureaus through the assistance of Government led by the TPA, the Tourism Industry Association and the National Cultural Commission. In addition, the proper establishment of professional tourism associations based on product and customer service will need to be done in order for such bodies to organise themselves, enforce professional standards, and better deliver products and services that suits their customers. Suppliers in the surfing business, bird watching and several others are organised and therefore lend support to each other, however, others are yet to be organised and require sound governance structures in place to maintain cooperation and cohesiveness.

A particular issue has been the severe financial hardships faced by tourism businesses arising from the negative inflow of international tourists owing to the COVID-19 pandemic. Unable to generate the necessary income to keep them operating, many small business owners are at the point of folding up or have stopped operating altogether. For others, it has been difficult to get the required financial assistance from the banks owing to poor credit rating and a lack of government guarantee support. The problem is compounded by a lack of proactive effort in getting the injection of capital through foreign direct investment (FDIs) to support PNG businesses. So many PNG business are struggling alone when potentially they can get support from the outside.

Our primary goal in this subsector therefore is to employ interventions that will improve the productive capability of our tourism providers and suppliers, while at the same time increase the number of businesses in the sector. We recognise that a variety of constraints exist that undermine the productive capacity of our tourism providers and suppliers and therefore we will target the most important constraints. At the same time, we recognise the need for establishing more local tourism business to increase the quantity and variety of tourism services and products. Adding on to this will be our emphasis on FDIs in the sector to create tourism operators that can provide for high-end tourists that are originating from outside of PNG.

Subsector Primary Goal and Expected Outcomes

Subsector Primary Goal	Expected Outcomes What we expect to create in the economy, business and people.
Provider/supplier productive capacity is strengthened and the number of tourism suppliers and producers is increased.	<ul style="list-style-type: none"> • Improvement in business efficiency and productivity. • Growth in the number of local tourism businesses and others in the value chain. • Growth in the local and national economy. • PNG is recognized globally and regionally as a favoured tourist destination. • Increase demand for products and services.

Subsector Objectives and Descriptions

There are five objectives to be achieved under our primary goal of strengthening productive capacity of suppliers and to increase the number of tourism operators.

No.	Objectives	Descriptions
1.	The productive and operational capacity of tourism businesses and operators is strengthened and raised.	<p>Productivity is enhanced by strengthening skills and competence, operating systems, infusion of technology, efficiency in resource use, and management capability.</p> <p>Recognising this, we will use various interventions targeting training and skills enhancement, improvement in ICT use, scaling up knowledge in marketing and advertising in the tourism space, and strengthening the management and administration skills of tourism businesses and operators. We will do so by working with key players in the sector including the Tourism Industry Association, individual operators associations, the PNGTPA and other GOPNG agencies.</p>



2.	Small tourism business start-ups growth and viability is strengthened and attracting FDIs in tourism business is stepped-up .	<p>We will develop targeted intervention on encouraging small business start-ups by looking at providing avenues for credit and offer relevant training in running such businesses.</p> <p>We recognise that FDI is crucial to the development of the tourism industry of PNG, and top end resorts and hotels will require high capital investments.</p> <p>In that regard, we will work in tandem with our international PNGTPA offices around the world in consultation with relevant government stakeholders to market PNG, the aim of which is to lure FDIs into the sector.</p> <p>Our target will be to set up commercial ventures in unique PNG destinations that hold the promise of attracting international visitors.</p>
3.	Financial/credit support scheme for tourism businesses affected by the COVID-19 pandemic is established .	<p>Tourism businesses who have been affected by COVID-19, financial relief for recovery is critical at this juncture. Stimulating resilient and sustainable business models must be given prominence to encourage tourism emergency preparedness in all aspects.</p> <p>Recognising this, we will work together with the government to put in place a credit facility for tourism operators to remain viable. In this connection, we will aim to tap in on the SME credit facility currently provided by the Government and administered by commercial banking institutions.</p>
4.	Taxation and tariff measures aimed at reducing the cost of running businesses and encourage growth are established .	<p>Rising inflation and the downward spiral in the exchange rate have raised the cost of inputs needed by tourism businesses. This has often made tourism businesses difficult to survive.</p> <p>Working with all stakeholders within the Government, we intend to rally government support to introduce taxation and tariff measures aimed at reducing the costs of selected inputs for the tourism sector thus alleviating the high-cost tourism operators have to regularly face.</p>

5.	The operating capacity and sustainability of the provincial tourism office and related supports systems, including the creation of professional supply associations, are established.	<p>Tourism must have a provincial base that is self-sustaining which in turn will take full charge of coordinating, organising and developing tourism in the provinces and districts. The role of PNGTPA and other central agencies is to empower and facilitate the use of resources and know how.</p> <p>Provincial tourism bureaus and the stakeholders operating in provinces must take ownership of their tourism resources and drive the development of this sector in the province.</p> <p>In this regard, we will focus on strengthening the capacity and operation of two important stakeholder entities: the provincial tourism bureau and the establishment of professional grouping or associations.</p>
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Subsector Strategies and Indicators

The following key strategies are central to achieving our subsector objectives and to strengthen the overall productive capacity of tourism suppliers and producers, and raise the number of tourism businesses.

Key Strategies	
1.1	Adopt and implement a variety of multifaceted capacity building initiatives, including training, adoption of new ICT platforms, staff development, and enhancing management competency.
1.2	Adopt and implement specific programs for strengthening start-up businesses, and initiate aggressive marketing for attracting FDIs.
1.3	Introduce a financial support facility aimed at providing relief to tourism providers to revive businesses during the COVID-19 pandemic.
1.4	Introduce taxation/tariff measures to ease the cost on business and encourage growth.
1.5	Facilitate self-sustaining provincial tourism bureaus and professional associations are established and effectively run to take charge of provincial tourism development.

We will use the following indicators to monitor and guide our performance as we move forward to strengthen the overall productive capacity of suppliers and producers and raise their numbers.

Key Indicators	Target (by 2025)
Capacity building programs implemented <ul style="list-style-type: none"> A steady rise and coverage of capacity building initiatives throughout PNG. 	2 initially and increasing per year.
Positive impact <ul style="list-style-type: none"> Improvement in efficiency and operations of producers and suppliers. Growth of tourism business. 	>60% satisfactory rating from suppliers and producers after intervention. Percentage rise in net worth of tourism businesses.
New Tourism businesses <ul style="list-style-type: none"> Credit facility set-up for start-ups. Number of start-ups surviving and growing. 	By 2023. 1 per year in each province.
FDI Capital inflow <ul style="list-style-type: none"> Capital investment on tourism ventures. 	K100 million by 2025.
Financial Support Program <ul style="list-style-type: none"> Financial support program is established for Tourism SMEs. Tourism incubation centres. Capital injection support to tourism SMEs through the program. Emergency financial support. 	By 2022. 4 by 2025. Average of K10 million per year. K5 million by 2025.

Taxation and tariffs <ul style="list-style-type: none"> • Tax incentives for the sector is established. • Business feedback on tax incentives. 	2022 budget and successive budgets >60% satisfaction.
Provincial Tourism Bureaus set-up <ul style="list-style-type: none"> • Establishment of provincial tourism bureau and operating capacity. 	By 2024 all bureaus should be up and running.
Professional tourist business/service associations set-up <ul style="list-style-type: none"> • Incorporation of tourist business associations/service and operating capacity. 	By 2024 all association should be up and running.



Tourists holding a freshwater eel, New Ireland Province.

Product and Service Subsector

Subsector Focus

The product and service subsector consists of all the tourism products and services required and consumed by the international and local visitor together with the support and enabling systems for their production and delivery. Ensuring that tourism products and services are easily accessible nationwide and abroad will enable the industry to continue business amidst the global pandemic impacts and restrictions of travel movements. This will also enable the industry to continue generating revenue sustainably now and into the future.

Product and service provision can be aided by consulting and working together. Enhanced product itineraries and synchronized tourism services can be designed to appeal to the general public that is beneficial for all existing, new and potential clients through better coordination and effective consultation among key stakeholders. Effective marketing and promotion of all tourism products by leveraging on existing platforms and initiating new marketing strategies will encourage more clients to be interested to spend and engage in experiencing tourism products.

Tourism products and services are diverse in Papua New Guinea. Different products have their own potential to attract a specific target market or a group of target markets. In order to maximise value in this area, we need to step up effort in product and service development, regulation and marketing. In this connection, we will carry out market research, segment our markets, identify target markets and promote all niche tourism products. There will be a properly coordinated marketing approach that can reach the population at large domestically and internationally.

The TPA in tandem with key sector stakeholders such as the PNG Tourism Industry Association will continue to provide support to developing and marketing all tourism products and services. Through the establishment of MOUs to strengthen the partnerships in providing marketable tourism packages for clients to have maximum access to tourism products and attractions whether it'd be culture related, history related or nature related activities.

Education, Awareness and Training remains a crucial element in ensuring that tourism products are protected, maintained and developed to achieve quality service delivery and experiences for clients. We will focus on ensuring that there is a mass awareness, skills-based training and credible training on tourism products in the country in order to sustainably protect, build a competitive advantage for uniqueness and generate revenue to grow and expand.

Our goal in this subsector therefore is to improve the overall quality and diversity of tourism products and services and to ensure that such products and services are made available to the visitors as and when required. In our quest to achieve this goal, we will employ a variety of strategies targeting various areas alluded to above and ensure that services and products are delivery in their required quality.

Subsector Primary Goal and Expected Outcomes

Subsector Primary Goal	Expected Outcomes
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Quality and Diversity of Tourism Products and Services are improved	<ul style="list-style-type: none"> • PNG's competitive advantage in niche product/ services and visitor experience. • Increased reputation of PNG as a preferred tourist destination. • Increased demand for PNG as a preferred tourist destination. • PNG's cultural heritage and traditions, communities and natural environment are preserved. • Growth in the national and provincial economies.

Subsector Objectives and Descriptions

There are three objectives to be achieved under our primary goal of improving the quality and diversity of tourism products and services.

No.	Objectives	Descriptions
1.	Tourism product and services is made accessible to all visitors as much as possible.	<p>Ensuring that tourism products and services are easily accessible nationwide and abroad will enable the industry to continue business amidst the global pandemic impacts and restrictions of travel movements. This will also enable the industry to continue generating revenue sustainably now and into the future.</p> <p>We will focus on building specific tourism products in response to the demand of objective 1 Domestic sub-sector.</p> <p>Proper consultation and coordination with relevant government agencies, private sector, NGO's and industry associations is required. Enhanced tourism product packaging and itineraries and synchronized tourism services can be designed to appeal to the market.</p>

2.	Marketing tourism product and services is expanded in tandem with Objectives 1 and 2 of the International Subsector.	<p>Effective marketing and promotion of all tourism products by leveraging on existing platforms and initiating new marketing strategies will encourage more clients to be interested to spend and engage in experiencing tourism products.</p> <p>We will make an effort to identify more target markets in the market segments through market research. By identifying target markets, we will promote our niche products to reach the target markets effectively.</p>
3.	Capacity for producing and supplying tourism products and services is enhanced .	<p>Education, Awareness and Training remains a crucial element in ensuring that tourism products are protected, maintained and developed to achieve quality in production, service delivery, and enhances the experience for visitors.</p> <p>We will focus on ensuring that there is a mass awareness, skills-based training and credible training on tourism products in the country to sustainably protect and build a competitive advantage for uniqueness that generates revenue.</p> <p>Working consistently with our objective of strengthening capacity of suppliers in the Supply and Producers Subsector, we will deliver targeted training to strengthen the producer's capacity to develop and market high-quality tourism products.</p>

Subsector Strategies and Indicators

The following key strategies are central to achieving our subsector objectives and to strengthen the quality and diversity of our tourism products and services.

Key Strategies	
1.1	Initiate consultation and coordination between industry associations to identify; cross-industry partnership for development of product itinerary and synchronized services for the benefit of all.
1.2	Intensify destination awareness campaign. Harmonize niche tourism marketing activities at national and provincial levels, ensuring that a coordinated marketing approach among tourism providers is taken.

1.3	Clearly segment products and services under responsible sister agencies through MOUs for understanding of roles and support.
1.4	Carry out education; training and awareness for product and service quality and supply. Carry out awareness to increase client base and emphasize on economically sustainable and unique product and service for a competitive advantage.

We will use the following indicators to monitor and guide our performance as we move forward to strengthen the quality and diversity of our tourism products and services.

Key Indicators	Target
Ease of accessing tourist products and services <ul style="list-style-type: none"> Survey feedback from visitors on product/service quality and diversity and satisfaction level. 	>60% satisfaction rating annually.
Marketing tourism product and service <ul style="list-style-type: none"> Enhanced digital experience through updating of online platforms. Impact of marketing and advertising feedback from visitors. Feedback on the impact of synchronizing and synergizing marketing and advertising by tourist operators at the provincial level. 	PNGTPA by 2022. All tourism businesses by 2025. >60% satisfaction rating annually. >60% satisfaction rating annually.
Training for capacity building on tourism product and service creation and quality <ul style="list-style-type: none"> Number of certified training programs implemented per year. Number of tourism operators undergoing training. Improvement in the quality and diversity of products and services rating by producers and consumers. 	Average of three per year (100 participants per year). 20 participants per year. >60% satisfaction rating annually.

Regulation and Standards Subsector

Subsector Focus

The regulation and standard subsector encompass the regulations and standards together with their support system responsible for the effective regulation of the sector, the efficient delivery of product and services, and the smooth flow of visitors in and out of the country. Having minimum service standards that aspires to generate a minimum level of service quality is critical to shape the behaviour of tourism operators who will be required to subscribe to such standards. It is even more important on the perspective of the traveller in that having a desired minimum standard offers some guarantee to a certain level of quality of service and product.

The prioritization of establishing industry regulations, certification and licensing, accreditation and revenue generation is currently weak. Targeting those areas by having proper regulations and standards will enable the sector to perform its functions effectively, and to service both the industry and the tourists with high standards of service and care, in the long term. There is a need to strengthen the current legislation of the PNGTPA Act by empowering the PNGTPA and key stakeholders to promulgate minimum service standards and ensure they are effectively followed. In addition, a system of accreditation of service providers and to certain standards will be critical for all parties involved in the sector. At the provincial level, there may be a need to review provincial policy and legislations to ensure quality standards of provincial and district tourism are maintained. In this regard, the PNGTPA, the PNG Tourism Association and other key stakeholders will play a facilitative and assisting role and assist provinces to examine their policy and legislative framework.

Recognizing the above, we will ensure that the National Tourism Standards framework once developed can be rolled out nationwide for the industry to have the opportunity to build itself professionally with having the right standards as well as give confidence and quality visiting experiences for clients that seek value for money when purchasing tourism products and services.

Unnecessary barriers to travel will have to be re-examined with the view of streamlining travel so that the visitor finds it easy to visit PNG. In this context, regulations that are overly bureaucratic and places unreasonable hindrances, and impose unnecessary costs to visitors, will have to be removed. It is paramount that we incentivize travel and lure visitors to our shores than discouraging visitors. We recognize this to be a key issue so we will review existing travel requirements and regulations with the view of reducing cost and making it easier for visitors to visit PNG.

Subsector Primary Goal and Expected Outcomes

Subsector Primary Goal	Expected Outcomes What we expect to create in the economy, business and people.
Tourism Regulation and Standards are strengthened	<ul style="list-style-type: none"> • Stronger governance of the sector. • Improved tourism business processes and efficiency. • Improved business products and services. • Rise in the quality of hospitality service standards. • Rise in international and local tourist numbers. • Growth in the national and provincial economies.

Subsector Objectives and Descriptions

There are five objectives to be achieved under our primary goal of strengthening tourism regulations and standards.

No.	Objectives	Descriptions
1.	PNGTPA Act is reviewed with the view to strengthen the sector's regulations.	Legislative changes will require the development of a regulatory framework that will set the basis for industry regulation, certification; licensing and accreditation.
2.	Provincial policies and regulations are reviewed to bring them in line with the changes in the PNGTPA Act and to ensure higher standards of tourism services and products is set and enforced.	At the provincial level, there may be a need to review provincial policy and legislations to ensure quality standards of provincial and district tourism are maintained. In this regard, the PNGTPA, the PNG Tourism Association and other key stakeholders will play a facilitative and assisting role and assist provinces to examine their policy and legislative framework.
3.	A national Industry-wide standard is introduced .	Empowered by the objective above, the goal will be to develop a national framework for tourism standard being broad principles that would govern the provision of products and services and the behaviour of actors/suppliers.
4.	Role of respective industry associations on developing standards are reviewed with the view to enhance industry-specific self-regulation.	Regulations through a common legislative framework is required. However, tourism operator association self-impose minimum standards of service is essential for members. This will require the formal creation of such associations, an accreditation system of membership, and the development of a set of minimum standards and/or Code of Conduct that will validate members.
5.	The barriers to and high cost of travel arising from cumbersome regulations and bureaucratic processes is reviewed with the view to streamline travel.	Existing barriers to travel will have to be re-examined with the view of streamlining travel so that the visitor experience is seamless.

Subsector Strategies and Indicators

The following key strategies are central to achieving our subsector objectives and our overall goal of strengthening the regulatory framework and standards of PNG tourism.

Key Strategies	
1.1	Carryout a review of the National Tourism Policy and PNGTPA Act 1993 with the view of strengthening the regulatory framework for standards of service and products to enforce compliance and accountability.
1.2	Review provincial tourism policies and regulations to improve standards of service and compliance at the provincial level.
1.3	Examine the role of specific industry associations with the view to strengthen the development of specific industry standards through properly established associations.
1.4	Establish a nation industry-wide framework based on a set of principles that uphold integrity, quality standards and accountability.
1.5	Examination of the airline procedures and processes in respect to cargo and travel by the visitor, visa applications, processing and costs and customs handling of visitors.



Papuan Blackbass – sport fishing.

We will use the following indicators to monitor and guide our performance as we move forward to strengthen tourism regulations and standards.

Key Indicators	Target
Legislative review and amendment—National Review of National Tourism Policy and PNGTPA Act 1993 and incorporate changes to strengthen national regulations on standards and compliance in tourism.	By 2022.
Policy and regulatory review—Provinces Review of provincial policies and regulations and make improvements targeting improved standards and compliance	By 2023.
Training for capacity building on tourism product and service creation and quality Incorporation of industry associations and development of self-regulating standards.	By 2025.
Barriers to travel Review of barriers and costs imposed by regulation is carried out and resultant changes are made.	By 2024.

Critical Enablers Subsector

Subsector Focus

The critical enablers subsector consists of the external factors outside of the immediate control of the tourism sector but are significant to directly influencing the growth of the sector. Critical enablers exists within the wider government circles, the economy and within society. The tourism sector does not have direct levers of influence on external factors but must work together with other sectors, and depend on others within the government and the economy to positively influence or control these factors in order to provide an enabling environment for tourism to grow.

A key hindrance to tourism growth in PNG has been the constraints imposed by the critical enablers that tourism depends on to grow. Unless there is an improvement on critical enablers, there will be little prospects for the government and PNG to tap the huge economic benefits from tourism. That is why tourism is everyone's business. It requires everyone to play their role in order for the country to fully reap the benefits offered by tourism.

The critical enabling factors important to the tourism sector include but are not limited to: law and order, government policies aiding tourism growth such as taxation and fiscal policy incentives; critical infrastructure that allows for movement and travel such as transport services and roads, and airlines and shipping services; infrastructural assets for wellbeing and commerce such as electricity, communication and digital technology; and the supply of goods and services such as food and beverages important to providers of tourism like resorts, hotels and tour companies that look after tourists.

Inadequate support and the weak critical enablers continue to affect the growth of the tourism sector. Law and order, for example, remains a primary impediment to tourism growth in Papua New Guinea. The negative impacts of crime related occurrences are evident in many parts of the country and greatly effects not only the tourism industry, but also destinations, local communities and tourists alike. If the economy and the sector are to move forward, PNG must seriously address law and order.

In addition, over the last decade the ICT and digital sector has experienced significant growth in PNG. While this may be the case, there is still more that needs to be done in this area. Segments of tourism businesses particularly in the rural areas remain largely unconnected and lack the necessary skills and knowledge in ICT administration. In the government policy space, enabling policies—for example, in the fiscal policy area using the leverage of taxation—have often paid little attention to introducing measures that would spur growth in the sector resulting in, for example, high cost of inputs. Business operators and visitors are then left to bear the burden of high inputs thus making it difficult to conduct business, or in other cases passing the costs to the traveller.

Often the state of the advancement of the economy is a key determiner of the availability of many enabling factors described above. We recognise that there are a lot of intervening factors that the sector has little control over owing to the state of PNG's economy and owing to their exogenous nature. Getting all of them up to speed therefore would be a near impossible task. So in the next five years, we would like to work with our partners and fellow stakeholders and target several critical enablers that would set the stage for growth in the tourism sector. In that regard, we will give our best efforts to rally support from the Government and the private sector, coordinate with other key actors, and work through them to strengthen the critical enablers important to growing PNG tourism.



Subsector Primary Goal and Expected Outcomes

Subsector Primary Goal	Expected Outcomes
-----	What we expect to create in the economy, business and people -----➔
The role of critical enablers to the Tourism Sector is Strengthened	<ul style="list-style-type: none"> • Improved provision and access of tourism products and services. • Improved peace and security. • Improved support to key stakeholders of the sector. • More successful tourism businesses. • PNG is recognized globally and regionally as a favoured tourist destination. • Rise in international and local tourist numbers. • Growth in the national and provincial economies.

Subsector Objectives and Descriptions

There are three objectives to be achieved under our primary goal of strengthening the role of critical enablers.

No.	Objectives	Descriptions
1.	Law and order is improved to support tourism growth.	Law and order continues to destroy the reputation of PNG and has been a primary impediment to tourism growth. We intend to impress upon the government and the law enforcement agencies to provide undivided attention to crime mitigation, initiate pro-active strategies to minimise crime, and work with the local communities that are hosts to various tourism set-ups to recognise the value of tourism and protect tourism in the local communities.
2.	Government regulatory and fiscal policies are streamlined to support tourism growth.	Government's intervention using a variety of tax incentives can spur growth in the sector. As well, government interventions in streamlining visa processing, customs and transport travel requirements can reduce cost on travellers and cut down delays, thus encouraging travel. These issues have not been fully looked into with a view of getting a better 'deal for the sector. Consistent with similar objectives in the other subsectors, we intend to examine these issues and work with other partners in the government to explore ways in which the sector can benefit from government regulatory and fiscal policies.



3.	Digital technology and ICT for tourism use are strengthened.	Like in other countries, we rely on a national ICT and digital technology infrastructure to support the tourism sector. This has its own problems. However, the advancement in digital technology and ICT now allows for advanced technology to be used remotely, although at times this may be expensive. Working with other stakeholders we will explore ways on how this can improve tourism in the local settings. We will also work with tourism providers to scale-up the use of technology in their own setting so that commerce and business in tourism can be progressed much faster.
4.	Other critical enablers are improved.	We will actively work with the government, the private sector and other stakeholders to collectively improve the other enablers to provide support for tourism development.

Subsector Strategies and Indicators

The following key strategies are central to achieving our subsector objectives and our primary goal of strengthening the role of critical enablers.

Key Strategies	
1.1	Law and order is outside the tourism sector's control. However, we intend to work with the government and the police to figure out ways to strengthen the law and order situation. We will also encourage provinces and local communities to work within their domain to advance the cause and value of tourism.
1.2	This is outside of the immediate control of the sector, however, working through key stakeholders we intend to impress on them to implement a range of fiscal measures to incentivise the sector. We also intend to work with our partners to examine existing regulatory practices on travel and movement of visitors with the aim of easing travel and reducing the costs associated with it, so that visitors can be encouraged to frequently visit PNG.
1.3	A national grid system of ICT connectivity that allows for internet is currently being rolled out around the country by DataCo. Capitalising on this, we will work with DataCo to examine and implement ways of assisting tourism providers to speed up their ICT infrastructure particularly in provinces, so they can be able to speed up their business process. Doing so will allow for digital advertising and will make digital technology available to the traveller in provinces and remote communities.

We will use the following indicators to monitor and guide our performance as we move forward to strengthen the role of the critical enablers of the sector.

Key Indicators	Target
Law and order <ul style="list-style-type: none"> Perceptions of security (or feeling secure) by tourism providers and travellers. Tourism Safety Ambassador's program established. 	>60% feeling of security. 2 provinces by 2025.
Digital technology impact Survey feedback on the use of digital technology from tourism providers and travellers. <ul style="list-style-type: none"> Tour operators utilizing digital platforms for ease of business. 	>60% satisfaction rating. 50 per year.
Barriers to travel Favourable perceptions of ease and cost of travel.	>60% satisfaction rating.



Parrots.

Governance Subsector

Subsector Focus

The governance sector of actors and organisations that are responsible for the overall governance of the sector, together with the governance and the administrative systems required to provide leadership, synergy and coordination, inherent in the governance function, is the need to provide the overall lead and steering, maintain oversight, monitoring and control, and coordinate the manifold activities of the sector carried out by different stakeholders at different levels. The TSDP is framed based on the principle of synergy and therefore it is important that different efforts are synergised to bear on the overall outcomes sought by the sector in the TSDP.

Providing leadership and synergising and coordinating the efforts of all actors within the sector will be challenging, however, efforts must be made in the TSDP to address this difficult but important task. As well, existing arrangements are weak and will need to be strengthened if the sector is to work as a collective whole and move forward with maximum impact. As evident in the next section on implementation and coordination, leadership, synergy and coordination will be carried out at three levels: the strategic or national level, the provincial level, and at the industry association levels.

We aim to focus attention on three critical areas. Firstly, we will focus our attention to the existing agencies that are responsible for providing leadership, synergy and coordination at all levels: strategic, provincial, and organisation/association levels. Our goal will be to strengthen their capacity and refocus their attention to providing effective governance of the sector. In this connection, emphasis will be placed on the **PNGTPA** as the lead agency for steering and coordination at the national level. At the national level much of the facilitation and empowering role in the sector will be played by the PNGTPA. On the culture side, we need to strengthen the capacity of the **NCC** and ensure there is greater cooperation between the PNGTPA and the NCC, ensuring that they work in unison to provide the kind of leadership necessary for the sector.

Second, we need to tighten integration by ensuring that systems of synergy, oversight and coordination are integrated from the national level right down to the provinces and industry so that we maintain a **whole of government and industry approach** in steering and coordinating the sector. This will require us to put in place important points of coordination where necessary to ensure an integrative approach is put into full effect. In this vein, we will establish the **national and provincial tourism councils** whose task will be to serve as key coordinating points that draw members of government and the industry. A primary task of the councils will be to monitor and report back on the implementation of the TSDP. An elaboration of this arrangement is captured in Section V (Figure 13).

Third, we need to strengthen the overall governance and oversight of the sector at the provincial level while linking that to the national level. This will require us to strengthen firstly the role of the provincial tourism bureaus and secondly the respective industry associations and get them to work together. We anticipate that the provincial council will do that.

Subsector Primary Goal and Expected Outcomes

Subsector Primary Goal	Expected Outcomes What we expect to create in the economy, business and people
<p>Leadership, synergy and coordination of the sector are strengthened</p>	<ul style="list-style-type: none"> • A strong whole of government and industry approach in administering the sector. • Strong governance of the sector. • A strong and better sector performance. • Strong national and provincial economies.

Subsector Objectives and Descriptions

There are five objectives to be achieved under our primary goal of strengthening the sector's leadership, synergy and coordination.

	Objectives	Descriptions
1.	PNGTPA's overall leadership and coordination capacity is strengthened .	The PNGTPA plays a pivotal role in the tourism sector's development being the lead agency of government and the primary connection/synergy point between the government and the industry players (private sector). Created by statute, it is responsible for providing policy advice to the government on tourism development through the minister, coordinate the development of the sector with the industry and to market PNG as a preferred tourist destination. Under the TSDP, the PNGTPA will play a much more aggressive and proactive role in providing overall leadership, synergy and coordination at the strategic level. In order to meet these demanding tasks, the Authority will be required to strengthen its capacity. Accordingly, targeted areas of intervention will be selected including strengthening the Authority's monitoring, data analysis and evaluation capacity, and its steering and stakeholder engagement capacity. On the whole, the authority will need to re-examine its structure and role with the aim of repositioning itself so it can ensure the TSDP is implemented to achieve the desired effects.

2.	The NCC's role at the national and provincial levels is strengthened .	A niche area of tourism that has a pull factor is PNG's unique traditions and cultures. In some societies, people still live them and therefore they have the real potential of luring visitors to witness and experience them. It is here that the role of the NCC becomes critical not only in preserving our traditions and cultures but to work in tandem with the PNGTPA to showcase our culture and traditions in whatever way possible in order to enhance PNG tourism. Strengthening the capacity of the NCC therefore will be critical in this regard. Then there will be a need to foster a close cooperation between the PNGTPA and the NCC. As well, strengthening cultural centres and various cultural groupings within provinces as part of the broader strategy of strengthening provincial tourism will be a key feature of provincial tourism and the TSDP.
3.	The NCC's role at the national and provincial levels is strengthened .	There is no proper system of coordinating the tourism sector starting from the strategic (national) to the provincial and local levels so that a whole of government and industry approach is maintained. In this regard the sector will work to ensure one is established. The framework for this system is discussed in Section V Implementation and Coordination.
4	Provincial Tourism Bureaus and Industry Associations are strengthened .	Provincial tourism bureaus and industry associations are critical points for coordinating the implementing the TSDP in the provinces and for developing the sector. We will work to properly establish tourism bureaus and industry associations, capacitate them, and synchronise their roles with the PNGTPA, the NCC and the National Tourism Council to enhance coordination.
5.	National and Provincial Tourism Councils as part of the sector integration system are established .	National and Provincial Tourism Councils as part of the sector integration system are established. The integrated system of tourism coordination is explained in Section V Implementation and Coordination.

Subsector Strategies and Indicators

The following key strategies are central to achieving our subsector objectives and our primary goal of strengthening the sector's leadership, synergy and coordination.

Key Strategies	
1.1	Strengthen the leadership and coordination roles of the PNGTPA focusing on critical capacity gaps within the Authority. In this regard, the Authority may have to reposition itself to better coordinate the implementation of the TSDP and the sector.
1.2	Strengthen the role of the NCC and various provincial NCC centres and synchronise them with the provincial tourist bureaus and industry associations, ensuring that they operate in a coherent way to support provincial and local tourism.
1.3	Properly establish tourism bureaus and industry associations, capacitate them, and synchronise their roles with the PNGTPA, the NCC and the National Tourism Council to enhance coordination and synergy.
1.4	Establish the National and Provincial Tourism Councils as bodies consisting of a cross section of stakeholders (from the government, the tourism industry, private sector and local communities), tasked with providing overseeing and coordinating the implementation of the TSDP.



Kokopo Beach bungalows, staff member serving beverage to guests.

We will use the following indicators to monitor and guide our performance as we move forward to strengthen leadership, synergy and coordination of the sector.

Key Indicators	Target
PNGTPA Strengthened Successful implementation of capacity building interventions. MOU for joint collaboration with NCC signed.	100% successful delivery. MOU signed and activated.
NCC Strengthened Successful implementation of capacity building interventions within NCC.	100% successful delivery.
A national integrated system for coordination and oversight is established.	



Kokopo Beach Bungalows, East New Britain Province.

The system is established and operational.	By 2024.
Provincial Tourism bureaus are established Provincial Tourism bureaus are reorganised/strengthen or established.	By 2024.
National Tourism Council is established The respective council is established and running.	By 2024.
Industry Associations are established All industry Associations are established and running.	By 2024.



Man dressed in Western Province traditional attire.



SECTION iv

ALIGNING THE TSDP 2022-2026 LOGFRAME TO THE MTDP III LOGFRAME



SECTION IV: ALIGNING THE TOURISM SECTOR LOGFRAME TO THE MTDP III LOGFRAME

The Tourism Sector's Role in Sustainable Economic Development Captured in PNG's National Development Plans

Subsector Focus

PNG's overall development is guided by several national development plans, emphasizing similar goals but in somewhat different ways. Each national plan recognizes the unique and unequivocal economic and social contribution of tourism to the nations' social and economic wellbeing, citing its significance and calling for its urgent development. Indeed, PNG's national plans declare a self-evident and global truth: that a country will never go wrong and therefore stands to immensely gain economically if it invests in tourism in a sustained manner. Therefore, developing tourism is critical for PNG.

The **PNGDSP 2010 – 2030** identifies tourism as a **“chosen priority sector”** (p.102) of the country with the stated goal of “Build a strong, vibrant world class tourism sector” (ibid). The overall goal of the **MTDP III** is **“inclusive sustainable economic growth”** for PNG and plans for **7 Key Result Areas (KRAs)** to be delivered in order to achieve this overall goal. **KRA 3 “increased revenue and wealth creation”** and **KRA 7 “responsible sustainable development”**, are goals whose achievement would require the support and direct contribution of the tourism sector. Finally, the **Vision 2050**, the overarching national plan of the country, specifically identifies **tourism as “a wealth creation sector”** (p. 6-7), and calls on the GOPNG to concretely develop it. Among others, Vision 2050 calls for the **“aggressive and marketing promotion of PNG as a preferred tourist destination** (p.7). It is apparent that all these cannot be achieved unless the ongoing constraints are addressed and proper interventions are put in place to enable the Tourism Sector to contribute effectively and meaningfully to PNG's development.

The TSDP Implements the Goals of the National Development Plans

The formulation of the TSDP 2022 - 2026 implements the undertaking made by these national plans to develop PNG tourism as a key accelerator of the national economy. The TSDP is another decisive effort yet by the PNGTPA and the sector's stakeholders to rally their efforts under a common planning framework (the TSDP) to develop the sector for the benefit of PNG. As shown in the foregoing sections, the TSDP takes a SWAps approach, planning the required interventions on **seven subsectors** to the Tourism Sector critical to growing PNG tourism. By delivering its primary and long-term goals and attain its vision, it will enable the sector to contribute to the desired economic, social and sustainability outcomes laid out in the PNGDSP, the MTDP III and Vision 2050.

International Tourism Subsector Logframe

In the first five (5) months of 2021, international visitor arrivals to PNG dropped by 79% or about 25,577 fewer international arrivals to the country compared to the same period last year. As many countries around the world enforce restrictions on travel at the international borders, arrival from our key source markets is affected and have seen a significant drop this year. The downward trend is expected to continue in the next few months of 2021 as travel is limited and major cruise lines also continue to suspend cruising in international waters. However, we are optimistic that as restrictions lessen, business as usual returns, Covid-19 testing becomes general practice and vaccination programmes are rolled out, that tourism will begin to flourish.

Digital transformation in tourism and travel has proven to be an effective tool for information dissemination and added value to marketing and advertising efforts by intensifying consumer and brand reach. Harnessing this opportunity, whilst forging strategic partnerships with Airlines and GoPNG departments, PNGTPA will expand the international market reach, outside of the traditional source markets of: Australia-NZ, Japan, United Kingdom, North America, China and Europe.

Goal: Increasing the capital contribution of international visitors by increasing the number of international tourists.									
Ref MTDP III Economic Growth Goal (EGG)	Indicator	Source	Baseline (year) 2020	2022	2023	2024	2025	2026	
EGG 1.1, 1.3, 1.6	1.% GDP contribution to the national economy	TPA (estimate)	0.6%	1.3%	1.9%	2.2%	2.9%	4.2%	
	2. Proportion (%) of Bonafide tourists over all foreign visitor arrivals	TPA (estimate)	8 %	5 %	10%	12%	15%	18%	
	3. Total receipts incurred by foreign visitors (K' billion)	TPA (estimate)	0.38	0.45	0.56	0.75	1.2	1.6	
PNGTPA									
Lead Government Agency									
Executing Agencies									
ICSA, NSO, BPNG, DFAIT, NCC, NMAG, NMSA									
No.	Sector Strategy	National/Sector Plan or Policy Reference							
1	Increase international visitor numbers	PNG Tourism Sector Development Plan 2022 – 2026; MTDP III (2018-2022)							
2	Increase Global and regional reach of marketing and advertising PNG as the preferred tourist destination is intensified and expanded	PNG Tourism Sector Development Plan 2022 – 2026; MTDP III (2018-2022)							

Goal: Increasing the capital contribution of international visitors by increasing the number of international tourists.									
3	Establish/Strengthen partnership with Global/Regional Tourism Organisations	PNG Tourism Sector Development Plan 2022 – 2026; MTDP III (2018-2022)							
4	Establish partnership with Kundu – PNG Consulate offices	PNG Tourism Sector Development Plan 2022 – 2026; MTDP III (2018-2022)							
5	Establish partnership with ANG for marketing & advertising	PNG Tourism Sector Development Plan 2022 – 2026; MTDP III (2018-2022)							
6	Establishment of the Tourism Satellite Account	PNG Tourism Sector Development Plan 2022 – 2026; MTDP III (2018-2022)							
Deliverables		2022	2023	2024	2025	2026	Link Code		
1.	Review and launch of the Tourism Marketing Strategy	✓	✓	✓	✓	✓	1-3.1-6.1		
2.	No. of visitor arrival - air	45,500	56,000	75,000	120,000	150,000	1-3.1.2		
3.	No. of visitor arrival - sea	1200	4500	6000	8,000	10,000	1-3.1.3		
4.	No. of visitor arrival - land	650	720	850	970	1120	1-3.1.4		
5.	No. of International markets reached	6	7	8	9	9	1-3.2.5		
6.	No. of Kundu Offices with tourism representation	1	1	1	1	1	1-3.4.6		
7.	Establish TPA Australia office (Cairns)		✓	✓	✓	✓	1-3.3.7		
8.	No. of Tourism Certified – Airline General Sales Agents		5	8	10	14	1-3.5.8		
9.	No. of TSA Members	3	8	15	20	25	1-3.6.9		
Link Code	Investment Main Program Interventions	2022 (K' million)	2023 (K' million)	2025 (K' million)	2026 (K' million)	Total costs (K' million)	estimated	Funding Option	
1-3.1-6.1, 1-3.1.2, 1-3.1.3, 1-3.1.4, 1-3.2.5, 1-3.4.6, 1-3.3.7, 1-3.5.8, 1-3.6.9	1. International Tourism Marketing & Advertising Program	2.00	4.00	6.00	8.00	28.00		GoPNG/ DP	

Domestic Tourism Subsector Logframe

Prior to the onset of the Novel Corona virus (Covid-19), TPA, being mandated to market and promote the tourism potential of the country, focused on the international consumer markets and provided minimal interventions in driving domestic tourism travel. The global pandemic has forced National Tourism Office's all over the globe to pivot and re-strategize. Looking within our borders for adventure, new experiences and appreciating the diversity of our country will be at the helm of recovery for the PNG tourism industry.

The Domestic Marketing Strategy will articulate the areas of priority needed to strengthen domestic tourism products and packages. Subsidized travel for domestic bonafide tourism will be an integral part to ensuring there is incentivized travel available to the general public for the purpose of recreational tourism travel.

GOAL: Increase capital contribution of domestic tourism by raising the number of domestic visitors.								
Ref MTDP III Economic Growth Goal (EGG)	Indicator (unit)	Source	Baseline (year)	Annual Target				
			2020	2022	2023	2024	2025	2026
EGG 1.1, 1.3, 1.6	1. Proportion (%) of Domestic Bonafide tourists over all domestic travellers by air.	TPA estimate	10	25	30	35	37	39
	2. Proportion (%) of Bleisure Tourists over all domestic travellers by air.	TPA database	40	45	50	55	60	65
	3. Proportion (%) of MICE Tourists over all domestic travellers by air.	TPA database	50	55	60	65	70	80
Lead Government Department		PNGTPA						
Executing Agencies		NCC, NMAG, Air Nuigini, DCIT, Provincial Govt., Tourism Bureau's/Authority(s)						
*Domestic segments as per current demand trends (i.e. MICE, Sport activities, tourism, VFR, culture, trekking, and fishing)								

Domestic Tourism Subsector Logframe

No.	Sector Strategy	National /Sector Plan or Policy Reference						
1	Increase in Domestic Bonafide Tourists.	PNG Tourism Sector Development Plan; Marketing Strategy Review 2021.						
2	*Increase in Domestic Leisure Tourists.	PNG Tourism Sector Development Plan; Marketing Strategy Review 2021.						
3	*Increase in Domestic MICE Tourists.	PNG Tourism Sector Development Plan; Marketing Strategy Review 2021.						
4	Subsidize Domestic Travel for Bonafide Tourists.	PNG Tourism Sector Development Plan; Marketing Strategy Review 2021.						
	Deliverables	2022	2023	2024	2025	2026	Link Code	
1.	No. of Domestic Bonafide Tourists.	2,000	5,000	10,000	15,000	18,000	1.1.1	
2.	No. of Domestic Leisure Tourists.	3,000	6,000	12,000	16,000	17,000	2.2.2	
3.	No. of Domestic MICE Tourists.	2,500	5,000	7,000	10,000	11,000	3.3.3	
4.	No. of Subsidized Bonafide Packages Sold for Domestic Tourists.	100	150	200	250	300	1.4.4	
5.	Launching of the Domestic Market Campaign.						1-3.1-4.5	
6.	No. of Domestic marketing and promotion multimedia partners.	10	20	30	40	50	1-3.1-4.6	
7.	Launching and implementation of Domestic Air Arrival Cards.	√	√	√	√	√	1-3.1-4.7	
Link Code	Investment Main Program Interventions	2022 (K' million)	2023 (K' million)	2024 (K' million)	2025 (K' million)	2026 (K' million)	Total estimated costs (K' million)	Funding Option
1.1.1 2.2.2 3.3.3 1-3.1-4.5, 1.4.4, 1-3.1-4.5, 1-3.1-4.6, 1-3.1-4.7	1. Domestic Tourism Marketing & Advertising Program.	2.00	2.00	2.00	2.00	2.00	10.00	GoPNG/ DP

Tourism Provider and Supplier Subsector Logframe

The tourism and travel sector of PNG is made up of MSME's who all contribute to the supply chain of tourism and travel services to consumers, whether tour operator, guesthouse owner, artisan, restaurant, homestay, hire car's etc., all stakeholders in the tourism and hospitality play a vital role in ensuring a traveller has a great experience in a host country, province or community.

In response to the global pandemic, the government's intervention of \$200 million disbursed into commercial banks and appropriate departments (50% BSP; 40% NDB and 10% Department of Commerce and Industry) have been an indication of support to MSMEs struggling to recover from almost zero international visitor and limited economic activity, especially in niche areas such as dive, surf, trekking and bird watching. To ensure tourism sector stakeholders have the capacity to access such funding opportunities, TPA will forge strategic partnership to build capacity of our tourism MSME's and create pathways for access to finance to stabilize business continuity.

GOAL: Provider/supplier productive capacity is strengthened and the number of tourism suppliers and producers is increased.							
Ref of MTDP III Economic Growth Goal (EGG)	Indicator (unit)	Source	Baseline		Annual Target		
			2020	2021	2022	2023	2024 2025
EGG 1.1, 1.6	1. Proportion of tourism MSMEs active (%).	TPA estimate	30	45	55	60	65 70
	2. Proportion of tourism MSMEs having access to finance.	TPA estimate	Nil	20	40	50	55 60
Lead Government Department.		PNGTPA					
Executing Agencies.		SME Corporation, DCI, BPNG, CEFI, Financial Institutions, IPA, IRC, NSO, NRI, DLIR.					

No.	Sector Strategy	National /Sector Plan or Policy Reference							
1	Liaise with SMEC on the official definition of MSMEs.	PNG Tourism Sector Development Plan 2022-2026; National SME Policy; National Financial Inclusion Policy; MTDP III (2018-2022).							
2	Establish agreements with IPA, SMEC, DCIT, Treasury and Tourism Industry Association to identify the number of Tourism MSMEs.	PNG Tourism Sector Development Plan 2022-2026; National SME Policy; National Financial Inclusion Policy; MTDP III (2018-2022).							
3	Establish agreements with SMEC, Financial Institutions and CEFI, to provide financial support.	PNG Tourism Sector Development Plan 2022-2026; MTDP III (2018-2022).							
4	Provide enabling infrastructure for tourism market access.	PNG Tourism Sector Development Plan 2022-2026; PNGDSP 2010-2030; MTDP III (2018-2022).							
5	Promote MSMEs in the sector to provide and improve PNG local products.	PNG Tourism Sector Development Plan 2022-2026; National SME Policy; National Financial Inclusion Policy; MTDP III (2018-2022).							
6	Study conducted on sector assessment and needs.	PNG Tourism Sector Development Plan 2022-2026; PNGDSP 2010-2030; MTDP III (2018-2022).							
No.	Deliverables	2022	2023	2024	2025	2026	Link Code		
1.	Clear definition of Tourism MSMEs through the revised SME Act 2021.	✓	✓	✓	✓	✓	1-1.1		
2.	Collect total number of Tourism MSMEs from IPA and SMEC.	✓	✓	✓	✓	✓	1-2.2.2		
3.	No. of MOUs signed and active with financial institutions.	1	2	3	4	5	1-2.3.3		
4.	No. of tourism recipients for financial support.	20	40	60	80	100	1-2.3.4		
5.	No. of MOUs signed MTAC agencies and provincial city/town councils for tourism market access/development/upgrading.	✓	✓	✓	✓	✓	1-2.4.5		
6.	No. of National Parks enhanced or developed for the purpose of tourism.	1	3	5	7	9	1-2.5.6		
7.	MOU with Department of Works for tourism accessibility.	✓	✓	✓	✓	✓	1-2.4.7		
8.	No. of tourism booths (NCD, ENB, MBP, ESP, EHP).	1	1	1	1	1	1-2.6.8		

Link Code	Investment Main Program Interventions	2022 (K' million)	2023 (K' million)	2024 (K' million)	2025 (K' million)	2026 (K' million)	Total costs (K' million)	Funding Option
1.1.1, 1-2.2.2, 1-3.3, 1-2.3.4, 1-2.4.5, 1-2.5.6, 1-2.4.7 1-2.6.8	Tourism SME Financial Support Facility.	5.00	15.00	15.00	10.00	10.00	55.00	GoPNG/ DP
	Tourism Suppliers and Producers Organizational Capacity Development Program.	6.00	10.00	15.00	20.00	25.00	76.00	



Mt. Hagen Show performers from Western Highlands Province.

Tourism Product and Service Subsector Logframe

Professional service and standards are at the heart of tourism and hospitality, in order to be globally competitive as an adventure destination in the global market, PNG needs to provide specific attention and resourcing to ensuring tourism product and service quality is strengthened. PNG boasts an array of water-based activities, diverse culture, endemic biodiversity and adventurous land-based activities that remain key attractions for visitors, both international and domestic.

The way forward for our sector over the next five years must be driven by inclusivity; ensuring needs are assessed at the Ward level's, resource custodians are part of the consultative process to project implementation, tourism and hospitality certified training and qualifications are far reaching and available to all. The global pandemic has given PNG the opportunity to reset its tourism sector, sustainability and resilience will be at the core of our sector building back better.

GOAL: Improve the overall quality, diversity and accessibility of tourism products and services.							
Ref MTDP III Economic Growth Goal (EGG)	Indicator (unit)	Source	Baseline	Annual Target			
			2020	2022	2023	2024	2025 2026
EGG 1.1, 1.3, 1.4	1. Proportion (%) of locally owned Tourism Products and Services over total number of tourism products and services (%).	TPA estimate	85	87	89	92	96 98
	2. Total value from locally owned Tourism Products and Services over the total value of tourism products and services (K' million).	TPA estimate	20	25	30	40	50 60
	3. Proportion (%) of tourism businesses export ready over total number of tourism businesses.	TPA estimate	29	34	45	56	67 78
Lead Government Department.		PNGTPA					
Executing Agencies		NMAG, NCC, SME Corp, IPA, DCTI, CEPA, IRC, NSO.					

No.	Sector Strategy	National /Sector Plan or Policy Reference
1	Carry out training for locally owned Tourism Operators, Resource Custodians and Tourism stakeholders for the development of tourism products and sites.	PNG Tourism Sector Development Plan 2022-2026; National Trade Policy; SME Policy; IPA Corporate Plan.
2	Carry out tourism awareness to increase client base and emphasize on economically sustainable, unique-competitive advantage.	PNG Tourism Sector Development Plan 2022-2026; National Trade Policy; SME Policy; IPA Corporate Plan.
3	Establish LLG/Ward Needs Assessment for tourism host communities to determine tourism development.	PNG Tourism Sector Development Plan 2022-2026; SME Policy; IPA Corporate Plan.
4	Diversification of tourism product base.	PNG Tourism Sector Development Plan 2022-2026; National Trade Policy; SME Policy; IPA Corporate Plan.
5	Clearly segment products and services with agencies and institutions through MOUs/Agreements for understanding of roles and support for tourism product diversification.	PNG Tourism Sector Development Plan 2022-2026; NCC Corporate Plan 2019-2023, NMAG Corporate Plan 2019-2023.
6	Strategic partnerships for green tourism innovation; eco-tourism solutions; protection and preservation of tourism products.	PNG Tourism Sector Development Plan 2022-2026; National REDD+ Strategy; PNG Protected Area's Policy.
7	Strategic partnership(s) for the enhancement of quality, skills, knowledge, packaging and presentation for market export.	PNG Tourism Sector Development Plan 2022-2026; NCC Corporate Plan 2019-2023, NMAG Corporate Plan 2019-2023.

No. Deliverables	2022	2023	2024	2025	2026	Link Code
1. Conduct Tourism Industry Training Needs Analysis.		✓			✓	1-3.1.1
2. Tourism Industry Training Strategy launched and implemented.			✓	✓	✓	1-3.1.2
3. Training Modules developed.				✓	✓	1-3.1.3
4. No. of substantive tourism awareness campaigns conducted.	1	1	1	1	1	1-3.2.4
5. No. of tourism related trainings.	20	30	40	50	60	1-3.1-2.5
6. No. of MOUs signed with DOE & DHERST institutions (Limana, KBC, APTC, DWU, UOG).	1	1	1	1	1	1-3.1-2.6
7. No. of qualified tourism professionals with (Tertiary, TVET qualification).	0	20	40	50	60	1-3. 1-2.7
8. No. of Tourism Cooperative established for three (3) pilot community(s).	0	1	2	3	4	1-3.3.8
9. No. of new niche tourism products (Agritourism, MICE, Voluntourism, Medical Tourism, Green Tourism).	1	1	1	1	1	1-2.1-4.9
10. Annual Tourism Expo hosted by PNG Tourism Industry Association.	✓	✓	✓	✓	✓	1-3.5.10
11. Tourism Product Development Strategy Launched and implemented.		✓	✓	✓	✓	1-3.4-7.11
12. No. of tourism accredited and licensed tourism businesses that are export ready.	✓	✓	✓	✓	✓	3.7.12.
13. PNG Cruise Development Strategy Launched and implemented.			✓	✓	✓	1-3.7.13

Link Code	Investments	2022 (K' million)	2023 (K' million)	2024 (K' million)	2025 (K' million)	2026 (K' million)	Total costs (K' million)	Funding Option
1-3.1.1	Tourism Product and Services Improvement Program.	4.00	5.00	6.00	10.00	20.00	45.00	GoPNG/ DP
1-3.1.2								
1-3.1.3	Tourism Sector Development Program.	5.00	10.00	10.00	20.00	10.00	55.00	GoPNG/DP
1-3.2.4								
1-3.1-2.5								
1-3.1-2.6								
1-3.1-2.7								
1-3.3.8								
1-2.1-4.9								
1-3.5.10								
1-3.4-7.11								
3.7.12								
1-3.7.13								



WWII site in Wewak, East Sepik Province.

Governance Subsector Logframe

Strengthening coordination between National, Provincial, Local Level Government, groups and individuals to work together for positive change through good governance will ensure sustainable development is achieved. The fragmented state of the tourism industry creates risks and will ultimately lead to low levels of performance, efficiency and effectiveness in all areas. The strong, transparent administering of this vibrant resource sector will take PNG's competitive ability to the next level as a desired adventure destination in the region and globally.

As the tourism sector of the country has developed, we have moved away from the policy directions of maximizing visitor numbers and receipts, but rather, creating conditions for competitive conditions for tourism businesses and regions (hubs). Interventions to strengthen competitive conditions include:

- Regulating markets – operators, aviation, accommodation etc.
- Managing tourism attraction's, site's, national parks, heritage sites and cultural centre's
- Providing enabling infrastructure
- Setting quality, training and environmental standards
- Border security and visa policy
- Stimulating tourism growth and investment

Leadership, coordination and synergy will be integral components of good governance within the tourism sector of PNG.

GOAL: Leadership, synergy and coordination of the sector are strengthened.								
Ref of MTDP III Economic Growth Goal (EGG).	Indicator (unit)	Source	Baseline	Annual Target				
				2022	2023	2024	2025	2026
EGG 1.1	1. Sector Budget Allocation for the Tourism Sector (K’ million).	IFMS	16.5	23.0	41.0	50.0	57.0	70.0
	2. (%) of perception of visitor safety.	TPA database	NIL	15	25	50	80	150
	3. Proportion (%) of tourism-related crimes over the total crime rate in PNG.	RPNGC (2010) TPA estimate	10.4 per 1000 people	8	7.8	7.4	6.0	5.8
	4. Proportion (%) of provincial tourism bureau’s/authority over the total number of provinces.	TPA database	25 (2021)	33.3	41.6	50	58.3	66.6

GOAL: Leadership, synergy and coordination of the sector are strengthened.									
	5. Proportion (%) of professional/ formal bodies established over the total number of tourism operators.	TPA estimate	5.1	9	13	15	21	24	
Lead Government Department		PNGTPA							
Executing Agencies		Treasury, RPNGC, Provincial Administrations, DPLG, NCC, NMAG, NSO.							
No.	Sector Strategy	National /Sector Plan or Policy Reference							
1.	Policy and Legislative Reform.	National Sustainable Tourism Policy; PNG Tourism Sector Development Plan 2022-2026.							
2.	Effective Implementation, Monitoring, Evaluation & Reporting.	National Planning & Monitoring Act 2016.							
3.	Improve Sector Coordination.	PNG Development Strategy 2010-2030, Medium Term Development Plan III – Volume 2 (Economic Sector).							
4.	Increase Tourism Positivity Campaign.	PNG Tourism Sector Development Plan 2022-2026; DPM Corporate Plan; GESI Policy; PNGDSP 2010-2030.							
5.	Increase number of safe traveller operators.	PNG Tourism Sector Development Plan 2022-2026.							

No.	Sector Strategy	National /Sector Plan or Policy Reference
6.	Provide training for Volunteers to provide security for tourists.	PNG Tourism Sector Development Plan 2022-2026; National Volunteer Services Development Plan.
7.	Partner with NVS to register tourism safety volunteers.	PNG Tourism Sector Development Plan 2022-2026.
8.	Strengthen provincial tourism offices in partnership with affiliated Provincial Administrations.	PNG Tourism Sector Development Plan 2022-2026; Provincial Economic Sector and/or Integrated Plan's.
9.	Respective council's, association's, group's etc. operational to stimulate industry coordination and compliance.	PNG Tourism Sector Development Plan 2022-2026; IPA Corporate Plan.
10.	Provide consultative platform for all industry stakeholders to utilize.	PNG Tourism Sector Development Plan 2022-2026.

No. Deliverables	2022	2023	2024	2025	2026	Link Code
1. National Tourism Policy.	✓	✓	✓	✓	✓	1.1.1
2. Legislative review and amendment - National.	✓	✓	✓	✓	✓	1.1.2
3. TPA to conduct monitoring and evaluation reporting.	✓	✓	✓	✓	✓	1.2.3
4. PNGTSDP Steering Committee operational.	✓	✓	✓	✓	✓	1.3.4
5. National Tourism Council established.		✓				1.3.5
6. Tourism Industry National Standard Framework Launched.			✓			1.1-3.6
7. PNGTPA Regional Office Pilot setup.			✓	✓	✓	1.2.7
8. No. of positive feedback.	100	100	200	200	400	2.4.8
9. No. of certified PNG Safe Traveller initiative operators.	10	20	20	30	20	2.5.9
10. No. of registered volunteer tourism safety ambassador's (Pilot Province).			1	2	2	3.6-7.10
11. No. of Provincial Tourism/product-based Associations.	3	2	2	3	2	4.8.11
12. No. of provincial MOU's implemented.	2	3	3	3	3	4.8.12
13. No. of Provincial Tourism Council's established.	2	2	3	3	5	4.9-10.13
14. National/ Provincial Tourism Forum hosted annually.	✓	✓	✓	✓	✓	4.9-10.14

Link Code	Investment Main Program Interventions	2022 (K' million)	2023 (K' million)	2024 (K' million)	2025 (K' million)	2026 (K' million)	Total costs (K' million)	Funding Option
1.1.1, 1.1.2, 1.2.3, 1.3.4, 1.3.5, 1.1-3.6, 1.2.7, 2.4.8 2.5.9, 3.6-7.10, 4.8.11, 4.8.12, 4.9-10.13, 4.9-10.14	Sector Governance: Strengthening Leadership, Synergy and Coordination (Strengthening Sector Regulations and Standards).	4.00	5.00	6.00	7.00	5.00	27.00	GoPNG/ DP



Tourists cruise ship passengers in a traditional war canoe in Alotau, Milne Bay Province.



SECTION V

Implementation and Coordination



SECTION V: IMPLEMENTATION AND COORDINATION

The Challenge of Implementation and Coordination

The task of implementation and coordinating a diverse sector such as tourism will be challenging as it involves many participants who play diverse roles at different levels. A critical requirement will be to work under the ambit of the TSDP where sector participants are steered and guided by the TSDP's goals and vision so there is unity and harmonisation in direction and arriving at the intended destination—which is the vision of the TSDP.

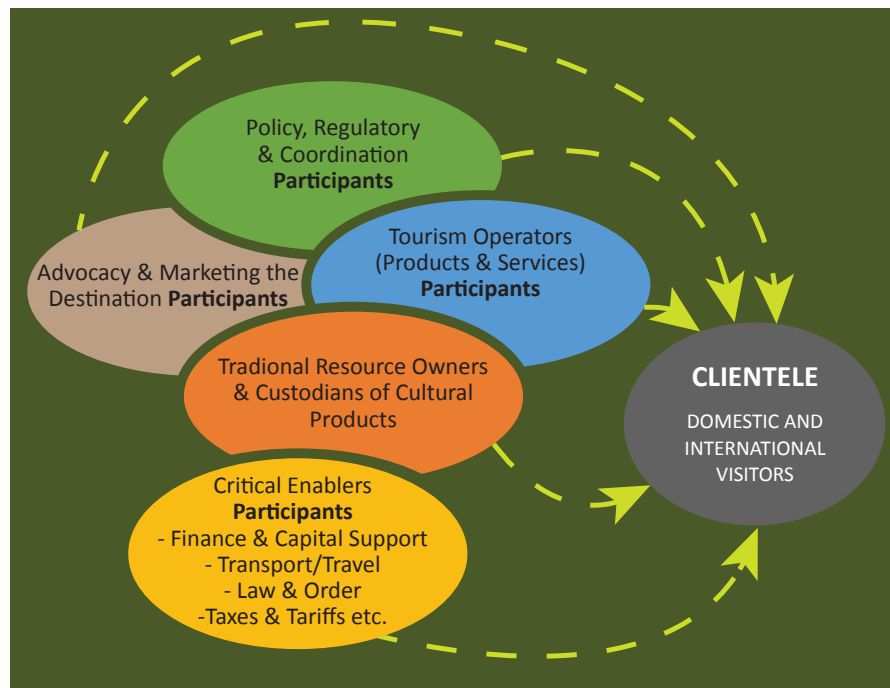
The Ministry for Tourism, Arts and Culture (MTAC) will need to play a lead role in providing leadership and coordination at the strategic level, however, working through different coordination implementation points down the line, from the national level, right down to provinces and districts and industry players (Figure 14). As already seen in this Plan, the TSDP is not a micro-management tool and therefore will not be used as such; rather its role is to steer the sector at the strategic level and therefore it would be expected that the micro-management aspect of the sector will be left to each participant to undertake based on their prevailing needs, roles and management circumstance. However, it is expected that the TSDP will provide the platform for cooperation where participants will work together to achieve the common goals and vision of the sector.

Requirements for Effective Implementation

The success of the TSDP leading to the acceleration in the growth of the sector will depend on how seriously participants take their role and effectively perform such role, and secondly on how each participant's efforts are unified to create the impacted change on the desired outcomes of the goals of the TSDP. Tourism is everyone's business, no participant can do it alone and be successful, irrespective of how best one tries. In this respect, the coordination role, which is the role of bringing all participants to work together and unify their actions towards common goals, will be critical. In addition, it will be required of each participant to understand the interdependent relationship they are in: that in order to succeed they would depend on others. It would be in their best interest to cooperate with one another.

◀ **Opposite Page:** Birdwatching, West New Britain Province.



Figure 12: Coordinating Implementation is Clientele Focused

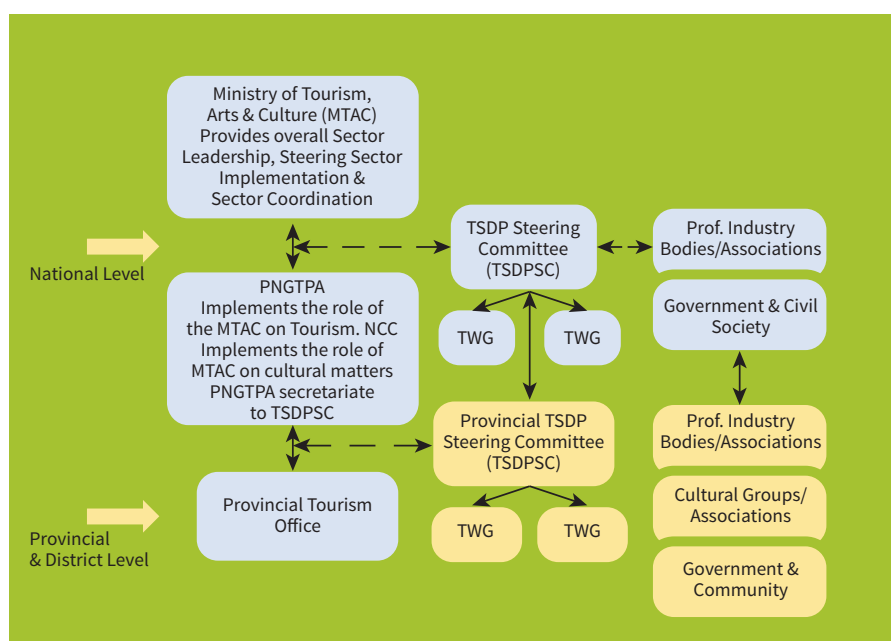
On a broader level, participants can be classified into various groupings based on what the group does and may decide to cooperate at that level (Figure 13). Some participants may be classified in more than one group. However, successful implementation will depend on each participant playing their individual part within the context of their group and the sector.

Effective implementation within the sector will require inclusiveness and full participation of all based on the realisation that everyone is in this together and the stalling by one or several will have adverse consequences on the others, and ultimately the sector and the PNG economy. The natural tendency over the years has been to leave the development of the sector to the PNGTPA and the tourism operators in the private sector (tour and travel companies, hoteliers and other accommodation and hospitality providers and cultural groups). This approach will have to change under the TSDP where the full participation of all will be required. Some participants' roles are defined in statutes while many others are not. Whatever the case may be, it is important that all should fully participate in the sector's development.

Synergising and Unifying Implementation and Coordination

The sector will rely on a set of robust arrangements at the national, provincial and district level (Figure 14) to unify and coordinate implementation, ensuring that all parties provide their input on the way the TSDP is implemented, is progressively monitored and that issues of mutual concerns within the sector are effectively addressed.

Figure 13: Vertical and Horizontal Coordination of Implementation



Key Stakeholders in Coordination and Implementation

The Ministry of Tourism, Arts and Culture (MTAC) will be the focal coordinating ministry within Government to oversee policy and strategic planning implementation. The ministry, through its key tourism agency, PNGTPA, will collaborate with relevant government ministries, departments and agencies responsible for implementation of this plan. On the strengthening and showcasing PNG cultural heritage, the NCC will play a lead role in working with industry participants and the PNGTPA in facilitating the development of PNG's culture among traditional resource owners and custodians in the provinces. For this plan to achieve its full potential, coherence between government and private sector must be prioritized, this will be achieved through the establishment of a Steering Committee.



The PNGTPA is the lead agency responsible for providing overall leadership over the sector, as such, the PNGTPA Board will provide strategic direction on the implementation of the TSDP. PNGTPA will work with other agencies of the Government and the private operators in the sector ensuring that there is a whole of government and industry approach in the coordination and implementation of the TSDP.

The PNG Tourism Industry Association (TIA) will be the lead advocacy and representative of the respective industry associations and will work closely with the PNGTPA and the MTAC in providing advice and input on the way the TSDP is implemented and on the overall growth of the sector. It will feature prominently in the steering committees and will work through the steering committees in the provision of oversight and coordination of the TSDP.

The National Tourism Plan Steering Committee will be chaired by the CEO of the PNGTPA and will be an important body tasked to provide oversight of the performance of the TSDP and advise the Minister and the sector on the implementation of the TSDP and the overall health of the sector. The Steering Committee will act as an important avenue for maintaining dialogue on the important concerns of the sector. This committee will be made up of representatives from the Government, key industry stakeholders, traditional resource owners and civil society, and will be determined by the minister. The Committee will meet on a quarterly basis to discuss and collate updates on the implementation of TSDP and discuss other matters of concern of the sector.

Ministerial Intervention, Action and Reporting. The TSDP Steering Committee will be required to submit a progressive report to the Minister for Tourism, Arts and Culture on an annual basis. The report will provide the progress to date of the implementation of the TSDP and other issues of concern facing the sector.

The role of the Papua New Guinea Tourism Promotion Authority. PNGTPA will provide the Secretariat role for the TSDP Steering Committee and will have general oversight and responsibility of the implementation of this plan.

The Secretariat of this committee will be responsible for:

- Administering the quarterly meetings of the TSDP Steering Committee
- Furnishing the meeting minutes and action items in a timely manner
- Developing Ministerial submission(s) for the purpose of Ministerial intervention at the NEC level in direct relation to a TSDP key outcome/target
- Coordinate information dissemination for all TSDP Steering Committee members

The Provincial TSDP Steering Committee. The provincial tourism office(s) in liaison with the Provincial Executive Council (PEC) are encouraged to establish a Provincial TSDP Steering Committee to support the National Steering Committee and will play a similar role to that of the national committee except that it will focus on the implementation of the TSDP and the overall health of the sector within the province. The committee will be chaired by the head of the Provincial Tourism Office and will be made up of key provincial stakeholders drawn from the provincial government and districts, industry, traditional resource owners, and the civil society. The Committee will be required to submit an annual progressive report on the implementation of the TSDP to the Provincial Tourism Office, provincial industry players and the TSDP steering committee at the national level.



The Technical Working Groups (TWGs). As and when appropriate, TWG's will be established by the National and Provincial Steering Committees to assist the work of the steering committees and the PNGTPA. TWGs will have specialised technical groups consisting of experts and whose membership will be determined by the nature of the given tasks. They will be required to work on specific terms of references and will be required to report the outcome of their work to the relevant steering committee.

Main Coordination Points

Four coordination points are emphasised and will be strengthened to assist the implementation of the TSDP:

Sector Level Coordination at the National Level. This will cover vertical and horizontal coordination across the entire sector and at all levels. The goal is to pull all participants together and help steer them to develop relevant interventions at each participant's level. The PNGTPA acting on behalf of the MTAC and being the mandated body by statute, will play a lead role on this. On the side of culture and traditions, the NCC will play a lead role in tandem with the PNGTPA. The PNGTPA and the NCC will synergise their efforts and provide assistance to provincial and industry-based coordination efforts. Whilst the NMAG will provide a supporting role to the lead agencies for the preservation, conservation and promotion of PNG History.

The TSDP Steering Committee (TSDPSC) consisting of sector representatives will be another peak body that will play an oversight and coordination role and will advise the PNGTPA and the NCC on the appropriate strategies to guide and develop the sector.

Coordination at the Provincial Level. This will cover vertical and horizontal coordination within provinces and districts. Provinces through their respective Provincial Executive Council(s) should take active involvement in developing provincial tourism together with industry-based providers, and traditional resource custodians within the province. As part of the TSDP strategy, the PNGTPA and the NCC working together as a team, will assist put in place the coordination and governance mechanisms to develop tourism in the provinces. The private sector will be encouraged to take a lead role in driving the coordination and governance of provincial tourism, of course assisted and guided by the PNGTPA, the NCC and respective provincial authorities. The strengthening of the Provincial Tourism Bureau(s) and the Provincial TSDP Steering Committee will be encouraged as key points of coordination and governance of tourism in the province.

Coordination at the Professional Industry-based Bodies Level. This will cover coordination and governance by specific industry-based bodies such as specific tour/service operators and associations and will focus on coordinating implementation within their own group. Such bodies will be encouraged to establish their own professional grouping to deal with a range of issues of concern and on the implementation of the TSDP.

Coordination at the Resource Custodians of Various Cultural Practices Level. This has received less emphasis over the years; however, it is to be mentioned that traditional resource custodians' involvement in tourism development is critical. Efforts will be made to strengthen the establishment of this group to ensure that they effectively operate and coordinate among themselves as a cohesive and effective group, providing their input to tourism and the implementation of the TSDP at the provincial and district level.





SECTION Vi

Monitoring and Evaluation



SECTION VI: MONITORING AND EVALUATION

Monitoring and evaluating the sector's performance will be critical to determine the sector's progression towards its goals and their resultant impact on tourism businesses, the economy and people. Monitoring and evaluation will also be necessary to identify constraints and lessons, which would then serve a basis for making ongoing improvement on the sector's interventions and overall performance.

Monitoring	Monitoring involves the collection, analysis, communication and use of information about the project's progress. Monitoring systems and procedures should provide the mechanism by which relevant information is provided to the right people at the right time to help them make informed decisions. Monitoring should highlight strengths and weaknesses to project implementation and enable responsible personnel to deal with problems, improve performance, build on success and adapt to changing circumstances. (EU PCM Guideline, 2004: 108)
Evaluation	Is the systematic and objective assesment of an ongoing or completed project, program or policy, including its design, implementation, and results. The aim is to determine the fulfillment of objectives, development efficiency, effectiveness, impact and sustainability. (OECD, 2010:21)
Evaluation	<ul style="list-style-type: none"> • Determines overall effectiveness, efficiency and economy of policy. • Demonstrates the value of intervention: whether it's worthwhile after all. • Demonstrates impact and benefits. • Demonstrates how stakeholders have benefited. • Finds out what has not worked and why it hasn't worked. • Strengthens accountability for results and performance. • Strengthens confidence and trust of sponsors, clients and stakeholders. • Provides valuable lessons for the future. (Sause, 2020)

◀ **Opposite Page:** Male in traditional attire from the Highlands region.



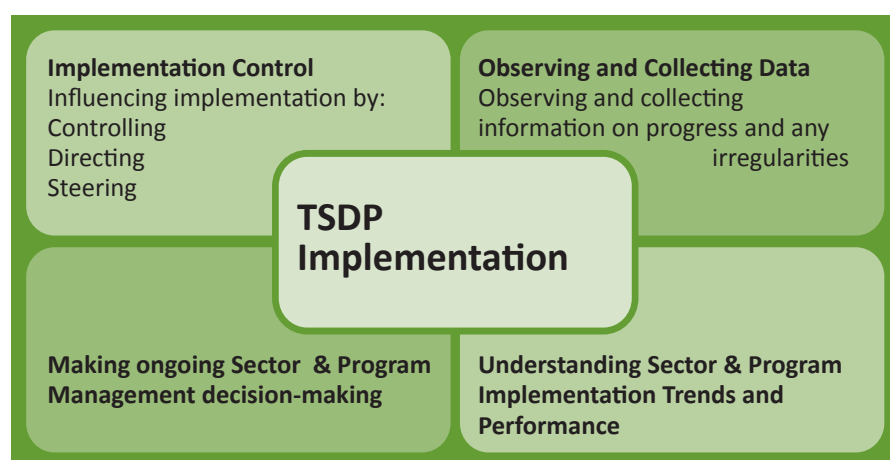
There are some monitoring arrangements in place currently but these are limited and need to be expanded to enable the collection and analysis of critical data necessary for decision making and ongoing improvement. Likewise, evaluation on key parts or on the overall sector's achievement of results and their resultant impact is weak and will need to be strengthened. The PNGTPA will play a lead role in both monitoring and evaluation, ensuring that relevant frameworks, approaches and techniques are used to collect the best data possible to enrich monitoring and evaluation. Interventions developed by the sector will need to be evidenced-based, informed by good monitoring and evaluation data. In this connection, there will be a need to strengthen the existing research and data analysis capacity of the PNGTPA and the Provincial Tourism Offices. The strengthening process will be part of the overall strategy pursued in the Governance subsector to strengthen synergy, leadership and coordination.

The Sector's Approach to Monitoring and Evaluation

Monitoring

Monitoring will be a continuous exercise involving the collection and analysis of data for the purpose of informing sector stakeholders on the ongoing progress of the sector, subsectors and specific areas of concern. Monitoring will focus on the ongoing performance of the sector and will use but not necessarily be limited to the performance indicators and their respective targets in the seven subsectors. Monitoring may also focus on specific data sought in which case the monitoring technique applied will determine the type of data and what purpose it would serve in the tracking of progress and performance. *To get good data and consequently analyse it, which is the foundation for good monitoring practice, the sector will have to employ a mix of monitoring approaches and techniques.*

Figure 14: The Monitoring Function in Implementation and Performance Control



Point of Monitoring and Stakeholder Involvement. Monitoring will take place at *the sector, subsector, provincial, district and industry/stakeholder participant levels*. Provinces and professional bodies and associations are encouraged to build their own monitoring and evaluation system compatible to their setting, in order to determine their own and the sector's performance within the province. The PNGTPA and the TSDP Steering Committee should play an active facilitative role, assisting provincial stakeholders strengthen their monitoring capacity in that regard. The monitoring and evaluation system should be guided by the approaches and techniques discussed in the following sections and stakeholders in the provinces and professional bodies should be actively using them to monitor the progress and achievements of the TSDP in the province or in the specific domain of the stakeholder.

Evaluation

Whereas monitoring will be continuous or regular aimed at tracking progress, evaluation will aim at ascertaining the achievement of results and the consequent impact from the implementation of the TSDP, on a specified or on a periodic basis. While most evaluation will be ex-post and therefore retrospective in nature, some will be ex-ante and therefore will be prospective in nature. It is expected that the bulk of the evaluation of the TSDP will be carried out retrospectively. In the TSDP, the subsector objectives and related strategies are connected to the primary and long term goals of the sector on a theory of change logic. And the primary goals of the sector are logically linked to certain expected outcomes aimed at creating a positive change on PNG businesses and people involved in the sector's value change, and ultimately the PNG economy. These, among others, will be the focus of various evaluation exercises.

Effectively evaluating the sector will require the collection of data using various evaluation approaches and techniques. A blend of evaluation approaches will be necessary to ascertain what has become of the results and impact, and to determine whether the theory of change logic is correct. And where results and the desired impact have not been achieved, to ascertain why this has been the case. This can then serve as useful lessons for future planning and implementation.

Point of Evaluation and Stakeholder Involvement. Evaluation will take place at the *sector, subsector, provincial and district and industry/stakeholder participant levels*. The PNGTPA is expected to play a lead facilitating role in tandem with respective stakeholders, but evaluation should be *carried out by independent parties*, acting objectively. Provinces and professional bodies and associations are encouraged to build their own evaluation system compatible to their setting to determine their own and the sector's performance within the province. The evaluation system should be guided by the approaches and techniques discussed in the following sections and stakeholders in the provinces and professional bodies should be actively using them to evaluate the achievements of the TSDP within the province or the specific domain of the stakeholder.

Data Sharing in Monitoring and Evaluation

There cannot be effective monitoring and evaluation without the sharing of data and experience. Monitoring and evaluation are only possible if there is availability of performance data. Given the size of the sector and the manifold focus of the sector, it will not be possible for one or several parties to be responsible for reporting monitoring and evaluation data. Everyone is expected to grow the sector but they will depend on good monitoring and evaluation data shared at different points by different stakeholders if possible. This is why it is important to build different avenues of sharing monitoring and evaluation data, so that everyone can access such data and hopefully use it to improve the performance of the sector.



It is proposed that these will be the important avenues for data sharing on the performance of the sector:

- *The Annual National Tourism Summit staged by the TSDP Steering Committee*
- *The Annual Provincial Tourism Summit to be staged by the TSDP Provincial Steering Committee*
- *The respective tourism associations sharing of information among members using a selected medium*
- *The quarterly release of statistics on visitor arrivals by the PNGTPA*
- *A quarterly newsletter produced jointly by the PNG Tourism Industry Association, PNGTPA and the National Cultural Commission*
- *A dedicated online repository of monitoring and evaluation data to be developed by the PNGTPA and accessed by all*



Rondon Ridge, Western Highlands Province.

Monitoring and Evaluation Approaches and Techniques

To get the best monitoring outcomes, the sector will use a mixture or combination of approaches and techniques to acquire data for monitoring purposes for the TSDP and the sector.

Sector's Monitoring

Table 4: Monitoring Approaches and Techniques

Monitoring						
No.	Monitoring Approach	Technique Used	Purpose	Timing	Means of Reporting Data	Responsible Party
1	International Visitor Arrivals.	Visitor Arrival Cards.	<ul style="list-style-type: none"> Track the number of visitors into the country. 	Continuous	Visitor Arrival Report	PNGTPA
2	Domestic Visitor Arrivals	Visitor Arrival cards	<ul style="list-style-type: none"> Track the number of visitors into the Provinces. 	Continuous	Visitor Arrival Report	PNGTPA
3	Survey of various types.	Online or manual surveys using questionnaires and ratings and may use simple random, stratified, systematic and cluster sampling methods on populations where data is sought.	<ul style="list-style-type: none"> To extract useful data/information on different matters of performance, or data on visitors and stakeholders. 	Regular	Survey Report	PNGTPA or other stakeholders
4	Subsector monitoring of Performance Indicators and Targets.	Assessing performance based on the performance indicators and targets.	<ul style="list-style-type: none"> To track progress by comparing actual to baseline. 	continuous	Subsector Performance Report	PNGTPA
5	Interview.	Face to face interview based on structured or unstructured questionnaires targeting a certain population or client.	<ul style="list-style-type: none"> To extract useful data/information on different matters of interest of visitors and stakeholders and the sector. 	Regular	Interview Report	PNGTPA or other stakeholders
6.	Rapid Appraisal.	Quick assessment based on a specific TOR with the intent of drawing findings on events/happenings.	<ul style="list-style-type: none"> To understand what is going on and extract useful data/information on different matters of interest of visitors and stakeholders and the sector. 	When required	Rapid Appraisal Report	PNGTPA or other stakeholders

Monitoring						
No.	Monitoring Approach	Technique Used	Purpose	Timing	Means of Reporting Data	Responsible Party
7	Industry Stakeholder Self-Assessment Feedback.	Questionnaire and ratings.	<ul style="list-style-type: none"> To get important feedback from stakeholders on various matters of performance with the intention of making improvements. 	When required	Stakeholder Assessment Report	PNGTPA or other stakeholders
8	Capacity Gap Analysis.	Assessment of capacity gaps in specific areas or on specific stakeholders guided by a TOR.	<ul style="list-style-type: none"> To get insights on capacity constraints and the development of interventions. 	When required	Capacity Assessment Report	PNGTPA or other stakeholders
9	Baseline Study.	Assessment to get important baseline data that is not using inspection and questionnaires on certain target population, organisations or activity.	<ul style="list-style-type: none"> To get critical baseline data that was not previously available. 	When required	Baseline Study Report	PNGTPA or other stakeholders
10	Program or Project Intervention Monitoring.	May use a combination of techniques.	<ul style="list-style-type: none"> To extract performance data on a specific program or project intervention used as a strategy in a subsector or the sector. 	When required	Program/project Progress Report	PNGTPA or other stakeholders

To get the best evaluation outcomes, the sector will use a mixture or combination of approaches and techniques to acquire data for evaluation purposes for the TSDP and the sector.

Sector's Evaluation

Table 5: Evaluation Approaches and Techniques

Evaluation							
No.	Evaluation Approach	Technique Used	Purpose	Timing	Means of Reporting Data	Commissioning Party	Carried Out By
1	Overall Review of the TSDP or the sector	Ex-ante (retrospective) assessment of the TSDP This would usually be guided by a Terms of Reference.	<ul style="list-style-type: none">• To find out what has worked and what has not worked and why.• To determine the overall worthiness of the Plan in terms of its efficiency, effectiveness and economy.• To build confidence of the Government and others and to strengthen accountability, and• To gain useful lessons and evidence for future planning purposes.	At the end of the TSDP.	Review Report.	PNGTPA/other stakeholders.	Independently by external parties.
2	Performance Review on selected parts of the TSDP or sector	Ex-ante (retrospective) assessment of specific parts or areas of concern of the TSDP. This would usually be guided by a Terms of Reference.	<ul style="list-style-type: none">• To find out how the specified area of concern has performed, the trajectories and effects of the underlying issues of concern, and take corrective action or enforce accountability on the areas of concern.	During the life of the TSDP.	Review Report.	PNGTPA/other stakeholders.	Independently by external parties.

Evaluation							
No.	Evaluation Approach	Technique Used	Purpose	Timing	Means of Reporting Data	Commissioning Party	Carried Out By
3	Mid-Term Review of the TSDP	A review of what has transpired during the first half-life of the TSDP. This would usually be guided by a Terms of Reference.	<ul style="list-style-type: none">To find out what has worked and what has not worked and why, in the first half-life of the TSDP. The goal is to learn, re-align and make changes or take corrective action for better results, and enforce accountability.	Mid-term	Mid-Term Review Report	PNGTPA/other stakeholders	Independently by external parties
4	Result-based Evaluation	An ex-post evaluation of the objectives, performance indicators and targets. Often this would be guided by a Terms of Reference.	<ul style="list-style-type: none">Specifically focused on results. In the case of the TSDP, the subsector objectives and their effects on the sector's overall primary goals. The theory of change logic is the focal point of evaluation.	During completion or after the life of the TSDP	Result-based Evaluation Report	PNGTPA/other stakeholders	Independently by external parties
5	Impact-based Evaluation	An ex-post evaluation looking at the impact or long-term effects of the TSDP or the sector's performance. This is usually guided by a Terms of Reference.	<ul style="list-style-type: none">Looking at the long-term effects of the TSDP, on whether or not and how the TSDP has transformed the sector, the PNG businesses in the value chain, the economy, and the people who work or depend on the sector.	After the TSDP has been completed. Often several years after.	Impact-based Evaluation Report	PNGTPA/other stakeholders	Independently by external parties

Evaluation							
No.	Evaluation Approach	Technique Used	Purpose	Timing	Means of Reporting Data	Commissioning Party	Carried Out By
6	Program or Project-based evaluation.	Evaluating the performance of a specific program or project intervention deployed within the ambit of the TSDP or the sector.	<ul style="list-style-type: none"> • To determine the overall success or failure of the intervention, and • To determine what has worked or not worked and why. To maintain accountability, and build confidence. 	After completion of the program/project.	Program/Project Evaluation Report.	PNGTPA/other stakeholders.	Independently by external parties.
7	Rapid Appraisal.	A rapid evaluation to get immediate data on what has transpired. Usually carried out on an event or concern that require immediate attention.	<ul style="list-style-type: none"> • To find out about what has transpired with the view to take corrective action. 	Ongoing.	Rapid Appraisal Report.	PNGTPA/other stakeholders.	Usually done internally.
8	Audit.	A financial review on the financial transactions or spending of monies on the interventions of the TSDP.	<ul style="list-style-type: none"> • To provide independent assurance that money is being spent correctly. 	Ongoing or after completion.	Audit Report.	PNGTPA/other stakeholders.	Independent Auditor.

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Annexures

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Overall Sector Leadership, Steering and Coordination				
1	The Ministry of Tourism Arts & Culture (MTAC)	The lead department headed by the minister and reports to the NEC that has the overall responsibility for tourism policy and development.	<ul style="list-style-type: none"> Provides overall leadership and coordinates with all stakeholders on the implementation of the TSDP. Plays a lead role in developing the Tourism sector. 	National level Entire sector.
2	PNG Tourism Promotion Authority (PNGTPA)	<p>Statutory Authority legally responsible for advising the Government on tourism development and market PNG tourism.</p> <p>Overall public service leader representing the MTAC in the tourism sector policy development and implementation.</p>	<ul style="list-style-type: none"> Provides policy advice on tourism development to government. Encourage the provision & development of tourism facilities & products. Promote and market PNG as a desired tourist destination. Guide & facilitate new investment on tourism. Promote and assist high levels of tourism service education and management. Monitor and report on trends & impact of tourism developments. Establishment of Regional Offices. 	Entire sector Covers national, provincial and district levels.
				Goals 1 - 7

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Overall Sector Leadership, Steering and Coordination				
3	National Cultural Commission (NCC).	<p>The statutory authority legally tasked to preserve, protect and promote the varied traditional cultures of PNG.</p> <ul style="list-style-type: none"> • Assist and facilitate, preserve, protect, develop and promote the traditional cultures of the indigenous peoples of Papua New Guinea. • Encourage the development, promotion and protection of the contemporary cultures of Papua New Guinea. • Facilitate the marketing of selected and approved aspects of the cultures of Papua New Guinea. • Co-ordinate with related Government and Non-Government Agencies on cultural matters. • Co-ordinate cultural activities with Provincial cultural bodies. • Liaise with Non-Government organisations on cultural matters. • Liaise with international cultural organisations. 	All levels of government & industry.	Goals 1-7
4	National Museum & Art Gallery (NMAG).	<p>The national agency tasked to maintain, preserve and promote the history, oral traditions, cultures and arts of PNG.</p> <ul style="list-style-type: none"> • Assist and facilitate, preserve, protect, develop and promote the historical and cultural attractions in PNG. • Encourage the development, promotion and protection of the historical attractions of Papua New Guinea. • Facilitate the marketing of selected and approved aspects of the historical sites. • Provide support to TPA for information on historical sites in PNG. • Support National Policy Interventions for historical tourism development. 		

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Leadership, Steering and Coordination within the Industry at the National Level				
5	PNG Tourism Industry Association (PNGTIA).	<p>Peak tourism body consisting of industry service provider representatives responsible to advocate for members interest on tourism development.</p> <ul style="list-style-type: none"> • Provide the medium for representation whilst protecting, promoting and advancing the interests of registered members. • Enhance the commercial sustainability of its members by providing marketing support and representation to all levels of government. • Coordinate and organize tourism related courses, workshops and programs. • Disseminate tourism related information. 	<p>Entire sector</p> <p>Covers national, provincial and district levels.</p>	Goals 3
6	National Tourism Council (TSDP).	<p>Monitoring and oversight body of the TSDP representing, industry, CBOs and the Government.</p> <ul style="list-style-type: none"> • Provide oversight and coordination of the TSDP. • Ensure that legal and other compliance standards are met. • Advocate and ensure good governance and improved implementation of the TSDP. • Monitor and report back on the implementation and progress of the TSDP. 	National Level.	Goals 6
7	PNG Tourism Promotion Authority Board.	<p>Statutory Authority legally responsible for advising Government on tourism development and market PNG tourism.</p> <ul style="list-style-type: none"> • Providing the direction, the vision, the mission and goals of the PNGTPA. • Developing of governance framework by which PNGTPA will function under. • Protection of PNGTPA investments and assets. • Overall monitoring and control of PNGTPA functions. 	National Level.	Goals 1, 2, 3, 4, 5 & 7

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Leadership, Steering and Coordination at the Provincial Level				
8	Provincial Tourism Bodies.	Respective bodies in the provinces responsible for developing provincial tourism policy and implementation.	<ul style="list-style-type: none"> • Assist in tourism policy formulation and implementation at provincial levels • Promote social, economic, environmental and cultural well-being of local communities participating in tourism. • Integrate and coordinate local and national plans for tourism development. • Report to the PNGTPA on the status of tourism plans and programs, and tourism data and statistics within their jurisdiction. • Communicate rules and regulations on the operation of tourism business, including national standards, accreditation and licensing. 	District, Provincial & National Levels.
9	Provincial Industry Associations.	Professional provincial industry associations responsible for the governance and delivery of tourism services within specific industry or service groupings.	<ul style="list-style-type: none"> • Safeguard, support and promote the interests of tourism industry supplier in provinces. • Maintain self-regulation and governance in respective industry body within provinces. 	District and Provincial Level.
10	Traditional Resource Custodians.	People or organisations holding rights and responsibilities to land, natural resources, cultures and traditions used for tourism purposes.	<ul style="list-style-type: none"> • Ensure the protection of land and natural resources and the continuation of traditional and cultural practices. • Ensure adherence to compliance standards and regulatory frameworks. • Facilitate partnerships in economic development through the mobilisation of natural resources. 	District & Provincial Levels.
				Goals 1 & 7
				Goals 5 & 7
				Goal 4

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Leadership, Steering and Coordination within the Industry at the National Level				
11	National Capital District Commission.	<p>Government office responsible for control, management and administration of the National Capital District.</p> <p>Ensure assistance given to the Motu Koitabu people of the National Capital District.</p>	<ul style="list-style-type: none"> Assist in tourism policy formulation and implementation. Assist integrate and coordinate national plans for tourism development in NCD and Motu-Koitabu areas. Report to the PNGTPA on status of tourism plans and programs, tourism data and statistics within NCDC jurisdiction. Provide support in communicating rules and regulations on the operation of tourism business including national standards accreditation, licensing and tourism awareness in NCD and Motu-Koitabu areas. Promote social, economic, environmental and cultural well-being of local communities' participation in tourism. 	National, Provincial and Local Level Governments.
				Goal 7 (1-7)
Sector Critical Enablers				
12	Department of Justice and Attorney General (DJAG).	Government department responsible for the development and/or endorsement of all legislations in PNG.	<ul style="list-style-type: none"> Provide technical advisory support to PNGTPA for the review, development and/or endorsement of all tourism related legislations in PNG at the national, provincial and local levels. 	National, Provincial and Local Level Governments.
				Goal 6 (Goals 1-7)

Participants and their Roles					
	Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers					
13	National Statistics Office (NSO).	Government department responsible for the development and enforcement of all national statistics and data collection designs and mechanisms in PNG.	<ul style="list-style-type: none">• Provide technical advisory and support to PNGTPA for all tourism related data collection and mechanisms PNG at the national, provincial and local levels of government.• Provide technical advisory and support to PNGTPA for the development, establishment of the and effective performance management of the PNG National Tourism Satellite Account.	National, Provincial and Local Level Governments.	Goal 6 (Goals 1-7)
14	Department of Health (DoH).	Government department for all health services in PNG including the National Recovery Approach for PNG amidst the COVID-19 pandemic.	<ul style="list-style-type: none">• Provide support at national, provincial and local levels of government to enable health services to be easily accessible and affordable nationwide including in tourism hot spots, sites, destinations.• Provide technical support in boosting COVID-19 recovery measures and processes in the tourism industry.	National, Provincial and Local Level Governments.	Goal 6 (Goals 1-7)
15	Department of Information and Communications Technology (DICT).	Government department responsible for all ICT services in PNG.	<ul style="list-style-type: none">• Provide accessible, available and affordable ICT services in PNG.• Provide support to advancing the national tourism industry in the digital age.• Provide better ICT infrastructure for effective service delivery in local/remote areas in PNG for the benefit of host tourism destinations to flourish.	National, Provincial and Local Level Governments.	Goal 6 (Goals 1-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
16 Independent Consumer Competition Commission (ICCC).	Government department responsible for regulating the economy of PNG such as pricing, licensing, industry regulation and consumer protection for the price, quality and reliability of goods and services in PNG.	<ul style="list-style-type: none"> Provide technical advisory and support for the improvement of regulating the pricing of goods and services in the National Tourism industry. 	National, Provincial and Local Level Governments.	Goal 7 (1-7)
17 Department of Personnel Management (DPM).	Government department responsible for public service management matters in PNG.	<ul style="list-style-type: none"> Provide support to the Provincial Administration offices and Provincial Tourism Bodies (Authorities, Bureaus, Division of Commerce, etc) to review the organizational/ administrative structures of the provincial tourism offices. Provide support to MOTAC to review organizational structure for the improved performance of the ministry and the implementing agencies under the Ministry. 	National, Provincial and Local Level Governments.	Goal 6 (Goals 1-7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
18	National Agriculture Quarantine and Inspection Authority (NAQIA).	Government department responsible for providing biosecurity through the provision of information, quarantine and inspection services in and for PNG.	<ul style="list-style-type: none"> • Provide technical advisory and administrative support to ease import and export of local PNG animal and plant products whilst maintaining biosecurity against pests and diseases. • Provide technical advisory and administrative support to ease import and export of local PNG made cultural products (artifacts) whilst maintaining biosecurity against pests and diseases. • Provide support in expanding awareness efforts for maintaining biosecurity against pests and diseases regarding the trade of indigenous plants, cultural artifacts and exotic animal products of PNG in the tourism industry. 	Goal 6 (Goals 1-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
19 Department of Finance.	<ul style="list-style-type: none"> Government department responsible for whole of government financial management, financial policy formulation, financial systems development, maintenance, financial and accounting information processing, financial management and accounting procedures, monitoring of financial performance against the budget and legislative compliance and financial reporting requirements for the whole of Government 	<ul style="list-style-type: none"> Provide technical advisory and support to MOTAC for the timely and adequate funding support of all funding allocations annually. Provide technical advisory and support for the development, improvement and management of all financial management systems in the National, Provincial and Local level Governments supporting the Tourism Sector. Provide support in local awareness for procedures, processes and reporting templates and mechanisms for all financial development, management and reporting under the Constitution, Organic Law and Public Finance Management Act 2016 and all other related legislations, plans and policies. 	National, Provincial and Local Level Governments.	Goal 6 (Goals 1-7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
20	Department of Provincial and Local Government Affairs (DPLGA).	Provide strategic policy advice on the National Policy Coordination and Implementation at all levels of government.	<ul style="list-style-type: none"> Provide and support National Policy Coordination and implementation at the National, Provincial, District, City Authorities and the local level governments to support the tourism sector. 	Goal 7 (1-7)
21	Department of Implementation & Rural Development (DIRD).	Responsible for the oversight and effective coordination of Government of PNG's policies and programs to support rural development.	<ul style="list-style-type: none"> Provide support at national, provincial and local levels of government to enable rural development initiatives for tourism development, growth and sustainability in rural PNG. 	Goal 7 (1-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
22	Royal PNG Constabulary.	Primary law and order agency responsible for maintaining law and order, peace and normalcy.	<ul style="list-style-type: none"> • Provide reliable support to the sector through productive partnership to innovatively manage and mitigate all law-and-order issues in PNG utilizing the resources, existing & new opportunities that are available. 	All levels of government. Goal 5 or (Goals 1-7)
23	Department of Treasury.	Lead central agency of the Government responsible for fiscal policy formulation and management especially on the use of fiscal policy to stimulate tourism growth.	<ul style="list-style-type: none"> • Provide ongoing guidance & support to improve awareness & access to taxation and fiscal incentives for all types/categories of tourism businesses for growth. • Provide support for policy review to ensure timely funding is available for sector growth. 	National Level. Goal 5 or (Goal 6)
24	Internal Revenue Commission (IRC).	Statutory authority responsible for taxation matters and especially on tax matters to support and stimulate tourism growth.	<ul style="list-style-type: none"> • Provide effective support on tax administration and incentives to the sector. 	National Level. Goal 5 or (Goals 5-6)
25	Investment Promotion Authority (IPA).	Statutory authority tasked for promoting and facilitating investment and registration of businesses.	<ul style="list-style-type: none"> • Provide ease of access to information, training and investment opportunities for the sector. • Promote SMEs in the sector. • Promote FDI and registration of tourism businesses. 	All levels of government; National, Provincial and Local. Goal 5 or (Goals 5-7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
26	Department of National Planning and Monitoring (DNPM).	Lead central agency for developing national strategic plans and managing the national development budget and PIP.	<ul style="list-style-type: none"> • Provide assistance for sector planning, monitoring and evaluation. • Provide assistance on the preparation and approval for the PIP funding support to the tourism sector. 	All levels of government; National, Provincial and Local.
27	Department of Commerce and Industry (DCI).	Department responsible for enhancing, facilitating and promoting commerce and industry development and SME growth.	<ul style="list-style-type: none"> • Provide leadership and to support the sector with accessing and increasing opportunities for trade and export. • Provide support to SMEs in the sector. 	All levels of government; National, Provincial and Local.
28	Department of Foreign Affairs and International Trade (DFAIT).	Department responsible for Foreign Affairs and facilitation of PNG's national interest overseas, including advancing PNG's business interest in Tourism.	<ul style="list-style-type: none"> • Facilitate FDIs in the Tourism sector. • Work in tandem with TPA's international offices to market PNG Tourism. 	National.
29	National Maritime Safety Authority (NMSA).	Statutory authority responsible for maritime safety and regulations.	<ul style="list-style-type: none"> • Maintain compliance and regulations on all forms of sea transport used for Tourism purposes. 	All levels of government; National, Provincial and Local.
30	National Airports Corporation (NAC).	Public commercial entity responsible for the construction, maintenance and upkeep of all landing and aerodrome facilities used by tourists.	<ul style="list-style-type: none"> • Provide support to the sector for improved aviation services nationwide. • Provide leadership to create opportunities for investment and increased competition for existing and new airline operators. 	All levels of government; National, Provincial and Local.

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
31	Department of Transport (DoT).	Department responsible for land transport planning and establishment of road networks planning important to the Tourism industry.	<ul style="list-style-type: none"> • Provide support to the sector for improved transport services nationwide. • Create opportunities for partnership to upgrade transport services in tourism destinations/sites. 	National Level
32	Department of Works (DoW).	Department responsible for the maintenance and rehabilitation of all physical infrastructures necessary for the sector to use.	<ul style="list-style-type: none"> • Provide support to the sector for improved transport services nationwide. • Create opportunities for partnership to upgrade transport services in tourism destinations/sites. 	All levels of government; National, Provincial and Local
33	PNG Customs and Border Protection Services.	Statutory authority responsible for monitoring, facilitating and controlling the inflow and outflow of foreign travellers/tourism in PNG.	<ul style="list-style-type: none"> • Regulate and control the inflow and outflow of travelling tourists. • Regulate and control the movement of goods tourists bring in and out of the country. • Create opportunities for partnership to improve the sector. 	National & Provincial Levels
34	Immigration & Citizenship Services Authority (ICSA).	Statutory agency responsible for visa control on entry and exit of PNG.	<ul style="list-style-type: none"> • Provide support to the sector for improved services for international tourists. • Provide ease of access of efficient services for the sector. • Create opportunities for partnership to improve immigration services for the sector. 	National & Provincial Levels
				Goal 5 or (Goals 3-7)
				Goal 5 or (Goals 3-7)
				Goal 5 or (Goals 5-7)
				Goal 5 or (Goals 5-7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
35	National Information Communication and Technology Authority (NICTA).	Statutory Authority responsible for ICT policy and for facilitating the growth of ICT to support the Tourism sector.	<ul style="list-style-type: none"> • Provide support to the sector for national compliance for communication; access, usage, security & services. • Provide support to the sector for improved communication; access, infrastructure and services. 	National & Provincial Levels. Goal 5 or (Goals 3-7)
36	National Institute of Standard and Industrial Technology (NISIT).	Statutory body responsible for providing advice and regulating standards and industrial technology.	<ul style="list-style-type: none"> • Provide leadership & coordination for the development of national standard framework(s) for implementation. 	National & Provincial Levels. Goal 5 or (Goals 3-7)
37	Department of Prime Minister & National Executive Council.	Lead central agency responsible for policy advice to the NEC and for coordinating the implementation of government policy across government.	<ul style="list-style-type: none"> • Provide leadership and coordination with all responsible national, provincial and local leaders to support the sector implementation of the TSDP 2022-2026. 	All levels of government. Goal 5 or (Goals 5-7)
38	All Media Agencies.	Print, broadcast and electronic media companies.	<ul style="list-style-type: none"> • Provide responsible and effective marketing & promotional support for the sector. • Support the sector to create innovative marketing and promotion materials for sales. 	All levels of government & the industry. Goal 5 or (Goals 3-7)
39	Donor Agencies.	Donor partners of PNG responsible for providing development and financial support to the Sector.	<ul style="list-style-type: none"> • Provide accessible opportunities for the sector. • Create partnership for opportunities to upgrade the sector to be globally competitive as a tourist destination. 	All levels of government & industry. Goal 5 or (Goals 3-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
40	National Tourism Council.	Monitoring and oversight body of the TSDP representing, industry, CBOs and government.	<ul style="list-style-type: none"> • Provide support to sector for compliance in meeting education qualifications and nation operational standards of service. • Create opportunities for partnership for new tourism training programs. 	All levels of government & industry.
41	Conservation and Environment Protection Agency (CEPA).	Statutory agency responsible for developing policy, protecting the environment, and for enforcing the regulations on environment and biodiversity sustainability.	<ul style="list-style-type: none"> • Work with traditional resource owners and custodians of flora and fauna, biodiversity and environment to properly use such resources for tourism purposes and for their sustainability. • Provide support to the sector for protection of tourism products. • Assist the sector to maintain authenticity and quality of historical, cultural and natural tourism products. 	All levels of government & industry.
42	PNG Ports.	Public commercial entity responsible for the creation and maintenance of sea transport infrastructure important for tourism purposes.	<ul style="list-style-type: none"> • Provide support to the sector for growth in the cruise industry. • Strategic collaboration for cruise infrastructure development. 	National & Provincial Level.
43	Airlines.	Entities responsible for providing air transport outside and within the country.	<ul style="list-style-type: none"> • Provide and facilitate the travel of tourists internationally and domestically by air. • Enable the ease of travel within and outside of PNG Synergize with the PNGTPA and the TIA to organize affordable (cost-effective) and rewarding package travel for tourists. • Partner with GSAs for marketing and promotional activities. 	Government and private sector.
				Goal 5 or (Goals 3-7)
				Goal 3 or (Goals 3-7)
				Goal 5 or (Goals 3-7)
				Goal 4 or (Goals 1-7)

Participants and their Roles					
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution	
Sector Critical Enablers					
44	PNG Power.	Public commercial entity responsible to provide power to the tourism industry providers and clientele.	<ul style="list-style-type: none">• Provide accessible, reliable and cost-effective electricity for the sector.	All levels of government . & industry	Goal 5 or (Goals 3-7)
45	Bank of PNG.	Central Bank and financial regulator.	<ul style="list-style-type: none">• Provide support to the sector for statistics and research.• Provide guidance for tourism investment opportunities in PNG within the banking sector.• Create partnerships with the sector for innovative packages or programs.	National Levels.	Goal 3 or (Goals 1-7)
46	Centre for Excellence in Financial Inclusion (CEFI).	NGO centre for financial inclusion and training.	<ul style="list-style-type: none">• Provide support to the sector for ease of access to finance.• Provide guidance and financial literacy training for the sector.• Create partnerships with the sector for innovative packages or programs.	All levels of government & industry.	Goal 3 or (Goals 1-7)
47	Commercial Banks.	Private banks that provide access to credit and other financial support to tourism businesses.	<ul style="list-style-type: none">• Provide support to the sector for ease of access to finance.• Provide guidance and financial literacy training for the sector.• Create partnerships with the sector for innovative packages or programs.	All levels of government & industry.	Goal 3 or (Goals 3-7)
48	Department of Education (DOE).	Government department responsible for developing and implementing education policy up to higher secondary level.	<ul style="list-style-type: none">• Provide accessible and high-quality education for the sector.• Create more education programs for all tourism related products and services.• Review curriculum for education system to integrate tourism knowledge and skills.	All levels of government & industry.	Goal 3 or (Goals 3-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
49	Department of Higher Education, Research, Science and Technology (DHERST).	Government department responsible for higher education policy and implementation in tertiary and TVET institutions.	<ul style="list-style-type: none"> • Create more career pathways for the sector through partnership. • Review of tertiary curriculum to upgrade tourism knowledge and skills of the sector. • Create opportunities for the sector to access education programs. 	All levels of government & industry.
50	NGOs.	NGO's existing within the community.	<ul style="list-style-type: none"> • Assist the sector to provide accessible services for all. 	All levels of government & industry.
51	Churches.	Religious organisations within the community.	<ul style="list-style-type: none"> • Assist the sector to mitigate law and order issues at tourist destinations. 	All levels of government & industry.
52	Department of Community Development & Religion.	Department responsible for community development & religion.	<ul style="list-style-type: none"> • Assist the sector to mitigate law and order issues at tourist destinations. • Create opportunities for partnership to promote effective participation to get community involvement in the sector. 	All levels of government & industry.
53	National Youth Development Agency (NYDA).	Government Agency responsible for developing and implementing youth policy.	<ul style="list-style-type: none"> • Create opportunities for youth development in the sector. • Create partnership for youth programs in the sector. 	All levels of government & industry.

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
54	Department of Justice and Attorney General (DJAG).	Government department responsible for the development and/or endorsement of all legislations in PNG.	<ul style="list-style-type: none"> • Provide technical advisory support to PNGTPA for the review, development and/or endorsement of all tourism related legislations in PNG at the national, provincial and local levels. 	National, Provincial and Local Level Governments.
55	National Statistics Office (NSO)	<ul style="list-style-type: none"> • Government department responsible for the development and enforcement of all national statistics and data collection designs and mechanisms in PNG. 	<ul style="list-style-type: none"> • Provide technical advisory and support to PNGTPA for all tourism related data collection and mechanisms PNG at the national, provincial and local levels of government. • Provide technical advisory and support to PNGTPA for the development, establishment and effective performance management of the PNG National Tourism Satellite Account. 	National, Provincial and Local Level Governments.
56	Department of Health (DoH)	Government department for all health services in PNG including the National Recovery Approach for PNG amidst the COVID-19 pandemic.	<ul style="list-style-type: none"> • Provide support at national, provincial and local levels of government to enable health services to be easily accessible and affordable nationwide including in tourism hot spots, sites, destinations. • Provide technical support in boosting COVID-19 recovery measures and processes in the tourism industry. 	National, Provincial and Local Level Governments.
57	Department of Information and Communications Technology (DICT)	<ul style="list-style-type: none"> • Government department responsible for all ICT services in PNG. 	<ul style="list-style-type: none"> • Provide accessible, available and affordable ICT services in PNG. • Provide support to advancing the national tourism industry in the digital age. • Provide better ICT infrastructure for effective service delivery in local/remote areas in PNG for the benefit of host tourism destinations to flourish. 	National, Provincial and Local Level Governments.

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
58	Independent Consumer Competition Commission (ICCC).	Government department responsible for regulating the economy of PNG such as pricing, licensing, industry regulation and consumer protection for the price, quality and reliability of goods and services in PNG.	<ul style="list-style-type: none"> • Provide technical advisory and support for the improvement of regulating the pricing of goods and services in the National Tourism industry. 	National, Provincial and Local Level Governments.
59	Department of Personnel Management (DPM).	Government department responsible for public service management matters in PNG.	<ul style="list-style-type: none"> • Provide support to the Provincial Administration offices and Provincial Tourism Bodies (Authorities, Bureaus, Division of Commerce, etc) to review the organizational/administrative structures of the provincial tourism offices. • Provide support to MOTAC to review organizational structure for the improved performance of the ministry and the implementing agencies under the Ministry. 	Goal 6 (Goals 1-7)
			National, Provincial and Local Level Governments.	Goal 6 (Goals 1-7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
60 National Agriculture Quarantine and Inspection Authority (NAQIA).	Government department responsible for providing biosecurity through the provision of information, quarantine and inspection services in and for PNG.	<ul style="list-style-type: none"> • Provide technical advisory and administrative support to ease import and export of local PNG animal and plant products whilst maintaining biosecurity against pests and diseases. • Provide technical advisory and administrative support to ease import and export of local PNG made cultural products (artifacts) whilst maintaining biosecurity against pests and diseases. • Provide support in expanding awareness efforts for maintaining biosecurity against pests and diseases regarding the trade of indigenous plants, cultural artifacts and exotic animal products of PNG in the tourism industry. 	National, Provincial and Local Level Governments.	Goal 6 (Goals 1-7)
61 Department of Finance.	Government department responsible for whole of government financial management, financial policy formulation, financial systems development, maintenance, financial and accounting information processing, financial management and accounting procedures, monitoring of financial performance against the budget and legislative compliance and financial reporting requirements for the whole of Government.	<ul style="list-style-type: none"> • Provide technical advisory and support to MOTAC for the timely and adequate funding support of all funding allocations annually. • Provide technical advisory and support for the development, improvement and management of all financial management systems in the National, Provincial and Local level Governments supporting the Tourism Sector. • Provide support in local awareness for procedures, processes and reporting templates and mechanisms for all financial development, management and reporting under the Constitution, Organic Law and Public Finance Management Act 2016 and all other related legislations, plans and policies. 	National, Provincial and Local Level Governments.	Goal 6 (Goals 1-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Critical Enablers				
62	Department of Implementation & Rural Development.	<p>Department responsible for the oversight and effective coordination of the Government of Papua New Guinea's policies and programs to support equitable rural development.</p>	<ul style="list-style-type: none"> • Provide support tourism sector programs alignment for Rural Development • Provide leadership and effective coordination for rural development working with tourism sector programs implementation. 	Goal 5 (Goals 3 – 7)
63	Department of Provincial and Local Government Affairs.	<p>Department responsible for providing policy advice on National Policy Coordination and Implementation at the national and provincial levels, Districts, City Authorities and local level governments.</p>	<ul style="list-style-type: none"> • Provide support and facilitate tourism sector development initiatives and programs implementation. 	Goal 5 (Goals 3 – 7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Suppliers of Tourism Products and Services				
64	Tour Operators, Hoteliers, Event Managers and Stagers of traditional Festivals and Singings, Professional Diving Association such as the Private Providers of Tourism Services and Products in the Value Chain.	Mostly private businesses that are critical to the provision of tourism services.	<ul style="list-style-type: none"> • Provide essential tourism services that draws international and domestic tourists. 	Goal 3 or (Goals 1-7)
65	PNG Tourism Promotion Authority (PNGTPA).	Statutory authority tasked with marketing PNG as a tourist destination and for facilitating tourism growth and development, and for providing overall coordination and leadership of the tourism sector.	<ul style="list-style-type: none"> • Provide support to the sector for development of quality tourism products and services. • Create opportunities for suppliers of the sector to upgrade their services. 	Goal 3 or (Goals 1-7)
66	National Museum and Art Gallery (NIMAG).	Statutory authority responsible for preserving, promoting and marketing PNG's history, oral arts and traditions.	<ul style="list-style-type: none"> • Provide support to the sector for the protection of the historical tourism industry. 	Goal 3 or (Goals 1-7)
67	Provincial Tourism Bodies.	Various provincial bodies responsible for tourism policy development and implementation.	<ul style="list-style-type: none"> • Provide support to the sector to manage all tourism activities for the industry at a provincial level. • Engage effectively with industry for review, funding and development of all tourism products and services at a provincial & local level. 	Goal 3 or (Goals 1-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Suppliers of Tourism Products and Services				
68	Conservation and Environment Protection Agency (CEPA).	<p>Statutory agency responsible for developing policy, protecting the environment, and for enforcing the regulations on environment and biodiversity sustainability.</p> <ul style="list-style-type: none"> • Work with traditional resource owners and custodians of flora and fauna, biodiversity and environment to properly use such resources for tourism purposes and for their sustainability. • Provide support to the sector for protection of tourism products. • Assist the sector maintain authenticity and quality of historical, cultural and natural tourism products. 	All levels of government & industry.	Goal 3 or (Goals 3-7)
69	Surf Association of PNG (SAPNG).	<p>An industry professional association set-up to facilitate, coordinate and manage the growth of surfing in PNG among its members and within the tourism sector.</p> <ul style="list-style-type: none"> • Collaborate with PNGTPA to identify and establish surf products in PNG. • Build rapport with local communities and resource custodians for the development of surf product sites and services. • Joint marketing initiatives between PNGTPA and SAPNG. • Support the sector to ensure surf tourism operators are working in alignment to implement the TSDP 2022-2026. 	National Government (PNGTPA) & industry.	Goal 4
70	PNG Customs and Border Protection Services.	<p>Statutory authority responsible for monitoring, facilitating and controlling the inflow and outflow of foreign travellers/tourism in PNG.</p> <ul style="list-style-type: none"> • Regulate and control the inflow and outflow of travelling tourists. • Regulate and control the movement of goods tourists bring in and out of the country. • Create opportunities for partnership to improve the sector. 	National & Provincial Levels.	Goal 5 or (Goals 5-7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Suppliers of Tourism Products and Services				
71	Immigration & Citizenship Services Authority (ICSA).	Statutory agency responsible for visa control on entry and exit from PNG.	<ul style="list-style-type: none"> • Provide support to the sector for improved services for international tourists. • Provide ease of access of efficient services for the sector. • Create opportunities for partnership to improve immigration services for the sector. 	National & Provincial Levels. Goal 5 or (Goals 5-7)
72	Commercial Banks.	Private banks that provide access to credit and other financial support to tourism businesses.	<ul style="list-style-type: none"> • Provide support to the sector for ease of access to finance. • Provide guidance and financial literacy training for the sector. • Create partnerships with the sector for innovative packages or programs. 	All levels of government & industry. Goal 3 or (Goals 3-7)
73	Department of Education (DOE).	Government department responsible for developing and implementing education policy up to higher secondary level.	<ul style="list-style-type: none"> • Provide accessible and high-quality education for the sector. • Create more education programs for all tourism related products and services Review curriculum for education system to integrate tourism knowledge and skills.	All levels of government & industry. Goal 3 or (Goals 3-7)
74	Department of Higher Education, Research, Science and Technology (DHERST).	Government department responsible for higher education policy and implementation in tertiary and TVET institutions.	<ul style="list-style-type: none"> • Create more career pathways for the sector through partnership. • Review of tertiary curriculum to upgrade tourism knowledge and skills of the sector. • Create opportunities for the sector to access education programs. 	All levels of government & industry. Goal 3 or (Goals 1-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Suppliers of Tourism Products and Services				
75	Department of Agriculture and Livestock (DAL)	Government department responsible for all agriculture development in PNG.	<ul style="list-style-type: none"> • Provide technical and administrative support to establish and develop Agritourism for the stimulation of Domestic Tourism. 	National, Provincial and Local Level Governments. Goal 3-7
76	Small and Medium Enterprises Corporation (SMEC).	Government department responsible for all SME development in PNG.	<ul style="list-style-type: none"> • Provide technical and advisory support to the tourism industry for the incubation and development of tourism entrepreneurs and start-ups. 	National, Provincial and Local Level Governments. Goal 3-7
77	Department of Information and Technology (DICT)	Government department responsible for all legislations, and policies in relation to ICT services in PNG.	<ul style="list-style-type: none"> • Provide technical and advisory support for improving cyber security tourism products and services that are marketed online. • Provide technical and advisory support for improving the e-commerce platforms for tourism products and services. 	National, Provincial and Local Level Governments. Goal 3-7
78	Independent Consumer Competition Commission (ICCC)	Government department responsible for regulating the economy of PNG such as pricing, licensing, industry regulation and consumer protection for the price, quality and reliability of goods and services in PNG.	<ul style="list-style-type: none"> • Provide technical advisory and support for the improvement of quality regarding the regulation of the pricing of goods and services in the National Tourism industry. 	National, Provincial and Local Level Governments. Goal 3-7

Participants and their Roles					
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution	
Suppliers of Tourism Products and Services					
79	National Training Council (NTC) Secretariat.	Government department responsible for all private sector Training in PNG.	<ul style="list-style-type: none">• Provide technical and advisory support to MOTAC on training needs for the tourism industry globally.	National, Provincial and Local Level Governments.	Goal 3-7
80	National Volunteer Services (NVS).	Government department responsible for all national volunteer services in PNG.	<ul style="list-style-type: none">• Provide voluntary support services to the national tourism industry.	National, Provincial and Local Level Governments.	Goal 3-7
81	Department of Labour & Industrial Relations.	Government department responsible for the regulation of all employment services in PNG.	<ul style="list-style-type: none">• Provide technical and administrative support to the National Tourism Industry regarding the effective performance management of employees.	National, Provincial and Local Level Governments.	Goal 3-7
82	National Development Bank (NDB).	Government department responsible for national development banking services in PNG.	<ul style="list-style-type: none">• Provide technical and advisory support to the tourism industry for the incubation and development of tourism entrepreneurs and startups through the provision of banking and loan services/schemes for the national tourism industry.	National, Provincial and Local Level Governments.	Goal 3-7
83	Kokoda Track Authority.	Government department responsible for managing the Kokoda Track.	<ul style="list-style-type: none">• Provide support in enhancing tourism awareness and development along the Kokoda Track.	National, Provincial and Local Level Governments.	Goal 3-7

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Suppliers of Tourism Products and Services				
84 Data Company Limited.	State owned entity responsible for whole services to the Information and Communication Industry. Mandated to build and operate the National Transmission Network to deliver ICT services in PNG.	<ul style="list-style-type: none"> • Provide technical support nationwide for the digital transformation of the national tourism industry. 	National, Provincial and Local Level Governments.	Goal 3-7
85 National Capital District Commission.	Government office responsible for control, management and administration of the National Capital District. Ensure assistance given to the Motu Koitabu people of the National Capital District.	<ul style="list-style-type: none"> • Assist in tourism policy formulation and implementation. • Assist integrate and coordinate national plans for tourism development in NCD and Motu-Koitabu areas. • Report to the PNGTPA on status of tourism plans and programs, tourism data and statistics within NCDC jurisdiction. • Provide support in communicating rules and regulations on the operation of tourism business including national standards accreditation, licensing and tourism awareness in NCD and Motu-Koitabu areas. • Promote social, economic, environmental and cultural well-being of local communities' participation in tourism. 	National, Provincial and Local Level Governments.	Goal 3-7

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Overall Sector Leadership, Steering and Coordination				
86	Department of Lands.	Overall policy, implementation & coordination.	<ul style="list-style-type: none"> Support the sector to ensure land registration processes are simplified and easily accessible nationwide (for registration of tourism sites). 	Goal 3 or (Goals 1-7)
87	PNG Tourism Promotion Authority (PNGTPA).	Overall policy, implementation & coordination.	<ul style="list-style-type: none"> Support the sector to ensure national compliance processes are simplified and easily accessible nationwide. 	Goal 4
88	PNG Tourism Industry Association (PNGTIA).	Peak Industry body representing tourism service providers responsible to assist develop the sector and to assist in coordinating the implementation of the TSDP 2022-2026.	<ul style="list-style-type: none"> Support the sector to ensure all tourism related associations are working in alignment to implement the TSDP. Assist tourism related associations to revive, be reviewed, or become established to manage tourism related affairs within the sector. Coordinate with tourism related associations to assist in managing, implementing & coordinating all tourism related products & services with the local resource custodians for effective marketing and sales. Encourage all tourism-related associations to become members of the PNGTIA. To manage responsibly and effectively all functions according to national compliance within the tourism industry. Encourage the establishment of Destination Management Organisations or Companies for each province. Coordinate with DMOs/DMCs for sales and marketing of tourism products & services nationwide as wholesalers for all tourism products and services that are sellable within the provinces. 	Goal 4

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Overall Sector Leadership, Steering and Coordination				
89	PNG Dive Association.	An industry professional association set-up to facilitate, coordinate and manage the growth of diving in PNG among its members and within the tourism sector.	<ul style="list-style-type: none"> • Collaborate with PNGTPA to identify and establish dive products in PNG. • Build rapport with local communities and resource custodians for the development of surf product sites and services. • Joint marketing initiatives between PNGTPA and PNGDA. • Support the sector to ensure dive tourism operators are working in alignment to implement the TSDP 2022-2026. 	Goal 4
90	Airlines.	Entities responsible for providing air transport outside and within the country. Global General Sales Agents (GSA) Offices	<ul style="list-style-type: none"> • Provide and facilitate the travel of tourists internationally and domestically by air. • Enable the ease of travel within and outside of PNG Synergize with the PNGTPA and the TIA to organize affordable (cost-effective) and rewarding package travel for tourists. • Partner with GSAs for marketing and promotional activities. 	Goal 4 or (Goals 1-7)
91	Kokoda Track Authority.	Government agency responsible for servicing Australian and New Zealand tourists entering PNG for trekking and managing the sustainability of PNG's top destination - the Kokoda Track.	National Government Agencies.	Goal 1

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Marketing and Advertising				
92	Destination Marketing Representative (DMR).	Destination ambassadors within a particular region.	<ul style="list-style-type: none">• Creating networks within the travel industry abroad to sell PNG.• Provide travel campaigns across various international markets.• Give clients access to local insight and contacts.• Expand existing country promotions to targeted market potential.• Utilize DMRs to market and promote investment opportunities abroad.	All levels of government & industry.
93	Media.	Various print, voice and electronic media organisations responsible for advertising and projecting the image of PNG as a desired tourism destination.	<ul style="list-style-type: none">• Influence public debate, perception and shaping conversation through the conveyance of news.• Keeping the public informed about issues affecting society locally and abroad.	All Levels of government & industry.
94	National Film Institute (NFI).	Organisation responsible for producing and encouraging the making of and preserving cultural documentaries.	<ul style="list-style-type: none">• Provide archival and database management of existing documentaries and cultural films.• Digitize, restore and preserve Papua New Guinea’s moving images for future referencing and use. Facilitate travel visa for overseas based filming crews intending to do research/documenting the cultural heritage of PNG. <ul style="list-style-type: none">• Streamline information and application process.	All levels of government & Industry.

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Marketing and Advertising				
95	Department of Foreign Affairs (DFAIT) – Public Diplomacy.	Unit responsible for vetting of media, filming, journalist and photography permits. Review of policy for streamlining of procedure.	<ul style="list-style-type: none"> • Journalist, Filming and photography clearance. • Streamline information and application process. 	Goal 7
96	Airlines.	Global General Sales Agents (GSA) offices.	<ul style="list-style-type: none"> • Partner with GSAs for marketing and promotional activities. 	Goals 1, 2
97	Department of Foreign Affairs and Trade – Overseas Mission(s).	High Commissions and Embassies marketing of PNG as a desired tourism destination and of attracting FDIs.	<ul style="list-style-type: none"> • Collaboration and dissemination of tourism information. • Marketing and promotional activities • Global trade event participation. 	Goals 1, 2
Sector Foreign Direct Investment				
98	Investment Promotion Authority (IPA).	Statutory authority responsible for facilitation of FDIs to the tourism sector.	<ul style="list-style-type: none"> • Support the sector to bring investors for tourism development. • Support the sector to market and promote all potential investment opportunities for small to large scale tourism projects. 	Goal 5 or (Goals 3-7)
99	PNG Tourism Promotion Authority (PNGTPA).	Statutory Authority legally responsible for advising government on tourism development and market PNG tourism. Overall public service leader representing the MTAC in the tourism sector policy development and implementation.	<ul style="list-style-type: none"> • Support the sector to bring investors for tourism development. • Support the sector to market and promote all potential investment opportunities for small to large scale tourism projects. • Monitor the progress of investment in the sector. • Ensure incentives are provided to attract and retain long term investments in PNG. • Support the sector to access foreign direct investment opportunities. 	Goal 5 or (Goals 3-7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Foreign Direct Investment				
100	Department of Foreign Affairs and International Trade (DFAIT).	High Commissions and Embassies responsible for marketing PNG as a preferred investment destination.	<ul style="list-style-type: none"> Support the sector to maximise opportunities for investment for new bilateral agreements. Ensure that existing bilateral agreements having tourism priorities or commitments are followed through, operationalised and monitored. 	Ministry & National Level. Goal 5 or (Goals 3-7)
101	Regional Trade Organizations (Pacific Trade and Investment, South Pacific Tourism Organization etc.).	Regional bodies responsible for facilitating, monitoring and developing regional tourism in tandem with PNG tourism authorities.	<ul style="list-style-type: none"> Support the sector to export tourism products. Support the sector for ease of access to information and trade opportunities globally and or regionally. 	Ministry & National Level. Goal 5 or (Goals 3-7)
102	National Trade Office (NTO).	National Trade Office responsible for promoting, facilitating and coordinating PNG trade internationally.	<ul style="list-style-type: none"> Support the sector to export tourism products. Support the sector for ease of access to information and trade opportunities globally and or regionally. 	Ministry & National Level. Goal 5 or (Goals 3-7)
103	Department of Commerce & Industry (DCI).	Parent department of the NTO.	<ul style="list-style-type: none"> Support the sector to export tourism products. Support the sector to ease of access to information and trade opportunities globally and or regionally. 	Ministry & National Level. Goal 5 or (Goals 3-7)
104	Department of Prime Minister & National Executive Council (PM & NEC).	Lead central agency of government responsible to maintain a “whole of government” approach to attracting and coordinating FDI.	<ul style="list-style-type: none"> Support the sector to attract large scale foreign direct investments (joint venture). Support the sector to be equipped and available for large scale foreign direct investments (joint venture). 	Ministry & National Level. Goal 5 or (Goals 3-7)

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Foreign Direct Investment				
105	PNG Business Council (PNGBC)	Peak body consisting of business membership and responsible for advocating the interest of members and facilitate the growth of PNG businesses, including tourism businesses, within and outside the country.	<ul style="list-style-type: none"> • Support the sector to generate revenue. • Provide business advisory services for the sector to participate effectively in existing and or investment opportunities. • Through partnership, assist and promote the sector overseas/nationwide. 	Industry.
106	Chamber of Commerce	Peak body responsible for advancing the cause of businesses operating in the private sector.	<ul style="list-style-type: none"> • Support and amplify the voice of the sector for FDI opportunities within PNG or abroad. • Partner with PNGTIA to create investment profiles for marketing and promotions. • Provide ease of access to information & opportunities for tourism investment (globally/domestically). 	Ministry & National Level.
107	Department of Treasury	Lead central agency responsible for advising on and managing fiscal policy, and for developing policy on FDIs.	<ul style="list-style-type: none"> • Support the sector to review existing FDI policies to allow more opportunities for local and foreign participation regarding investment. 	Ministry & National Level.
108	Internal Revenue Commission (IRC)	Statutory authority responsible for taxation on all matters of investment.	<ul style="list-style-type: none"> • Review existing policies to allow improved tax benefits for tourism investors. • Support the sector to provide tax incentives for all foreign and domestic investors . • Provide ease of access to information for investors. • Simplify processes for tourism investors (foreign/ domestic). 	National & Provincial Level.
				Goal 5 or (Goals 3-7)
				Goal 5 or (Goals 3-7)
				Goal 5 or (Goals 3-7)
				Goal 5 or (Goals 3-7)

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Foreign Direct Investment				
109	Independent Consumer Competition Commission (ICCC).	Government department responsible for regulating the economy of PNG such as pricing, licensing, industry regulation and consumer protection for the price, quality and reliability of goods and services in PNG.	<ul style="list-style-type: none"> • Provide technical advisory and support for the improvement of regulating the pricing of goods and services in the National Tourism industry. 	Goal 6
110	Department of Personnel Management (DPM).	Government department responsible for public service management matters in PNG.	<ul style="list-style-type: none"> • Provide support to the Provincial Administration offices to review the organizational/administrative structures of the provincial tourism officers. 	Goal 6
112	National Agriculture Quarantine and Inspection Authority (NAQIA)	Government department responsible for all import and export of bioproducts for PNG.	<ul style="list-style-type: none"> • Provide technical advisory and administrative support to ease import and export of local PNG animal and plant products whilst maintaining biosecurity against pests and diseases. • Provide technical advisory and administrative support to ease import and export of local PNG made cultural products (artifacts) whilst maintaining biosecurity against pests and diseases. • Provide support in expanding awareness efforts for maintaining biosecurity against pests and diseases regarding the trade of indigenous plants, cultural artifacts and exotic animal products of PNG in the tourism industry. 	Goal 6

Annexure 1: Key Participants of the Tourism Sector

Participants and their Roles				
Participant	Participant Type	Role	Level of Participation	Sector Goal Contribution
Sector Foreign Direct Investment				
113 Department of Finance.	Government department responsible for whole of government financial management, financial policy formulation, financial systems development, maintenance, financial and accounting information processing, financial management and accounting procedures, monitoring of financial performance against the budget and legislative compliance and financial reporting requirements for the whole of Government.	<ul style="list-style-type: none"> • Provide technical advisory and support to MOTAC for the timely and adequate funding support of all funding allocations annually. • Provide technical advisory and support for the development, improvement and management of all financial management systems in the National, Provincial and Local level Governments supporting the Tourism Sector. • Provide support in local awareness for procedures, processes and reporting templates and mechanisms for all financial development, management and reporting under the Constitution, Organic Law and Public Finance Management Act 2016 and all other related legislations, plans and policies. 	National, Provincial and Local Level Governments.	Goal 6

Annexure 2: Resourcing and Capability Plan

Summary by Main Programme Interventions

Link Code	Summary Investment in the Sector. Main Program Interventions	2022 (K' million)	2023 (K' million)	2024 (K' million)	2025 (K' million)	2026 (K' million)	Total Estimated Costs (K' million)	Funding Option
1-3.1.1 1-3.2.2	1. Global & Domestic Marketing, Advertising and Sales.	4.00	6.00	8.00	10.00	10.00	38.00	GOPNG/Donor
1-3.3.3	2. Tourism SME Financial Support Facility.	5.00	15.00	15.00	10.00	10.00	55.00	GOPNG/Donor
1-3.3.3 1-3.4.4	3. Tourism Suppliers and Producers Organizational Capacity Development Program.	6.00	10.00	15.00	20.00	25.00	76.00	GOPNG/Donor
1-3.3.3 1-3.4.4	4. Tourism Product and Services Improvement Program.	4.00	5.00	6.00	10.00	20.00	45.00	GOPNG/Donor
1-3.7.7	5. Sector Governance: Strengthening Leadership, Synergy, and Coordination, and Strengthening Sector Regulations and Standards.	4.00	5.00	6.00	7.00	5.00	27.00	GOPNG/Donor
TOTAL		23.00	41.00	50.00	57.00	70.00	241.00	

Annexure 2: Resourcing and Capability Plan.

Link Code	Main Program Interventions Breakdown	2022 (K' million)	2023 (K' million)	2024 (K' million)	2025 (K' million)	2026 (K' million)	Total Estimated Costs (K' million)	Funding Option
1-3.1.1	1. Global & Domestic Marketing, Advertising and Sales	4.00	6.00	8.00	10.00	10.00	38.00	GOPNG/Donor
1-3.2.2		2.00	2.00	2.00	2.00	2.00	10.00	
	1.2 International Marketing, Advertising & Sales	2.00	4.00	6.00	8.00	8.00	28.00	
1-3.3.3	2. Tourism SME Financial Support Facility	5.00	15.00	15.00	10.00	10.00	55.00	GOPNG/Donor
	2. 1 Tourism SME Financial Guarantee Scheme	3.00	5.00	8.00	5.00	5.00	26.00	
	2. 2 Tourism SME Credit & Sustainability Support against COVID-19	2.00	10.00	7.00	5.00	5.00	29.00	
1-3.3.3	3. Tourism Suppliers & Producer Organisational Capacity Development Program	6.00	10.00	15.00	20.00	25.00	76.00	GOPNG/Donor
1-3.4.4		2.00	4.00	6.00	6.00	8.00	26.00	
		4.00	6.00	9.00	14.00	17.00	50.00	
1-3.3.3	4. Tourism Product Services Improvement Program	4.00	5.00	6.00	10.00	20.00	45.00	GOPNG/Donor
1-3.4.4		1.00	2.00	3.00	4.00	8.00	18.00	
		3.00	3.00	3.00	6.00	12.00	27.00	
1-3.7.7	5. Sector Governance: Leadership, Synergy, & Coordination Strengthening Program (Including Regulation & Standards)	4.00	5.00	6.00	7.00	5.00	27.00	GOPNG/Donor
	5. 1 Leadership, Synergy, Coordination & Regulations - National Level	2.00	2.50	3.00	5.00	3.00	15.50	
	5. 2 Leadership, Synergy, Coordination & Regulations - Provincial Level	2.00	2.50	3.00	2.00	2.00	11.50	
TOTAL		23.00	41.00	50.00	57.00	70.00	241.00	

Annexure 2: Resourcing and Capability Plan.

Investment Reference

PIP No.	Capital Investment Program	Executing Department/Agency	Funding Source
NEW	International and Domestic Marketing and Advertising	TPA	GoPNG/DP
04906	Tourism Sustainable Development Program	TPA	GoPNG/DP
03220	SME Risk Access Financing Facility	DCI	GoPNG/DP/SME
03062	Nationwide SME Development Program	SME	GoPNG/DP/SME
	Credit Guarantee Corporation Program	BPNG	GoPNG/SME
03136	Kokoda Initiative Program	CEPA	GoPNG/DP/KIP
03386	Infrastructure Development Grant	Treasury	GoPNG/ITCS
04940	Tourism Sector Development Program	TPA Development Partner	GoPNG/D



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