

MASTER PLAN ON ASEAN CONNECTIVITY 2025

Mid-Term Review

EXECUTIVE SUMMARY



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The Master Plan on ASEAN Connectivity (MPAC) 2025, adopted by ASEAN Leaders at the 28th / 29th ASEAN Summits in Vientiane, Lao PDR, in September 2016 aims to achieve a *seamlessly and comprehensively connected and integrated ASEAN that will promote competitiveness, inclusiveness, and a greater sense of Community*. It comprises 15 initiatives in the five strategic areas of: (a) Sustainable Infrastructure; (b) Digital Innovation; (c) Seamless Logistics; (d) Regulatory Excellence; and (e) People Mobility.

The objectives of this Mid-Term Review (MTR) of MPAC 2025 are to take stock of the progress guided by the Operational Guide for the Monitoring, Review and Evaluation (MRE) of MPAC 2025; highlight successes and identify challenges in the implementation of MPAC 2025; identify and establish linkages to other ASEAN and external initiatives; and make recommendations for necessary adjustments to boost implementation at both regional and national levels in line with a review of the continued relevance of MPAC 2025. In particular, the relevance is assessed in light of emerging trends in the region, with a particular focus on the ongoing COVID-19 pandemic which has major implications for connectivity.

The key findings include:

MPAC 2025 INITIATIVES COULD TRANSFORM SOCIO-ECONOMIC OUTCOMES IN ASEAN AND EMERGING TRENDS SUCH AS COVID-19 WILL MAKE CONNECTIVITY INCREASINGLY RELEVANT

MPAC 2025 initiatives are aimed at enhancing physical, institutional, or people-to-people connectivity and addressing some of ASEAN's key needs. The potential socio-economic impact of MPAC 2025 varies by initiative and strategic area. Some of the key potential impacts by strategic area are shown in (EXHIBIT 1).

MPAC 2025 initiatives hold significant potential for socio-economic impact

STRATEGIC AREA 1: Sustainable Infrastructure

Establishing a rolling infrastructure pipeline could generate up to **USD35.9 billion** in investment based on the identified projects to date.

Increasing infrastructure productivity could reduce the need for new infrastructure by **USD44–74 billion** annually.¹

Sustainable urbanisation actions could result in savings for 13 major ASEAN cities of up to **USD50 billion** in total.

STRATEGIC AREA 2: Digital Innovation

Digital trade (enabled by strong digital data governance frameworks) could create exports of over **USD100 billion** and support technology adoption benefits of **USD281 billion** by 2030.²

Digital transactions have been shown to support remittance, of which **60% of recipients are women**.³

Digital financial services could lead to **USD295 billion** in new credit, **USD368 billion** in new deposits and a leakage reduction of **USD10 billion** per annum for governments.⁴

STRATEGIC AREA 3: Seamless Logistics

Improving supply chain efficiency **could significantly reduce the average time and cost to export and import.**

Better border facilitation resulting in an assumed 50 percent reduction in the time and costs of transiting across 34 ASEAN borders from 2015 onwards, **could add a 0.05% improvement in ASEAN GDP by 2025.**⁵

STRATEGIC AREA 4: Regulatory Excellence

Harmonisation of standards and the removal of non-tariff barriers are a priority for ASEAN economic integration according to 19% and 34% of Australian and 33% and 51% of American businesses in the region respectively.⁶

Regulatory convergence on NTMs could reduce the regional average price of agricultural products **by 2.5–4%** and the price of industrial products **by 0.5–1.5%**.⁷

STRATEGIC AREA 5: People Mobility

If growth of intra-ASEAN travellers could be increased to match even half the growth experienced in extra-ASEAN travellers, this could result in an **additional 15.5 million annual visitor arrivals** by 2025 compared to a business as usual scenario.⁸

Allowing skilled labour to freely move within ASEAN based on real wage differences has been simulated to lift AMS **GDP by 0.08% on average.**⁹

- 1 Infrastructure productivity: How to save \$1 trillion a year, McKinsey Global Institute, McKinsey & Company, January 2013.
- 2 Hinrich Foundation Digital Trade Research Project, Hinrich Foundation, 2019.
- 3 Financial inclusion and consumer empowerment in Southeast Asia, OECD, 2018.
- 4 Digital finance for all: Powering inclusive growth in emerging economies, McKinsey Global Institute, McKinsey & Company, 2016.
- 5 East Asia and Pacific – Enhancing ASEAN Connectivity Monitoring and Evaluation, World Bank, 2016.
- 6 Company Perspectives, International Trade Centre (ITC), 2016.
- 7 Non-Tariff Barriers (NTBs) in ASEAN and their elimination from a business perspective, EU, ASEAN and Asian Trade Center, 2019.
- 8 Non-Tariff Measures and The Impact of Regulatory Convergence in ASEAN, Knebel C. and Peters R., 2019.
- 9 Economic Impacts of Skilled Labor Mobility within the ASEAN Economic Community. Corong E. and Aguiar A., 2016.

The MTR assessed 10 key trends impacting connectivity in ASEAN including urbanisation, increasing consuming class, stagnant productivity growth, increasing skill gaps, growth in the number of cooperation frameworks involving ASEAN Member States (AMS), rising inequality, increasing stress on biodiversity, the emergence of digital technologies and increasing geostrategic concerns. One of the most pressing challenges in the short-term will be tackling the health and economic implications of the COVID-19 pandemic. The pandemic is likely to have drastic consequences for all ASEAN economies as well as for regional connectivity. AMS could see reductions in pre-COVID-19 growth rates ranging from more than three percentage points to reaching as high as almost 11 percentage points.¹⁰ Given the focus on restrictions of mobility, it could seem that the COVID-19 pandemic creates a significant challenge to connectivity. However, a closer review reveals that connectivity could actually have increasing relevance due to the pandemic. This is due to connectivity being crucial for the region's recovery from COVID-19, as well as strengthening the resilience of AMS to deal with future pandemics. More specifically, the relevant benefits from MPAC 2025 initiatives include:

- 1). Supporting recovery.** Many MPAC 2025 initiatives can have important benefits for economic growth and jobs. For example, driving sustainable infrastructure investment can generate stimulus for economic growth and create jobs to combat the rising unemployment; making travel information easier to find will present a crucial opportunity for travel industry that has been more affected by COVID-19 than any other industry (this could include information of local quarantine measures, risk areas and travel restrictions); and new vocational programmes could be established to specifically focus on workers that have been displaced by the COVID-19 crisis.
- 2). Building resilience.** Many MPAC 2025 initiatives not only promote resilience to better manage future healthcare crises, but also enable individuals and businesses to be better placed to deal with the economic implications of future disease outbreaks. For example, promoting sustainable urbanisation actions in the area of 'health & well-being' can strengthen pandemic resilience in cities; improving the availability of open data can help governments and private sector leverage new data sources to understand the impact of crises as they unfold and help inform more targeted policy efforts; driving digital adoption by MSMEs can build resilience through enabling alternative business models (e.g. deliveries, e-commerce) and facilitating social distancing through remote work (e.g. telecommuting); and expanding financial services allows for remote payment and flexibility of workers to part take in short-term employment in the gig-economy, as well as the targeted use of government welfare programmes.

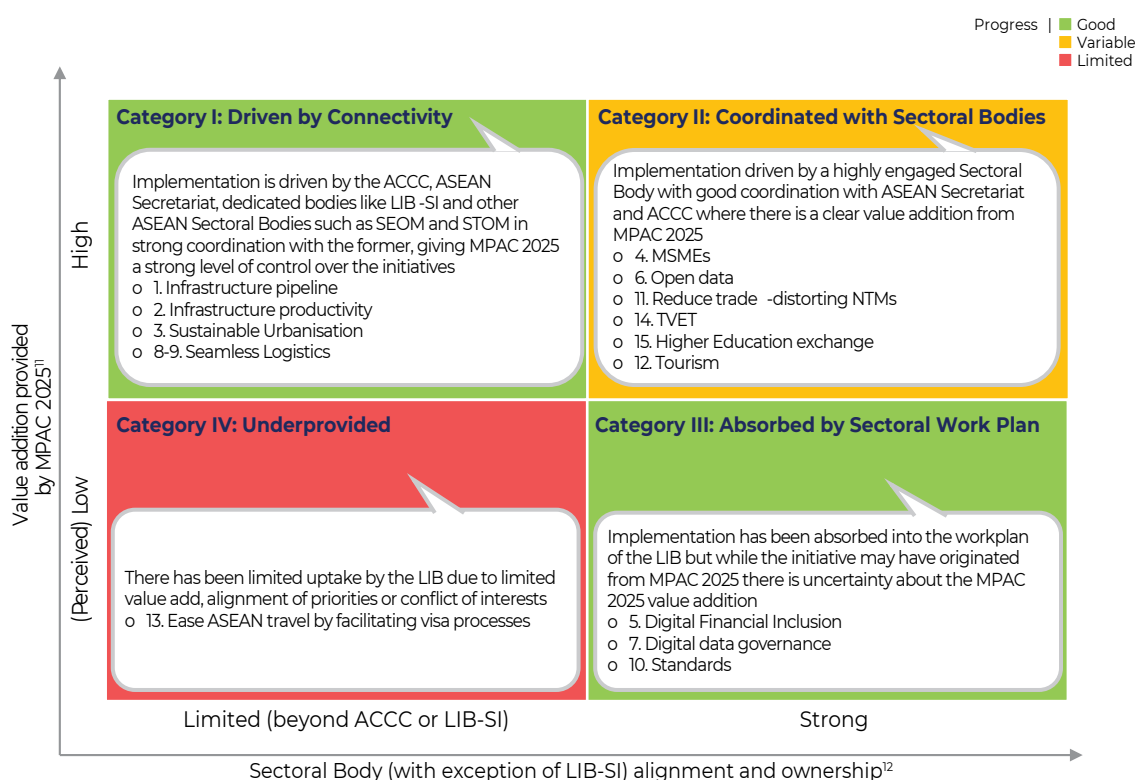
¹⁰ World Economic Outlook, IMF, June 2020

SIGNIFICANT PROGRESS ON MPAC 2025 IMPLEMENTATION HAS BEEN ACHIEVED TO DATE, BUT THERE ARE VARIATIONS BY INITIATIVE

MPAC 2025 has made good overall progress. Of the 15 initiatives, 12 are in the implementation phase 1, and three are still in the planning phase. However, within the 12 that are in the implementation phase, progress has been uneven. The degree of progress is influenced by i) the value addition provided by MPAC 2025 to the priorities of the Lead Implementing Body (LIB) and ii) the level of alignment with and ownership by the LIB and relevant ASEAN Sectoral Bodies; two dimensions that appear to have strong correlation with the degree to which initiatives are moving towards their end objectives. Based on these dimensions, MPAC 2025 initiatives can be categorised into four groups (EXHIBIT 2).

EXHIBIT 2

MPAC 2025 initiatives can be broadly categorised into four groups



SOURCE: MTR Analysis

Initiatives in Category I (Driven by Connectivity) and Category III (Absorbed by sectoral work plan) in particular have made good progress. These initiatives have benefited from clear and strong ownership and while they may face challenges down the line, major roadblocks are not expected. On the other hand, Category II initiatives (Coordinated with Sectoral Bodies) show variable progress with some progressing well but slowly and

¹¹ Refers to whether there is a clear value addition by MPAC 2025 and Connectivity that is readily understood by all stakeholders.

¹² Refers to whether the initiative closely aligns with LIB's priorities and hence whether there is an incentive of the LIB to push implementation

others facing roadblocks, such as lack of funding. Understanding these challenges in detail and developing a strong focus on sectoral and national alignment will be crucial to ensure successful implementation going forward. Category IV (Underprovided) initiative have made the least progress and will require some significant re-evaluation both in terms of their objectives, concepts and implementation plans.

The overall good progress of initiatives in MPAC 2025 can be attributed to a number of factors including a stronger focus as compared to previous plans (MPAC 2025 has 15 initiatives versus 125 in comparison to the original MPAC developed in 2010), specific metrics to measure progress, a rigorous regional MRE process (including three updates per year to ACCC and an annual MRE Meeting with all LIBs and relevant Sectoral Bodies), good access to financing for initiatives, and proactive efforts to engage stakeholders including ASEAN Dialogue Partners (DPs) and Other External Partners (OEPs). However, the analysis also revealed six key challenges currently constraining implementation:

- 1. Sectoral alignment.** Challenges around aligning priorities with relevant ASEAN Sectoral Bodies or identifying a suitable LIB; and uncertainty of how MPAC 2025 can add value to sectoral work plans. Understanding the value addition of MPAC 2025 for the implementation of projects and activities above and beyond activities already carried out by the LIB is particularly crucial. Initiatives that have clearly defined this value addition and the role of MPAC 2025 support are amongst those progressing the fastest.
- 2. National level implementation.** These includes alignment with relevant agencies' priorities in AMS; lack of clarity on roles and limited incentives among National Coordinators (NCs) and National Focal Points (NFPs); and lack of necessary data at the national level. Several ASEAN DPs and OEPs have highlighted limited linkages between support for connectivity and their bilateral programmes (e.g. different infrastructure priorities proposed by their AMS partners to what projects are included in the Initial Pipeline). While the addition of NFPs made by MPAC 2025 over the previous MPAC has the potential to significantly enhance implementation effectiveness, in practice there are some challenges, related to clarity on the roles, challenges in coordination and a lack of incentives to support action. An anonymous survey of NFPs and NCs revealed that while most of them were knowledgeable on MPAC 2025 and were clear on its objectives, only about 60 percent of respondents had a clear understanding of their own roles. Furthermore, only half of respondents stated that they had sufficient time to perform their roles (in addition to their existing duties), and this could become more challenging as initiatives begin national level implementation. Only 55 percent of NFPs reported that their work with MPAC 2025 is recognised and valued by their own government department. Finally, coordination is a challenge with a lack of handover processes (when an NFP or NC is replaced) and only half of respondents saying that there is sufficient coordination between NCs and NFPs in their respective countries.

- 3. Engagement with other connectivity-related initiatives and ASEAN DPs and OEPs.** A detailed analysis of connectivity-related initiatives at the regional or global level, and sub-regional level reveals the growing number of activities in this space. This can create a risk of duplication, but more importantly missed opportunities for collaboration, requiring effective alignment or creating synergies as each initiative has its own mechanism. While engagement with many DPs and OEPs has been strong thus far, there is a need to accelerate efforts, develop more targeted approaches to engage DPs and OEPs, and to engage more frequently with external regional and sub-regional initiatives. While the ACCC engages with DPs and OEPs frequently, most engagements remain at 'high-level' conversations; often next steps on initiative support are not discussed, leading to financing issues for certain initiatives. Additionally, some external stakeholders expressed interest to receive progress update of initiatives more regularly. This would allow them to play a more facilitative role to align the focus on certain initiatives to ensure alignment with their overall technical or financial assistance goals and bilateral efforts in the region. This will become increasingly crucial given the shift in DPs' priorities following COVID-19.
- 4. Need to adapt initiatives to changes in context.** Changes in sectoral priorities and external events (e.g. COVID-19) can create challenges for implementation of certain initiatives, potentially create broader concerns about the perception of key stakeholders of the benefits of connectivity, and risks to continued donor funding with potential changes in priorities. There is a crucial need for adaptability in MPAC 2025 to adjust the implementation of initiatives (potentially removing some initiatives) to reflect this changing context and to develop a clear narrative to engage stakeholders on the continued relevance of MPAC 2025 in light of COVID-19. Beyond COVID-19, MPAC 2025 needs to be agile in order to accommodate changing priorities of LIBs and to cater to the requirements of donors who are increasingly looking for elements of environmental sustainability and inclusiveness in their support programmes.
- 5. Ensuring ownership beyond 2025.** MPAC 2025 has been very successful at sourcing external financing for initiatives from DPs and OEPs. However, it will be crucial to ensure there is a clear plan on financing, skills, and resources to deliver MPAC 2025, as well as support outputs to be implemented post 2025 particularly for initiatives that will require continued maintenance of databases/platforms and technical support. Further, given the complexities around the cross-cutting nature of MPAC 2025 and the increased focus on coordination over the next five years, it will be crucial that the ASEAN Connectivity Division (ACD) and other relevant Divisions in the ASEAN Secretariat (ASEC) are equipped with the adequate resources (e.g. budget and staff) to facilitate such activities.
- 6. Private sector engagement.** Since most initiatives are in early phases of implementation, current engagement with the private sector has been limited. Strengthening coordination with the private sector will be crucial to the success of initiatives, particularly given likely constraints on government finances post COVID-19.

17 RECOMMENDATIONS IN SIX AREAS HAVE BEEN DEVELOPED TO TACKLE THE IDENTIFIED IMPLEMENTATION CHALLENGES

The review identifies six recommendation areas, each of which includes specific actions to address the challenges highlighted by the MTR. National level implementation and sectoral alignment were highlighted by stakeholders as the top areas requiring strengthening. However, it is crucial to understand that all recommendation areas are complementary in nature and should be considered in combination for maximum effect:

EXHIBIT 3

There are 17 recommendations across 6 areas to address the challenges related to MPAC 2025 implementation

Recommendation area	Supporting recommendations	Challenges addressed
Enhance sectoral-level alignment	Augment the existing value addition framework of MPAC 2025 for sectoral bodies	MPAC 2025's value addition
	Increase the frequency and quality of MPAC 2025's engagement with LIBs	Sectoral alignment & Coordination
	Elevate MPAC 2025 narrative to the highest possible level	Sectoral alignment & Coordination
Strengthen in-country implementation	Clearly define roles and responsibilities, in particular of NCs and NFPs	AMS alignment & Coordination
	Obtain support from senior stakeholders to strengthen incentives for implementation by NCs and NFPs	AMS alignment, Coordination & Capacity
	Develop handover mechanism for NFPs	AMS alignment & Coordination
	Develop a best practice guidebook for a coordination mechanism at the national level (for consideration by AMS)	AMS alignment & Coordination
Convene relevant connectivity efforts and engage ASEAN Partners with a more structured approach	Convene the connectivities	External alignment
	Improve consultation with DPs and OEPs on ASEAN Connectivity	External alignment & Financing
	Establish a Connectivity - DPs and OEPs Working Group	External alignment & Financing
	Build projects together by leveraging DPs and OEPs' expertise	External alignment & Financing
Adapt MPAC 2025 initiatives to changing regional context	Conduct review of MPAC 2025 initiative concepts at least once in two years as part of the annual MPAC 2025 MRE process	Theory of change
	Develop a COVID-19 focussed narrative for MPAC 2025	Theory of change
	Ensure environmental sustainability and inclusiveness are embedded within each initiative	Theory of change & Financing
Ensure ownership of MPAC 2025 initiatives	Determine clear ownership for on-going initiatives beyond 2025	Sustainability of output
	Strengthen internal capabilities	Skills & Information gaps
Deepen private sector engagement	Include private sector engagement in KIMs of each initiative	External alignment

- Enhance sectoral-level alignment.** The starting point to improve implementation must be enhancing sectoral alignment. The basis for such alignment is a clear value addition of MPAC 2025 to the implementation activities conducted by LIBs. It is important that MPAC 2025 initiatives have a clearly defined value addition throughout the initiative's lifecycle, from conceptualisation to implementation. MPAC 2025 has been very successful at clearly identifying initiatives that added

value at the time of inception. MPAC 2025 provided initiatives that were not previously included in the sectoral work plan, or at least not to the same depth or breadth but entering implementation, the context may have shifted. The regional context has changed, some LIBs have fully absorbed MPAC 2025 initiatives making them their own or developed new additional initiatives with overlapping goals and objectives. Hence a new, implementation focussed framework of value addition is required. It is also required that this value addition is regularly and consistently tested. As priorities of ASEAN Sectoral Bodies are likely to shift further with other initiatives advancing and the social, political and economic context of the region changing, MPAC 2025 needs to seek close coordination with stakeholders to better understand how the value addition may be impacted. Specific recommendations that could facilitate this involve:

- 1. Augment the existing value addition framework of MPAC 2025;** Develop, clarify, and socialise an extended framework of MPAC 2025 value addition to the implementation of relevant ASEAN Sectoral Bodies' activities. The MTR puts forward a framework that places MPAC 2025 at the 'CORE' of connectivity related activities in ASEAN that will focus on **C**oordination, **O**wnership, **R**esources and **E**mphasis.
 - 2. Increase the frequency and quality of MPAC 2025's engagement with LIBs and relevant ASEAN Sectoral Bodies,** in addition to the annual MPAC 2025 MRE meeting, ensuring that changes in value addition and priorities are captured. For example, the ACCC chair and co-facilitators (or the ACCC member from the same AMS as the LIB chair) of strategic areas could engage current and incoming LIB chairs (up-coming year or even two years in advance) once or twice per year to discuss the value addition and support MPAC 2025 could provide to sectoral work plans and collect feedback for adjustment in MPAC 2025 initiatives.
 - 3. Elevate the MPAC 2025 narrative to the highest possible levels in ASEAN** to communicate importance as well as availability to offer support to strengthen the value addition. This could include more extensive presentations of the objectives and progress of MPAC 2025 to the Joint Consultative Meeting (JCM), explore presenting MPAC 2025 to the ASEAN Economic Ministers (AEM) meeting (noting the high degree of linkages between MPAC 2025 and the ASEAN Economic Community [AEC] Pillar), and other ASEAN Sectoral Ministerial Bodies Meetings. Further, MPAC 2025 should continue to encourage relevant ASEAN Sectoral Bodies under the AEC, ASEAN Political-Security Community (APSC) and ASEAN Socio-Cultural Community (ASCC) Pillars to include MPAC 2025 in their meeting agendas. MPAC 2025, as an important cross-pillar issue, could also be included as a priority agenda for the incoming ASEAN Chair.
- **Strengthen in-country implementation.** It is important to strengthen in-country implementation through ensuring clarity on roles and responsibilities, enabling time/incentives to support implementation, and developing mechanisms to

enhance coordination between key stakeholders such as NCs and NFPs. Specific recommendations that could facilitate this include:

- 4. Clearly define roles and responsibilities, in particular of NCs and NFPs.**
 - 5. Obtain support from senior stakeholders to strengthen incentives for implementation by NCs and NFPs.**
 - 6. Develop a clear handover mechanism for NFPs.**
 - 7. Develop a best practice guidebook for a coordination mechanism at the national level based on best practices from AMS.** While each AMS is different, this guidebook could provide some ideas which AMS may want to consider for strengthening in-country coordination.
- **Convene relevant connectivity efforts and engage ASEAN partners with a more structured approach.** While MPAC 2025 has performed well on securing funding and support for initiatives from DPs and OEPs, the range of different DPs and OEPs could be broadened. The MTR identified a wide range of connectivity related initiatives in the region and MPAC 2025 should increase its efforts to establish linkages and exchanges with these initiatives. Specific recommendations that could facilitate this include:
 - 8. Convene the connectivities** which not only will allow for better coordination between efforts and information exchange, but also firmly position MPAC 2025 at the centre of all connectivity efforts in the region. This could include organising an annual workshop or symposium with representatives of various sub-regional and other global and regional connectivity programmes (e.g. Indonesia–Malaysia–Thailand Growth Triangle [IMT-GT]; Brunei Darussalam–Indonesia–Malaysia–Philippines East ASEAN Growth Area [BIMP-EAGA]) or for ACD representatives to attend meetings of these programmes on a regular basis.
 - 9. Improve the format of consultations with DPs and OEPs.** MPAC 2025 should re-introduce the 2017/2018 format of concept note consultation (or initiative concepts, see recommendation number 12 below). What is needed is an ASEAN driven exchange which allows for discussions around connectivity based on specific feedback from DPs, clear funding priorities of MPAC 2025, challenges and required support for connectivity initiatives.
 - 10. Establish a Connectivity-DPs and OEPs Working Group** which will allow for MPAC 2025 related discussions to move from high-level to technical level providing better inputs for the annual ACCC Consultations with DPs and OEPs on Connectivity.
 - 11. Build projects together by leveraging DPs and OEPs' expertise** more heavily when it comes to the adjustment of initiative implementation and specific projects, increasing the probability of support from partners.
 - **Adapt MPAC 2025 initiatives to changing regional context.** It is necessary to increase the level of flexibility when it comes to the implementation of initiatives as well as mechanisms to update concept notes and inputs and outputs of initiatives

to mirror the evolving needs of ASEAN. Specific recommendations that could facilitate this include:

- 12. Conduct a review of the MPAC 2025 initiative concepts** at least once in two years as part of the annual MPAC 2025 MRE process. The ACD could prepare a living document for each MPAC 2025 initiative that give an overview of the context, objectives, key implementing measures (KIMs), outputs and outcomes of the initiative, alongside an overview of the current progress and next steps. These will be updated as initiatives progress.
 - 13. Develop a COVID-19-focused narrative for MPAC 2025.** Ensure close alignment with AMS' and create synergies with DPs and OEPs' priorities related to COVID-19 and communicate clearly the continued relevance of connectivity in this era. This may involve updating or re-scoping initiatives.
 - 14. Ensure environmental sustainability and inclusiveness are embedded within each initiative.** Re-scope relevant initiatives to ensure that sustainability and inclusiveness are embedded in the overarching objectives of the initiative in order to support ASEAN's overall commitment in promoting environmental sustainability, gender equality, women's economic empowerment and social protection, and to support the focus of some DPs and OEPs.
- **Ensure ownership of MPAC 2025 initiatives.** With MPAC 2025 entering the second half of its lifecycle it will be important to start looking beyond 2025. In particular, it will be crucial to understand how outputs such as databases, platforms and pipelines developed under MPAC 2025 initiatives will be maintained going forward as otherwise their sustainability may not be guaranteed. This involves establishing ownership of outputs amongst key organisations (either within ASEAN, or external to AMS or partner organisations, e.g. multilaterals) as well as finding sources of funding. Specific recommendations that could facilitate this include:
 - 15. Determine clear ownership for on-going initiatives beyond 2025** to make sure there are AMS champions, point-persons and organisations tasked with updating and maintaining outputs.
 - 16. Strengthen internal capabilities** by (a) ensuring ACD has the necessary resources to implement the new 'CORE' value addition framework; and (b) strengthening technical capabilities of ASEC in the long-term. Additionally, it will be crucial for the resources to possess necessary project management skills along with topic expertise to drive implementation.
 - **Deepen private sector engagement.** Since most initiatives are in the early phase of implementation, current engagement with private sector has been limited. It will be important to ensure that private sector engagement is part of KIMs in each initiative going forward to enable the development of practical outputs that are likely to be adopted by relevant industry players. Additionally, ASEAN Business Councils i.e. ASEAN Business Advisory Council and the Joint Business Councils should be (continue to be) invited to participate in the annual ASEAN Connectivity Symposium and, should it be established, also the Connectivity-DPs and OEPs Working Group to create awareness and to communicate the importance of MPAC 2025.



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