



**DEMOCRATIC REPUBLIC OF  
TIMOR-LESTE**

**NATIONAL STRATEGIC PLAN FOR  
THE DEVELOPMENT OF TOURISM  
2023-2030**

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## **Executive summary**

The National Strategic Plan for the Development of Tourism (NSPDT) 2023-2030 is a priority of the VIII Constitutional Government

The **VISION** of the NSPDT 2023-2030 is to develop Timor-Leste as a **unique** tourism destination **in Asia**, with a **Tourism sector that is Inclusive, Sustainable and Responsible**.

The **MISSION** is to move from **Policy into Action** to accomplish the Policy Goals and objectives of the current Strategic Plan.

This Strategic Plan considers the various policy documents by which the Government has reinforced its commitment towards the development of Tourism, namely from the Timor-Leste Strategic Development Plan 2011-2030 to the Policy Growing Tourism to 2030, to the Program of the Eight Constitutional Government, to the Economic Recovery Plan and the Major Planning Options 2023.

Hence, the NSPDT 2023-2030 establishes strategic vectors of intervention and proposed actions to be taken by the Government until 2030, to accelerate and boost the development of Tourism in Timor-Leste, in partnership with all stakeholders, including national institutions, civil society, development partners and private sector.

The Strategic Plan defines **11 strategic vectors** of intervention aligned within the corresponding Pillar of the Tourism Policy for which they contribute. To achieve the outputs proposed **53 priority areas** of intervention are established, as well as **100 priority activities** for each of these areas, to take action and accomplish the established goals.

The NSPDT already includes a Pluriannual Implementation Plan until 2030, presenting a timeline for the priority activities, main responsible and partners. This plan, alongside the structure of Good Governance of the Strategic Plan will ensure an efficient and effective implementation.

## **Abbreviations and Acronyms**

DMETP - Department for Management and Execution of Tourism Policy

CT – Community Tourism

ERP – Economic Recovery Plan

GDHE – General Directorate of Higher Education

GDE – General Directorate of Environment

GDPO – General Directorate of Public Works

GDTC – General Directorate of Transports and Communications

GDT – General Directorate of Tourism

GOP - Grand Options of Planning

DLT - Department of Licensing of Tourism

MAF – Ministry of Agriculture and Fishery

MI- Ministry of Interior

ME – Ministry of Education, Youth and Sports

MF-Ministry of Finance

MFAC – Ministry of Foreign Affairs and Cooperation

MTC – Ministry of Transports and Communications

MTCI – Ministry of Tourism Commerce and Industry

MSA – Ministry of State Administration

MSMMT – Municipal Services of Management Markets and Tourism

MTCI MR – MTCI Municipal Representatives

MCAE – Ministry of Coordination of Economic Activities

MHESC – Ministry of Higher Education, Science and Culture

MPASC - Minister of Parliamentary Affairs and Social Communication

MPT - Minister of Planning and Territory

MPW – Ministry of Public Works

TATL- Tourism Authority of Timor-Leste

NIS – National Institutes of Statistics

NDCCT – National Directorate of Community and Cultural Tourism

NSPDT – National Strategic Plan for the Development of Tourism

NDTD – National Directorate for Tourism Development

NDTMIR – National Directorate for Tourism Marketing and International Relations

NDTEAP – National Directorate for Tourism Activities, Enterprises and Products

NDTPE – National Directorate of Technical and Professional Education

PPP – Public Private Partnership

SDP – Strategic Development Plan

SSE- State Secretary of environment

STA – Special Tourism Area

SEFOPE – State Secretary for Professional Training and Employment

SSCOOP – State Secretary for Cooperatives

TIC – Agency for Information Technology

TUDT –Technical Unit for the Development of Tourism

UNWTO – United Nations World Trade Organizations

# 1. TOURISM IN TIMOR-LESTE

The Government of Timor-Leste has long considered tourism a priority sector for the social and economic development of the country. From the Timor-Leste Strategic Development Plan 2011-2030 to the National Tourism Policy, the Program of the Eight Constitutional Government, the Economic Recovery Plan of Timor-Leste and the Grand Options of Planning 2023. Tourism has always been one of the key potential sectors to boost and diversify the national economy. Also, in alignment with the priority of the Government, it is considered essential that this is an inclusive, sustainable and responsible sector. A sector developed by the people, for the people and with the people of Timor-Leste.

## 2.1. Timor-Leste Strategic Development Plan 2011-2030 (SDP)

The Timor-Leste Strategic Development Plan 2011-2030 (SDP) included Tourism has one of the priority sectors to thrive and expand, thus contributing to economic development, job creation and strengthen society.

Has a sector with high potential to create jobs, the Government of Timor-Leste also indicated the importance of qualification of human resources in this sector, from a new secondary technical education that “...will include formal links with industry and the marketplace to give students direct experience of the workplace both nationally and internationally”<sup>1</sup>. The development of social capital for this sector also foresees offer at higher education level with the creation of a service industry Polytechnic to cover tourism and hospitality, located in Los Palos.

Further, the SDP 2011-2030 regarded the conservation of natural zones important where commercial activity should be limited, but sustainable tourism projects and activities could be included such as cultural, tourism and recreation activities are permitted.

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<sup>1</sup> Timor-Leste Strategic Development Plan 2011-2030, Government of Timor-Leste, 2011

The following niche markets were identified as a target for Tourism sector:

- Eco and marine tourism
- Historic and cultural tourism
- Adventure and sports tourism
- Religious and pilgrimage tourism
- Conference and convention tourism.

This SDP 2011-2030 divided the country into 3 Tourism areas:

**ORIENTAL** (Manatuto, Baucau, Lautem, Viqueque)

**CENTRAL** (Dili, Ainaro, Cova Lima, Manufahi)

**OCIDENTAL** (Liquiça, Ermera, Bobonaro, Oecusse)

**Figure 1: Map of Touristic regions of Timor-Leste**

Fig.1 Mapa das 3 Zonas Turísticas de Timor-Leste segundo o PEDN 2011-2030



fig 4

Source: SDP 2011-2030

Following this division of the country into 3 tourism regions a mapping exercise started in 2015 and it has been updated and completed in early 2023. This mapping presents an assessment of the country's tourism sites and their existing conditions (infrastructures, accommodations, transports and communications, and others). The findings and recommendations of this mapping were considered for the development of the National Strategic Plan for Tourism.

## 2.2. Timor-Leste National Tourism Policy - Growing Tourism to 2030

In 2017, the Timor-Leste National Tourism Policy - Growing Tourism to 2030 was approved and was an additional step of the Government of Timor-Leste towards the development of the

Tourism as a key sector to contribute to the country's social and economic development, whilst contributing to preserving the historical, cultural, and natural patrimony in a responsible manner, enhancing the national identity and engaging the local communities. The Tourism Policy highlights the importance of a coordinated effort of all Tourism stakeholders to this endeavor, calls on the Government, Private sector, and Civil Society to collaborate and partner.

The Tourism Policy sets the path for the development of Tourism in Timor-Leste, based on 5 Priority Pillars. Namely:

### **Pillar Priority**

The Government of Timor-Leste embraces Tourism as a priority for national economic and social development.

A collective work of the Government with all tourism stakeholders is needed so that tourism is a driver of the country's economic and social development, a standard bearer of national pride and the essence of an internationally recognised country brand of Timor-Leste as a travel destination.

### **Pillar Prosperity**

Health, wealth and happiness for the Timorese people should be the outcome of a robust tourism economy.

Tourism represents a significant opportunity to stimulate the Timor-Leste economy and to also ensure that benefits are shared to all areas of the country, improving the prosperity of Timorese people, especially vulnerable groups such as women and youth, and local communities.

### **Pillar People**

People are at the core of Tourism.

The Timorese workforce is to be given skills, knowledge and attitude to support the delivery of quality experiences for all visitors to Timor-Leste.

All Timorese can view themselves as "tourism ambassadors".

### **Pillar Protection**

Conservation, preservation and safeguarding of Timor-Leste's natural environment, cultural heritage and vulnerable segments of society. It also aims to ensure the well-being of international visitors.

### **Pillar Partnership**

The complexity of the tourism ecosystem calls for mobilising broad support from Government, industry, academia, civil society, and the Timorese people to be effective and successful.

These policy pillars were established and contribute to the key minimum goals to be achieved by the Policy by 2030:

- Revenue from overseas tourism and international visitors, excluding carrier receipts (air fares and ferry charges) will be at least US\$150 million per year
- Employment in tourism will exceed 15,000
- At least 200,000 international tourists will visit Timor-Leste annually with an average stay of five days.

Despite the impact of the pandemic in the country's economy, and most notably in the Tourism sector, these goals will be maintained and pursued.

## **2.3. Impact of COVID-19 and Economic Recovery Plan of Timor-Leste**

In 2020 the world was affected by the COVID-19 pandemic, and its impact affected not only the world health panorama, but consequently the economic and social development. Small island states like Timor-Leste were further affected due to their isolated geographical situation and travelling restrictions put in place to safeguard the health of the Timorese people.

In 2020, the international tourist arrivals decreased 93% in Timor-Leste, and by September 2021 they decreased 92%<sup>2</sup>. A sharp contrast to 2019 when, according to the 2019 Tourism

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<sup>2</sup> Source: UNWTO Tourism Dashboard, <https://www.unwto.org/international-tourism-and-covid-19>



Survey<sup>3</sup>, 80,758 international arrivals were issued a class 1 Tourist Visas, and there was a total of 38,074 leisure travellers spending US\$ 23,2 Million. According to the survey, of these leisure travellers the top 3 nationalities were Australian (40%), followed by USA (10%), Indonesian (8%).

The sharp decrease in the touristic supply and demand thus had a non-parallel impact on the sector, and tourism related businesses struggled to maintain their businesses running, retain staff and pay operating costs. The Hotel Owners Association of Timor-Leste (HOTL) estimated that since the beginning of 2020<sup>4</sup> the sales revenue in the hospitality and tourism sector had fallen 95%<sup>5</sup>.

According to the “2020 Economic impact of COVID-19 in MSMEs and Timor-Leste Tourism sector” Asia Foundation survey, the micro, small and medium enterprises (MSMEs) were the most affected. “Of the MSMEs surveyed that primarily depend on international travelers, 43 percent reported closing. Although 84 percent of the MSMEs that serve domestic tourists reported a decline in business, only 18 percent of these had closed.”.

In addition, the impact of Covid-19 increased further the gender inequality gap, with 61% of women who lost their jobs, compared to 39% of men, according to the United Nations report “Timor-Leste Socioeconomic Impact Assessment of Covid-19”. This gap is even more significant in the Tourism sector and, particularly in Timor-Leste, where women account for 62% of the accommodation and food service workforce. Women working in Tourism are also overrepresented as unpaid family workers.

Given the severe impact of the pandemic in Tourism in the country, the Timor-Leste 2020 Economic Recovery Plan (ERP) 2020 highlights the need to allocate additional state budget for this sector, and also indicates recovery measures to be put in place.

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<sup>3</sup> 2019 Survey Travelers to Timor-Leste, Ministry of Tourism, Commerce and Industry, Asia Foundation, and New Zealand Foreign Affairs and Trade

<sup>4</sup> “Timor-Leste 2020 Economic Recovery Plan.”, Government of Timor-Leste, August 2020, [http://timor-leste.gov.tl/wp-content/uploads/2020/08/PT-Plano\\_Recuperacao\\_Economica\\_Timor-Leste-202011.pdf](http://timor-leste.gov.tl/wp-content/uploads/2020/08/PT-Plano_Recuperacao_Economica_Timor-Leste-202011.pdf)

<sup>5</sup> “Timor-Leste 2020 Economic Recovery Plan.”, Government of Timor-Leste, August 2020, [http://timor-leste.gov.tl/wp-content/uploads/2020/10/EN-PRE\\_screen.pdf](http://timor-leste.gov.tl/wp-content/uploads/2020/10/EN-PRE_screen.pdf)

These include as indicated in table below the importance of investing in the quality of human resources; the need to develop rural roads that access various tourism sites, as also indicated in the results of the mapping and assessment of tourism; marketing campaigns; promotion of eco-tourism; and others.

**Figure 3: Proposed measures in ERP for recovery of the Tourism sector**

Sector/Areas	Proposed Measures
Tourism	<ul style="list-style-type: none"> <li>• Create a state-owned company to boost the sector;</li> <li>• Improve vocational education/training in this area by upgrading a tourism school to a high, international level;</li> <li>• Promote the recovery of former administrators' residences and "military buildings" to preserve our heritage and support tourism, potentially with support from Development Partners and UNESCO;</li> <li>• Rehabilitate rural roads that appeal to tourist interest, using labour-intensive public employment programs;</li> <li>• Control (extinction) of crocodiles on the north coast to make beaches safe;</li> <li>• Build/create (Metinaro?) a theme park dedicated to the dissemination and preservation of Timorese culture and crafts;</li> <li>• Promote Ecotourism, combining accommodation with coffee or rice plantations, for example;</li> <li>• With the sector National Strategy approved as a background, define a concrete plan to develop tourism, in stages. Due to its characteristics, start now with the "eastern end", municipalities of Baucau, Viqueque, and Lautém, as the initial priority area for the development of tourism (which will be followed by other areas); within 5-6 years, rehabilitate the Baucau airport to receive charter flights;</li> <li>• Build the already planned National Library-Museum in Dili;</li> <li>• Develop advertising and marketing campaigns about Timor-Leste, to be disseminated abroad, highlighting the natural wealth of the country's seas and mountains.</li> </ul>

Source: Timor-Leste 2020 Economic Recovery Plan.", Government of Timor-Leste, August 2020

## 2. NATIONAL TOURISM STRATEGIC PLAN 2023-2030 FOR TIMOR-LESTE

### 3.1. Methodology

The Timor-Leste Strategic Development Plan 2011-2030 was the first step towards the development of Tourism in the country. This policy development framework highlighted the importance of the sector for the social and economic development of the country and aimed to achieve by 2030 the following impact:

“ (...)

*. A strong and thriving tourism and hospitality industry backed by improved infrastructure, support for local tourism businesses and a skilled local workforce (...)*

*. A high number of sustainable small and micro businesses in growing industry sectors such as tourism, (...)*”.

Additionally, the SDP 2011-2030 assumed the following targets:

**2011-2015 (short term):** focus on developing the human resources of the sector, the development of infrastructures, institutional strengthening and achievement of the Millennium Development Goals

**2016 -2021 (medium term):** Key tourism destinations will be operating with upgraded infrastructure, well established local activities and businesses, and promotional materials

**2021-2030 (long term):** Timor-Leste will have a well-developed tourist industry attracting a large number of international visitors

In 2017, the National Tourism Policy - Growing Tourism to 2030 was another milestone in the policy development for Tourism comprising, as mentioned in previous chapter, 5 Priorities (**p**riority, **p**rosperity, **p**rotection, **p**artnership, **p**eople) – the 5 Ps.

However, the National Strategic Plan for Tourism was yet to be developed and approved. The NSPDT is therefore considered priority for the development of Tourism and to move from policy into action. This priority is clearly stated in the point 4.3 of the Program of the Eight

Constitutional Government, and the priority therein defined have been considered and included for the most part in this Strategic Plan.

Hence, the methodology adopted also included the revision of two preliminary drafts of Tourism strategic documents, one developed in 2016<sup>6</sup> and another one in 2019<sup>7</sup>.

After revision of the existing strategic documents, the final decision was to adopt the proposal of the 2016 strategic document, which prioritised 10 vectors of intervention to guide the framework and activities of the tourism Strategic Plan. The 2016 document also based its structure and recommendations on the initial assessment of tourism sites, and the division of the country into 3 Touristic regions, as indicated in the Timor-Leste SDP 2011-2030. The 10 vectors proposed then were:

1. Definition & regulation of tourist areas/sites
2. Infrastructure development
3. Supply of tourism products and services
4. Sustainable & environmental responsibility
5. Legal, institutional, and business framework
6. International institutional framework
7. Human Resources
8. Support to tourism entrepreneurship
9. Engage people
10. Marketing destination

These vectors redesigned, updated and adjusted and new ones created and included. In the next section of this Strategic Plan the priority vectors of intervention will be presented further.

The methodology adopted also aims to respond to the priorities of the Government and was based on a consultative process with institutional partners, namely with other line ministries and municipalities, development partners, private sector and professional associations.

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<sup>6</sup> Ministry of Tourism, Arts & Culture, 2016, Timor-Leste, Draft of the “Plano Estratégico de Desenvolvimento do Turismo de Timor-Leste”.

<sup>7</sup> Ministry of Tourism, Arts & Culture with support of USAID’s Tourism for All Project, 2019, Timor-Leste, Draft “Timor-Leste National Tourism Development Strategy, Strategy and Implementation Framework.

The consultations held both at sectoral and municipal level were most welcomed by all parties and confirmed the need to establish regular communication and collaboration to advance the National Strategic Plan for Tourism.

As mentioned previously, the Strategic Plan was presented to several international development partners and received general positive feedback, including from the United National World Tourism Organization.

In addition, an inventory of programs, projects and activities was conducted by the General Directorate of Tourism in 2021 and helped assess the accomplishments and what remains to be implemented. Further, this exercise served to compile lessons learned to feed into the implementation plan of the Tourism Strategic Plan.

The NSPDT was presented and discussed in the Interministerial Commission, in the Interministerial Technical Unit and to the Integrated Planning Center, thus having gathered political and technical consensus.

### **3.2. Strategic vectors of intervention of the National Strategic Plan for the Development of Tourism 2023-2030**

The National Strategic Plan for Tourism (NSPDT) 2023-2030 identifies 11 strategic vectors considered a priority for the development of Tourism in Timor-Leste and for the achievement of the 5 Ps of the Tourism Policy.

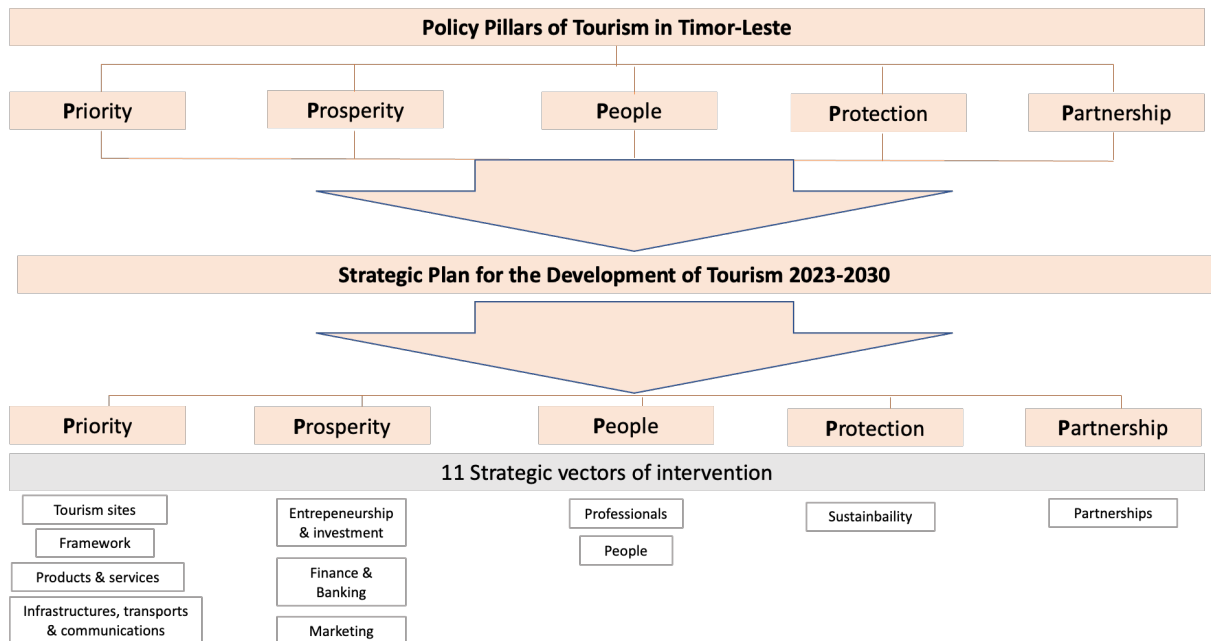
Hence, the 11 strategic vectors of the Tourism Strategic Plan are as follows:

**Figure 4: Strategic Vectors of the NSPDT 2023-2030**

<b>PILLAR</b>	<b>STRATEGIC VECTOR OF THE NSPDT 2023-2030</b>
<b>PRIORITY</b>	Tourism sites Framework (institutional, legal and good governance) Products and Services

	Infrastructures, transports, and communications
<b>PROSPERITY</b>	Entrepreneurship and Investment Banking and Finance Marketing
<b>PEOPLE</b>	Tourism Professionals and Qualification People
<b>PROTECTION</b>	Sustainability
<b>PARTNERSHIPS</b>	Partnerships

**Figure 5: Pillars and Strategic Vectors of Tourism**



The following section of this chapter will explain in detail each of the strategic vectors and the priority areas identified for each.

### **3.2.1. Developing the tourism sites**

The identity of the Timorese people is rich in its history, culture, and pristine nature. This creates unique experiences for tourists and increases the competitiveness and attractiveness of Timor-Leste as a tourist destination.

For the development of Tourism in the country it is crucial to identify and map the tourism sites. The update and finalization of the tourism mapping was completed in early 2023 and supports the decision making of the Government to prioritize an inter-ministerial intervention for the development of the supporting equipments and support services to develop the tourism sites, whilst preserving them, protecting the national heritage, and benefiting the local communities across the country.

This mapping exercise was initiated in 2015 and done according to the division of the country into 3 touristic regions, as per SDP 2011-2030:

**ORIENTAL** (Manatuto, Baucau, Lautem, Viqueque)

**CENTRAL** (Dili, Ainaro, Cova Lima, Manufahi)

**WESTERN** (Liquiça, Ermera, Bobonaro, Oecusse)

The findings and recommendations of this mapping refer to the identification of the country's numerous tourism sites, per touristic region, and their existing conditions (infrastructures, accommodations, transports and communications, and others).

The regulation of tourism areas, its management and use, is also vital. The establishment of special tourism areas will be crucial, and they will be created to protect the tourism sites, its environment and communities. The tourism projects therein inserted will respect the sites in a responsible, sustainable and inclusive manner, that benefits the local communities. The establishment of these areas will also allow for definition of the type and location within it of sustainable infrastructures, equipment's and services and the Tourism Carrying Capacity, amongst other elements. They are to be developed in coordination with the Ministry of

Territory Planning, State Secretary for Environment, with the respective Municipalities, Ministry of Agriculture and Fishery and other relevant institutions.

The Special Tourism Areas to be established until end of 2025 will be:

- The Nino Konis Santana Park, Timor-Leste first protected area of and considered in the SDP 2011-2030 the “ (...) *centrepiece of Timor-Leste’s tourism strategy*”, which includes several marine protected areas such as Com, Tututala and Jaco Island.
- The Island of Atauro, for which the general regulation for its Territory development plan has already been developed and approved<sup>8</sup>, and the MTCI is already in the stage of elaborating a development plan for Atauro as an ecotourism destination based on that Plan. MTCI is already in the process of finalising the regulation for this special Tourism Area, in collaboration with the Municipality of Atauro.
- Tatamailau, or Mount Ramelau, which is the highest mountain in Timor-Leste, with a beautiful and pristine nature, ideal for hiking enthusiasts and the practice of bird watching. It is also an important faith-based destination as the mountain is dedicated to the Virgin Mary to whom a statue was erected and where there is an annual pilgrimage for worship of the Virgen Mary of Ramelau.
- Special Administrative Region Oecusse-Ambeno (RAEOA), where a special economic zone was created and due to their location and interest to establish terrestrial tourism routes.

The number of Special Tourism Areas will be expanded later, and the mid-term evaluation of the Strategy in 2026 will assist in the definition of the next STA’s to be created, based on main findings of the first four STA’s, lessons learned and success stories.

Additionally, the MTCI will digitalize and secure all the information and findings of the tourism sites and make them easily accessible for policy makers, tourists, private sector and other relevant stakeholders.

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<sup>8</sup> Decree-Law 10/2016, 4 May, General regulation of the Territory Use Plan



Based on the mapping of the tourism landmarks, several tourism routes will be developed or further enhanced (nature, historical, faith-based, coffee, wellness) to diversify the tourism offer and for the industry to contribute for the development of all areas of the country and its local communities. This type of tourism offer also attracts a wider range of tourists and markets that enjoy travelling in search of experiences under a unified theme and an itinerary that combines several locations, activities and services under that theme.

The identification of tourism sites and special tourism areas is therefore a crucial step for the development of the Strategic Plan and remaining strategic vectors of intervention, namely for later vectors such as the development of tourism products and services, marketing and others.

Pillar	Strategic Vector	Priority
Priority	1. Tourism Sites	1.1.Completion of the identification of tourism sites and their supporting signage, equipment and services 1.2.Creation and establishment of Special Tourism Areas: Nino Konis Santana Park, Atauro, Ramelau and RAEOA.

### 3.2.2. Strengthening the institutional, legal and good governance framework

The development of a solid legal and institutional framework adjusted to the needs and context of the country and its institutions will support the establishment of a strong business environment for Tourism to thrive in Timor-Leste.

Strengthening the capacity of the Ministry of Tourism, Commerce and Industry (MTCI), of the Tourism Directorates is therefore vital for the success of a National Strategic Plan for Tourism.

This will require emphasis on capacity building program of the staff, consolidation of communication lines and coordination mechanism with other line directorates, municipal authorities and various stakeholders, and a consolidation of the Monitoring and Evaluation (M&E) and reporting mechanisms.

The Directorate General of Tourism (DGT) will seek to further enhance the capacity of its staff and of the national directorates, promoting bilateral and south-south cooperation where its staff can benefit from working in partner Tourism Ministries or partner organisations in temporary deployment assignments, but also technical cooperation where they can learn from the experience and best practices of other organizations (as foreseen later in Pillar Partnership, vector 10. Partnerships).

The strengthening of the capacity of MTCI will also include mentoring sessions between its directorates to inform and update colleagues on latest development of each directorate and department, as well as the development of training sessions of latest guidelines and plans developed within each area, so that there is amongst all and overview of ongoing activities and how the several areas of the Tourism directorates connect and support each other.

Precedence will be given to conduct a capacity assessment of the Tourism Directorates to develop a pluriannual capacity building plan based on the findings and recommendations of this assessment. It will also support the identification of training opportunities that respond to the directorates needs.

The creation of the Tourism Authority of Timor-Leste (TATL) is a priority and was proposed in the in the 2020 ERP. This Authority will bring together in a single entity all the competences, duties and institutional responsibilities related to regulation, promotion and marketing, enhancement of the business environment and sustainability of tourism, from supply to demand. This will be done in coordination with development partners, civil society and the private sector (national and international, at home and abroad). The Authority's mandate will include, for example, the management of the Tourism Fund, the management of the Pousadas de Timor business model(s), other businesses in the tourism sector, from Public-Private Partnerships, Joint-ventures, BOT, privatization and direct investment, among others.

The Authority will also include a Tourism Advisory Board, which will be established and led by ANTTL and will serve as an advisory body and forum for discussion on tourism policies and issues. Members representing diverse organizations and development partners, as well as private and civil society organizations which represent a wide range of products and services, areas of interest to the industry including marketing, and of locations across the country. This

will also be the forum to discuss the progress of the Strategic Plan and the partnerships established in this area. The legislation creating this authority is included in the activities of this vector.

In addition, to respond to identified needs, such as the existence of comprehensive and harmonized tourism statistics, ANTTL will have a Statistics Department and Tourism Observatory. Thus, the creation of this Department is an urgent need to have consistent, harmonized, specialized and complete statistical data on the sector that, at the moment, is not in the hands of the DGT, and which relies heavily on the support of partners, from national institutions to development partners. However, to support its work, decision-making and development of programs and policies in the Tourism sector, ANTTL needs to be able to collect and analyze all data from existing partners, establish new data collection mechanisms where they do not yet exist or need improvement, create an M&E mechanism, data analysis and provide a basis for proposed policies, programs and activities.

The objective is to meet the UN standards for measuring tourism (Tourism Satellite Account), through data that meet a common international and standardized conceptual framework, generating economic data comparable to tourism. In addition, an annual statistical bulletin will be published with key sector data for various partners and the data will be available online in a simple way, for example in the form of a Tourism Panel.

This data will also be essential for the M&E system that will be put in place to track the progress of the Strategic Plan, including an annual report, as well as a rapid mid-term review (2025) and a final review. of the Strategic Plan (2030).

The role of the DGT in capacitating other national stakeholders will be crucial. The DGT will capacitate partners such as the staff of the Municipal Services for Management of Market and Tourism, and the regional representatives of the MTCI, on programs such as the Community Tourism Program, new legislation and initiatives, and others. Also, dissemination of information to private sector, civil society and local communities will support greatly the framework of the tourism sector.

The municipal partners will greatly support the implementation of the National Strategic Plan for Tourism at the local level, as verified during the participatory and consultative process of

development of this Strategic Plan. To this end, a clear definition of tasks, and tools of collaboration between these stakeholders will further enhance the advancement of this Strategic Plan. A working group will be established to maintain this regular collaboration and to ensure that the local perspective and inputs contribute to the development of the tourism sector.

The development and thrive of Tourism in Timor-Leste, particularly in the aftermath of the pandemic, will require the establishment of a Good Governance structure, between the MTCI and other line ministries, but also structures and arrangements that connect with local power, local implementation, with private sector, international development partners and civil society.

The Good Governance bodies that will be put in place for the advancement of the Strategic Plan are:

- *High-level inter-ministerial Commission for the Development of Tourism* (Commission),<sup>9</sup> that was established in 2019<sup>9</sup> to contribute to the advancement of the National Tourism Policy - Growing Tourism to 2030, and for the much-needed intersectoral and inter-ministerial coordination and collaboration.
- *Inter-Ministerial Technical Unit for Tourism*, led by MTCI, focuses on inter-sectoral technical and operational issues related to Strategic Plan, and implementation plan. This working group follows and monitors the progress of the Tourism Strategic Plan and will create task groups by area, such as education, municipalities, sustainability, investment, and others. The task groups will meet to solve the technical and operational matters related to their areas. External entities will be invited on a need-based approach. The rules and norms of this Technical Unit already in place will be revised and adjusted to the needs of the Strategic Plan and its implementation plan.
- *Working group with municipalities*, mentioned previously to allow for coordination and joint implementation of the Tourism Strategic Plan at the local level.
- Other *had-hoc groups* that need to be created to respond to specific tasks and issues that might arise, to be led by the Ministry with the mandate of Tourism

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<sup>9</sup> Despacho No.024/PM/VI/2019, Jornal de Republica, Timor-Leste

The legal framework will enable and support the needs of the sector for the functioning of tourism businesses, preservation of environment and heritage, institutional strengthening. Some of the legislation includes<sup>10</sup>:

- The Tourism Law which indicates the base for organization, monitoring, oversight, promotions of the tourist activities
- The Decree-Law of the Tourism Fund (later explained in Pillar Prosperity, Vector 6. Entrepreneurship and Investment)
- The Decree-Law of the Tourism Authority of Timor-Leste
- Decree-law on retribution of tourism economic activities
- Ministerial Diploma on Community Tourism
- Decree(s) for the creation of Special Tourism Areas
- Others

Pillar	Strategic Vector	Priority
Priority	2. Framework	2.1. Institutional 2.2. Good Governance Structure 2.3. Legislation

### 3.2.3. Developing Tourism Products and Services

The Timor-Leste tourism offer of products and services can be varied and interest a wide range of markets and tourists. From nature, maritime sports, cultural, historical, and several others. The richness of the country is vast, its nature pristine and diverse, beautiful historical and cultural heritage. All these resources greatly contribute for the potential of this sector.

The Government of Timor-Leste will play a key role in Tourism product and service development based on the upgrade and completion of the Tourism Sites mapping completed in

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<sup>10</sup> Complete list of legislation in Annex 1 – Implementation Plan of the National Strategy for Tourism

early 2023. Such mapping allows for an extensive assessment of the existing tourism sites across the country and develop several types of tourism products and services.

One of the priorities is to develop the Timor-Leste Tourism Routes for the several types of tourism products that the country can offer to visitors and to enhance the quality of these products and services. From nature activities related to its maritime tourism, to natural parks, trekking, mountain biking, cultural, resistance, faith-based and others. The tourism routes will target specific audiences and their interests and aspirations around a unified theme, and the marketing campaigns will communicate to these audiences (Pillar Prosperity, Vector 6. Marketing). There are already some existing programs developing this type of product, such as the case of the Mambe Kafe Trail (Coffee Trail), “Jornada de Resistência” (historical trail of the resistance history) and the “Five Summits” (Mount Ramelau, Matebian, Mt. Maubohilau, Kablaki and Datoi-Tapo) for hiking and trekking lovers.

Hence, the General Directorate of Tourism will collaborate extensively with several national directorates, municipalities, and other tourism development partners to ensure that these routes and associated tourism sites are prepared with the necessary set of infrastructures, services, equipment. This endeavor requires an extensive resource mobilization work and collaboration but it’s crucial for the relaunch of the Tourism Sector in Timor-Leste, as the quality and uniqueness of these products and services are vital for visitors to enjoy their experience and recommend it.

As mentioned earlier in the Strategic Vector Tourism Sites, until end of 2025 four Special Tourism Areas (STA) will be created and established based on the findings of the Tourism Mapping and this is essential to protect these areas, as they are located in nature protected areas and to ensure that the tourism products and services delivered in those areas respect the environment and contribute to their conservation. The definition of these areas needs to be done in close work with other line ministries such as the Ministry of Planning and Territory, State Secretary of Environment, complying with the Strategic Plan for Territorial Planning of Timor-Leste and in coordination with the Municipalities.

In addition to the Tourism routes, there will be great efforts for the maintenance, growth, and improvement of the ongoing Community Tourism Program. This type of program will contribute for a positive impact of the tourism sector around the country, benefiting socially

and economically the local communities and spreading the offer of tourism products and services to many locations. This type of tourism product is especially important to support women's empowerment and entrepreneurship at the community level, and to increase women's knowledge of Tourism.

The potential benefits of this type of Tourism are even greater in a Small Island development State as Timor-Leste and aligns with international priorities and standards of several international organizations, including ASEAN. In 2021, the implementation of this program was initiated in 5 pilot sukos: Uaimori (Viqueque, Uailili (Baucau), Selo Craic (Aileu), Maubisse and Nunu Mogue (Ainaro). In 2022 it was expanded to 13 sukos. It is expected that the program will expand and as per implementation plan of the strategy it should be implemented in sukos in all municipalities until 2030.

For the development of this type of tourism, institutional cooperation with the State Secretariat for Cooperatives is crucial given the importance of the cooperatives to gather workers operating in the same activity and which also includes associations in the field of tourism, both at the central and decentralized levels. Creating synergies with existing associations can enhance the positive impact of the Community Tourism Programme.

Other national institutions to cooperate with for the Community Tourism Program may include the State Secretariat for Equality and Inclusion, SEFOPE for specific training and institutions in the environmental area, among others.

Events Tourism is something for which Timor-Leste is already appreciated, particularly related to big events such as the Dili Marathon or the Tour Timor, which Timor is already known for, and these types of events will support the relaunch of the tourism in the aftermath of the covid-19 pandemic. It is also a type of tourism that is highly appreciated within the country, being a potential for growth of domestic tourism, namely for faith-based events such as the annual pilgrimage to Tatamailau (Mount Ramelau), the annual pilgrimage to the Sanctuary of Our Lady of Aitara, and the "Senhor Morto" in Oecusse.

The cultural and gastronomy festivals will also be an important for the development of events tourism.

From the already known and established events to new ones already being studied, such as an EXPO of Timor-Leste, national and international meetings and exhibitions, traditional game events, and others, an annual calendar and an extensive resource mobilization program will be established to fund and support these events.

Another priority for product development will be the Pousadas of Timor, combining a mix of boutique hotel experience with historical heritage, as the buildings of the pousadas have historical relevance which the guests will be able to experience within a modern, select, comfortable environment.

The complete experience will be framed within the surrounding touristic offer, such as discovery of close by nature areas, historical sites, sports, wellness with SPA services offer within the pousadas using locally developed products. For this, it will be required to combine efforts with the private sector to preserve this historical patrimonial heritage but also contribute to its conservation and to improve the quality of the services they offer.

A study on the best business(es) model(s) for the Pousadas will need to be developed, to look into the best scenarios for the development of these hotels.

Currently, some Pousadas have been rehabilitated, but additional investment and time is needed to significantly improve accommodation conditions, as well as review the current conditions and contracts of the Pousadas. After carrying out the study and opting for the best business model, the conditions of the future contracts to be signed with the private sector will include, for instance, the need to preserve the building's assets, as well as the possibility of expanding the number of rooms available, and others. This will be included in the legislation to be developed for this purpose.

Another condition is to include a Health Post for the visitors in each of the Pousadas, as is the example of the Pousada de Baucau, which is yet to conclude its health post<sup>11</sup>. This type of support structure will weight even more with Tourists wanting to be reassured that they will have access to quality health service.

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<sup>11</sup> Timor-Leste Economic Recovery Plan, Government of Timor-Leste, Timor-Leste, 2020



Gastronomy tourism is a fundamental component of the touristic experience, enhancing the discovery of the country and inviting all the senses to participate and enjoy it. It is one of the ways to know a country and its culture. Gastronomy in Timor-Leste needs to be further developed and to complement the rest of the tourism experience. The local culinary needs to be offered with quality, proper health and hygiene conditions to visitors, but also with innovation of products, whilst maintaining the national culinary identity. Combining this with locally produced quality drinks will enhance further this type of experience.

Programs like community tourism will support the development of the culinary offer by the local communities and already include cooking lessons. Other type of touristic gastronomic offer to be developed will consist of culinary classes and visits to the markets where tourists can see and know the local ingredients used.

Also, the development of the tourism curriculum to include training in this area and the upgrade of the educational infrastructures to accommodate for the needs of this type of training (Pillar People, vector 7. Professionals) will be established.

Other ongoing programs will continue, improve and expand such as is the case of the already mentioned faith-based events and of Jornada da Resistência, as well as visit to Parque Dom Boaventura. Another milestone of a touristic offer is Dili Historical City. Dili is still the biggest entry point into Timor-Leste and in it an immense and diverse historical heritage can be found, from the Portuguese Colonial history to the Japanese invasion, the Timor Resistance and the independence.

Another service to be continued and improved is the support with information to Tourism at the Tourism Information Centers. Currently the Dili TIC is already working but needs an upgrade in the premises and in the type of information provided to the visitors, namely with the inclusion of interactive technology that allows the tourist to access online to reliable information on tourism activities and make reservations with trusted accommodations, tour guides, and so on. The priority until 2025 is to build another 3 TICS, in Baucau and Batugade, Dili International Airport, with the same type of modern, interactive project as is the expected upgrade of the Dili TIC.

An important service to be provided is information to tourists about health, safety and security in Timor-Leste. This information will be shared on timorleste.tl, social networks and leaflets in CITs, accommodation, restaurants and other businesses related to tourism. They will include information on safer means of transport, road safety, general precautionary measures and, specifically, the development of campaigns to educate people about crocodiles and to prevent and reduce the risk of attacks.

Pillar	Strategic Vector	Priority
Priority	3. Products and services	3.1. Tourism Routes 3.2. Special Tourism Areas 3.3. Community Tourism Program 3.4. Pousadas de Timor 3.5. Gastronomy 3.6. Events tourism 3.7. Ongoing programs: faith based events, Jornada da Resistência, eco-tourism, Parque Dom Boaventura, Dili Historical City 3.8. Tourism Information Centers 3.9. Health, safety and security information

### 3.2.4. Developing the infrastructures, transports and communications

For the development of the Tourism sector in Timor-Leste, it is vital that the necessary infrastructures, transports, and communications, are in place and supporting the businesses and people.

Inter-ministerial coordination and planning is essential to successfully develop the construction and rehabilitation projects that prioritise and sustain tourism development, such as roads, airports, ports, telecommunications, and others. The investment in tourism infrastructures, transports and communications requires public and private sector investment and should be

prioritised in key tourism destinations of the country, to ensure the greatest return and helps support sustainable tourist experiences.

There has been progress in this area as several of these projects are already foreseen in the Timor-Leste National Development Plan 2011-2030, some completed or initiated. For instance, main highways completed, or the Dili port passenger terminal, expansion of the Dili International airport amongst others.

Regular and institutional collaboration will therefore be essential to prioritise the development of infrastructures, transports and communications that have great impact on the tourism sector, including the multiannual prioritisation of infrastructures that greatly impact on vital programs, such as the Community Tourism Program, access to tourism destinations and special tourism areas. Line ministries multiannual and annual action plans and their budgetary planning can then be based on these identified and agreed needs.

**The development of tourism infrastructures, transports and communications will have to ensure that they are inclusive and accessibility to all is guaranteed, thus ensuring that the rights of people with physical disabilities are respected.**

By road, high-ways and national roads will benefit the Tourism industry and the landmarks across the country. Some have been already completed (Dili-Baucau, Suai, Maubara-Liquiça, Tututala) and others initiated, and they facilitate the travelling within the country.

There is, however, an additional need to develop rural roads and trails to create and improve accessibility to tourist sites and local communities, increasing, for instance, the potential of the community tourism program, tourist routes, nature tourism. Most of these stretches of rural roads are identified in the Tourism mapping. The development of these infrastructures to increase, improve and diversify the road and trails accessibilities to tourist destinations where is most needed. Private operators will be able to improve the offer of tours with quality buses, taking tourists to their intended destination, decreasing the current difficulty and lack of comfort of many of the existing transport options. Tourists will be better able to reach nature tourism sites, for example, with trails. Within cities, some transport options should be considered and supported and they include better and safer taxi services, minibuses, tum-tum and others.

By water, some infrastructures have been developed such as the Passenger Terminal of the Dili Port, but more need to be completed around the country for domestic cruises Timor, such as floating marinas in Com and Jaco<sup>12</sup>. The functioning of the Nakroma is also a progress for the water transport between Dili-Atauro and Dili-Oecuesse.

It is necessary to work with tour operators and private sector to create the conditions for regular and attractive cruises to the country. Cruise regulation and Standard Operation Procedures, and regulation for water sports and recreational needs to be developed and approved, to ensure that only those companies that comply with robust and defined regulations can operate in Timorese waters. This will be an additional guaranty that this type of tourism will benefit the country and its people, as well as the passengers on board. Even more important given the unique and pristine waters of the country integrated in the maritime area of the Coral Triangle.

By air, the price of international flights is still seriously undermining Timor's competitiveness as a tourist destination. Currently, high flight prices are the result of a limited number of companies authorized to operate. In addition, post-pandemic, only the Dili-Darwin route operates with an airline with an air services agreement, while the remaining destinations operate with charter flights. With the pandemic, the number of countries accepting flights decreased, but is already increasing since the end of 2021.

The Government of Timor-Leste together with private sector partners in the short and medium term should work on more efficient options to lower ticket prices and resume and expand tourism activity in the country.

One of the endeavors already underway is the development of the international airport in Dili, which is expected to be fully completed by the end of 2025/2026, with the completion of the expansion of the runway and a new passenger terminal. This will allow for larger planes to land, more direct international connections can therefore be operated by airlines with large connecting hubs, as well as a greater number of flights and airport operating hours. The number of direct flights from remote destinations may increase, also allowing for a diversity of target markets for tourism in Timor.

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<sup>12</sup> Mapping of Timor-Leste tourism sites, 2022, MTCI and UNTL

Also, and as indicated in the Economic Recovery Plan, the project to rehabilitate Baucau Airport to receive charter flights will be resumed.

Another effort by the Government of Timor-Leste will be to advocate for the removal of travel advisories from Timor. In Timor-Leste's recovery plan, it is also indicated as essential to re-establish air services to Australia and Singapore. Regular flights to Australia have resumed, as well as flights to Singapore.

Additionally, the aim is to obtain from IATA (Associação Internacional de Transportes Aéreos) the code to be able to issue tickets for international flights from Timor-Leste. Thus, tourism agencies already operating in Timor-Leste gain access to the possibility of issuance international tickets without resorting to third countries, which contributes to the reduction of ticket prices and also makes it possible for tourists to make an online reservation in anywhere in the world for a flight to Timor.

Other mechanisms and forms of cooperation will be analyzed and negotiated.

In terms of communications, it is important to highlight the positive impact of the installation of fiber optics in the country for Tourism, benefiting companies and tourists. The tender has already been approved by the government for the purchase and installation of fiber optic cable.

<b>Pillar</b>	<b>Strategic Vector</b>	<b>Priority</b>
<b>Priority</b>	4. Infrastructures, Transports and Communications	4.1. By road 4.2. By water 4.3. By air

### **3.2.5. Supporting entrepreneurship and investment**

The support to the investment in tourism will be vital to relaunch the sector and for its prosperity, to generate growing interest of entrepreneurs and investors, particularly national ones.

To this end, the MTCI, in collaboration with other line ministries responsible, for instance, for areas such as finance will lead a coordinated effort to develop incentive packages, including financial support, fiscal benefits, and others. Advisory support and fiscal benefits already provided by entities such as Tradeinvest will continue, but now sustained with a more complete set of information, rules and regulations to access, for instance, support to business in Tourism.

Furthermore, with the completion of the mapping of tourist sites and the establishment of the Special Tourism Areas, it will be possible to identify a set of potential types of investments throughout the country for this sector. These projects presented will be assessed on a case-by-case basis by ATTL, together with other relevant institutions. They must respect the strategic plan for territory planning, obey the criteria for a positive environmental impact assessment and the conditions to be considered an investment that actually contributes to a tourism sector in Timor-Leste as a unique, inclusive, sustainable and responsible destination.

These incentive programs will be managed by the Tourism Fund of the Tourism Authority of Timor-Leste, and its mandate will be to mobilize and manage resources to support the initiatives and projects that contribute to the country's development as a tourist destination. Therefore, it will be necessary to develop and approve, as a matter of priority, legislation for the Tourism Fund.

The Tourism Fund will develop the norms for incentive packages for tourism entrepreneurs, which includes namely: eligibility and scoring criteria for applicants, such as to be located within one of the Special Tourism Areas or Tourism Routes; committee for the assessment of these projects, and others. Additional factors that will be pondered are the number of jobs facilitated, stage of the business cycle, sustainability component, and others. This will be achieved in a coordinated effort with development partners and private sector. From additional financial support to add to the Tourism Fund, to special conditions of microcredit lines for micro, small and medium enterprises, to Public Private Partnerships (PPP's). The scope of cooperation is diverse and much needed.

Also, special programs to support women and youth entrepreneurship will be created and prioritized. As mentioned earlier, women account for a high percentage of the tourism labor force: 62% of the accommodation and food service workforce. Women working in Tourism are also overrepresented as unpaid family workers. The Government of Timor-Leste will support the empowering of women tourism business owners and contributing to revert the scenario of lower-level jobs and salary gap. By developing special programs of support to women entrepreneurs for the set-up of their businesses, including lines of credit, special fiscal benefits and others, women role in the Tourism sector will shift and improve.

The median age of the population is 19.6, reflecting a very young country where 39% of the population is between 0 and 14 years old, 53% is between 15 and 59 years old and only 8% is over<sup>13</sup>. Such demographics highlight the importance to support youth and, in the case of the Tourism Strategic Plan that translates also into special support to young entrepreneurs, similarly to the support to women entrepreneurs.

The support to these vulnerable groups will also be contemplated and complemented with measures in other areas such as education, further explained in other sectors (Pillar People, vector Professionals).

In addition, special support and programs of incentive will be created to support tourism businesses that prioritize sustainability and technology. Businesses whose activity, operational procedures and practices contribute for climate action and are sustainable are to be supported, as well as those who incorporate technology that contributes to the sustainability of its business.

Alongside the respective diploma for the creation and establishment of the Tourism fund, an investment tourism guideline will be created to simplify the access to reliable and structured information for potential investors<sup>14</sup> to generate sustainable investments. This guideline will also be available in the Tourism official website and of other national institutions such as Tradeinvest, Ministry of Finance, and others deemed relevant.

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<sup>13</sup> DGE-MF (2016), General Population Census and General Housing Census 2015, DGE-MF: Dili.

<sup>14</sup> Such type of guidelines is already being developed and used with success in other countries, with the support of UNWTO <https://www.unwto.org/investment/tourismt-investment-report-2020>

In addition, in what concerns Licensing and Certification of tourism activities, it is essential to develop a manual for this type of activity to ensure the quality of the tourism businesses and activities, thus also protecting the consumers, and will be supported by the relevant legislation that will define the type of permits and licenses required for each type of tourism business. This will need the development of a simple and practical online system for licensing and certification of tourism activities. The responsible for this licensing falls under the National Directorate of Tourism enterprises, activities and products.

Pillar	Strategic Vector	Priority
Prosperity	5. Entrepreneurship and investment	5.1. Tourism Fund 5.2. Support to women and youth tourism entrepreneurship 5.3. Support to projects with sustainability and technological component 5.4. Investment Tourism Guidelines 5.5. Licensing and certification of Tourism activities

### 3.2.6. Banking and Finance

Banking and finance services contribute greatly to promote Tourism and in the case of Timor-Leste the Government of Timor-Leste will work closely with bank and financial institutions to design products and services that are friendly to travelers.

Namely, the need to extend the availability of digital payments across the country and for tourism related services and activities will greatly improve the visitors experience as the tourist will be able to use this form of payment more often, including in online bookings. Also, all types of credit cards should be accepted in the country, which doesn't happen at the current moment.



Further, more ATM facilities for all types of credit cards across the country need to be installed, as well as more exchange rate locations that are easily accessible to tourists and close to tourism sites, such as airports, and others.

Pillar	Strategic Vector	Priority
Prosperity	6. Banking and Finance	6.1. Expand the system of digital payments 6.2. Acceptance of all credit cards 6.3. Increase the number and geographical location of ATMs in the country 6.4. Exchange rate locations

### 3.2.7. Strengthening Marketing

Destinations rich in history, culture, and nature, such as Timor-Leste, are perceived as more authentic and this contributes to its image as a unique tourist destination.

Targeted tourism campaigns of Timor-Leste as a tourism destination are therefore crucial to attract tourists, particularly at a time when the Tourism industry is recovering from the impact of COVID-19 pandemic. In 2020, the international tourist arrivals decreased 93% in Timor-Leste, and by September 2021 they decreased 92%<sup>15</sup>.

Hence, increased marketing efforts, both at domestic and international levels, will be very important to promote Timor-Leste as a tourism destination.

The Government will develop even further the campaigns under the umbrella of its brand Explore the Undiscovered, to promote Timor-Leste as a unique destination in Asia. One of the first steps will be simplifying and formalizing agreements on property rights of the brand and its use.

Domestic marketing campaigns will continue to incentive tourism in the country and amongst Timorese. The DGT and its marketing directorate will build upon existing programs that meet

<sup>15</sup> Source: UNWTO Tourism Dashboard, <https://www.unwto.org/international-tourism-and-covid-19>

the interest of the people, such as events tourism, community tourism, faith-based tourism and historical tourism related to the history of resistance - “Jornada da Resistência” the brands already created. The digital presence of this campaign will be increased and diversified, from social networks to tourism official website, national TV, others.

Targeted campaigns to selected countries and/or region will be determinant to revive the tourism sector an attractiveness of the country. The efficiency of these campaigns is increased as they are tailored to the interests of selected tourists, actual or potential, showcasing a brand, images and communicating to their wishes and dreams. Countries such as Australia, New Zealand, Singapore, China and Indonesia, continue to be a preferred market destination, based on history of nationality of tourist travelers to the country, priorities established namely in the Economic Recovery Plan. The World Bank Tourism Demand Assessment 2021, also indicated that tourists from Australia, UK and Singapore would be very likely to travel to a destination such as Timor-Leste.

Timor-Leste will continue to focus on CPLP and all ASEAN destinations, as a member of the former and as an observer status at ASEAN and agreement “in principle” for its full membership. The historical and geographical ties with these organizations and its members make them preferred target destinations for Timor-Leste Tourism marketing campaigns.

A program for targeted destination marketing campaigns will therefore be developed and include not only traditional presence in tourism fairs and events, but also substantial effort and resources will also be employed to develop digital marketing program for the Tourism Sector in Timor-Leste, as it is vital to utilize the potential of digitalization and application of new technologies.

Additionally, marketing campaigns that aim to promote a specific type of product and the associated route will be developed and promoted, targeting an audience that seeks experiences associated with a specific type of tourism. These will include campaigns for some of the following products: nature, coffee, trekking, wellness, historical, resistance, cultural, pousadas de Timor, faith based, and others.

The DGT and its Marketing Directorate will build a strong web presence and digital marketing program to reach a broader group of prospective tourists. The official Timor-Leste tourism

website ([www.timorleste.tl](http://www.timorleste.tl)) has been an important element of this digital presence. The Ministry of Tourism, Commerce and Industry with the aim of making this a crucial mean of communication to tourists will continue its work to maintain updated its digital presence, including the content of the website, with marketing campaigns, connecting information with other relevant websites/areas such as municipalities, visa information, health links, list of suppliers of tourism services and products. All the content inserted in this website is approved by MTCI, so as to ensure the quality and reliability of the information provided.

This priority area of digital marketing will also include the upgrade of the Dili Tourism Information Centre (TIC) with a project to use technology to provide interactive experiences to the visitors who can obtain reliable information on attractions, activities and events, help with reservations for accommodation or tours. This type of technology will also be used in the TICs that will be built in Baucau, Batugade and Dili International Airport (Pillar Priority, Vector Products and Services).

The digital marketing efforts will be lead within the MTCI by the National Directorate for Tourism Marketing and International Relations, and later by ATTL. Additional capacity building activities will be implemented through the capacity building plan, with the support of tourism partners, similarly to ongoing collaborations in this area.

The digital marketing program and the products developed will also include building a presence in wide-reaching travel mobile applications and websites, a vibrant and up to date social media presence in selected social media networks. Other line actions for this area will be the support to online sales of tours and tourism experiences.

Specific campaign(s) on the sustainability of Tourism in Timor-Leste will be a mean to promote the efforts of the country, its government and tourism partners in developing a sector that is responsible, sustainable and inclusive. One of the initiatives will be the awards for the **green tourism businesses** (Pillar Prosperity, Vector 9. Sustainability).

Campaigns for Events Tourism will continue, including for events for which Timor-Leste has already build a name and recognition such as the Dili Marathon and the Timor Tour. These events will be particularly important to relaunch the tourism after the Covid-19 pandemic, as they will attract a variety of tourists and participants in the events which will be able to

experience the country, what it offers and share it on social media, increasing the impact of these events.

As with all other vectors of this Strategic Plan, the success of these endeavors will also rely on partnership with other tourism stakeholders, and in the case of Marketing on the collaboration with existing tourism associations.

<b>Pillar</b>	<b>Strategic Vector</b>	<b>Priority</b>
<b>Prosperity</b>	7. Marketing	7.1. Domestic Marketing 7.2. Destination Marketing 7.3. Tourism product/route marketing 7.4. Digital Marketing 7.5. Sustainable Tourism Marketing 7.6. Events Marketing

### **3.2.8. Capacitating the Tourism Professionals**

The thrive of the Tourism sector is highly dependent on the adequate quantity and quality of its human resources. The prosperity of this sector can greatly contribute to job creation across the country, from entry level to higher management, and to all ages and groups of the working force.

It is even more important to support job creation for vulnerable groups such as women and youth, and to retain them in this sector, which will contribute to the reduction of the unemployment rate. Vulnerable groups, particularly women, have been severely affected by the pandemic. Globally women account for most of the working force in the Tourism sector, and in the case of Timor-Leste they account for 62% of the accommodation and food service workforce. The impact of Covid-19 increased further the gender inequality gap, with 61% of women who lost their jobs, compared to 39% of men, according to the United Nations’ report “Timor-Leste Socioeconomic Impact Assessment of Covid-19”.

There has been significant progress in the qualification of the human resources for Tourism. Currently, the educational offer exists at secondary level, professional training, and higher education courses.

However, further improvement of the infrastructures and equipment of the educational institutions is needed. For instance, in 2016 eight secondary schools were converted into schools that offer secondary tourism diploma, but these premises need upgrade and adequate equipment for some tourism training (e.g., kitchens, and others).

Also, the Tourism Hospitality School for graduate courses in Tourism has not been created. . This project is foreseen in the Timor-Leste SDP 2011-2030 and is estimated to include a “tourism campus” with specific infrastructures and equipment very needed for some of the specialized training in this area. The location will be in Los Palos and the Ministry of Higher Education has already identified the property for the development of this project.

Curriculum revision and improvement, diversification of courses available, and further capacity development of the teachers will also be priority interventions. This is considered key for the Government of Timor-Leste. To this end, the Government will continue to invest in the educational offer of the country for the qualification of human resources. This effort will be enhanced through cooperation between the Ministries of Tourism, of Education, of Higher Education, and SEFOPE. It will include a coordination and collaboration in curriculum development, but also study programs will be adjusted to the needs of the labor market, number and type of courses available for the identified needs.

Curriculum and courses to enhance digital competence will be prioritized to develop the skills for digital tourism related needs, from digital management of operations, virtual services of the industry, to others.

A specific program will be developed to enhance and increase women educational opportunities, which will include scholarships, specific courses for women tourism management and leadership, and other measures.

Tourism as a sector that promotes inclusiveness is one of the values that guides this Strategic Plan. To create greater job opportunities for people with disabilities will also be a key measure of the Government, in partnership with the private sector.

Another important component of the capacitation of human resources for the Tourism sector is the placement of the students in certified curricular or professional internships, that not only prepare them for the labor market, but that may also constitute a real opportunity for employment. The certification of all organizations/companies that provide these internships is a step to be taken to improve further the quality of study programs in the Tourism sector. The certificate of internship approved will be reviewed every 3 years to ensure that the organization upholds the necessary standards.

The official tourism website will include a specific section with all tourism job opportunities, thus being a digital hub where employers (public, private, national and international) can announce their employment opportunities and job seekers have all the information they need related to tourism vacancies

Pillar	Strategic Vector	Priority
People	9. Professionals	8.1.Educational infrastructures and equipment 8.2.Tourism Hospitality School 8.3.Tourism Curriculum 8.4.Certified curricular or professional internships 8.5.Women educational opportunities 8.6.Tourism digital competence 8.7.Tourism website with section on all tourism job opportunities

### 3.2.9. Engage People

Engaging citizens in the development of public policies and strategies is key for its success and this is even more important for tourism, as the people of Timor-Leste are the core of tourism and its development.

Citizens and communities that are informed about the potential and benefits that a responsible tourism sector can bring to the social and economic development of the country will contribute greatly for the success of the National Strategic Plan for Tourism. They must also be aware of their rights: the industry and visitors should respect the culture, history, and nature of the country at large, and of their communities.

The line of action for such awareness and sensitization campaigns will include a comprehensive social marketing program developed by MTCI, that will include campaigns in the social media, schools, and others, in collaboration with the Ministry of Parliamentary Affairs and Social Communication, Ministry of Education and Ministry of Higher Education, civil society and other relevant institutions.

The partnerships with municipalities and Civil Society Organizations will be particularly important for campaigns to the communities in matters as important as environmental awareness, or the community tourism program.

Another line of action for the vector People that was identified during the consultation process with the municipalities, was the need to raise awareness of the communities across the country of the Community Tourism Program already in place, thus informing the people of what it entails, how can they apply and benefit from it.

Additionally, for this vector it is also considered extremely important an environmental awareness program that will range from campaigns in schools, in Tourism events, in meetings with communities, to sensitize people for the need to preserve their environment and the historical, cultural and natural heritage. This is crucial for Tourism development and for a better touristic experience. The cleaning of tourist sites is considered a priority and will be further developed in the next vector.

Pillar	Strategic Vector	Priority
People	9. People	9.1.Social Marketing 9.2.Community Tourism 9.3.Environmental awareness

### 3.2.10. Ensuring Sustainability

Timor-Leste’s exceptional and varied nature make it a privileged tourist destination for those seeking nature tourism and the variety of tourism experiences related, namely maritime tourism, ecotourism and others.

Nature protection is a key priority of the Government of Timor-Leste that guides several policies and programs, and tourism is no exception. In addition, to recover from the significant negative impact that the COVID-19 pandemic has had on the economy, of which tourism has been one of the most affected sectors, it is necessary to plan for a responsible recovery that protects nature, contributes to climate action, and benefits the population. This requires interconnectedness and cooperation between the different stakeholders of tourism: government, private sector, civil society, development partners.

Sustainable tourism contributes to increasing the competitiveness of the sector and ensure alignment with international commitments, such as the Sustainable Development Goals (SDG’s). *“Tourism has the potential to contribute, directly or indirectly, to all of the goals. In particular, it has been included as targets in Goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production (SCP) and the sustainable use of oceans and marine resources, respectively.”*<sup>16</sup>

The mapping of the Tourism sites has identified a very serious problem of lack of sanitation and reduced or non-existing garbage collection in most of the tourist sites. This is of great concern not only for the environment, but it is also a weakness that affects greatly the tourism industry in the country. Hence, the tourism sites cleaning program will be developed and

<sup>16</sup> <https://www.unwto.org/tourism-in-2030-agenda>



implemented jointly by the MTCI, State Secretary for Environment and Ministry of State Administration, civil society and private sector.

This priority area of action will require a strong commitment and partnership in the development of solutions that will also need to include and empower the local communities in finding the solutions and implementing them. The creation of sanitation system and garbage collection is a must for the development of the country. However, for the tourism sites, additional measures such as agreeing with the local communities in regular touristic site cleaning in exchange for returns to their community will be of great value and efficiency, particularly in far reach sites.

The establishment of the Special Tourism Areas (Pillar Priority, strategic vector 1. Tourism sites) is also one of the priorities for this vector. The creation of these areas ensures that the tourism projects therein inserted respect the environment and contribute to the welfare of the local communities. All tourism projects and prospective investment must comply with environmental preservation, through approval of the environmental impact assessment (EIA).

Additionally, the MTCI, in collaboration with institutional partners such as State Secretary for Arts and Culture, and Ministry of Foreign Affairs will seek to be a member for UNESCO Global geoparks. The UNESCO global geoparks are “(...) *single, unified geographical areas where sites and landscapes of international geological significance are managed with a holistic concept of protection, education and sustainable development*”<sup>17</sup>. They connect the people with their geological heritage, and with the support of the UNESCO Geoparks Network the local communities, local and regional powers will be able to make this link whilst drawing on support and lessons from this network. The support to such heritage will contribute greatly to building more unique, eco-sustainable touristic experiences. Engagement of existing associations with work already established in the protection, preservation and promotion of sustainable activities in the Timor-Leste Parks will be sought also in this process.

The sustainability of tourism must be a guiding principle for all tourism activities and businesses. Tourism partners will collaborate and take concerted action for, e.g., plastic

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<sup>17</sup> <https://en.unesco.org/global-geoparks>

reduction, local sourcing of food, local sourcing of construction materials, and other measures to be implemented in the medium/long term.

In what concerns the reduction of plastic usage the Government of Timor-Leste will seek to endorse the commitments to 2025 of the Global Tourism Plastic Initiatives<sup>18</sup> of the One Planet Network, and encourage the tourism partners to also join, thus leading a coordinated effort for the reduction of this type of pollution and contributing to climate action.

The creation of a list of certified green tourism businesses and its suppliers will be another action taken by the Government of Timor-Leste, with a joint effort from MTCI and other line ministries. These businesses will be part of a marketing initiative to inform local and international tourists (Pillar Prosperity, vector 7. Marketing), and its suppliers will therefore be part of a sustainable/green tourism chain of value, whose benefits go beyond the economic income they generate and include a long-term benefit for the planet and life of future generations.

An assessment committee will be established with members from MTCI and other line ministries, as well as other tourism partners with relevant work in promoting sustainability in the sector. Based on the criteria of assessment to be established the applications will be analyzed and the winners announced every year. This quality “green stamp” will have a logo associated that the winners can use in their promotion material (Pillar Prosperity, vector Marketing). This certification will be reassessed every 2 years.

In addition, a Sustainable Tourism Levy of \$5 will be charged to all international visitors upon arrival. This amount will signal to visitors the country’s commitment to a sustainable tourism sector and a guaranty that such revenue will be used solely to support sustainable businesses, particularly of women and youth entrepreneurs.

<b>Pillar</b>	<b>Strategic Vector</b>	<b>Priority</b>
<b>Protection</b>	10. Sustainability	10.1.Tourism sites cleaning 10.2.Special tourism areas

<sup>18</sup> <https://www.oneplanetnetwork.org/programmes/sustainable-tourism/global-tourism-plastics-initiative/join/destinations>

		10.3.UNESCO Geoparks 10.4.Concerted climate action 10.5.Global Tourism Plastic Initiative 10.6.Green tourism businesses 10.7.Sustainable tourism levy
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### 3.2.11. Consolidating Partnerships

The progress of tourism sector in Timor-Leste and the success of its national Tourism Strategic Plan will greatly benefit from the cooperation and partnership between all its stakeholders. From the Government of Timor-Leste to civil society, local communities, development partners, to private sector, regional networks, everyone matters.

Understanding how important partnerships are, the **Government of Timor-Leste will play an important role in the development and management of Tourism and will lead a cooperation framework with all Tourism partners** to agree on priority areas of collaboration, to have concerted line of actions, to establish mechanisms of partnership tailored to each stakeholder interests and profile.

A sustainable and responsible tourism that benefits not only visitors, but also the people of Timor-Leste, requires extensive work for and with the local communities, which can also be achieved through establishment of formal agreements with Civil Society and local communities, consultations, and other types of collaboration.

During the consultation process with other line ministries and municipalities it was clear how institutional partnerships are imperative for the success of the National Strategic Plan for the Development of Tourism 2023-2030. Such partnership will result into intersectoral planning and cooperation, a continuous and active involvement of all institutional partners, as well as

collaborative action in several vectors and priority areas identified. Some of the Good Governance bodies (Pillar Priority, vector Framework) will assist greatly in this partnership.

In relation to regional partnerships, they are very important considering the geographical context and the possibility of cooperation for capacity building, knowledge exchange, development of projects and activities to fulfill international standards, e.g., for sustainable goals, or community tourism. Namely, partnership with CPLP and with ASEAN will be considered priority.

International development partners, both bilateral and multilateral, will also account for an important component of the tourism partnership framework, and the scope of the collaboration can include south-south cooperation, capacity building projects and exchange of expertise, technical support to develop activities foreseen in the Implementation Plan for the national Strategic Plan for Tourism, and others. Memorandum of Understanding and Technical Agreements with each of these partners will be consolidated and agreed to establish a formal cooperation and resources to mobilize.

As for the collaboration with the private sector, several areas are considered relevant and the Government of Timor-Leste will seek to develop a cooperation, as previously explained in other strategic vectors. This will range from data collection, to support in the development of tourism infrastructures, to special credit lines, projects of support to entrepreneurship and investment in Tourism, campaigns aimed at local communities on tourism awareness and related programs.

In compliance of good governance, the Government of Timor-Leste will publish an Annual Partnership Report with the progress of the partnerships established for the advancement of the Strategic Plan.

<b>Pillar</b>	<b>Strategic Vector</b>	<b>Priority</b>
<b>Partnership</b>	11. Partnerships	11.1.Institutional 11.2.Development partners (Bilateral and Multilateral) 11.3.Regional (CPLP and ASEAN)

		11.4.Private sector and civil society 11.5. Annual partnership report
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### **3. Implementation of the Strategy**

#### **4.1. Monitoring and Evaluation**

A Monitoring and Evaluation (M&E) mechanism will be established to follow the progress of the Strategic Plan, including an annual report, as well as a mid-term evaluation (2025) and a final evaluation of the PENDT (2030).

The M&E of the Strategic Plan will monitor the progress of the Multi-Year Implementation Plan until 2030, presented in Annex 1.

The MTCI will also seek to coordinate with other relevant ministries, members of the Technical Unit, the development of more detailed annual plans, to ensure that priority activities are included in the respective annual action plans, in parallel with the annual planning of the State budget.

### **4. Financial planning and Resource mobilization**

The Government of Timor-Leste acknowledges the need to invest further in certain economic sectors, such as Tourism, to resume and relaunch after the COVID-19 pandemic<sup>19</sup>.

However, the scope and range of all the vectors of the National Strategic Plan for the Development of Tourism 2023-2030, and the activities foreseen in the Implementation Plan to achieve the expected results of the Strategic Plan and the key goals of the National Tourism Policy requires a considerable investment that cannot be covered solely by the State Budget.

One of the priorities in what concerns financial planning will be to conduct a study and assessment of financial costs until 2030 to implement all the activities of the pluriannual implementation plan. This study will be led by MTCI, as the coordinator of the Interministerial Technical Unit for Tourism.

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<sup>19</sup> Economic Recovery Plan, VIII Government of Timor-Leste, Timor-Leste, 2020

Hence, the Government of Timor-Leste and, in particular, the MTCI will seek to mobilize additional resources to be able to implement the National Strategic Plan for Tourism, from financial, to technical support that assist in the completion of foreseen activities and achievement of expected results.

The National Strategic Plan for Tourism is therefore the much-needed framework that will guide the Government of Timor-Leste and partners from policy into action.

## Annex 1 - PLURIANNUAL IMPLEMENTATION PLAN 2023-2030

### NSPDT 2023-2030 – INCLUSIVE, SUSTAINABLE, RESPONSIBLE

#### PILLAR PRIORITY

STRATEGIC VECTORS	PRIORITY AREA	ACTIVITIES	TIMELINE							RESPONSIBLE PARTIES	
			2023	2024	2025	2026	2027	2028	2029		2030
1. Tourism sites	Mapping of tourism sites	Completion of Tourism Mapping	X								MTCI, Development Partners
		Promote knowledge sharing of Tourism Mapping findings and recommendations (amongst DGT, other line ministries and municipalities)	X								MTCI , MSA, Municipalities
		Planning of intervention for Tourism Sites Signage.	X								MTCI, MPW, MTC, MHECC, MSA, Municipalities



		Tourism Sites Signage	X	X	X	X	X	X	X	X	MTCI, MPW, MTC, MHECC, MSA, Municipalities
		Planning of interventions for “essential” package of signage, equipment and services of tourism sites	X								MTCI, MPW, MTC, MHECC, MSA, Municipalities
		“Essential” package of signage, equipment and services of tourism sites	X	X	X	X	X	X	X	X	MTCI, MPW, MTC, MHECC, MSA, Municipalities
		Establishment of Special Tourism Areas (STA):									MTCI, MSA, MPT, MTC, MHEAC, Municipalities
		- Atauro	X								
		- Ramelau		X							
		- Nino Konis Santana		X							
		- RAEOA			X						

<b>2. Framework</b>	Legislation	Tourism Law	X								MTCI
		Ministerial Diploma for licensing of tourism activities	X								MTCI

	Ministerial Diploma of Community Tourism	X									MTCI
	Legislation for the remuneration of tourism activities	X									MTCI
	Tourism Authority of Timor-Leste	X									MTCI
	Legislation for Special Tourism Areas	X									MTCI, MPT, MSA, Municipalities, Development Partners
	Decree-Law of the Tourism Fund	X									MTCI, MF
	Cruise Regulation	X									MTCI, MTC, Development Partners
	Diploma for water sports and recreational	X									MTCI, MAF, Development Partners
	Review of the ToR of the Interministerial Technical Unit for Tourism	X									MTCI, TUDT
	Legislation for Sustainable Tourism Levy		X								MTCI, MF

		Legislation for establishment of Committee for evaluation of Green Business Tourism Certification		X								MTCI, MED, MH
Institutional		Capacity building of DGT and its national directorates: training, south-south cooperation, inter-departmental mentoring, technical temporary deployment assignments	X	X	X	X	X	X	X	X	X	MTCI, development partners
		Capacity Assessment of MTCI	X									MTCI, development partners
		Development of pluriannual capacity building plan	X									MTCI, development partners
		Capacity building on CT and other tourism programs, at local level	X	X	X	X	X	X	X	X	X	MTCI, Municipalities
		MoU of understanding with MSA on tasks and activities of Municipal Services for										MTCI, MSA

		management of markets and tourism and MTCI municipal representatives									
		Creation of working group with Municipalities led by MTCI on implementation of NSPDT at local level	X	X	X	X	X	X	X	X	MTCI, MSA, Municipalities
		Establishment of a Tourism Statistics working group	X	X	X						MTCI, NIS, MTC, Development partners
		Development of a Manual for Tourism Licensing and Certification	X	X							MTCI, Development Partners
		Establishment of an online system for licensing of tourism activities	X	X							MTCI, Development Partners
		Establishment of the Tourism Authority	X	X							MTCI

	Costing of Tourism Pluriannual Implementation Plan 2023-2030	X								MTCI, TUDT, Development Partners
	Annual report on implementation of NSPDT	X	X	X	X	X	X	X	X	MTCI
	Mid-term review of the Strategic Plan			X						External Evaluators
	Final evaluation of the Strategic Plan								X	External Evaluators
	Annual Tourism Statistical Bulletin	X	X	X					X	MTCI/, NIS, Development partners
	Inter-Ministerial Commission	X	X	X	X	X	X	X	X	MCAE
	Tourism Interministerial Technical Unit	X	X	X	X	X	X	X	X	MTCI
	Ad-hoc Groups	X	X	X	X	X	X	X	X	MTCI, Members as per identified needs

<b>3. Products &amp; Services</b>	Community Tourism	Strengthening and expansion of Community Tourism Program	X	X	X	X	X	X	X	X	MTCI, Development partners, SSCOOP, SEFOPE, MAF, Municipalities, MSA, Public and Private Associations, SOCs	
	Tourism Routes	Definition and development of Timor-Leste priority Tourism Routes	X									MTCI, MSA, MPO, MTC, MPT, MHESC, SSE, Municipalities, Development partners, private sector, professional organizations and associations of the sector
		Establishing the Timor-Leste priority Tourism Routes	X	X	X	X	X	X	X	X	X	MTCI, MSA, MPW, MTC, MPT, MHESC, SSE, Municipalities, Development partners, private sector, professional organizations and associations
	Events Tourism	Strengthening of an annual program of events (cultural, gastronomy, traditional	X	X	X	X	X	X	X	X	X	MTCI, MI, MHESC, Municipalities, private sector, development

	games, sports, historical, musical such as Genre Tebe-Dahur)									partners, professional organizations and associations
Pousadas de Timor	Study on business model for the Pousadas de Timor	X								MTCI, Development Partners
	Develop a program to preserve Timor Pousadas and create a network of boutique hotels in the country	X	X	X	X	X	X	X	X	MTCI, MHESC, Municipalities, Development Partners Private Sector
Gastronomy tourism	Design of the Tourism Gastronomy Program, to develop the offer of local gastronomy: activities inserted within other actions (community tourism, routes, marketing, education)	X								MTCI, MAS, MH, MAF, Municipalities, private sector, development partners, professional organizations and associations
	Implementation of the Tourism Gastronomy Program	X	X	X	X	X	X	X	X	MTCI, MAS, MH, MAF, Municipalities, private sector, development partners, professional

											organizations and associations
	Dili Historical City	Dili Historical City	X	X	X	X	X	X	X	X	MTCI, MHESC, Municipality of Dili, Private sector, Development Partners
	Ongoing programs	Improvement and expansion of ongoing programs: faith - based tourism, Jornada da Resistencia, others	X	X	X	X	X	X	X	X	MTCI, MSA, MHESC, development partners
	Tourism Information Centers	Upgrade of the DILI TIC	X								MTCI
		TIC's in Baucau, Batugade and Dili International Airport		X	X						MTCI, MTC, MI
	Information on health and safety	Development of information products on health and safety	X	X	X	X	X	X	X	X	MTCI, MSA, MTC, MH, development partners
<b>4. Infrastructures, transports &amp; communications</b>	Community Tourism	Integrated intersectoral mechanism for development of infrastructures, transports and communications that	X	X	X	X	X	X	X	X	MTCI, MPW, MTC, Municipalities, SSE, development partners, civil society and private sector



		support the Community Tourism Program									
	Tourism sites and routes	Integrated intersectoral mechanism for development of infrastructures, transports and communications that support the Community Tourism Program	X	X	X	X	X	X	X	X	MTCI, MPW, MTC, Municipalities, SSE, development partners, civil society and private sector
	Special Tourism Areas	Implementation of a joint project for infrastructures, transports and communications in Special Tourism Areas	X	X	X	X	X	X	X	X	MTCI, MPW, MTC, Municipalities, MF, SSE, Development partners
	Accessibility for people with physical disabilities	Development of specific program to ensure all touristic infrastructures include accessibility for people with physical disabilities	X	X	X	X	X	X	X	X	MTCI, MPO, MTC, MSSSI
	Air Transport	Completion of Dili International Airport Project	X	X	X						MTC

		IATA Code	X	X							MTCI, MTC, private sector, development partners
		Rehabilitation of the Airport of Baucau				X	X	X	X	X	MTC
	Water Transport	Development of docking sites for domestic cruises: - Com and Jaco - Others		X	X						MTCI, MPW, MPT, SSE, Municipalities, private sector, development partners
		Cruise SOPs Timor-Leste	X								MTCI, development partners
	Handover SEFOPE Tourism infrastructures	Completion of a no-cost handover of SEFOPE Tourism infrastructures	X								MTCI, SEFOPE

**NSPDT 2023-2030 – INCLUSIVE, SUSTAINABLE, RESPONSIBLE**

**Pillar PROSPERITY**

STRATEGIC VECTORS	PRIORITY AREA	ACTIVITIES	TIMEFRAME								RESPONSIBLE PARTIES	
			2023	2024	2025	2026	2027	2028	2029	2030		
<b>5. Entrepreneurship &amp; Investment</b>	Licensing of tourism activities	Establishment of an online system for licensing and certification of Tourism activities	X	X								MTCI, TIC, SERVE
	Women Entrepreneurship	Development and implementation of a special support program to support women entrepreneurs' projects in the Tourism sector	X	X	X	X	X	X	X	X	X	MTCI, MCAE, MF, Tradeinvest, private sector, financial institutions, development partners, CSO
	Youth Entrepreneurship	Development of a special support program to support youth entrepreneurs' projects in the Tourism sector	X	X	X	X	X	X	X	X	X	MTCI, MCAE, MF, Tradeinvest, private sector, financial institutions, development partners, CSO

	Technological Inclusion	Support package to Tourism businesses to increase their digital presence and technological tools	X	X	X	X	X	X	X	X	MTCI, Development partners
	Tourism Fund	Knowledge dissemination on Tourism Fund rules and regulations, available support lines	X	X							MTCI, MF, Tradeinvest, Development Partners, Private sector, bilateral and multilateral organizations
	Investment Tourism Guideline	Development and dissemination of Investment Tourism Guideline for Timor-Leste	X	X							MTCI, MCAE, MSA, MF, Tradeinvest, private sector, development partners, professional associations and organizations
<b>6. Finance and Banking</b>	Digital Payments	Increase number of tourism businesses accepting digital payments	X	X	X	X	X	X	X	X	MTCI, MF, Central Bank, Banking and finance system
		All types of credit cards accepted in Timor-Leste	X	X	X	X	X	X	X	X	MTCI, MF, Central Bank, Banking and finance system

		Increase the number and geographical location of ATMs in the country		X	X	X	X	X	X	X	MTCI, MF, Central Bank, Banking and finance system
		Exchange rate: more locations available across the country	X	X	X	X	X	X	X	X	MTCI, MF, Banking and finance system, private sector

<b>7. Marketing</b>	Domestic Marketing	Development of specific marketing campaigns for domestic tourism	X	X	X	X	X	X	X	X	MTCI, development partners, private sector	
	Destination Marketing	Selection of target markets for tourism marketing campaigns	X	X	X	X	X	X	X	X	MTCI, MFAC, development Partners, private sector	
	Route marketing	Develop marketing campaigns for each of the established tourism routes	X	X	X	X	X	X	X	X	MTCI, Development Partners	
	Digital marketing	Timor-Leste Tourism Website: digital asset restructuring and upgrading	X	X								MTCI, TIC, Development Partners
		Social media of Official Tourism Brand (Explore the Undiscovered):	X	X	X	X	X	X	X	X	X	MTCI, development partners

		media presence on 4 selected social network and channels.									
		Tourism Information Centers with innovative digital interactive products for the visitors: <ul style="list-style-type: none"> <li>- Dili TIC</li> <li>- Baucau, Batugade TIC's</li> <li>- Dili International Airport TIC</li> </ul>		X		X		X			MTCI, development partners
	Green Tourism Businesses	Annual announcement of Green Tourism Businesses awards		X	X	X	X	X	X	X	MTCI, Development Partners, Private sector
	Events Tourism	Domestic and international campaigns for the events of the annual calendar of tourism events (cultural, historical-resistance, traditional games, gastronomy, faith based)		X	X	X	X	X	X	X	MTCI, development partners

**Pillar PEOPLE**

STRATEGIC VECTORS	PRIORITY ACTIVITIES	ACTIVITIES	TIMEFRAME								RESPONSIBLE PARTIES	
			2023	2024	2025	2026	2027	2028	2029	2030		
<b>8. Professionals</b>	Educational Infrastructures and Equipment	Upgrade of existing tourism educational facilities (secondary, vocational, and higher education) to deliver quality education	X	X	X	X	X	X	X	X	X	MTCI, MEYS, MHESC, SEFOPE, private educational institutions, development partners
	Strengthening of teachers' capacity	Joint Program to strengthen the capacity of teachers in the tourism area.	X	X	X	X	X	X	X	X	X	MTCI, MEYS, MHESC, SEFOPE, private educational institutions, development partners
	Tourism Curriculum	Improvement of tourism curriculum (revision, creation of new, diversification of areas of curriculum)	X	X	X							MTCI, MEYS, MHESC, SEFOPE, private educational institutions, development partners

	Tourism Digital Competence	Establishment of Tourism Digital courses		X	X	X						MTCI, MEYS, MHESC, SEFOPE, private educational institutions, development partners
	Tourism Hospitality School	Establishment of a Tourism Hospitality School in Los Palos	X	X	X	X	X	X	X	X	X	MTCI, MHESC, Municipality
	Certified Internships	Establishment of a system of tourism certified internships	X	X	X	X	X	X	X	X	X	MTCI, MEYS, MHESC, SEFOPE, Private Sector
	Tourism job opportunities	Creation of a section in the Tourism official website with Tourism Job Opportunities (national and international, employment and internships, and from diverse organizations, public to private sector)	X	X	X	X	X	X	X	X	X	MTCI, MEYS, MHESC, SEFOPE, Private Sector, Development Partners
	Women Educational Program	Develop a joint program for women education opportunities in the Tourism sector	X	X	X	X						MTCI, MEYS, MHESC, SEFOPE, Private Sector, Development Partners



	Employment of persons with disabilities	Awareness campaigns for job creation in tourism for persons with disabilities in the private and public sector			X	X	X	X	X	X	MTCI, MSSI, Development partners
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<b>9. People</b>	Social Marketing	Awareness campaigns on the benefits of Tourism in schools, communities, social media, TV, radio and other communication forums		X	X	X	X	X	X	X	MTCI, MEYS, MHESC, MSA, MPASC, development partners, Municipalities, SCO's
	Community Tourism	Dissemination of Community Tourism Program to civil society organization, communities	X	X	X	X	X	X	X	X	MTCI, Municipalities, CSOs
	Environmental Awareness	Awareness and sensitization campaigns on the importance of respecting environment and its impact on Tourism.		X	X	X	X	X	X	X	MTCI, MEYS, MHESC, SSE, Municipalities, CSOs

**NSPDT 2023-2030 – INCLUSIVE, SUSTAINABLE, RESPONSIBLE**

**Pillar PROTECTION**

STRATEGIC VECTORS	PRIORITY AREAS	ACTIVITIES	TIMEFRAME								RESPONSIBLE PARTIES
			2023	2024	2025	2026	2027	2028	2029	2030	
<b>10.Sustainability</b>	Tourism sites cleaning	Sanitation and garbage collection program in tourist sites	X	X	X	X	X	X	X	X	MTCI, SSE, MAF, MSA, Municipalities, CSOs
	UNESCO Global Geoparks	Apply for UNESCO geoparks network	X	X	X						MTCI, MHESC, SSE, MFAC, UNESCO
	Global Tourism Plastic Initiative	Government of Timor-Leste endorses the Global Tourism Plastic Initiative	X	X	X						MTCI, SSE, MTC, UN
	Green Tourism Businesses	Establishment of the Green Tourism Businesses initiative	X	X	X	X	X	X	X	X	MTCI, SSE, development partners, private sector
	Sustainable Tourism Levy	Creation and implementation of a sustainable tourism levy	X	X	X	X	X	X	X	X	Government of Timor-Leste, MTCI, MTC, MI

**Pillar PARTNERSHIP**

STRATEGIC VECTORS	PRIORITY AREA	ACTIVITIES	TIMEFRAME								RESPONSIBLE PARTIES	
			2023	2024	2025	2026	2027	2028	2029	2030		
<b>11.Partnerships</b>	Development Partners (bilateral and multilateral)	Enhance and/or establishment of cooperation agreements under the Strategic Plan framework	X	X	X							MTCI, MFAC, development partners
	Regional Organizations	Establish of cooperation agreements with regional	X	X	X	X	X	X	X	X		MTCI, MFAC, development partners
	Tourism partnership report	Publication of an annual report on partnerships in the scope of NSPDT		X	X						X	MTCI, development partners

## ANNEX 2 – SUMMARY TABLE OF NSPDT AND RESULTS MANAGEMENT

### Policy Pillar – PRIORITY

#### Strategic Vector 1. Tourism Sites

**Outcome 1: Increased knowledge of tourism sites in Timor-Leste**

**Output 1:** Signage, equipment and services for all tourism destinations developed and functioning

**Priority Areas:**

1.1. Completion of the mapping of tourism sites and their signage, equipment and services

1.2. Creation and establishment of Special Tourism Areas

**Target 1.1:** 100% of tourism sites and special tourism areas operating with basic standard of signage, equipment and services.

**Target 1.2:** By 2023 all tourism sites information digitalized

**Target 2:** Four Special Tourism Areas established by 2025: Park Nino Konis Santana, Atauro, Ramelau, RAEOA

#### Strategic Vector 2. Institutional, Good Governance and Legal Framework

**Outcome 2:** Public institutions discharging efficiently their mandate, leading and advancing the NSPDT 2023-2030

**Institutional**

**Output 2.1.:** Tourism directorates staff capacity strengthened to fulfil their duties & responsibilities

**Output 2.2:** DGT organic restructured

**Output 2.3:** Tourism Authority of Timor-Leste created and established

**Good Governance**

**Output 2.3:** Good Governance structure of the NSPDT 2023-2030 established and functioning regularly to support the advancement of the strategic plan

**Legislation**

**Output 2.4.** Legislation to support the development of Tourism approved

**Priority Areas:**

2.1. Institutional

2.2. Good Governance Structure

2.3. Legislation

**Target 2.1.1:** Capacity assessment of Tourism Directorates completed in 2023

**Target 2.1.2:** Pluriannual capacity building plan completed by end of 2023

**Target 2.1.3:** Duties and TdR of staff revised according to the findings and recommendations of the Capacity Assessment by end of 2023

**Target 2.1.3:** Each of the tourism directorates and departments will have 2 capacity building activities per year

**Target 2.1.4:** Tourism Authority established and functioning by end of 2024

**Target 2.2:** All of the good governance bodies established and functioning by end of 2023

**Target 2.3:** 100% legislation approved by target date

**Strategic Vector 3. Products & services**

**Outcome 3:** Tourism institutions empowered to develop sustainable and competitive tourism products and services, in collaboration with all tourism partners

**Output 3:** Programs of competitive tourism products and services, for domestic and international tourism, established

**Priority Areas:**

3.1. Tourism Routes

3.2. Special Tourism Areas

3.3. Community Tourism Program

3.4. Pousadas de Timor

3.5. Gastronomy

3.6. Events tourism

3.7. Other programs: Faith Based and Jornada da Resistência, eco-tourism, Dili historical city

3.8. Tourism Information Centers

**Target 3.1:** By 2030, 200.000 international tourists and visitors annually

**Target 3.2:** Increase the domestic tourism by 70% until end of 2030, relatively to 2022

#### **Strategic Vector 4. Infrastructures, Transports & Communications**

**Outcome 4:** The Government of Timor-Leste prioritises and leads an institutional plan to develop the infrastructures, transports and communications that support Tourism sites and services

**Output 4:** Tourism infrastructures, transports and communications developed

#### **Priority Areas:**

4.1. By road

4.2. By water

4.3. By air

**Target 4:** By 2030 all tourism sites, routes and special areas will have completed their supporting infrastructures, transports and communications

### **Pillar – PROSPERITY**

#### **Strategic Vector 5. Entrepreneurship and Investment**

**Outcome 5:** The Government of Timor-Leste supports and enables the establishment of a thriving entrepreneurial and business environment for the tourism sector that attracts investors, supports national businesses and contributes to a prosperous economy

<p><b>Output 5.2:</b> Tourism Fund Established</p> <p><b>Output 5.1:</b> Special programs of incentive and support to micro, small, medium enterprises, particularly for women and youth entrepreneurs, created and implemented</p> <p><b>Output 5.3:</b> Tourism Investment Guidelines developed and available to all potential investors.</p>
<p><b>Priority Areas:</b></p> <p>5.1. Tourism Fund</p> <p>5.2. Support to women and youth tourism entrepreneurship</p> <p>5.3. Support to projects with sustainability and technological component</p> <p>5.4. Investment Tourism Guidelines</p>
<p><b>Target 5.1:</b> By 2030, at least 60% of projects approved under special benefits/incentives are women owned</p> <p><b>Target 5.2:</b> By 2030, at least 80% of projects approved benefit national small and medium enterprises</p> <p><b>Target 5.3:</b> By 2030, 100% of projects approved will have a sustainability component</p> <p><b>Target 5.5:</b> By 2025, Tourism Investment Guidelines developed and published</p>
<p><b>Strategic Vector 6. Finance and Banking</b></p>
<p><b>Outcome 6:</b> Banking and finance services contribute greatly to promote friendly Tourism services</p>
<p><b>Output 6:</b> Government of Timor-Leste and banking and financial institutions develop products and services that are friendly to tourists</p>
<p><b>Priority Areas:</b></p> <p>6.1. Expand the system of digital payments in tourism businesses</p> <p>6.2. Acceptance of all credit cards</p> <p>6.3. Increase the number and geographical location of ATMs in the country</p> <p>6.4. Exchange rate locations</p>
<p><b>Target 6:</b> By 2025 all tourism businesses and services will be able to use all types of payments</p>

### Strategic Vector 7. Marketing

**Outcome 7:** Timor-Leste develops and disseminates targeted and efficient domestic and international marketing campaigns that promote Timor-Leste has a unique tourism destination

**Output 7:** Marketing campaigns for key tourism destinations, products and services developed

**Priority areas:**

7.1. Domestic Marketing

7.2. Destination Marketing

7.3. Tourism product/route marketing

7.4. Digital Marketing

7.5. Sustainable Tourism Marketing

7.6. Events Marketing

**Target 7.1:** By 2030, the no. of domestic tourists increases by 70%, compared to 2022

**Target 7.2:** By 2030, the no. of tourists from selected targets increases by 40%

**Target 7.3:** By 2030, the Timor-Leste sustainable tourism initiatives received international appraisals

### Pillar – PEOPLE

### Strategic vector 8. Professionals

**Outcome 8:** Timor-Leste establishes a structure for development of highly qualified human resources in the Tourism sector.

**Output 8.1:** Tourism education offer strengthened and adjusted to the needs of the labor market

**Output 8.2:** Tourism education schools fully established

**Priority Areas:**

8.1. Educational infrastructures and equipment



<p>8.2. Tourism School</p> <p>8.3. Tourism Curriculum</p> <p>8.4. Certified curricular or professional internships</p> <p>8.5. Women educational opportunities</p> <p>8.6. Tourism digital competence</p> <p>8.7. Tourism website with section on all tourism job opportunities</p>
<p><b>Target 8.1.:</b> By end of 2030 at least 80% of the tourism labor force has received formal tourism education</p> <p><b>Target 8.2:</b> By end of 2030, at least 60% of higher management positions in Tourism are occupied by women</p> <p><b>Target 8.3:</b> By end of 2030, at least 50% of the professional &amp; curricular internships have been employed by the organizations</p> <p><b>Target 8.4:</b> By end of 2030 all educational infrastructures are enabled and using upgraded and suitable equipment</p> <p><b>Target 8.5:</b> By end of 2030,tourism curriculum revised, updated and in line with international standards</p>
<p><b>Strategic Vector 9. People</b></p>
<p><b>Outcome 9.1:</b> Timorese understand the importance and benefits of a responsible tourism sector</p> <p><b>Outcome 9.2:</b> Timorese contribute to the positive image of the country as a tourist destination</p>
<p><b>Output 9:</b> Campaigns for sensitization of Timorese for benefits and rights of a responsible tourism sector developed and disseminated</p>
<p><b>Priority Areas:</b></p> <p>9.1. Social Marketing</p> <p>9.2. Community Tourism</p> <p>9.3. Environmental awareness</p>
<p><b>Target 9:</b> Annual sensitizations campaigns are done in every municipality</p>
<p><b>Pillar – PROTECTION</b></p>

### Strategic Vector 10. Sustainability

**Outcome 10:** The Government of Timor-Leste and partners prioritize sustainability and climate action in the tourism sector

**Output 10:** Tourism sector contributes to climate action

**Priority Areas:**

- 10.1. Tourism sites cleaning
- 10.2. Special tourism areas
- 10.3. UNESCO Global Geoparks Network
- 10.4. Concerted climate action
- 10.5. Global Tourism Plastic Initiative
- 10.6. Green tourism businesses
- 10.7. Sustainable tourism levy

**Target 10.1:** By 2030, 80% of tourism businesses use energy efficiency system and waste management

**Target 10.2:** By 2030, 80% of tourism businesses do not have single use plastic

**Target 10.3:** By 2025 all tourism sites will have established regular and efficient garbage collection systems.

**Target 10.4:** By 2023, Government of Timor-Leste will have endorsed the Global Tourism Plastic Initiative

**Target 10.5:** By 2025 Timor-Leste will have joined the UNESCO Global Geoparks Network

### Pillar– PARTNERSHIP

### Strategic Vector 11. Partnerships

**Outcome 11:** The Government of Timor-Leste leads and empowers a tourism cooperation framework with multi-sectoral partners

**Output 11:** Partnerships with tourism stakeholders established and functioning in the scope of the NSPDT

**Priority Areas:**

11.1. Institutional

11.2. Development partners (Bilateral and Multilateral)

11.3. Regional (CPLP and ASEAN)

11.4. Private sector and civil society

11.5. Partnership annual report

**Target 11:** By end of 2024 the Government of Timor-Leste will have formalized partnerships with all tourism stakeholders.

