

Island of Majuro, Marshall Islands

DESTINATION INFORMATION AT A GLANCE

POPULATION:

55,000 (2020).*

CAPITAL:

Majuro (Majuro Atoll, just north of the equator, 3,672 kilometers (km) southwest of Honolulu, 3,867 km northeast of Cairns).

OFFICIAL LANGUAGES:

Marshallese and English. English is widely spoken.

CLIMATE:

Hot and humid equatorial climate, with the average temperature hovering close to 27°C year-round.

CURRENCY:

US dollar (\$).

ENTRY AND VISA REQUIREMENTS:

Citizens of the Federated States of Micronesia, Palau, and the United States do not require a visa to enter the country. A 30-day tourist visa is available on arrival for citizens of Australia; the European Union; Japan; New Zealand; Republic of Korea; Taipei, China; the United Kingdom; and other Pacific nations.

GEOGRAPHY:

An archipelago of two island chains, Ratak (Sunrise) and Ralik (Sunset), including five islands, 29 atolls, and 1,150 islets, with a land area of 181 square km spread across nearly two million square km of ocean.

*Asian Development Bank. 2021. *Key Indicators for Asia and the Pacific 2021*. Manila.

Republic of the Marshall Islands

PACIFIC TOURISM SECTOR SNAPSHOT | NOVEMBER 2021

INTRODUCTION

One of five coral atoll nations in the world, the Republic of the Marshall Islands offers visitors clear warm water, an abundance of marine life, and a range of cultural and recreational activities. Visitors can swim, snorkel, dive, and surf, and the islands have a strong local culture and eventful history to explore—including an abundance of World War II relics.

The Marshall Islands' tourism industry accounts for just under 10% of gross domestic product (Pacific Tourism Organisation [SPTO] 2020). The economy is dominated by public spending supported by international aid. The tourism industry employed just over 600 Marshallese in 2015, equivalent to an estimated 5.5% of the country's total workforce (SPTO 2019).

Despite its natural beauty, notable historical and cultural attractions, and free association with the United States, the Marshall Islands is not currently well-known as a tourist destination. While the government has stated its commitment to the controlled development of a sustainable tourism industry, a lack of resources and a consistent strategy for tourism marketing and investment is impeding the implementation of initiatives intended to support this. In addition, expensive and difficult international air connections, unreliable domestic air services, high vulnerability to climate change and disasters, and the impact of poor waste management on the natural environment remain persistent barriers to sector growth.

TOURISM SECTOR OVERVIEW

Note: this overview compiles key tourism information based on the most recent available data. Due to the impact of coronavirus disease (COVID-19) on the tourism sector, some of this information has likely changed.

TRANSPORT AND CONNECTIVITY

Majuro is connected by “island hopper” (multi-destination) services operated by United Airlines and Nauru Airlines.

Before the COVID-19 pandemic closed international borders, the return United Airlines service operated four times weekly, traveling from Hawaii to Guam and stopping at Majuro and Kwajalein, in addition to Pohnpei, Chuuk, and Kosrae in the Federated States of Micronesia. Nauru Airlines operated a twice-weekly return service from Nauru to Kiribati via Majuro. Both services primarily targeted the visiting friends and relatives (VFR) and business markets, and loadings were low but improving. The Nauru route, which was timelier, more cost-effective, and did not require passengers to transit through the United States, was becoming an increasingly attractive option for international business travel to Majuro.

Domestic air services are operated by Air Marshall Islands (AMI), which is a state-owned enterprise. AMI has only three aircraft and services 24 regional destinations. Although the airline publishes a regular schedule, flights operate on an ad hoc basis. Cancellations are common, and there have been reports of non-arrivals stranding tourists on outer islands (Asian Development Bank [ADB] n.d.). AMI has never made a profit and has struggled with weak management and political interference, requiring significant government subsidies—\$1.4 million in 2018 for example—to remain in operation (Graduate School USA 2019). Poor quality runways on the outer islands have also contributed to aircraft maintenance problems (ADB n.d.).

Inter-island travel is commonly by domestic passenger-cargo ship. Services are inexpensive, as tariffs are well below cost recovery. Vessels have historically been poorly maintained, although currently two of the four main vessels are relatively new (ADB n.d.). For tourists, there is also the option of charter boats to visit islands close to Majuro.

Tourists can move around Majuro easily via vans, taxis, and rental cars. Majuro has just one sealed road, and a shuttle van runs the length of the island every hour, from the Robert Reimers Hotel to Laura village. Rental cars are available from at least five providers, and taxis are cheap and plentiful.

ACCOMMODATION

Accommodation in Majuro is in short supply. There are two main hotels: the Marshall Islands Resort, which has 150 rooms, a restaurant, and conference facilities, and the Hotel Robert Reimers, which has around 40 rooms. Additional accommodation is available at the Lojkar Apartments and two backpacker hostels. The general accommodation standard is moderate to basic, with the two main hotels estimated at 2- to 3-star standard.

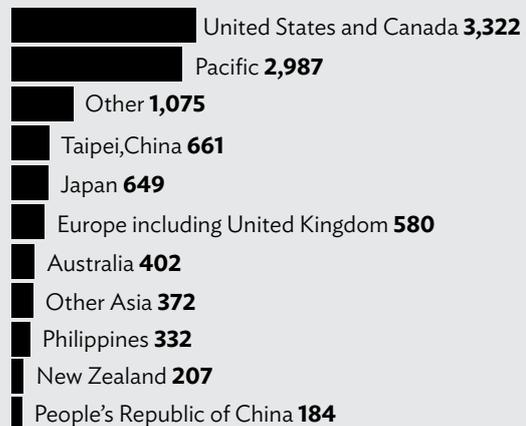
Box 1: Marshall Islands Key Visitor Statistics

Air Arrivals (2019)

10,771 visitors.

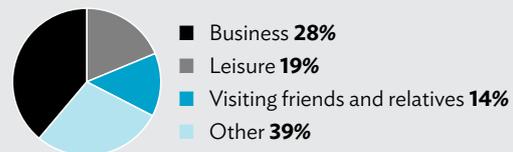
Source: Pacific Tourism Organisation.

Air Arrivals by Source Country (2019)



Source: Pacific Tourism Organisation.

Purpose of Visit (2019)



Source: Pacific Tourism Organisation.

Tourism Receipts (2017)

\$21.1 million.

Source: Pacific Tourism Organisation. 2020. 2019 Annual Visitor Arrivals Report. Suva. (Estimate).

Sea Arrivals

Two to three cruise ships each year, plus a small number of high-spending yacht visitors, although numbers and country of origin are not recorded.

Source: Government of the Marshall Islands. 2019. Strategic Tourism Development Plan 2020-2024. Majuro.

Source: Pacific Private Sector Development Initiative.

The Marshall Islands Resort is a state-owned enterprise. It has only recorded a profit once (in 2005) and has required operating subsidies in recent years (ADB n.d.). Occupancy rates are low—averaging just over 50% a year during 2014–2017—despite the small number of beds available in Majuro. The hotel does not

pay sales or government taxes, distorting the market and making it difficult for private sector operators to compete (ADB n.d.).

There are approximately 100 rooms on the nearby atolls and islands of the Marshall Islands. Accommodation ranges from small, air-conditioned island resorts to traditional thatched bungalows and basic camping facilities. There are a few high-end resorts on private islands, including the Boutique Resort Bikendrik Island and the Beran Island Resort, offering luxury accommodation for surfers and divers.

ORGANIZED TOURS

There are a small number of tour operators in the Marshall Islands. Most offer fishing tours, but there is also a dive operator, a surf tour company, and a guided tour of the World War II battlefields. The number of tour operators has dropped in recent years, and operators in Majuro often struggle to cope with demand during busy periods such as international conferences.

EMPLOYMENT AND TRAINING

Tertiary education is available through the College of the Marshall Islands and the University of the South Pacific's (USP's) Majuro campus. Tourism subjects are offered onshore at USP only in print or blended mode. Under the Marshall Islands compact agreement with the United States (US), citizens of the Marshalls Islands can study at US institutions without a visa. This provides additional study opportunities, but also leads to significant out-migration, as many Marshallese choose not to return home after completing their studies.

TOURISM GOVERNANCE, PLANNING, AND POLICY

The Office of Commerce, Investment and Tourism (OCIT) is responsible for tourism policy, planning, and marketing. Previously, the Marshall Islands Visitor Authority, a statutory authority mandated under the Tourism Amendment Act 1997, carried out these functions. However, in 2018, the Visitor Authority was merged with the Office of Commerce and Investment, to create a single department—OCIT—due to concerns about an overlap of functions and limited resourcing. OCIT now has five tourism staff and is led by a chief executive officer.

The Government of the Marshall Islands supports tourism and has put a number of plans and strategies in place to develop the sector (Table 1). The National Strategic Plan 2020–2030 lists tourism as a significant economic opportunity, suggesting it has “untapped potential in contributing to income and employment creation” (Government of the Marshall Islands 2020). The plan highlights the potential for harnessing the “blue economy” and advocates greater local participation and joint venture investments in the sector.

Sustainable tourism development is a priority. The country's vision for tourism, retained from the National Tourism Development Plan 2008–2011, is “to develop our economic base through tourism and to enable all Marshallese to benefit

Box 2: Marshall Islands Visitor Arrival Trends

Air Arrivals (2014–2019)



Source: Pacific Tourism Organisation.

The number of visitors in 2019 represented an increase of almost 70% from the previous year. This was largely due to international conferences held in Majuro. Prior to 2019, arrival numbers had been flat, with around 6,000 visitors per year since 2015.

The highest number of visitors to the Marshall Islands are from North America. Visitors from North America—predominantly the United States—accounted for 30% of arrivals in 2019. Pacific visitors accounted for a further 25%, followed by Japan and Taipei, China, at 6% each. The North American and European markets have seen the strongest growth over the past 5 years, increasing by 84% and 120%, respectively (Pacific Tourism Organisation, unpublished data). Although visitor arrivals are not seasonal, there is usually a defined peak at Christmas due to travelers visiting friends and relatives.

Source: Pacific Private Sector Development Initiative.

from controlled tourism development, insisting that this development will complement the Marshallese people, their natural environment and cultural heritage” (Government of the Marshall Island 2008). A focus on the quality of tourist, not quantity, is preferred.

TOURISM SECTOR CHALLENGES AND OPPORTUNITIES

TRANSPORT AND CONNECTIVITY

Potential tourism investment is undermined by unreliable air services. In 2008, unreliable air services led to the demise of dive tourism in Bikini Atoll, as international divers were repeatedly left stranded. While the outer islands hold significant economic potential for the Marshall Islands, the unreliability of AMI has and will continue to undermine their development (ADB n.d.). This challenge is compounded by limited and costly international flights into Majuro.

Table 1: Tourism Plans and Policies, Republic of the Marshall Islands

PLAN OR POLICY	STRATEGIES AND GOALS
2019-2021 Business Plan	<p>The current business plan for the Office of Commerce, Investment and Tourism.</p> <p>The plan outlines three tourism markets for priority support (Government of the Marshall Islands, Office of Commerce, Investment and Tourism 2019). These include further development of Majuro’s conference industry, expansion of dive tourism, and increasing outer island tourism by trialing “picnic flights.” The plan also outlines the Office’s commitment to encouraging foreign investment for resort development and air access, and pledges to support new air service agreements and private access to land.</p>
Strategic Tourism Development Plan 2020-2024	<p>The Marshall Islands’ current tourism sector strategy.</p> <p>The strategic development plan was written by an external consultant and proposes an unlikely target of 60,000 visitor arrivals and 300% growth in room occupancy by 2024 (Government of the Marshall Islands 2019). The plan’s proposed growth strategies—such as wellness and wedding tourism—are significantly more ambitious than the priorities outlined in the Office of Commerce, Investment and Tourism 2019-2021 Business Plan (Government of the Marshall Islands, Office of Commerce, Investment and Tourism 2019).</p>

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Government of the Marshall Islands. 2019. *Strategic Tourism Development Plan 2020-2024*. Majuro.
 Government of the Marshall Islands, Office of Commerce, Investment and Tourism. 2019. *2019-21 Business Plan*. Majuro.

Source: Pacific Private Sector Development Initiative.

ENVIRONMENT AND INFRASTRUCTURE

The Marshall Islands is highly vulnerable to climate change and disasters. The country is largely comprised of low-lying coral atolls, and rising sea levels, storm surges, typhoons, and drought pose a significant threat.

Limited access to water is a constraint to tourism. The Marshall Islands relies heavily on rainwater, and piped water is rationed. Households have access to 4 hours of water three times per week during non-drought periods. Water is frequently unsuitable for drinking (Secretariat of the Pacific Regional Environment Programme [SPREP] 2016).

Over 70% of the population lives in urban areas, and urban migration is continuing (SPREP 2016). Ebeye Atoll is the most densely populated place in the Pacific region and 100% urban (World Health Organisation 2015). The pressures of urbanization in Ebeye and Majuro affect water supply, waste disposal, and sanitation. Broken sewage infrastructure discharges raw effluent on reef flats, and bacterial counts more than 230 times the safe limit have been recorded in the lagoons around Majuro (SPREP 2016). This undermines public health, the marine environment, and tourism.¹

Waste management, collection, and recycling lag behind waste generation. In many cases, waste is still burned, and unregulated dumping is common. In 2008, the Government

of the Marshall Islands reported that the image of the Marshall Islands was being damaged by its poorly maintained natural environment—jeopardizing the very resource that attracts tourists in the first place (Government of the Marshall Islands 2008).

Infrastructure development approval processes could be strengthened to ensure the sustainability of the tourism sector. Despite an ostensible focus on sustainability, the Government of the Marshall Islands has few mechanisms to ensure development is congruent with sustainable tourism. Although there is a Planning and Zoning Act, it is not currently used. There are no defined zones for tourism development, and only limited information on the types of developments permissible. This could have a damaging impact on the local environment, particularly coastal areas, if tourism development increases (ADB n.d.).

VISITOR DEMAND

Growth of the tourism sector overall is constrained by stagnant tourist arrivals. Tourist arrivals in the Marshall Islands have not risen significantly since the 1990s. Data shows that total arrivals peaked at just under 7,500 in 2005, a number that was not exceeded until 2019 (Marshall Islands Office of Commerce, Trade and Investment, unpublished data). A study from 2008 found annual room occupancy of just 23% across all properties in 2006 and 2007 (Government of the

1 A recently completed Asian Development Bank project has delivered a much-needed water and sewage plant in Ebeye.

Box 3: Marshall Islands Key Attractions

- **Clear warm waters and sheltered lagoons**—The pristine marine environment, especially on the outer islands and atolls, is home to an abundance of life, including the world’s largest shark sanctuary, and offers excellent swimming, snorkeling and diving.
- **World-class fishing**—Plentiful stocks and established annual tournaments.
- **Niche surfing destination**—The country’s winds and reefs produce world class waves.
- **History and culture**—Including local weaving and handicrafts, canoes, and traditional navigation techniques. An important Japanese base during World War II, the Marshall Islands is host to a number of war relics, including sunken wrecks that attract international divers. The history of nuclear weapons testing is on display at the Alele Museum, and the adventurous can visit the World Heritage-listed Bikini Atoll Nuclear Test Site.

Source: Pacific Private Sector Development Initiative.



Marshall Islands 2008). Given the limited increase in arrivals, the occupancy rate is unlikely to have improved in the decade since. Low tourist numbers and poor occupancy rates provide limited incentive for private sector investment.

TOURISM MARKETING

The Marshall Islands has not been widely marketed as a destination. OCIT has only a small annual budget for marketing—around \$120,000 per year—of which over 50% is spent on attendance at international meetings, conferences, and events (Government of the Marshall Islands 2019). The former Marshall Islands Visitors Authority website remains the primary destination website, and there is some tourist information on the OCIT site. The Marshall Islands is yet to develop a destination brand.

American military personnel and their families at Kwajalein present a domestic marketing opportunity. Many have high disposable incomes and are keen to take weekend vacations. During the global COVID-19 shut down, OCIT has developed tourism packages—which include flights, accommodation, and car hire—to encourage local Americans and Marshallese to

travel domestically, both to stimulate demand and improve the tourism product for when borders reopen.

SECTOR ORGANIZATION

The official position of the Government of the Marshall Islands is that tourism should be “private sector-led.”

However, the difficulties of doing business in the Marshall Islands are considered a significant constraint on private sector development (Government of the Marshall Islands, Office of Commerce, Investment and Tourism [OCIT] 2019). Private sector support is facilitated through the Marshall Islands Chamber of Commerce. However, there are concerns that the body is not fully representative of all business interests in the country, and many smaller tourism operators are not members.

Small local operators struggle to compete with the larger, and in some cases government-owned, tourism businesses.

Many accommodation providers are local families without formal tourism training. They often have limited knowledge of marketing or online travel agents and are unable to accept online bookings or credit card payments. As a result, most international travelers who pre-book accommodation tend to frequent the same few properties.

ECONOMY, POLITICS, AND GOVERNMENT

State-owned enterprises are crowding out private sector tourism investment. Neither AMI nor Marshall Islands Resort is profitable, and both require ongoing government support to remain operational (ADB n.d.). This creates an uneven playing field for private sector investment and reduces the competitiveness of the Marshall Islands as a destination.

Foreign investment in tourism is actively encouraged but obtaining a foreign investment license is a cumbersome process. Small-scale foreign investments have been successful in the outer islands, but continue to be constrained by a lack of infrastructure, air connectivity, and a challenging business environment. The government is updating the National Investment Policy Statement to make it more user-friendly for investors and focus on the productive sectors of tourism, fisheries, and small and medium enterprises (OCIT, consultations with author, 2021).

Limited taxation on tourism investments can cause economic leakage (i.e. how much of the tourism dollar leaves the country). The Marshall Islands does not have a value-added tax. Instead, a gross revenue tax is used, which does not distinguish between low and high-profit businesses (ADB n.d.). Tax incentives are often used to attract international investment but are rarely accompanied by agreed performance measures, such as local employment minimums. Taxation payable by foreign-owned resorts in the outer islands is estimated to be as low as 3% (OCIT, consultations with author, 2020).

LAND ACCESS AND DEVELOPMENT

Tourism development in the Marshall Islands is constrained by the limited availability of land and complicated land ownership structures. The Marshall Islands has a land area

Box 4: Impact of COVID-19 on the Marshall Islands' Tourism Sector

The Marshall Islands declared a public health emergency on 7 February 2020. After introducing some initial trade and travel restrictions from late January 2020, borders were closed to commercial flights on 8 March 2020. At the end of July 2021, borders remained closed, with exemptions, such as those for personnel at the United States (US) military base on Kwajalein Atoll. A 21-day quarantine period applies for exempted arrivals from all countries (United Nations Economic and Social Commission for Asia and the Pacific 2021). Government outbound travel is banned, and Marshall Islands residents are strongly advised not to travel abroad. In response to the high rates of infection and death of Marshall Islanders living in the US, a government proposal to suspend outbound travel of private citizens is pending with the Marshall Islands' cabinet (Pacific Tourism Organisation 2021). As of July 2021, four cases of coronavirus disease (COVID-19) had been recorded in the Marshall Islands, detected and contained at the border, with no deaths (World Health Organisation 2021). By mid-April 2021, nearly 75% of adults in the main centers had received a first vaccination, and just over 50% in Majuro and Ebeye had received two doses (Radio New Zealand 2021).

The projected economic impact of COVID-19 on the tourism sector in the Marshall Islands is significant. The hotel and restaurant sector accounts for only 2.3% of the country's gross domestic product (GDP) but has been hard-hit. The two main hotels in Majuro have been virtually empty, and more than half of the restaurant sector is visitor-dependent (Graduate School USA 2021). Job losses for hotels and restaurants alone are projected to be 258, or 36% of the country's total projected 716 job losses (Graduate School USA 2021). GDP fell by 2.6% in FY2020 and is projected to contract an additional 3.3% in FY2021 before a growth of 4.0% expected in FY2022 (ADB 2021a), with the greatest losses expected in the fisheries sector (ADB 2021b).

In April 2020, the government announced an initial \$6 million economic relief package to support local businesses. The government later approved a budget of \$42 million for a national preparedness plan in response to the

pandemic, largely funded through donor grants (Graduate School USA 2021). The Marshall Islands has one of the highest aid dependencies in the Pacific, and has received significant emergency funding, including from the US, Asian Development Bank, and the World Bank (Graduate School USA 2021). The US Coronavirus Aid, Relief, and Economic Security Act, also known as the CARES Act, includes a support package of \$7.5 million for unemployment compensation (Graduate School USA 2021).

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Source: Pacific Private Sector Development Initiative.

^a The Marshall Islands' fiscal year ends 30 September.

Island of Majuro, Marshall Islands





Amata Kabua International Airport, Marshall Islands

of just 181 square kilometers. Like many Pacific nations, land in the Marshall Islands is largely owned by customary groups under complex governance structures. Non-Marshallese are not entitled to purchase land and leasing customary land is difficult because of poorly defined ownership, boundaries, and use rights (ADB n.d.).

EMPLOYMENT AND TRAINING

Marshall Islanders generally lack awareness of the importance and potential of tourism. This was the concern most frequently raised by stakeholders during consultation for the National Tourism Development Plan 2008–2011 (Government of the Marshall Islands 2008). Stakeholders felt that local awareness-building efforts had been insufficient and that most Marshallese—from the highest levels of government to communities in the outer islands—do not realize the extent of the potential benefits of tourism.

The tourism sector increasingly relies on foreign workers. A 2015 employer survey reported difficulty filling positions in the tourism sector—from entry-level jobs, such as waiters and retail staff, to positions requiring advanced qualifications and training (ADB n.d.). High-end resorts, such as Beran Island, import most of their staff, particularly chefs and trained surf and dive instructors, as these skills are not available locally.

The need for employment opportunities is growing. The 2011 census found that only 30% of the working-aged population had formal paid employment, with men almost twice as likely to be economically active as women. 40% of Marshallese in the outer islands are on an income of less than \$1 per day (ADB n.d.).

While there are already tourism jobs—for example for waiters, cooks, and tour guides—available in Majuro, tourism jobs in some outer islands will only increase in number as tourism grows. Improved tourism awareness and training could support local workers to service industry demand.

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