



# Integrating Circular Economy and Sustainable Consumption Practices in the Pacific Tourism Sector

**Sustainable Tourism  
Enhancement in the  
Pacific (STEP)**

BACKGROUND  
REPORT

## Acknowledgements

This Pacific Sustainable Tourism Background Report was developed as part of the Sustainable Tourism Enhancement in the Pacific (STEP) Programme, commissioned by the EU SWITCH-Asia Pacific Policy Support Component (PSC). The report was prepared by Penny Spoelder and Becky Last, with the support of the Pacific Tourism Organisation (SPTO), and under the supervision of Loraine Gatlabayan and Dr. Zinaida Fadeeva, Team Leader of the SWITCH-Asia Pacific Policy Support Component.

### **The SWITCH-Asia Pacific Programme**

© 2025 SWITCH-Asia Pacific

Cover photo credit: SPTO & David Kirkland

### **Disclaimer**

The information and contents in this document are the sole responsibility of the authors and do not necessarily reflect the views of the European Union.

# TABLE OF CONTENTS

## SECTION 1. REGIONAL CONTEXT

<b>1. Introduction &amp; context</b>	<b>6</b>
1.1. The Pacific Policy context	6
1.2. Sustainable Tourism in the Pacific Region	6
1.3. Value Proposition of the Circular Economy (CE) for Tourism	7
1.4. The STEP Project	7
1.5. Pacific Tourism Sector overview	9
1.6. Sector challenges	13
<b>2. Regional Framework &amp; Policy Overview</b>	<b>16</b>
2.1. Regional Frameworks	16
2.2. Policy Framework for Sustainable Tourism	17
2.3. National frameworks and policies	18
2.4. International hotel standards	20
<b>3. National Tourism Policies &amp; Standards Overview</b>	<b>21</b>
3.1. Fiji	21
3.2. Kiribati	24
3.3. Samoa	28
3.4. Vanuatu	31

## SECTION 2. STEP CONSULTATIONS

<b>4. Step Project Baseline Survey – Country Snapshots</b>	<b>35</b>
4.1. The findings of the Survey	35
4.2. Conclusions from the Survey	37
<b>5. Demonstration Countries: The consultations</b>	<b>38</b>
5.1. Policy and Regulatory Frameworks	38
5.2. Limited Capacity and Resourcing	38
5.3. Industry Engagement and Incentives	38
5.4. Market Access and Supply Chain Visibility	38
5.5. Demonstration Country Priority Actions	39
5.6. Key thematic areas	41
<b>6. Regional Validation Workshop</b>	<b>42</b>
6.1. Workshop structure and objectives	42
6.2. Ranking and validation of Thematic Areas	42

## SECTION 3. THEMATIC AREAS

6.3. Thematic Area 1: Enabling Sector Transition	45
6.4. Thematic Area 2: National & Regional Policy Support	47
6.5. Thematic Area 3: Sustainable Consumption & Production Practices	48
6.6. Thematic Area 4: Sustainable Buildings & Infrastructure	50
6.7. Thematic Area 5: Agriculture & Tourism Linkages	51
6.8. Next steps	52
6.9. Concluding comments	53
<b>7. Appendices</b>	<b>54</b>
Appendix A. Fiji detailed country context	54
Appendix B. Kiribati detailed country context	64
Appendix C. Samoa detailed country context	70
Appendix D. Vanuatu detailed country context	76
<b>References</b>	<b>86</b>

# LIST OF TABLES AND FIGURES

Table 1. Pacific visitor arrivals (2023 data) .....	10
Table 2. Total number of accommodation establishments, rooms and beds in Pacific Region .....	11
Table 3. Fiji Priority Actions following consultations .....	39
Table 4. Kiribati Priority Actions following consultations .....	39
Table 5. Samoa Priority Actions following consultations .....	40
Table 6. Vanuatu Priority Actions following consultations .....	41
Table 7. Key barriers for enabling sector transition .....	46
Table 8. Key Barriers for national and regional policy support .....	47
Table 9. Key Barriers for sustainable consumption and production practices .....	49
Table 10. Key Barriers for sustainable buildings and infrastructure .....	50
Table 11. Key Barriers to agriculture and tourism linkages .....	51
Table 12. Kiribati legislation and policy related to water, waste, infrastructure and energy .....	65
Table 13. Samoa policy context .....	71
Figure 1. Top priority areas by Sustainability Goal (STEP Baseline Survey) .....	37

## ABBREVIATIONS

<b>3Rs</b>	Reduce, reuse, recycle
<b>ADB</b>	Asian Development Bank
<b>APTC</b>	Australia Pacific Training Coalition
<b>BAU</b>	Business as usual
<b>CBTEs</b>	Community-based tourism enterprises
<b>CE</b>	Circular economy
<b>CROP</b>	Council of Regional Organisations of the Pacific
<b>DFAT</b>	Australian Department of Foreign Affairs and Trade
<b>DGM</b>	Destination governance and management
<b>DOT</b>	Vanuatu Department of Tourism
<b>ESG</b>	Environmental, social, and governance
<b>ECsAs</b>	Ecologically and Culturally Significant Areas
<b>EIA</b>	Environmental impact assessment
<b>EU</b>	European Union
<b>FHTA</b>	Fiji Hotel and Tourism Association
<b>FJD</b>	Fiji Dollars
<b>FTSF</b>	Fiji Tourism Standards Framework
<b>GDP</b>	Gross domestic product
<b>GoV</b>	Government of Vanuatu
<b>GSTC</b>	Global Sustainable Tourism Council
<b>IFC</b>	International Finance Corporation
<b>KDP</b>	Kiribati Development Plan
<b>KPA</b>	Key priority area
<b>KSTDPF</b>	Kiribati Sustainable Tourism Development Policy Framework
<b>KSTP</b>	Kiribati Sustainable Tourism Policy
<b>KV20</b>	Kiribati 20-year Vision



<b>MSME</b>	Micro, small and medium-sized enterprises
<b>MTCA</b>	Fiji Ministry of Tourism and Civil Aviation
<b>NDC</b>	Nationally determined contribution
<b>NDP</b>	Fiji National Development Plan
<b>NEPIP</b>	National Environment Policy and Implementation Plan (2016–2030)
<b>NGO</b>	Non-governmental organisation
<b>NSDP</b>	Vanuatu National Sustainable Development Plan
<b>NSTF</b>	Fiji National Sustainable Tourism Framework
<b>NTA</b>	National Tourism Authorities
<b>NTO</b>	National Tourism Organisation
<b>PATA</b>	Pacific Asia Travel Association
<b>PDS</b>	Pathway for the Development of Samoa
<b>PICs</b>	Pacific Island Countries
<b>PSC</b>	Policy support component
<b>PSDI</b>	Private-sector development initiative
<b>PSTI</b>	Pacific Sustainable Tourism Indicators
<b>PSTPF</b>	Pacific Sustainable Tourism Policy Framework
<b>PSTS</b>	Pacific Sustainable Tourism Standard
<b>PTSS</b>	Pacific Tourism Statistics Strategy 2021–2030
<b>SCP</b>	Sustainable consumption and production
<b>SDG</b>	Sustainable development goals
<b>SHHA</b>	Samoa Hotels & Hospitality Association
<b>SIDS</b>	Small Island Developing States
<b>SPC</b>	Pacific Community
<b>SPREP</b>	Secretariat of the Pacific Regional Environment Programme
<b>SPTO</b>	Pacific Tourism Organisation ( <i>formerly known as South Pacific Tourism Organisation</i> )
<b>SRWMA</b>	Samoa Recycling and Waste Management Association
<b>STA</b>	Samoa Tourism Authority
<b>STEP</b>	Sustainable Tourism Enhancement in the Pacific
<b>STSP</b>	Samoa Tourism Sector Plan
<b>SUP</b>	Single-use plastics
<b>TAK</b>	Tourism Authority of Kiribati
<b>UNCRD-DSDG</b>	United Nations Centre for Regional Development – Division for Sustainable Development Goals
<b>UNDP</b>	United Nations Development Programme
<b>UNEP</b>	United Nations Environment Programme
<b>UNESCO</b>	United Nations Educational, Scientific and Cultural Organization
<b>UNITAR</b>	United Nations Institute for Training and Research
<b>USP</b>	University of the South Pacific
<b>VSTP</b>	Vanuatu Sustainable Tourism Policy
<b>VSTS</b>	Vanuatu Sustainable Tourism Strategy
<b>VTHRDS</b>	Vanuatu Tourism Human Resources Development Strategy 2021–2030
<b>VTO</b>	Vanuatu Tourism Office
<b>VTOMS</b>	Vanuatu Tour Operator Minimum Standards
<b>VTPAP</b>	Vanuatu Tourism Permit and Accreditation Programme
<b>VTPCS</b>	Vanuatu Tourism Permit Classification System
<b>WBG</b>	World Bank Group

# SECTION 1. REGIONAL CONTEXT

## 1. INTRODUCTION & CONTEXT

### 1.1. The Pacific Policy context

The Pacific region is a vast and diverse area encompassing thousands of islands scattered across the Pacific Ocean. It includes three major subregions: Melanesia, Micronesia, and Polynesia, each with distinct cultures, languages, and histories. Stretching from Papua New Guinea in the west to Easter Island in the east, the region is home to small island developing states (SIDS) such as Fiji, Samoa, Kiribati, and the Marshall Islands. These island nations are characterised by their strong connection to the ocean, rich Indigenous knowledge systems, and deep cultural traditions rooted in community and environmental stewardship.

Despite their geographical isolation, Pacific nations face shared challenges and opportunities. They are particularly vulnerable to climate change, natural disasters, and economic volatility due to their reliance on tourism, agriculture, and foreign exchange remittances. At the same time, the region is known for its leadership in global climate advocacy, marine conservation, and cultural resilience. Regional cooperation through bodies like the Pacific Islands Forum and the Pacific Community helps foster collective action on issues such as sustainable development, regional security, and disaster preparedness.

The 2050 Strategy for the Blue Pacific Continent, adopted by Pacific Islands Forum leaders in 2022, serves as a comprehensive framework guiding the region's long-term development. The strategy emphasises the importance of sustainable and resilient economic models that ensure equitable access to resources and opportunities for all Pacific peoples. This includes promoting policies and practices that enhance resource efficiency, minimise waste, and support sustainable development. The implementation of the Blue Pacific Strategy in tourism is supported through several regional initiatives led by the Pacific Tourism Organisation (SPTO).

The policy context for this work was also shaped by the outcomes of the SIDS (in this case, the Pacific Island countries) Consultation Meeting on the Pre-Zero Draft of the New Declaration on 3R and Circular Economy in Asia-Pacific (2024–2034), held in Apia, Samoa in May 2024. This landmark regional consultation, co-organised by the United Nations Centre for Regional Development – Division for Sustainable Development Goals (UNCRD–DSDG), United Nations Department of Economic and Social Affairs (UN DESA), and the Secretariat of the Pacific Regional Environment Programme (SPREP), brought together representatives from 20 Pacific countries to address the unique challenges faced by SIDS in advancing sustainable material use, waste management, and circular economy practices. The meeting emphasised the urgent need for integrated 3Rs (reduce, reuse, recycle) and circular economy (CE) strategies, aligned with SPREP's regional frameworks, to achieve resource-efficient, resilient, and low-carbon societies. The insights and commitments from this consultation directly inform the strategic direction and priorities outlined in this Roadmap, ensuring that Pacific perspectives and realities are at the forefront of regional policy and action on Circular Economy (CE) and Sustainable Consumption and Production (SCP).<sup>1</sup>

### 1.2. Sustainable Tourism in the Pacific Region

The SPTO supports 20 member countries in advancing sustainable tourism through marketing, research, and policy initiatives. Many of these members are SIDS facing unique vulnerabilities.

The Pacific Sustainable Tourism Policy Framework (PSTPF) (Pacific Tourism Organisation, 2021), endorsed by Pacific Tourism Ministers in 2021, provides the strategic foundation for sustainable tourism across the region. It recognises sustainable consumption and production (SCP) and circular economy (CE) principles as essential to building a tourism sector that is resilient, inclusive, and regenerative. To operationalise this vision, the Pacific Leaders Sustainable Tourism Commitment – signed by SPTO member countries – represents a shared pledge to embed sustainability in national tourism strategies and action plans and commits countries to low-carbon, resource-efficient, and culturally respectful tourism development.

<sup>1</sup> <https://uncrd.un.org/content/sids-consultation-meeting-pre-zero-draft-new-declaration-3r-ce>

The Pacific Sustainable Tourism Standards (PSTS) are the region's primary tool for delivering these commitments (Pacific Tourism Organisation, 2023). Aligned with the Global Sustainable Tourism Council (GSTC) criteria, the PSTS set clear, practical benchmarks for tourism businesses and destinations across four goals.

**Goal 1. Prosperous economies** – encouraging circular business models, sustainable procurement, and efficient resource use

**Goal 2. Thriving and inclusive communities** – supporting local livelihoods and inclusive participation in sustainable tourism

**Goal 3. Visible and valued cultures** – protecting and promoting cultural heritage through tourism in a respectful, regenerative way

**Goal 4. Healthy islands and oceans** – reducing waste, conserving biodiversity, and fostering climate resilience

Together the Framework, Commitment, and Standards act as the regional mechanism to accelerate CE outcomes by linking policy, planning, and implementation at all levels of the tourism sector. They guide tourism operators, governments, and communities to adopt circular practices, from reducing single-use plastics and improving energy efficiency to creating local supply chains and rethinking waste as a resource.

National Tourism Offices (NTOs) play a central role in driving sustainable tourism across the Pacific Island Countries. As lead government agencies for tourism, NTOs are responsible for shaping policy, coordinating with stakeholders, and guiding the development of tourism that balances economic growth with environmental and cultural stewardship. Their role includes integrating sustainability into national tourism strategies, supporting the adoption of standards, and building awareness of sustainable consumption and CE principles across the sector.

NTOs also facilitate industry engagement, data collection, and capacity building – particularly for micro, small, and medium-sized enterprises (MSMEs) – while collaborating with other ministries (e.g. environment, infrastructure, climate) to embed tourism within broader national development and resilience goals.

### 1.3. Value Proposition of the Circular Economy (CE) for Tourism

The value proposition of the CE for tourism in the Pacific lies in its potential to create a more resilient, efficient, and inclusive tourism sector that aligns with the region's environmental, social, cultural, and economic priorities. By designing out waste, maximising resource use, and regenerating natural systems, CE approaches can reduce operational costs for businesses, protect the ecosystems that attract visitors, and create new income opportunities for local communities. For island nations with limited land, high import dependency, and fragile infrastructure, circular tourism offers practical solutions, such as local sourcing, waste-to-resource initiatives, and renewable energy use that strengthens self-sufficiency and climate resilience. It also appeals to the growing global market of eco-conscious travellers seeking authentic, low-impact experiences.

Advancing sustainable consumption and production (SCP) practices in the tourism sector is essential if the sector is to contribute effectively to sustainable development. This sector is well positioned to trigger change given the transversal supply chain connecting a wide array of sectors and stakeholders, which can lead to positive multiplier effects.

### 1.4. The STEP Project

The Sustainable Tourism Enhancement in the Pacific (STEP) Project, delivered under the EU SWITCH-Asia Pacific Policy Support Component, presents a strategic framework to advance CE and SCP practices within the Pacific tourism sector. While CE and SCP are integral pillars of sustainable development, the project's focus is specifically on these two areas, rather than the entire spectrum of sustainable development objectives.

A central tenet of the STEP initiative is to examine and address how resource use – such as energy, water, and materials – affects and is affected by every stage of the tourism supply chain, from sourcing and

procurement to service delivery and waste management. By focusing on these linkages, the project aims to reduce negative environmental impacts and promote more efficient, circular resource flows within the sector. The integration of 3R and CE principles is recognised as essential for achieving the Sustainable Development Goals (SDGs), advancing the 2050 Strategies for the Blue Pacific Continent, and contributing to the Antigua and Barbuda Agenda for SIDS (ABAS).

The objective of the project is to assess the status of PSTS implementation across SPTO member countries and develop practical, targeted actions to support the transition to sustainable tourism, CE/SCP practices at both national and regional levels.

Realising this vision calls for open-minded cooperation, innovation, and knowledge-sharing – both within countries and across the region. It positions the SPTO as a central facilitator of this change, enabling cross-sector collaboration, promoting research and innovation, and strengthening partnerships among governments, communities, and the private sector.

The methodology has followed a five-step process.

### **Step 1: Scoping assessment**

This phase involved desktop research, a regional survey, and direct consultation with national tourism stakeholders to:

- review existing tourism strategies, policies, and sustainability frameworks
- collect baseline data on the adoption and application of sustainable tourism standards
- validate findings and incorporate national context into the assessment.

### **Step 2: In-country consultation**

Focused consultations were conducted in four demonstration countries (DCs) – Fiji, Kiribati, Samoa, and Vanuatu – to:

- assess the status of tourism standards and sustainable tourism practices
- identify critical impact areas in each country's tourism system
- co-design tailored national pathways that integrate CE/SCP principles and align with the PSTPF and PSTS.

### **Step 3: Regional Validation Workshop**

Held from 23–24 April 2025 in Suva, Fiji, the Regional Validation Workshop,<sup>2</sup> brought together over 50 participants from ten Pacific Island countries, including representatives from National Tourism Organisations (NTOs), government agencies, the private sector, non-governmental organisations (NGOs), development partners, and communities. The workshop served to:

- validate the proposed PSTS focus areas and regional priorities
- assess progress and identify shared challenges across member countries
- begin ideating the Regional Roadmap through stakeholder feedback.

### **Step 4: Development of the Regional Roadmap**

Findings from the scoping, consultations, and validation workshop were synthesised to develop a Regional Roadmap<sup>3</sup> to:

- provide a staged, practical framework for PSTPF and PSTS implementation
- identify institutional and industry capacity gaps to guide technical assistance
- establish priority actions for SPTO and partners to support sustainable tourism development in a systematic and coordinated manner
- highlight investment opportunities to support sustainable tourism transitions.

---

<sup>2</sup> Workshop Agenda is available at [https://www.switch-asia.eu/site/assets/files/4392/step\\_regional\\_workshop\\_23-24\\_april\\_2025\\_fiji\\_agenda\\_final.pdf](https://www.switch-asia.eu/site/assets/files/4392/step_regional_workshop_23-24_april_2025_fiji_agenda_final.pdf) (SWITCH-Asia, 2025a). Workshop report is available at: [https://www.switch-asia.eu/site/assets/files/4392/step\\_workshop\\_21\\_may\\_final-1.pdf](https://www.switch-asia.eu/site/assets/files/4392/step_workshop_21_may_final-1.pdf) (SWITCH-Asia, 2025b).

<sup>3</sup> Regional Roadmap is available at: <https://www.switch-asia.eu/our-work/multi-country/supporting-sustainable-tourism-through-scp-policy-development-and-implementation-in-the-pacific/>.



## Step 5: Development of National Pathways

Country-specific interventions and priorities identified during in-country consultations were further refined through regional validation and detailed in four Country Pathway reports.<sup>4</sup> These pathways outline tailored actions for Fiji, Kiribati, Samoa, and Vanuatu, capturing local context, aligning with national priorities, and supporting the practical integration of PSTS, SCP, and CE principles into national tourism systems.

### *Value brought by the STEP Project*

The process of consulting and implementing the STEP Programme in Phase 1 has identified numerous stakeholder benefits that will be further developed as recommendations and projects are implemented, whether in STEP Phase 2 or with the support of others.

**A change of mindset:** The STEP programme can contribute to changing the mindset of the entire group of relevant stakeholders, and in particular the producers and end users in developing countries, which now increasingly recognise the importance of sustainable tourism and the cross-cutting nature of policies to bring about the change required. Moreover, the focus on small and medium-sized enterprises (SMEs) will be useful because these businesses comprise the larger part of the tourism sector in the Pacific and are instrumental in promoting responsible economic development.

**Awareness-raising:** The programme will play a crucial role in raising awareness about sustainable consumption in the tourism sector (private and public), where this concept is not yet widespread.

**Multi-stakeholder engagement:** The programme has encouraged strong collaboration among partners and stakeholders from the outset, therefore enhancing positive outcomes and results via multi-stakeholder engagement.

**Knowledge and information sharing:** The programme provides an excellent opportunity for knowledge and information sharing, as well as awareness-raising and regional support. It contributes to sharing and communicating the lessons learned, thereby helping to make changes at the policy level as well as creating opportunities for replication of best practices in other countries.

**Alignment to national priorities and international standards:** The priorities included in the Regional Roadmap are aligned with regional strategies and the National Development Plans and tourism strategies, plans and policies of each country.

## 1.5. Pacific Tourism Sector overview

### *The Importance of Tourism for the Pacific Economies*

Tourism plays a vital role in many Pacific Island economies, contributing significantly to employment, entrepreneurship, foreign exchange earnings, and investment. For some countries, particularly those with limited resource-based growth options, tourism offers a sustainable and skilled pathway for economic development. This importance is clearly reflected in national development plans across the region.

In 2023, total tourism receipts for the Cook Islands, Fiji, and French Polynesia were estimated at USD 2.2 billion, just below the USD 2.38 billion recorded in 2019. Tourism accounts for approximately 70% of GDP in the Cook Islands and 40% in Fiji, underscoring its centrality to economic performance.<sup>5,6</sup>

However, sector development is constrained by a range of systemic and structural challenges, many of which were reaffirmed through consultation:

- Geographic isolation and dispersion necessitate high levels of coordination and increase transport and infrastructure costs
- Small population bases and limited domestic capital restrict investment capacity, requiring external support
- Low critical mass hampers marketing efforts and drives up operational costs

4 Country Pathway Reports are available at: <https://www.switch-asia.eu/our-work/multi-country/supporting-sustainable-tourism-through-scp-policy-development-and-implementation-in-the-pacific/>.

5 Cook Islands Visitor Economy Factsheet, Volume 2, September 2024 and Fiji National Development Plan 2025–2029.

6 Statistics are drawn from national country data as reported in SPTO Annual Visitor Reports for 2019 and 2023.

- Weak connectivity, with limited international and domestic air services, inhibits intra-regional travel and dispersal
- Under-resourced public tourism agencies struggle to coordinate and drive sectoral reform
- Skills shortages, driven by outward migration, restrictive immigration, and limited training pathways
- Cultural and environmental risks, including degradation of traditional knowledge, marine and terrestrial ecosystems
- Land tenure complexities deter tourism investment
- High vulnerability to climate change and natural disasters, compounding recovery needs and infrastructure resilience demands
- Pacific nations are at varying stages of tourism development, shaped by their unique endowments, governance structures, and degrees of policy support.

## Visitor Arrivals

In 2023 Fiji accounted for over 38% of all arrivals (more than 1 million visitors), driven largely by air travel. French Polynesia, New Caledonia, and Vanuatu together made up 36% of regional arrivals, with cruise tourism playing a major role in New Caledonia and Vanuatu. Samoa and Cook Islands performed well with strong air travel figures, although cruise arrivals remained low. Table 1 presents 2023 visitor arrivals (air and cruise) across the Pacific.

**Table 1. Pacific visitor arrivals (2023 data)**

Pacific Island destinations	2023 Visitor arrivals (Air)	2023 Visitor arrivals (Cruise)	2023 Visitor arrivals (Air + Cruise)	% Share of 2023 Visitor arrivals (Air + Cruise)
American Samoa	64661	17392	82053	3.11%
Cook Islands	143506	0	143506	5.44%
FSM	1795	518	2313	0.09%
Fiji	929740	83473	1013213	38.42%
French Polynesia	261813	43815	305628	11.59%
Kiribati	8224	0	8224	0.31%
Marshall Islands	6046	0	6046	0.23%
Nauru	237	0	237	0.01%
New Caledonia	111472	236048	347520	13.18%
Niue	2414	0	2414	0.09%
PNG	112775	0	112775	4.28%
Samoa	174967	7784	182751	6.93%
Solomon Islands	26036	0	26036	0.99%
Timor Leste	0	0	0	0.00%
Tonga	55749	25577	81326	3.08%
Tuvalu	570	0	570	0.02%

Pacific Island destinations	2023 Visitor arrivals (Air)	2023 Visitor arrivals (Cruise)	2023 Visitor arrivals (Air + Cruise)	% Share of 2023 Visitor arrivals (Air + Cruise)
Vanuatu	53875	263578	317453	12.04%
Wallis & Futuna	5252	0	5252	0.20%

Source: Annual Visitor Arrival Report 2023, SPTO

## Accommodation

Accommodation across Pacific nations varies significantly. French Polynesia and Fiji have the highest capacity, each offering over 20,000 beds, reflecting mature tourism infrastructure. In contrast, smaller nations such as Tuvalu and Niue show modest figures consistent with limited land area and visitor numbers. Data gaps in countries like the Marshall Islands and New Caledonia suggest either underdeveloped infrastructure or reporting limitations (see Table 2).<sup>7</sup>

**Table 2. Total number of accommodation establishments, rooms and beds in Pacific Region**

Pacific Island destinations	Year (latest update)	Total no. of accommodations	Total no. of rooms	Total no. of beds
American Samoa	2020	20	263	395
Cook Islands	2023	658	2941	7348
FSM	2020	29	350	480
Fiji	2023	421	9598	21156
French Polynesia	2023	2450	7030	21735
Kiribati	2022	60	603	942
Marshall Islands	2022	8	0	0
Nauru	2015	8	40	50
New Caledonia	2022	280	0	0
Niue	2020	39	197	273
PNG	2022	512	6207	8951
Samoa	2022	163	2813	0
Solomon Islands	2022	277	2310	4139
Timor Leste	2019	64	500	900
Tonga	2022	278	638	909
Tuvalu	2016	10	50	60
Vanuatu	2023	153	1837	3551

Source: Annual Visitor Arrival Report 2023, SPTO

<sup>7</sup> Annual Visitor Arrival Report 2023, SPTO.

## **Structure of the Tourism Sector**

The structure of the tourism industry in the Pacific is shaped by geography, population size, and heavy reliance on micro, small, and medium-sized enterprises (MSMEs). This sector is highly community-based, with a growing formal sector but a large informal economy that intersects with agriculture, handicrafts, transport, and accommodation. The subdivision and structures of this industry structure are discussed below.

### ***Micro, small and medium-sized enterprises***

Micro, small and medium-sized enterprises (MSMEs) are the backbone of the Pacific tourism industry, comprising over 80% of tourism-related businesses in most Pacific nations. They provide significant employment for women, youth, and rural communities. MSMEs include accommodation providers, tour guides and operators, handicraft producers, local food vendors, transport providers, cultural performers, and community-based tourism enterprises (CBTEs). These businesses are deeply embedded in the cultural and social fabric of island communities and contribute to inclusive tourism development and local economic diversification, and furthermore they strengthen local resilience since they are deeply rooted in local ecosystems.

### ***International hotel brands and larger tour operators***

Alongside MSMEs, the Pacific tourism sector also includes several large-scale operators such as international hotel groups, regional resort chains, cruise lines, and inbound tour operators. These businesses play a critical role in shaping visitor flows, setting quality standards, and investing in infrastructure. They are often concentrated in major tourism hubs, with some expanding into outer island destinations. Larger operators tend to have greater access to finance, digital marketing channels, and skilled labour, allowing them to absorb shocks and scale operations more effectively than MSMEs. Their operations can generate significant foreign exchange earnings and employment, and they often form the anchor around which local supply chains (including food production, cultural experiences, and transport services) are built. In several countries, collaboration between large operators and local enterprises is evolving through supplier partnerships, staff training, and community engagement initiatives. However, ensuring that economic benefits are widely shared, procurement is locally focused, and that sustainability practices are adopted sector wide are challenges that remain.

### ***Tourism associations and industry councils, Chambers of Commerce***

Many nations have Tourism Associations or Industry Councils that are providing a voice for operators, advocating for policy support, and running training or marketing programmes. Chambers of Commerce engage in wider private sector development, often supporting tourism MSMEs through business services and grants.

Examples of the more established and influential associations include:

- Fiji Hotel and Tourism Association (FHTA)
- Vanuatu Tourism Operators Association (VTOA)
- Samoa Tourism Industry Association (STIA)
- National Chambers of Commerce

### ***Community-based tourism networks and cooperatives***

Community-based tourism enterprises (CBTEs) are co-operatives focusing on cultural tourism, agritourism, and ecotourism opportunities for local communities. In some countries, e.g. Fiji, Solomon Islands, Tonga, CBTEs have formed associations or informal networks for peer support and market access.

### ***National Tourism Organisations (NTOs)***

Each Pacific Island Country has one or more government bodies responsible for destination marketing, policy coordination, and industry development. Some NTOs are statutory bodies, some are Ministries, and some countries split policy and marketing into two entities. They vary in size and capability; some also regulate standards and licensing.

### *Public-sector and government agencies*

Ministries of Tourism, Environment, and Economic Development often work together on strategic plans and investment. Some have dedicated small business or rural development departments that support tourism MSMEs through training, microgrants, or loan guarantees, for example.

### *Development partners and donor programmes*

Many MSMEs and industry groups receive technical and financial support from donors and development partners. Key players include the Asian Development Bank (ADB), Australian Department of Foreign Affairs and Trade (DFAT), European Union (EU), International Fund for Agricultural Development (IFAD), New Zealand Ministry of Foreign Affairs and Trade (MFAT), United Nations Development Programme (UNDP), and the World Bank Group (WBG). Several of these partners also provide grants, loans and Technical Assistance (TA) to Governments, including for tourism-specific infrastructure and projects.

## **1.6. Sector challenges**

Tourism in the Pacific is shaped by a complex interplay of vulnerabilities, ranging from climate and disaster risks to institutional, infrastructure, and financial barriers. These challenges are interconnected and often magnified by the region's remoteness, small economies, and dependence on air and sea transport. Addressing them requires an inclusive and well-resourced response that aligns with national development priorities, community aspirations, and the urgent need for climate resilience.

### *Vulnerability to shocks*

Pacific tourism is acutely exposed to external shocks, both global and regional. The COVID-19 pandemic revealed the fragility of the sector, particularly among MSMEs many of which lacked the financial buffers or market diversity to withstand prolonged closures. Recovery has been slow and uneven, hampered by limited air connectivity, inconsistent visitor demand, and repeated natural disasters. Climate change continues to escalate risk profiles, with sea-level rise, saltwater intrusion, and extreme weather events causing physical damage, disrupting business continuity, and degrading key natural assets. Events such as Cyclone Harold (2020), the Hunga Tonga-Hunga Ha'apai eruption and tsunami (2022), and multiple high-magnitude earthquakes and cyclones in Vanuatu (2023–2024) illustrate the intensity and frequency of shocks. These are compounded by insufficient disaster preparedness, inadequate emergency infrastructure, and heavy reliance on imports and aviation-dependent supply chains.

### *Tourism governance*

Governance in the tourism sector is often fragmented and under-resourced. NTOs typically operate with small teams, limited budgets, and insufficient strategic authority. Weak inter-agency collaboration between tourism, climate, infrastructure, and environment ministries hampers policy integration. While many countries have tourism or sustainable tourism strategies, they are often outdated or under-implemented due to funding gaps and limited enforcement mechanisms. Data systems are weak, making it difficult to assess sector performance or inform decision-making. In remote and outer island areas, local governance structures are often excluded from national planning, limiting local voice and benefit-sharing.

### *MSME constraints*

MSMEs form the backbone of Pacific tourism but face persistent barriers that constrain their growth and resilience. Regulatory environments are often complex, with burdensome licensing processes and unclear compliance pathways. Basic infrastructure is frequently inadequate – including transport, information and communications technology (ICT), and utilities, especially on the outer islands. Financial systems are poorly developed, leaving MSMEs with limited access to affordable loans, insurance, or digital payment tools. Digital uptake remains low, with many businesses lacking the training or confidence to use online platforms for marketing, bookings, and customer management, limiting their competitiveness in international markets.



### ***Capacity and access to finance***

MSMEs often lack the resources or knowledge to adopt sustainability technologies. Many are unaware of the financial and environmental benefits of energy and water-efficient systems or cannot afford the upfront investment. Tailored financing tools such as microfinance, green credit lines, or revolving funds are also scarce. Technical assistance and local support services are limited, which curtails the feasibility of scaling up green practices. Even where donor support exists, uptake is constrained by a lack of business case understanding or the capacity to meet eligibility criteria.

### ***Skills and labour gaps***

Workforce capacity remains a major constraint to developing high-quality, experience-based tourism products. Many destinations lack trained personnel in specialised areas such as cultural guiding, eco-tourism, marine tourism, and high-end hospitality. Vocational training opportunities are limited, especially in remote locations, and certification programmes are not always aligned with industry needs. Restrictions or disincentives for hiring expatriate professionals further limit access to skilled labour in places where local expertise is unavailable, constraining service standards and innovation.

### ***Limited market reach and support***

Many tourism operators remain informal and unregistered, which excludes them from support programmes because they are invisible in data collection and policy responses. There is weak integration with international tourism markets and value chains, and limited access to business development services such as coaching, incubators, or co-operatives, particularly for community-based tourism enterprises (CBTEs). Opportunities for scale, consistency in product delivery, and quality assurance are in turn reduced.

### ***Vulnerability to climate impact***

The adaptive capacity of Pacific tourism operators to respond to climate impact appears inadequate. Many lack insurance coverage or contingency plans, and few have the capital or technical knowledge to invest in resilience measures. Limited national and regional support for the structures necessary for climate adaptation further undermines recovery, particularly for remote or small-scale operators, leaving businesses exposed to repeated losses and uncertainty.

### ***Infrastructure challenges***

Lack of basic infrastructure is a critical bottleneck preventing sustainable tourism growth and resilience. Water, sewerage, energy, and waste services are often unreliable or unavailable in key tourism areas, especially on outer islands. Many businesses rely on diesel generators, bore water, or septic systems that are expensive to operate and vulnerable to failure. Inadequate waste management systems lead to litter, marine pollution, and health risks, particularly in areas with growing numbers of tourists and limited government capacity. These deficiencies affect service quality, increase operating costs, and undermine environmental values central to the visitor experience.

### ***Solid waste***

Waste generation in the Pacific is increasing as the result of population growth, urbanisation, rising tourism numbers, and the influx of imported packaged goods. Organic waste makes up a large share (50%–70%) of household waste and presents an opportunity for composting or biogas production, yet few systems have been installed. The quantity of non-biodegradable waste, particularly plastic, is growing rapidly, driven by tourism consumption and limited enforcement of single-use plastic bans. Most waste is not sorted at the source, and recycling infrastructure is minimal or non-existent. Many countries rely on costly exports of recyclables to Asia or Australia, making waste management economically unsustainable. The absence of structured systems leads to widespread dumping, with significant consequences for ecosystems and marine health.

### ***Water and sanitation***

Reliable water and sanitation services are essential for safe and high-quality tourism experiences. However, many Pacific Island countries face critical challenges due to climate stressors such as drought, flooding, and saltwater intrusion. Tourism facilities often rely on rainwater harvesting or shallow aquifers, which are highly vulnerable to contamination or depletion. Inadequate sewage and wastewater treatment poses risks to human and ecosystem health, especially in coastal areas. Resilience infrastructure is lacking, leaving communities and businesses exposed during extreme weather events.

### ***Renewable energy***

Tourism's reliance on fossil fuels increases costs, emissions, and vulnerability to price fluctuations. While solar energy adoption is growing, particularly in off-grid locations, the overall share of renewable energy remains low (12.3% in 2017). Technical capacity limitations, difficulties in maintaining systems, and high costs for parts, especially in remote island contexts, impede progress. Despite strong donor support, including grid upgrades and renewable infrastructure, the widespread transition to low-carbon energy remains a challenge. Diversification into hydropower, wind, marine, and bioenergy has been minimal across most countries.

## 2. REGIONAL FRAMEWORK & POLICY OVERVIEW

Larger, overarching frameworks for sustainable tourism and SCP can be found at both the regional and national levels, either as dedicated action plans, or incorporated into other sustainable development strategies.

### 2.1. Regional Frameworks

The policy context for this Roadmap is shaped by the outcomes of the SIDS (Pacific Island Countries) Consultation Meeting on the Pre-Zero Draft of the New Declaration on 3R and Circular Economy in Asia-Pacific (2024–2034), held in Apia, Samoa in May 2024. This landmark regional consultation, co-organised by UNCRD-DSDG/UN DESA and SPREP, brought together representatives from 20 Pacific countries to address the unique challenges faced by SIDS in advancing sustainable material use, waste management, and circular economy practices. The meeting emphasised the urgent need for integrated 3R and CE strategies, aligned with SPREP's regional frameworks, to achieve resource-efficient, resilient, and low-carbon societies. The insights and commitments from this consultation directly inform the strategic direction and priorities outlined in this Roadmap, ensuring that Pacific perspectives and realities are at the forefront of regional policy and action on CE and SCP (United Nations Centre for Regional Development).

Several strategic frameworks guide collective efforts among Pacific nations and through the Council of Regional Organisations of the Pacific (CROP) agencies. These strategies aim to address shared challenges and promote sustainable development across various sectors. Key regional strategies include the following frameworks, strategies and action plans.

**Framework for Pacific Regionalism (2014):** This overarching framework promotes deeper regional cooperation and integration to advance sustainable development, economic growth, governance, and security. It emphasises the importance of collective action among Pacific nations and CROP agencies to address common challenges effectively.

**2050 Strategy for the Blue Pacific Continent:** Endorsed by Pacific Islands Forum Leaders, this long-term strategy focuses on the region's collective vision for a resilient and sustainable Pacific. CROP agencies are tasked with providing technical and coordination support for its implementation and monitoring.

**Pacific Regional Education Framework (PacREF):** PacREF aims to ensure accessible, inclusive, and quality education across the Pacific. It serves as a collaborative mechanism for Pacific nations and CROP agencies to enhance educational outcomes and address regional educational challenges.

**Pacific Regional ICT Strategic Action Plan:** This plan outlines priorities for improving information and communication technology infrastructure and access in the region. It seeks to bridge the digital divide and leverage technology for development, with CROP agencies playing a supportive role in its execution.

**Pacific Regional Culture Strategy:** Aimed at preserving and promoting Pacific cultures, this strategy provides a framework for cultural development initiatives. It encourages collaboration among Pacific Island Countries (PICs) and the Council of Regional Organisations of the Pacific (CROP) agencies to safeguard cultural heritage and promote cultural industries.

**Pacific Regional Environment Programme Strategic Plan:** Developed by the Secretariat of the Pacific Regional Environment Programme (SPREP), this plan focuses on environmental protection and sustainable resource management. It aligns regional efforts to address climate change, biodiversity conservation, and pollution control.

**Cleaner Pacific 2025 and Cleaner Pacific 2035:** SPREP provides technical support to Pacific nations in waste management and advancing circular economy outcomes through the implementation of **Cleaner Pacific 2025** and the following projects:

- **Implementing Sustainable Low and Non-chemical Development in Small Island Developing States (ISLANDS):** A GEF-funded initiative supporting hazardous waste management and circular systems for e-waste and end-of-life vehicles.

- **Pacific Ocean Litter Project (POLP):** Funded by the Australian Government, targeting single-use plastic (SUP) reduction through import bans and promotion of traditional alternatives.
- **PacWaste Plus:** EU-funded, improving organics management and implementing sustainable finance for plastics, e-waste, and tyres.
- **Sustainable Waste Actions in the Pacific (SWAP):** AFD-funded project advancing deposit-return schemes and waste financing.
- **Moana Taka Partnership:** Provides free shipping of recyclables to appropriate disposal facilities via Swire Shipping.
- **The Jaipur Declaration on 3R and circular economy:** Consulted in Asia and the Pacific, provides the goals for achieving resource-efficient, clean, resilient, and low-carbon societies.

With the Cleaner Pacific 2016-2025 strategy coming to an end, its successor Cleaner Pacific 2035 will build on past lessons, respond to current waste and pollution challenges, and align with global environmental commitments. Key focus areas include:

- **Integrated Waste Management:** Reducing waste, recovering resources, and improving disposal systems.
- **Pollution Control:** Protecting biodiversity and communities, especially from marine pollution.
- **Circular Economy:** Promoting sustainable consumption and production to reduce waste.
- **Capacity Building:** Strengthening national and regional capabilities for effective waste governance.

The strategy will rely on strong collaboration across governments, regional bodies, donors, private sector, and civil society, ensuring broad ownership and impact. Cleaner Pacific 2035 is set for completion and endorsement by SPREP in 2025.

## 2.2. Policy Framework for Sustainable Tourism

### *Pacific Sustainable Tourism Policy Framework (PSTPF)*

The PSTPF, endorsed by Pacific Tourism Ministers in 2021, provides the strategic foundation for transforming tourism across the region. This framework recognises that Sustainable Consumption and Production (SCP) and Circular Economy (CE) principles are essential to building a resilient, inclusive, and regenerative tourism sector.

To implement this vision, the Pacific Leaders Sustainable Tourism Commitment, signed by SPTO member countries, represents a shared pledge to embed sustainability in national tourism strategies and action plans, and commits countries to low-carbon, resource-efficient, and culturally respectful tourism development.

### *Pacific Sustainable Tourism Standards for Destinations and Industry (PSTS)*

The PSTS are the region's primary tool for delivering these commitments. Aligned with the Global Sustainable Tourism Council (GSTC) criteria, the PSTS set clear, practical benchmarks for tourism businesses and destinations across four goals.

**Goal 1: Prosperous Economies** – Encouraging circular business models, sustainable procurement, and efficient resource use

**Goal 2: Thriving and Inclusive Communities** – Supporting local livelihoods and inclusive participation in sustainable tourism

**Goal 3: Visible and Valued Cultures** – Protecting and promoting cultural heritage through tourism in a respectful, regenerative way

**Goal 4: Healthy Islands and Oceans** – Reducing waste, conserving biodiversity, and fostering climate resilience

Together, the Framework, Commitment, and Standards act as the regional mechanism to accelerate CE outcomes by linking policy, planning, and implementation at all levels of the tourism system. They guide tourism operators, governments, and communities to adopt circular practices, from reducing single-use plastics and improving energy efficiency to creating local supply chains and rethinking waste as a resource.

The PSTPF sets the strategic direction, and the PSTS provide the tools to bring this vision to life through practical, measurable action. SCP and CE are core enablers of Pacific sustainable tourism, not add-ons. They need to shape how policy is implemented, and impact is measured.

### *The Standards for phasing out single-use plastics*

Aligned with the PSTPF, SPREP and SPTO are working to reduce SUPs across accommodation, Food and Beverage (F&B), tours, events, cruise lines, and airlines. The Standards for Phasing Out Single-use Plastics in the Pacific Island Countries Tourism Industry (SPTO and SPREP, 2025) provide a clear framework to guide SPTO member countries in reducing plastic use across the tourism sector. The Standards serve three key purpose, namely

- acting as a benchmark for tourism businesses to assess current practices and progressively improve sustainability performance
- supporting public-private collaboration to accelerate plastic reduction and enhance environmental responsibility
- raising awareness among visitors and promote responsible travel behaviours.

Aligning with Goal 4 of the Pacific Sustainable Tourism Standard, specifically Criteria 4.2 and 4.9 (Industry), and 4.13 and 4.14 (Destination), these standards aim to drive a coordinated, industry-wide shift toward eliminating non-essential single-use plastics and embedding sustainable practices across Pacific tourism.

### *Other SPTO/SPREP Guidelines*

SPTO have collaborated with SPREP and other agencies on the development of other guidelines to promote sustainable tourism in the Pacific region.

- **Environmental Auditing Guidelines for Tourism Accommodations:** Offers resources for accommodations to assess and improve their environmental practices, focusing on areas such as energy and water usage, waste management, and conservation.
- **Environmental Impact Assessment (EIA) Guidelines for Coastal Tourism Development:** These EIA guidelines to assist Pacific nations in making informed decisions on sustainable coastal tourism development, ensuring that environmental considerations are integrated into planning processes.
- **Pacific Cultural Tourism Guidelines:** These guidelines aim to protect and promote the Pacific's cultural heritage within the tourism sector. They provide strategies to safeguard traditional knowledge and harness both tangible and intangible cultural assets responsibly.
- **Pacific Marine Tourism Guidelines:** Developed to support sustainable marine tourism practices, these guidelines offer a comprehensive framework that aligns with the priorities of the Pacific Sustainable Tourism Policy Framework, focusing on the conservation of marine ecosystems and responsible tourism activities.

## **2.3. National frameworks and policies**

While national tourism policies are tailored to the specific country context, they usually include a set of common thematic areas of importance for tourism development such as accommodation and facilities, biodiversity conservation, cultural heritage preservation, employment, human resources development, inclusion of local communities, infrastructure and services, investment, marketing and promotion, international and domestic connectivity, mobility within the destination, product development and diversification, quality standards, statistics and monitoring, and technology and innovation.

A review of national tourism policies across Pacific nations indicates a widespread acknowledgment of sustainability within policy frameworks. However, the explicit integration of CE/SCP principles remains limited.



## ***Policy content and implementation***

Most national tourism policies reference sustainability in their objectives or visions. While over half provide detailed sustainability references, few explicitly address SCP. Mentions of resource efficiency, e.g. in the areas of energy, water, and waste, are often linked to voluntary standards rather than mandatory regulations. Guiding instruments to support the execution of sustainability objectives are generally inexistent.

## ***Monitoring and evaluation***

Many policies include action plans, but as yet the mechanisms for monitoring and evaluating sustainable tourism impacts are underdeveloped, particularly concerning environmental metrics. References to monitoring often focus on economic performance, with limited attention to environmental aspects.

## ***Scope of sustainability***

References to food systems, sustainable building, procurement practices, and local sourcing are scarce, indicating a need for a more holistic approach to sustainability in tourism.

## ***Governance and coordination***

Tourism governance structures are often cross-cutting, involving various government branches. This complexity can hinder the integration of CE/SCP principles, especially in the absence of rigorous planning methodologies.

## ***Data availability***

Limited data on the environmental impacts of tourism at national and subnational levels poses a significant challenge to informed policy-making and effective monitoring.

## ***Influence of international support***

International organisations and development programmes have facilitated the adoption of sustainable tourism policies. Regional frameworks, such as the PSTPF, have been instrumental in aligning national policies with sustainability goals.

## ***Policy instruments***

Countries employ a mix of regulatory, economic, informational, and voluntary instruments to promote resource efficiency. Regulatory instruments, such as product performance standards and building codes, are not always specific to tourism and encounter enforcement challenges. Economic instruments are underutilised, while informational tools like awareness campaigns and sustainability labels are not widely available. Voluntary instruments, including tourism standards, are commonly found, and they often serve as de facto market standards. Incentives to implement these voluntary standards are used in some nations in the absence of regulations.

## ***Sustainable procurement***

Sustainable procurement policies do exist in most nations, often enshrined in legislation that restricts the import of certain products, such as plastic bags. These policies send market signals for the demand for more sustainable products.

## 2.4. International hotel standards

The presence of major international hotel groups such as InterContinental Hotels Group (IHG), Marriott International, Hilton Hotels & Resorts, and Wyndham has accelerated the uptake of CE/SCP practices across the Pacific. These groups are the most conspicuous in Fiji, which has the highest concentration of internationally branded properties, but this presence applies also to Samoa, Vanuatu, French Polynesia, and Papua New Guinea. Hotel groups apply corporate sustainability frameworks and certification programmes that often exceed national regulatory requirements, covering areas such as energy and water efficiency, waste reduction, sustainable procurement, and workforce training. Their monitoring and reporting practices provide practical demonstrations of international best practice, raising expectations across government, industry, and consumers.

The influence of these global standards is not without challenges. Their reliance on certification schemes and centralised procurement systems can create barriers for local MSMEs, which often lack the scale, capital, or documentation to meet thresholds for supplying goods and services. Similarly, corporate sustainability training is typically standardised across regions (e.g. Asia-Pacific), with limited adaptation to Pacific cultural values, traditional knowledge, or local operational contexts given the very low percentage of properties in these countries. In some cases, global requirements stand at odds with on-the-ground realities – for example, waste-sorting obligations where only non-segregated landfill facilities exist. These gaps highlight the need for careful localisation of standards if international hotel sustainability practices are to create inclusive opportunities and system-wide benefits.

However, these gaps nonetheless highlight how regional hotel groups such as Warwick, Tanoa and Pearl can play an important role alongside the international chains. These regional chains although fewer in number can indeed demonstrate more adaptable approaches, reinforcing the value of blending global and regional practice to create a standards ecosystem that is both internationally credible and locally grounded.

For the four STEP demonstration countries this landscape presents a variety of opportunities and gaps. Fiji benefits from the presence of multiple international and regional chains (roughly half the total in the region), with a high concentration of properties in the Denarau area that creates an opportunity to pilot CE/SCP practices at scale. Samoa benefits from the Sheraton/Marriott and other branded resort chains, but the sector remains relatively fragmented, highlighting opportunities to adapt international approaches to a smaller island context. Holiday Inn, Ramada and Warwick properties provide exposure for Vanuatu, while Kiribati stands apart as an outlier, with no international hotel presence and thus little direct influence from global standards. Such contrasts highlight the importance of the Pacific Sustainable Tourism Standards (PSTS): in contexts where global brands dominate, PSTS can serve as a harmonising mechanism to align external standards with national priorities, while in markets without branded operators, PSTS can provide a locally anchored framework to drive CE/SCP uptake.

# 3. NATIONAL TOURISM POLICIES & STANDARDS OVERVIEW

The analyses in this section of the report focus on each country's tourism-policy enabling environment along with existing standards programmes and initiatives, while a more detailed country-level assessment for each of the four STEP Demonstration Countries is provided in Appendices A–D.

## 3.1. Fiji



Photo credit: SPTO & David Kirkland

Fiji's national policy framework offers a strong foundation for the development of a sustainable and resilient tourism sector. The clear alignment between national development priorities, environmental protection, and inclusive economic growth reflects a deliberate policy shift toward a low-emission, high-value, and people-centred tourism economy. Key instruments reinforce cross-sectoral coherence across climate policy, infrastructure, waste management, cultural heritage, and social inclusion, creating a favourable policy environment for harmonisation with PSTPF, the PSTS and related global frameworks.

### *National Sustainable Development Plan 2025–2029 and Vision 2050*

The National Development Plan 2025–2029 and Vision 2050 (NDP) outlines an integrated development agenda centred on sustainable growth, social inclusion, and environmental protection. It identifies tourism as a priority sector for generating employment, stimulating rural economies, and showcasing Fiji's natural and cultural assets (GoF, 2024a).

In alignment with the United Nations Sustainable Development Goals (SDGs), the Plan reinforces tourism's potential to advance multiple national priorities, from inclusive job creation (SDG 8) and sustainable resource use (SDG 12) to biodiversity protection (SDG 15) and gender empowerment (SDG 5). It also lays the policy groundwork for the institutionalisation of sustainability standards and integrated monitoring systems across the tourism sector (GoF, 2024a; GoF, 2021).

Structured around interconnected goals, the Plan highlights:

- **Inclusive Economic Growth:** targeting diversified, innovation-driven sectors with tourism as a leading contributor to GDP, employment, and rural development.
- **Climate Resilience and Environmental Sustainability:** mandating integration of adaptation and emissions reduction across all sectors, supported by enabling legislation such as the Climate Change Act 2021 (GoF, 2021).

- Human and Social Development: focused on equitable access to education, skills, health services, and cultural vitality, particularly for youth, women, and rural populations.

The NDP's key themes are closely tied to tourism policy goals. A clear emphasis is placed on green infrastructure, digital transformation, and investments in skills and education to lift workforce productivity. These goals are reinforced by the Climate Change Act 2021 (GoF, 2021) and Fiji's updated Nationally Determined Contribution (NDC), which commits to reducing emissions by 30% from BAU levels by 2030 through renewable energy, sustainable land use, and eco-tourism initiatives (GoF, 2020).

The Plan sets clear performance benchmarks, including targets for visitor arrivals, tourism earnings, accommodation capacity, and employment generation. It acknowledges tourism's multiplier effects and outlines measures to strengthen the sector's role in rural development, skills formation, and infrastructure upgrading. Additionally, Vision 2050 elevates tourism as a sector of strategic importance in Fiji's transition to a low-emission, knowledge-based economy.

### ***Fiji National Sustainable Tourism Framework 2024–2034***

The Fiji National Sustainable Tourism Framework 2024–2034 (NSTF) serves as the cornerstone of Fiji's commitment to sustainable tourism. Developed through extensive public-private consultation, the NSTF envisions a thriving sector that promotes community wellbeing, enhances cultural visibility, and ensures environmental responsibility (GoF, 2024b).

Central to the NSTF is the establishment of national tourism standards, accreditation mechanisms, and incentives for responsible business practices. The Framework promotes a transition to climate-smart infrastructure, improved tourism data systems, and stronger integration of tourism into land use and development planning. It recognises the critical role of MSMEs and community-based tourism in achieving equitable outcomes and calls for enhanced capacity-building and finance access.

The Framework's alignment with the Pacific Sustainable Tourism Policy Framework (PSTPF) ensures regional coherence, while its Action Plan 2024-2027 (GoF, 2025a) operationalises short-term (three-year) priorities. The NSTF sets the stage for future legislation that will institutionalise sustainability obligations and performance tracking in Fiji's tourism sector.

The NSTF and its Action Plan, are structured around ten priorities, grouped under four goals.

#### **GOAL 1. Prosperous visitor economy**

- Priority 1: Create an enabling policy environment and regulatory coherence
- Priority 2: Nurture sustainable investments
- Priority 3: Create a competitive destination with diverse experiences

#### **GOAL 2. Thriving and inclusive communities**

- Priority 4: Place community empowerment and social inclusion at the centre of tourism planning
- Priority 5: Grow experiential and culturally responsible tourism that supports tourism dispersal
- Priority 6: Make tourism a career pathway of choice via rewarding employment and entrepreneurship

#### **GOAL 3. Visible and valued cultures**

- Priority 7: Protect and promote our diverse cultures and traditions
- Priority 8: Enable prosperous and creative industries

#### **GOAL 4. Healthy islands and oceans**

- Priority 9: Strengthen protection of our islands, coastal and ocean ecosystems
- Priority 10: Build resilience to climate change and transition to a low-carbon sector

All the Goals have Actions that are aligned with the STEP project, supporting the development of sustainable tourism standards and the adoption of circular economy and sustainable consumption and production practices.



## **Legislative foundation**

Fiji's legislative context for tourism is defined by a fragmented legal framework anchored in sectoral statutes and development mandates, rather than a single comprehensive Tourism Act. The Ministry of Tourism and Civil Aviation (MTCA) holds primary responsibility for sector governance, while Tourism Fiji operates under the Tourism Fiji Act 2004 as the statutory body responsible for destination marketing. However, the absence of a dedicated legal instrument to consolidate regulatory powers and institutional mandates has led to overlapping responsibilities, inconsistent enforcement, and weak alignment with sustainable development goals. Current tourism-related regulation spans multiple Ministries, agencies and authorities, without tourism-specific coherence, limiting the ability of the tourism sector to enforce sustainable tourism standards or implement integrated planning mechanisms. The NSTF and its accompanying Action Plan propose reforms to address these gaps. Among the priorities is establishing statutory backing for a sustainable tourism standards programme and integrating sustainable tourism benchmarks across the entire tourism ecosystem.

### **The Fiji Code of Conduct for Tourism Service Providers**

The Fiji Code of Conduct for the Tourism Service Providers,<sup>8</sup> endorsed by MTCA in 2023, establishes a set of core principles to guide the behaviour and practices of tourism operators across the country. Designed to reflect Fiji's national values, the Code emphasises respect for cultural heritage, protection of the natural environment, ethical business conduct, and inclusive community engagement. It encourages tourism operators to act as stewards of Fiji's unique ecosystems and cultural diversity, while upholding fair labour practices, customer safety, and responsible marketing. The Code also promotes the active participation of local communities in tourism development and calls on operators to support equitable benefit-sharing, environmental stewardship, and transparent communication. Although voluntary, the Code is seen as a foundational step toward a more formalised national tourism standards framework and is aligned with the vision and values of the NSTF. As such, it provides an ethical baseline and shared accountability platform for the industry as Fiji moves toward more inclusive and sustainable tourism practices (GoF, 2023a).

### **Proposed Fiji Tourism Standards Framework (FTSF)**

Fiji is in the process of establishing a national sustainable tourism standards framework to embed sustainability principles across the sector. The Fiji Tourism Standards Framework (FTSF) initiative is a key mechanism within the NSTF and incorporated across all four Goals in the 2024-2027 Action Plan. The Plan outlines foundational tasks including legal reform, institutional mandate clarification, and system-wide capacity-building. Data systems will be developed to support performance measurement, with indicators drawn from NSTF and in line with regional data collection efforts of SPTO through the Pacific Sustainable Tourism Indicators (PSTI) (Pacific Tourism Organisation, 2022).

While sustainability principles are already embedded in national policy through the NSTF, the Climate Change Act 2021, and the National Development Plan 2025-2029, the absence of legal enforcement mechanisms has seen limited uptake by the tourism sector. The FTSF is designed to address this gap by embedding sustainability into the tourism ecosystem through certification and potentially regulation, investment screening, and performance monitoring systems. Participation in the programme – and compliance in due course – will be linked to policy instruments such as concessional finance, investment facilitation, licensing, and marketing access.

### **Proposed Model for FTSF**

Stakeholder consultations have confirmed the industry appetite for a transparent, consistent, and locally appropriate accreditation system. A tiered accreditation system is proposed, beginning with voluntary self-assessment and progressing towards third-party certification, and/or regulation through Fiji's first Tourism Act (currently in development). The proposed model supports wide-scale adoption across the sector, including micro, small and medium enterprises (MSMEs), community-based operators, and larger tourism businesses.

A tiered certification model will provide a structured pathway from voluntary commitment (self-certification) to third-party audit and certification. This allows operators of different sizes and capacities to participate and improve over time. The proposed system also recognises businesses who have already chosen a third-party sustainable tourism certification programme, aiming to recognise these achievements and minimise

---

8 <https://mtca.gov.fj/wp-content/uploads/2024/03/Code-of-Conduct-Final.pdf>



duplication of effort. Once the programme is established, and if given legal foundation through the Tourism Act, certification may become directly linked to public and private incentives.

### *Alignment of Future FTSF with the PSTS for Industry*

The FTSF is designed to align directly with the PSTS and related regional frameworks, with criteria and indicators adapted to Fiji's unique context and NSTF priorities. The FTSF will provide a valuable demonstration case for translating the PSTS to national standards and then putting these into practice at the enterprise level. Regional tools and templates developed by SPTO and its member nations will be adapted for national use and embedded in implementation and training programmes. Indicators will be embedded into monitoring systems to track adoption and performance, ensuring comparability with other countries in the region, and integration with aggregation and analysis efforts being undertaken by SPTO.

## **3.2. Kiribati**



Photo credit: Pacific Tourism Media Library

### *Kiribati 20-Year Vision*

The Kiribati 20-Year Vision (KV20) is the country's long-term strategic framework, guiding national development efforts from 2016 to 2036. It articulates a bold aspiration for Kiribati to become a 'wealthy, healthy and peaceful nation,' underpinned by improved quality of life, sustainable economic growth, and strengthened resilience to external shocks. The KV20 builds on four transformative pillars: wealth (encompassing natural, human, financial, and cultural capital), peace and security, infrastructure, and good governance. It promotes a development pathway that is uniquely tailored to Kiribati's context—one that balances traditional values and the realities of geographic isolation, climate vulnerability, and economic constraints.

In practice, the KV20 seeks to diversify the economy beyond the public sector and remittances, with particular emphasis on developing the tourism and fisheries sectors as long-term growth engines. It also integrates cross-cutting issues such as gender equity, youth empowerment, and climate change adaptation, aiming to mainstream these throughout national planning. As a long-range vision, the KV20 serves as an anchor for all sectoral strategies and government plans, including the medium-term Kiribati Development Plans (KDPs), ensuring alignment across policy areas and coherence in public investment. It also serves as a reference point for engagement with international development partners, helping to articulate national priorities and promote coordinated support.

### *Kiribati Development Plan*

The Kiribati Development Plan (KDP) is the medium-term implementation mechanism that operationalises the goals of the KV20. The most recent KDP, covering 2020–2023, sets out six key priority areas: harnessing

human wealth, growing economic wealth and leaving no one behind, improving health, protecting the environment and strengthening resilience, promoting good governance, and developing infrastructure for inclusive economic growth. These key priority areas (KPAs) are supported by sectoral strategies, performance indicators, and budget allocations, enabling a more structured and accountable delivery of national priorities. The KDP functions not only as a planning tool but also as a coordination mechanism for aligning national efforts with regional and global frameworks such as the SDGs. The KDP provides the practical roadmap for translating the KV20's long-term vision into annual budgets, legislative action, and programme implementation.

### *Kiribati Sustainable Tourism Development Policy Framework*

Tourism development is guided by national strategies that support high-yield, sustainable tourism growth, as detailed in the Kiribati Sustainable Tourism Development Policy Framework (KSTDPF), the Kiribati Sustainable Tourism Policy (KSTP), and the TAK Strategic Plan 2024–2026 (Tourism Authority of Kiribati (TAK), 2023; Pacific Tourism Organisation (SPTO), 2024). Together, these plans set out priorities for sustainable growth, community involvement, and environmental protection.

The Kiribati Tourism Act 2018 establishes the legal framework for promoting tourism in Kiribati, focusing on the enhancement of natural, scenic, cultural, historical, and recreational attractions. It outlines the roles and responsibilities of the Tourism Authority of Kiribati (TAK) in developing and regulating the tourism industry, including licensing of accommodation providers, tour operators, and guides, as well as enforcement of standards for safety, environmental management, and cultural sensitivity (Republic of Kiribati, 2018).

The KSTDPF is built around seven sustainable tourism goals, each supported by specific priorities and policy interventions.

- **Environmental Protection:** Ensure tourism activities protect and enhance Kiribati's unique natural environment, including its fragile ecosystems and biodiversity.
- **Cultural and Historical Heritage:** Preserve and celebrate Kiribati's cultural and historical heritage, ensuring that tourism supports and showcases local traditions and history.
- **Community and Social Well-being:** Promote community engagement and social well-being by empowering local communities to participate in and benefit from tourism.
- **Visitor Satisfaction, Health, and Safety:** Guarantee high standards in visitor experience, health, and safety, making Kiribati a desirable and secure destination.
- **Economic Prosperity:** Contribute to national economic growth by creating jobs, supporting local businesses, and encouraging green entrepreneurship.
- **Green Entrepreneurship:** Inspire innovation and entrepreneurship in sustainable tourism practices, such as eco-friendly accommodations and renewable energy use.
- **Effective Leadership:** Foster strong leadership and governance to ensure the successful implementation and monitoring of sustainable tourism policies.

The framework recommends integrating sustainable tourism priorities with existing national policies and legislation. It emphasises a collaborative approach involving government, private sector, civil society, and local communities to achieve its goals. Some key interventions include:

- Developing eco-friendly accommodations that use renewable energy and promote water conservation
- Supporting community-based tourism initiatives that empower local people and preserve cultural heritage
- Implementing waste management and resource recovery programmes in tourism operations
- Establishing tourism zones and developing niche tourism markets, such as eco-tourism, cultural tourism, and adventure tourism
- Creating sustainable tourism indicators to measure and monitor the sector's impact on the environment, economy, and society

## ***Kiribati Sustainable Tourism Policy***

Launched in 2024, the Kiribati Sustainable Tourism Policy (KSTP) outlines the government's vision for a sustainable tourism sector that protects natural environments, preserves cultural heritage, and promotes inclusive economic growth. The policy aligns with national and regional frameworks, including the Kiribati 20-Year Vision (KV20) and the Kiribati Development Plan 2020–2023 (SPTO, 2024).

The KSTP sets out seven sustainable tourism goals and key actions, with certain key actions in Goals 1, 5, and 6 particularly aligned with this project, supporting the development of sustainable tourism standards and the adoption of circular economy and sustainable consumption and production practices (TAK, 2023; SPTO, 2024).

These specific goals and associated actions are listed below.

### ***Goal 1. Tourism Must Protect the Natural Environment***

- i. Establish a tourism waste disposal and recycling programme based on the Kiribati Waste Management and Resource Recovery Strategy 2020–2030.
- iii. Encourage a water use and conservation system for all tourism business operations based on the Kiribati National Water Resources Policy.
- v. Promote farm and/or ocean-to-table concepts for all tourism accommodation and restaurant operations.

### ***Goal 5. Tourism Will Contribute to National Economic Prosperity***

- iv. Embrace innovation, technology, and digitisation of all tourism opportunities.
- vi. Provide technical support to Tourism SMEs, encouraging sustainability practices.

### ***Goal 6. Tourism Should Inspire Green Entrepreneurship***

- i. Incorporate a Sustainable Tourism Kiribati label into the Mauri Mark Accreditation Programme.
- ii. Develop a Kiribati Green Tourism Business Toolkit to support businesses in adopting sustainable practices.
- iii. Establish a Green Tourism Incentive Programme to encourage eco-friendly investments.
- iv. Develop a Kiribati Sustainable Tourism Investment Guide to align tourism development with sustainability principles.
- v. Encourage circular economy-inspired practices across tourism business operations, reducing waste and maximising resource efficiency.

## ***Mauri Mark and Mauri Way***

The Mauri Mark Accreditation Programme is Kiribati's national quality accreditation system for tourism businesses. Managed by the Tourism Authority of Kiribati (TAK), it assesses accommodations and tourism operators based on safety, service quality, and sustainability standards. The programme is currently being expanded to include restaurants, bars, tourism leisure crafts, and dive operators.

Tourism businesses undergo an annual assessment based on predetermined criteria, with a rating assigned based on their performance.

Accommodation providers are classified into two categories:

- Category 1: Hotels, resorts, guesthouses, motels, and self-contained apartments
- Category 2: Island bungalows, homestays, and Airbnbs

Each property is evaluated across seven key areas:

- Business Operations
- Fire Safety Procedures
- Health and Hygiene Standards
- Safety and Maintenance
- Facilities and In-Room Amenities
- Environmental Sustainability Practices
- Guest Support Services

### *Programme objectives*

TAK has identified five key objectives for the Mauri Mark Accreditation Programme:

1. Gain international recognition from a reputable accreditation body
2. Expand the programme to include more tourism businesses
3. Provide support for businesses to help them improve their ratings
4. Enhance visitor satisfaction by ensuring businesses meet high standards
5. Increase the number of certified individuals working in the tourism sector

### *Strategic Opportunities*

Stakeholder consultation has identified several issues:

- Limited staff capacity at TAK for thorough assessments
- Lack of alignment with international accreditation standards
- No structured monitoring system for sustainability performance
- Limited awareness among businesses about the benefits of accreditation (TAK, 2023).

To strengthen the Mauri Mark Standard, TAK intends to introduce enhanced requirements in the following areas:

- Quality Standards – Improved benchmarks for service quality and facility maintenance.
- Sustainability Standards – Greater emphasis on waste management, water conservation, energy efficiency, and community protection.
- Safety Standards – Strengthened food safety, hygiene, and disaster preparedness requirements.
- Strengthening Oversight and Implementation

TAK works with the Ministry of Environment, Lands, and Agricultural Development (MELAD) and the Ministry of Infrastructure and Sustainable Energy (MISE) to expand the accreditation programme and support environmental inspectors in monitoring tourism developments (TAK, 2023).



### 3.3. Samoa



Photo credit: SPTO & David Kirkland

#### *Pathway for the Development of Samoa (PDS) 2021/22–2025/26*

The Samoa National Development Frameworks, notably the Pathway for the Development of Samoa (PDS) 2021/22–2025/26 and Samoa 2040, serve as strategic blueprints guiding the country's socio-economic trajectory, with a particular emphasis on tourism revitalisation and diversification. The PDS articulates a set of national priorities aimed at fostering sustainable growth through tourism sector renewal, business innovation, and economic diversification. The targeted outcomes include increasing social and economic benefits by promoting diversified attractions, enhancing marketing efforts, and improving service standards, especially in eco-tourism, cultural, and historical sites, while also ensuring a proactive recovery from the impacts of the COVID-19 pandemic.

Samoa 2040 envisions a long-term future where tourism is positioned as a central engine of economic growth, with ambitious goals to significantly boost the country's GDP contribution by 2040. Together, these frameworks underpin Samoa's strategic approach to harnessing tourism as a vital component of the sustainable development agenda, aligning sector-specific initiatives with broader national objectives.

#### *Legislative foundation*

The Tourism Development Act 2012 mandates the Samoa Tourism Authority (STA) to develop, implement, and enforce documented standards and systems of ratings for all forms of tourism accommodation in Samoa, including hotels, resorts, motels, guest houses, beach fales, backpackers, home-stays, and other accommodation types. Section 30 of the Act specifically empowers the Authority to approve and publish systems of ratings and documented standards for tourism businesses, including accommodation providers. The Act also allows for the accreditation of tourism businesses and the use of approved ratings and accreditations in marketing and promotion (Government of Samoa, 2012).

#### *Samoa Tourism Sector Plan (STSP) 2022–2027*

The Samoa Tourism Sector Plan 2022-2027 provides the roadmap for revitalising and transforming Samoa's tourism sector post-pandemic, aiming for sustainability, resilience, and growth explicitly through rebranding efforts that prioritise culture, heritage, and environmental protection. Key Focus Areas are:

- Sustainable tourism economy and growth
- Rebranding Samoa's image, emphasising culture, heritage, and pristine environment
- Enhancing marketing, infrastructure, investment, and workforce development



- Building resilience to climate change, disasters, and health risks
- Targeting a new benchmark of 215,000 tourists per year

### ***National Tourism Climate Change Adaptation Strategy***

The National Tourism Climate Change Adaptation Strategy addresses climate-related tourism challenges and implements a key focus area of the STSP focusing on:

- Education and training for climate resilience
- Disaster preparedness, response, and recovery
- Energy efficiency initiatives

### ***Samoa Tourism Standards for Accommodation***

The Samoa Tourism Authority (STA) operates a comprehensive standards framework through mandatory business licensing for all tourism operators. The system encompasses rating classifications for five accommodation categories: Deluxe, Superior Standard, Standard, Budget, and Beach Fales, managed through a government-led Standards Committee with multi-agency representation.

All operators must sign Standards Compliance Agreements and undergo annual inspections across six assessment dimensions: cleanliness and hygiene, safety and security, amenities and facilities, service quality, and environmental practices. The STA Inspectorate enforces compliance through penalties, rating withdrawals, and public disclosure of evaluation results.

#### ***Resource constraints create compliance barriers***

Most operators lack capacity to meet basic safety requirements, with limited incentives for compliance due to financial constraints. Small community-based businesses struggle particularly with accessibility standards, fire safety installations, and environmental management practices. Workforce shortages compound these challenges, making consistent service delivery difficult.

#### ***Enforcement limitations***

While annual evaluations occur, consistent monitoring remains problematic, especially in remote areas. Some properties remain uncategorised or unrepaired after natural disasters, creating coverage gaps. The Standards Committee, though effective, requires excessive resources - suggesting need for risk-based approaches and self-assessment tools.

#### ***Environmental performance deficits***

Critical gaps exist in environmental criteria, climate resilience measures, and waste reduction strategies. No systematic monitoring tracks water, energy, or waste consumption across the sector. Only fragmented energy audits exist for select hotels.

#### ***Missing destination standards***

The system lacks destination-level standards for holistic tourism area governance beyond individual businesses. This limits comprehensive environmental and cultural impact management.

#### ***Limited sector coverage***

Marine tourism and other subsectors operate outside the standards framework, creating regulatory blind spots.

#### ***Market pressures undermine quality***

Samoa's remoteness and high costs force price competition, undermining quality investments. Pacific islands' perceived interchangeability challenges differentiation based on standards alone.

## **Strategic opportunities**

### ***Annual licensing integration***

Currently, the accommodation standards are linked solely to the Samoa Business Licensing System, which requires operators to apply for a license; however, there is significant potential to strengthen this linkage by integrating standards into the annual license renewal process. Such integration could mandate operators to submit data on waste, energy, and water use, thereby supporting ongoing monitoring and encouraging resource efficiency. Link standards to annual license renewals, requiring operators to submit waste, energy, and water usage data for systematic monitoring.

### ***Cultural asset leveraging***

Traditional practices of repurposing green waste for handicrafts and food waste for livestock demonstrate embedded circular economy principles. The sector should formally connect with these existing sustainable systems.

### ***Community partnerships***

There is also an opportunity for hotels and beach fale operators to strengthen community ties by establishing connections with local villages through NGOs or cooperatives. Such collaborations could support sustainable tourism initiatives, promote cultural exchange, and ensure that tourism benefits are shared more equitably across communities. Overall, addressing these implementation challenges requires a combination of resource optimisation, capacity building, and community engagement to advance Samoa's sustainable tourism objectives effectively.

### ***Risk-based compliance***

The model is resource-intensive and suggests the need for more cost-effective approaches, such as implementing self-assessment tools and adopting a risk-based approach to compliance monitoring. This would allow for targeted inspections, reducing costs while maintaining standards.

### ***Induction and training***

Additionally, providing induction and training on sustainable tourism practices is crucial to enhance understanding and foster a culture of compliance among operators. Particularly in rural areas, some beach fale accommodations pose risks related to waste management and safety, highlighting the importance of focused efforts on training and raising awareness in these communities.

### ***Reform imperatives***

To remain competitive globally, Samoa's standards require comprehensive reform focusing on:

- Integrated sustainability criteria aligned with government strategies
- Climate resilience and adaptation measures
- Inclusive tourism practices and accessibility standards
- Expanded coverage to marine tourism and other subsectors
- Enhanced monitoring through technology and data collection
- Community engagement and benefit-sharing mechanisms

Recent renewable energy incentives for tourism operators represent positive momentum, but fundamental system restructuring remains essential for sustainable sector development.

### 3.4. Vanuatu



Photo credit: Vanuatu Tourism Office

Vanuatu's national policy framework provides a comprehensive and integrated foundation for sustainable tourism development. The alignment between national development goals, environmental commitments, and tourism strategies reflects a maturing policy environment that supports the transition to a low-impact, high-value, and inclusive tourism economy. Key instruments establish coherence across climate, energy, waste, infrastructure, and cultural domains, offering a clear pathway for alignment with the Pacific Sustainable Tourism Standards (PSTS) and other global benchmarks.

#### **National Sustainable Development Plan 2016–2030**

The *Vanuatu National Sustainable Development Plan 2016–2030* (NSDP), known as *Vanuatu 2030: The People's Plan*, serves as the nation's highest-level policy framework, charting a course toward a stable, sustainable, and prosperous future. Developed through extensive consultations with citizens, community leaders, the private sector, and civil society, the plan reflects collective aspirations for the country's development. It is structured around three central pillars:

- Society: aiming to maintain a vibrant cultural identity and ensure a peaceful, inclusive society supported by responsive institutions
- Environment: focusing on preserving natural resources and enhancing resilience to climate change and natural disasters
- Economy: striving for equitable and sustainable economic growth that generates employment and income opportunities accessible to all.

Each of these pillars encompasses specific goals and policy objectives designed to translate the national vision into actionable priorities. For instance, under the Environment pillar, objectives include promoting climate resilience and ensuring the sustainable management of natural resources. The NSDP aligns with global commitments such as the United Nations Sustainable Development Goals (SDGs), providing a framework for coordinated efforts across various sectors to achieve holistic and sustainable development. In the context of tourism, the NSDP underscores the importance of sustainable and responsible tourism practices that contribute to economic growth while preserving Vanuatu's unique environment and cultural heritage (GoV, 2016).

#### **Vanuatu Sustainable Tourism Policy, Strategies and Plans**

**The Vanuatu Sustainable Tourism Policy (2019–2030)** sets the overarching vision for sustainable tourism in Vanuatu. The VSTP aligns with the NSDP by focusing on the principles of sustainability, by minimising and

mitigating against negative environmental, economic and sociocultural impacts. It incorporates responsible tourism where operators, governments, local people and tourists share the responsibility to demonstrate a focus on the ethics and human rights in making Vanuatu a more resilient destination.

The Policy sets out five sustainable tourism goals, each with Objectives and 'Actions to be Considered'.

**GOAL 1.** To develop and manage a sustainable and responsible tourism industry

**GOAL 2.** Visitors connect with Vanuatu's environment, culture and its people

**GOAL 3.** Sustainable and responsible tourism products and services developed, supported, and marketed to attract responsible, high-value tourists

**GOAL 4.** Tourism that enhances, conserves and protects the environment and cultural resources of Vanuatu

**GOAL 5.** Sustainable and responsible tourism brings improved income and well-being for Vanuatu and its people

All the Goals have Actions that are aligned with this project, supporting the development of sustainable tourism standards and the adoption of circular economy and sustainable consumption and production practices.

**The Vanuatu Sustainable Tourism Strategy (2021–2025)** builds on the VSTP and was introduced as a response to the compounded impacts of COVID-19 and climate-related disruptions. Framed around the themes of Wellbeing, Resilience, Diversification, and Sustainability, it defines 18 programmes of work aimed at reducing vulnerability and advancing a regenerative tourism model. These include the promotion of agritourism and wellness tourism, cultural revival through traditional cuisine classes, and improved coordination across government, industry and communities. The VSTS Implementation Plan also includes cross-referencing of VSTS activities with GSTC criteria, which supports future alignment with the PSTS.

**The Vanuatu Sustainable Cruise Tourism Development Strategy (2020)** measures the economic contribution of cruise tourism, assesses the environmental damage caused by the industry, and offers a 'scorecard' of cruise providers which outlines breaches of environmental regulations and laws. It proposes more detailed investigation into the expedition cruise and yacht markets and the negotiation of commercial agreements with cruise ship companies to jointly monitor and mitigate damages. The strategy explicitly integrates the 'polluter pays' principle from the National Environmental Policy and Implementation Plan (NEPIP), establishing accountability for waste and emissions generated by visiting ships. (Government of Vanuatu, 2020)

**The Vanuatu Tourism Human Resources Development Strategy (2021–2030)** outlines a national capability framework for tourism professionals. The strategy identifies core competencies required across business scales - from micro-enterprises to large resorts - emphasising the importance of training in sustainability, hygiene, and customer service. The framework comprises eight themes, which outline the standards required to meet the VSTP's objectives. The strategy engages both the tourism industry and the skills system, emphasising the need for high standards in tourism products and services to achieve the goals of sustainable tourism. It supports delivery of the VSTP by bridging skills gaps and enhancing quality across the tourism workforce.

Vanuatu also seeks to decentralise implementation through six **Provincial Sustainable Tourism Management Plans (2023–2028)**, developed by Provincial leaders and tourism stakeholders with support from the Department of Tourism. These plans identify locally prioritised actions from the VSTS and are designed to balance economic viability, social inclusivity, and environmental responsibility at the provincial level, through a dedicated five-year plan for tourism.

### **Vanuatu Tourism Permit and Accreditation Programme (VTPAP)**

#### **Legislative foundation**

Vanuatu's tourism standards framework is grounded in two core legislative instruments: the Vanuatu Tourism Office Act [CAP. 142] and the Tourism Councils Act No. 23 of 2012. The former establishes the Vanuatu Tourism Office (VTO) as the statutory body mandated to promote and coordinate tourism development nationally and internationally, in partnership with the Department of Tourism (DoT). The latter enables the creation of Local



Government Tourism Councils, which are responsible for developing area-specific tourism plans, promoting sustainable practices, and fostering community participation. Together, these Acts underpin a decentralised governance model that ensures local input while aligning national policy and market positioning.

This legal foundation authorises the Vanuatu Tourism Permit and Accreditation Programme (VTPAP), which regulates tourism businesses through the Vanuatu Tourism Product Classification System (VTPCS) and Vanuatu Tourism Operator Minimum Standards (VTOMS). Businesses are classified across accommodation, services, and transport categories and assessed against legal, safety, environmental, and service quality benchmarks. Those that comply receive a tourism permit and may be designated as 'Tourism Accredited'. The VTPCS, however, has some inconsistencies, including duplicate classifications and a missing standard for tourism associations. Additional safeguards apply in Ecologically and Culturally Significant Areas (ECSAs), where operators must comply with a DoT-issued Code of Conduct. This Code advances sustainability aims and offers a potential model for strengthening VTOMS criteria in future reforms.

This standards framework is closely aligned with the Vanuatu Sustainable Tourism Strategy 2021–2025 and is being updated to reflect changes in both national and international contexts as well as stakeholder feedback. This reflects the need (and desire within Government) for regulatory reform and adoption of sector best practices, including incorporation or adaption of regional benchmarks such as the PSTPF and the PSTS. The structure of VTPAP therefore supports both national policy execution and regional integration, while reinforcing Vanuatu's positioning as a sustainable, inclusive, and resilient destination.

### ***VTPAP objectives***

The VTPAP was established to support a regulated and high-performing tourism sector through five core objectives:

1. To enable competition based on quality, not just price
2. To raise baseline service standards across the industry
3. To align visitor expectations with available experiences
4. To direct investment towards responsible, high-quality tourism products
5. To build confidence in the national tourism brand (Government of Vanuatu, 2023a)

These objectives continue to underpin current reforms. While the VTOMS system provides robust coverage of operational and compliance areas, the inclusion CE and SCP practices remains limited. The current review process seeks to address these gaps through the integration of indicators for waste management, resource efficiency, and local economic contribution (GoV, 2021).

Importantly, there is a growing policy push to link accreditation with tangible business incentives, such as eligibility for government-funded training, sustainability upgrades, and marketing platforms (STEP, 2024). This would help position the VTPAP not just as a compliance tool, but as a pathway for continuous improvement. Enhancing sustainability alignment, rewarding good practice, and ensuring sector-wide accountability will be critical to reinforcing Vanuatu's position as a resilient and values-driven destination.

### ***Accreditation/Certification mechanism***

Tourism accreditation in Vanuatu operates through a self-assessment and compliance-based process under the Vanuatu Tourism Permit and Accreditation Programme (VTPAP). Businesses are first classified using the Vanuatu Tourism Product Classification System (VTPCS), which determines the applicable checklist from the Vanuatu Tourism Operator Minimum Standards (VTOMS). Operators complete a self-assessment, submit supporting documents, and if criteria are met, are issued a Tourism Permit. If gaps exist, a Conditional Permit is granted, allowing up to six months for rectification. While no formal audits are required, Provincial Tourism Officers provide guidance, conduct ad hoc monitoring, and support new applicants. A valid Tourism Permit is a prerequisite for obtaining a national Business Licence, which must be renewed annually by 31 January. This integration enhances the programme's authority but creates seasonal bottlenecks in permit processing. Additional compliance with the Vanuatu Code of Conduct for Tourism Operators is required for businesses operating in Ecologically and Culturally Significant Areas, although no formal enforcement of this Code currently occurs.



Despite its name, the VTPAP is more accurately described as a certification rather than an accreditation system. Accreditation typically involves independent, third-party verification against recognised standards (e.g. ISO or GSTC), whereas VTPAP is fully managed by the Department of Tourism, which both sets the standards and verifies compliance. There is no external audit body or independent assessment mechanism in place. The programme prioritises progressive improvement and support, offering conditional permits and guidance rather than a rigid pass/fail model.

## SECTION 2. STEP CONSULTATIONS

### 4. STEP PROJECT BASELINE SURVEY – COUNTRY SNAPSHOTS

Several countries – Cook Islands, Samoa, Vanuatu, Kiribati, Niue, Tonga, and Solomon Islands – have national tourism standards focused on accommodation quality, service, and visitor safety. With the introduction and socialisation of the PSTS, many are now reviewing their frameworks to integrate stronger sustainability criteria.

The STEP Project Baseline Survey (2024/25) reviewed tourism standards in 14 of the 20 SPTO member countries,<sup>9</sup> identifying key gaps and opportunities. Pacific nations were asked to assess the alignment of their current standards with PSTS and highlight priority areas for targeted support. The results are presented below.

#### 4.1. The findings of the Survey

##### *Destination Governance and Policy Priorities*

This set of questions was designed to determine which nations had established tourism standards, the extent to which these aligned with the Pacific Sustainable Tourism Standards (PSTS), and the level of interagency collaboration supporting sustainable tourism efforts. Key findings included:

- Some 55.6% of countries (e.g. FSM, American Samoa, PNG, New Caledonia) have no national standard
- Only 22.2% are fully or partially aligned with PSTS
- Most countries report inter-agency collaboration (77.8%), though integration of sustainability goals can be improved

**Insight:** Tailored technical support is required to expand national standards and align with PSTS and to establish standards for those nations without standards.

##### *Economic priorities*

This set of questions was designed to test alignment with PSTS Goal 1 (Prosperous Economies). Key findings included:

- Gaps in business resilience (44.4% not addressed), sustainable procurement (50% not included)
- Only 50% of countries surveyed collect sustainability data

##### **Priorities for Support**

1. Sustainable purchasing
2. Visitor information and interpretation
3. Business monitoring and reporting
4. Business resilience
5. Marketing and promotion

**Insight:** Clear frameworks and training are needed to strengthen business practices and data systems, particularly in areas of sustainable purchasing.

<sup>9</sup> Although only 14 of the 20 SPTO members are covered by the STEP project, the survey was extended to all SPTO members with the intent of this survey becoming an annual activity implemented by SPTO.

## *Social priorities*

This set of questions was designed to test alignment with PSTS Goal 2 (Thriving and Inclusive Communities). Key findings showed that

- there are gaps in accessibility (77.8%), community empowerment (81.3%), and decent work (27.8%)
- only 61.1% of countries surveyed collect any social-impact data

### **Priorities for Support**

1. Supporting local enterprises
2. Empowering communities
3. Community participation
4. Social inclusion
5. Decent work conditions

**Insight:** Strong intent exists, but the systems in place to monitor and deliver social outcomes are limited; supporting local enterprises is an essential component of SCP.

## *Cultural priorities*

This set of questions was designed to test alignment with PSTS Goal 3 (Visible & Valued Cultures). Key findings included:

- Cultural sustainability is under-addressed: 72.2% cite gaps in IP protection, 77.8% in managing tourism impacts
- Only 29.4% of countries surveyed collect relevant data

### **Priorities for Support:**

1. Heritage protection
2. Promoting local culture
3. Cultural interpretation
4. Managing the impact of tourism

**Insight:** Tools and guidance are needed to integrate cultural values into tourism.

## *Environmental priorities*

This set of questions was designed to test alignment with PSTS Goal 4 (Healthy Islands & Oceans). Key findings included:

- More work needed on solid waste (76.5%), wastewater (87.5%), water use (72.2%), and pollution (76.5%)
- Monitoring is weak: only 22–27% track energy, water, waste, or tourism density

### **Priorities for Support:**

1. Waste management
2. Water quality
3. Energy efficiency
4. Risk reduction
5. Wildlife/visitor management

**Insight:** Infrastructure and technical capacity are limited; circular economy approaches are seen as key to improving outcomes particularly in the areas of waste, water and energy.

## Circular Economy (CE) and Sustainable Consumption and Production (SCP)

This set of questions was designed to test countries' understanding of, and appetite for, CE and SCP interventions in the tourism sector. Key findings included:

- Strong support for reducing waste (94.1%), supporting eco-products (88.2%), and promoting resource efficiency (76.5%)

**Insight:** NTOs need access to skills, tools, and investment to scale circular economy action and to monitor implementation.

## 4.2. Conclusions from the Survey

The baseline survey confirms strong regional commitment to sustainable tourism, but also reveals consistent challenges in implementation, data collection, and systems integration. Key areas where the immediate support is required include:

- Development and rollout of national standards aligned to the PSTS
- Capacity building in monitoring, reporting, and data use to measure SCP
- Investment in infrastructure to support resource-efficiency
- Promotion and awareness for MSMEs on SCP and resource efficiency.

Top Priority Areas by Sustainability Goal (STEP Baseline Survey)

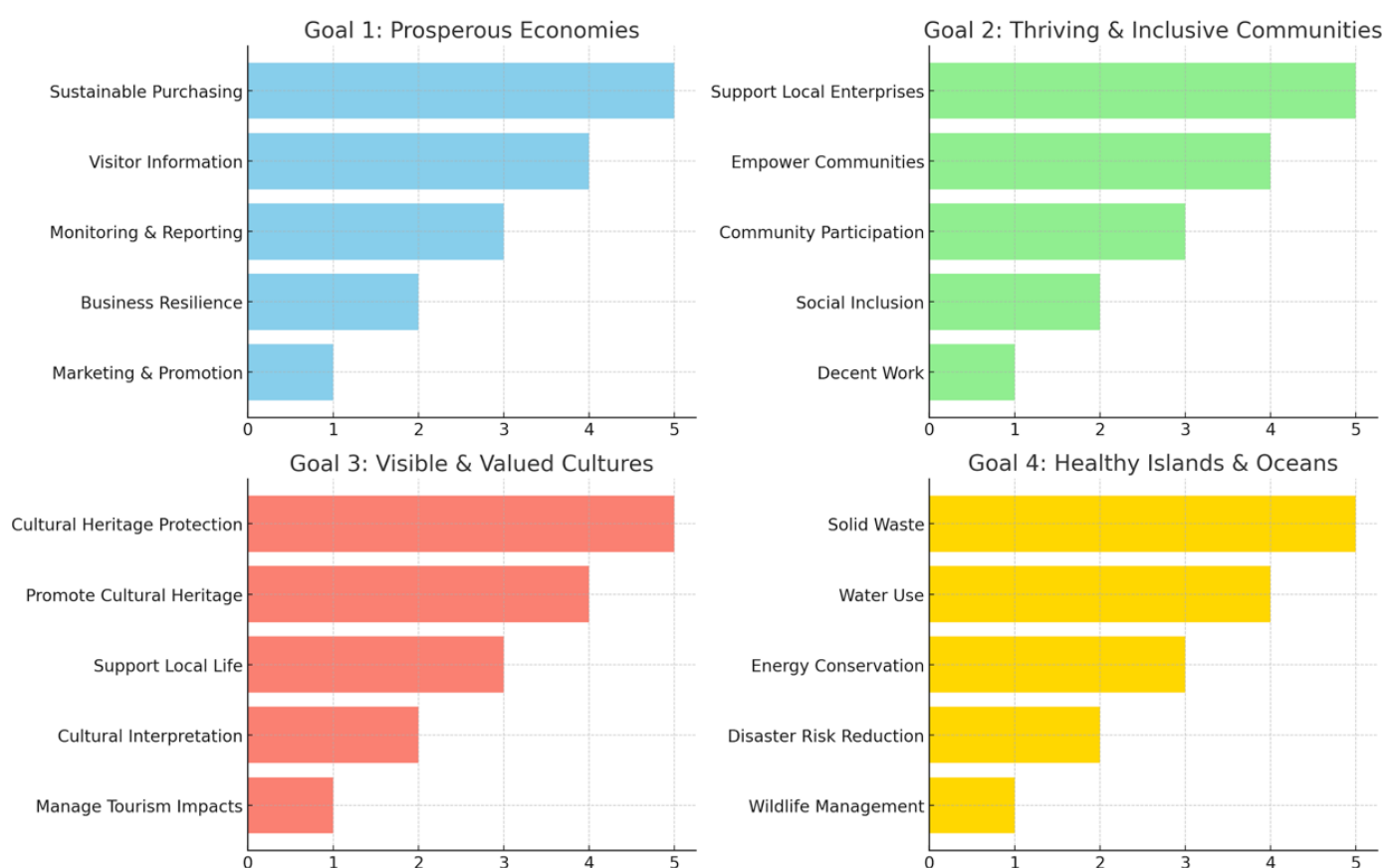


Figure 1. Top priority areas by Sustainability Goal (STEP Baseline Survey)

## 5. DEMONSTRATION COUNTRIES: THE CONSULTATIONS

In addition to conducting SPTO-member surveys, in-country consultations were carried out in Fiji, Kiribati, Samoa, and Vanuatu to develop national pathways aimed at accelerating and scaling up the adoption of sustainable tourism and SCP practices within the tourism sector. These consultations were combined with desk research to create the detailed country assessments in Appendices A–D.

Each country has a national tourism strategy that aligns with the PSTPF. With the exception of Fiji, each country has a tourism standard in place. However, key governance challenges continue to hinder implementation. These issues and challenges emerged during the consultations with the four countries, presented below.

### 5.1. Policy and Regulatory Frameworks

- Tourism responsibilities are shared across multiple ministries (e.g. environment, infrastructure, economic development), leading to coordination gaps.
- Fragmentation exists across sustainability and circular economy (CE) initiatives, often led by multiple agencies or development partners without central coordination.
- Existing tourism standards are narrow in scope, primarily targeting accommodation providers and service quality, with limited coverage of the four sustainability pillars (environmental, socio-cultural, economic, and management).
- Community-based tourism (CBT) enterprises present specific opportunities for advancing SCP and CE, but they face unique challenges distinct from larger operators and require targeted support.
- Monitoring and enforcement mechanisms for sustainable tourism standards are underdeveloped, with a need for clearer institutional roles and stronger inter-agency collaboration.

### 5.2. Limited Capacity and Resourcing

- Many national tourism offices are undergoing a shift from a promotional/marketing focus to destination development and management roles, but capacity and resources to support this transition remain limited. They face staff shortages, skills gaps, and limited operational budgets, affecting planning, monitoring, and destination management.
- Research, data collection, and digital marketing capabilities are often underdeveloped.

### 5.3. Industry Engagement and Incentives

- Many tourism businesses, particularly micro, small, and medium-sized enterprises (MSMEs), have a limited understanding of SCP concepts, hindering their adoption of sustainable practices such as renewable energy and waste minimisation.
- There are few incentives in place to encourage tourism businesses, especially MSMEs, to adopt sustainable practices, making it challenging to motivate change.

### 5.4. Market Access and Supply Chain Visibility

- The supply chain for sustainable tourism products and services is poorly understood, with limited visibility for both suppliers and buyers.
- The tourism industry lacks guidance on how to access or verify sustainable goods and services, and no clear authority currently exists to define or certify what is a 'sustainable' product.
- Aggregation of SMEs to supply locally made and sourced products remains underdeveloped, limiting scale and efficiency.



- Purchasers are limited to the options importers are willing to bring into each country, with choice of products reflecting sector scale and historic demand. For importers, there is risk attached to introducing new products, especially if a higher price point for more sustainable options.

## 5.5. Demonstration Country Priority Actions

Tables 3, 4, 5, and 6 describe specific actions identified by each NTO for inclusion in their respective national pathways to advance sustainable tourism and SCP. Several of these actions hold potential for replication across other Pacific nations and have been integrated into the Regional Roadmap recommendations.

**Table 3. Fiji Priority Actions following consultations**

Category	Action Items
<b>Destination governance and management</b>	<ul style="list-style-type: none"> <li>• Establish a steering committee to oversee the implementation of the National Sustainable Tourism Framework (NSTF) and the development of industry and destination standards</li> </ul>
<b>Regulatory and policy frameworks</b>	<ul style="list-style-type: none"> <li>• Develop industry standards systems and criteria for sustainable tourism, including a pathway that supports Community-based Tourism enterprises</li> <li>• Develop and align destination standards with government policies and donor programmes, potentially using the Pacific Standard as a basis</li> </ul>
<b>NTO capacity building</b>	<ul style="list-style-type: none"> <li>• Develop education and training modules focusing on standards, Sustainable Consumption and Production (SCP), and Circular Economy (CE) for industry stakeholders</li> </ul>
<b>Sector awareness</b>	<ul style="list-style-type: none"> <li>• Implement a communications strategy to support the development and adoption of tourism standards</li> </ul>
<b>Monitoring and evaluation</b>	<ul style="list-style-type: none"> <li>• Conduct supply chain analyses to identify gaps and opportunities for SCP and establish a register of sustainable products for the tourism sector</li> </ul>
<b>Agriculture (agri-food and tourism)</b>	<ul style="list-style-type: none"> <li>• Scale up food supply through agriculture initiatives, including the development of an agritourism strategy</li> </ul>
<b>Plastics / Waste</b>	<ul style="list-style-type: none"> <li>• Investigate financial and non-financial incentives to increase the uptake of sustainable products, contributing to waste reduction</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>• Convene forums for sustainable tourism product suppliers and vendors, leveraging existing events like HOTECH10</li> <li>• Develop digital tools to connect suppliers and purchasers, enhancing visibility and aggregation of sustainable products</li> </ul>

**Table 4. Kiribati Priority Actions following consultations**

Category	Action Items
<b>Destination governance and management</b>	<ul style="list-style-type: none"> <li>• Establish a Sustainable Tourism Committee as per the Policy Framework to support the development of the revised Mauri Mark accreditation system</li> </ul>
<b>Regulatory and policy frameworks</b>	<ul style="list-style-type: none"> <li>• Refine the Mauri Mark Accreditation System, including the Mauri Way and criteria, to align with the Pacific Sustainable Tourism Standard Criteria</li> <li>• Confirm the relationship between the tourism licensing system and the Mauri Mark 2.0 System, utilizing licensing as a tool to transition the sector to better practices</li> </ul>

<b>NTO capacity building</b>	<ul style="list-style-type: none"> <li>• Develop training materials and capacity-building programmes for industry stakeholders and students to support the rollout of the revised Mauri Mark 2.0</li> </ul>
<b>Sector awareness</b>	<ul style="list-style-type: none"> <li>• Improve institutional coordination through awareness-raising and communications facilitated by a steering committee</li> </ul>
<b>Monitoring and evaluation</b>	<ul style="list-style-type: none"> <li>• Enhance data collection systems to monitor and report on key performance indicators related to sustainable tourism</li> </ul>
<b>Agriculture (agri-food and tourism)</b>	<ul style="list-style-type: none"> <li>• Implement sustainable procurement interventions in the hospitality sector's supply chain, building on previous projects like LECRD and GGGI<sup>11</sup></li> </ul>
<b>Traditional building</b>	<ul style="list-style-type: none"> <li>• Formalise traditional building methods and materials</li> </ul>

**Table 5. Samoa Priority Actions following consultations**

<b>Category</b>	<b>Action Items</b>
<b>Destination governance and management</b>	<ul style="list-style-type: none"> <li>• Strengthen the Samoa Tourism Authority's (STA) understanding of sustainability and the importance of coordination with government agencies, NGOs, and industry</li> <li>• Review STA's organisational structure and resource allocation to support sustainable tourism policies and standards</li> </ul>
<b>Regulatory and policy frameworks</b>	<ul style="list-style-type: none"> <li>• Establish a revised standards framework to improve compliance, quality, and sustainability in the tourism sector, including financial and non-financial incentives</li> <li>• Review minimum standard criteria for accommodations and Beach fale, integrating them into the annual business license renewal process</li> </ul>
<b>NTO capacity building</b>	<ul style="list-style-type: none"> <li>• Develop training programmes (online and face-to-face) to support industry understanding of standards and reporting requirements</li> </ul>
<b>Sector awareness</b>	<ul style="list-style-type: none"> <li>• Create communication strategies and resources to assist STA in guiding the industry toward improved business practices associated with new standards</li> </ul>
<b>Monitoring and evaluation</b>	<ul style="list-style-type: none"> <li>• Establish data collection and monitoring systems to track industry performance against key indicators like waste, water, and energy, potentially reinstating previous pilot studies</li> </ul>
<b>Agriculture (Agri-food and tourism)</b>	<ul style="list-style-type: none"> <li>• Investigate options to support sustainable purchasing and imports with relevant government agencies, including excise duty concessions for energy-efficient products</li> </ul>
<b>Plastics / Waste</b>	<ul style="list-style-type: none"> <li>• Implement the Pacific Ocean Litter Project (POLP SUP) Project focusing on green procurement and industry awareness programmes to manage waste effectively</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>• Develop a tourism planning and business information hub providing details on building requirements, licensing, standards, grants, operating costs, and sustainable tourism practices</li> <li>• Establish a Sustainable Tourism Taskforce comprising various stakeholders to oversee the implementation of sustainability policies and strategies</li> </ul>

11 <https://gggi.org/partners-come-together-to-implement-kiribati-agriculture-strategy-and-support-low-emissions-and-climate-resilient-development/>

**Table 6. Vanuatu Priority Actions following consultations**

Category	Action Items
<b>Destination governance and management</b>	<ul style="list-style-type: none"> <li>• Enhance the Department of Tourism's (DoT) understanding of sustainability and its relationship with the Pacific Sustainable Tourism Standards (PSTS) and Framework</li> <li>• Conduct a validation workshop to reconvene discussions and align stakeholders on sustainable tourism strategies</li> </ul>
<b>Regulatory and policy frameworks</b>	<ul style="list-style-type: none"> <li>• Support the establishment of a revised framework (VTPAP) to improve compliance, quality, and sustainability in the tourism sector</li> <li>• Review minimum standard criteria (VTOMS) and explore incentives and disincentives to promote sustainability</li> </ul>
<b>NTO Capacity building</b>	<ul style="list-style-type: none"> <li>• Build industry awareness and capacity within the DoT to support new minimum standards, collaborating with training partners</li> </ul>
<b>Sector awareness</b>	<ul style="list-style-type: none"> <li>• Develop simple information strategies and materials to guide stakeholders on initiating sustainable tourism practices aligned with PSTS</li> </ul>
<b>Monitoring and evaluation</b>	<ul style="list-style-type: none"> <li>• Establish systems for data collection and monitoring to track industry performance, utilising platforms like ACRGIS</li> </ul>
<b>Agriculture (Agri-food and tourism)</b>	<ul style="list-style-type: none"> <li>• Conduct supply chain interventions to support local enterprise development, focusing on agriculture opportunities and waste reduction, particularly in provincial areas</li> </ul>
<b>Plastics / Waste</b>	<ul style="list-style-type: none"> <li>• Support waste management plans by identifying sustainable practices and solutions in collaboration with the industry</li> </ul>
<b>Other</b>	<ul style="list-style-type: none"> <li>• Ensure sustainability is embedded early in the investment and development life cycle of new tourism projects, connecting standards with the Vanuatu Foreign Investment Promotion Agency (VFIPA)</li> </ul>

## 5.6. Key thematic areas

The findings from the four Demonstration Country consultations were presented back to NTO stakeholders, and endorsement was received to further develop the Action Items identified in Tables 3–6. Key thematic areas for advancing sustainable tourism and SCP practices within the Pacific tourism sector were then identified by synthesising findings from the STEP Project Baseline Survey (2024/25) and the Demonstration Country stakeholder consultations. The draft thematic areas were presented to the SPTO Board Sub-committee for Sustainable Tourism and (separately) to the SPTO Board Sub-Committee for Small Island Developing States (SIDS), after which feedback from Committee members was incorporated.

The thematic areas to be taken forward for tentative validation with regional stakeholders are as follows:

- Destination governance and management
- NTO and sector capacity building
- Waste and resource efficiency
- Purchasing and procurement
- Agri linkages to tourism
- Sustainable buildings

## 6. REGIONAL VALIDATION WORKSHOP

### 6.1. Workshop structure and objectives

SPTO and the STEP Project convened a regional validation workshop to advance sustainable tourism practices across Pacific Island countries on April 23–24 2025 at Holiday Inn Suva, Fiji. The workshop brought together over 50 participants from 10 Pacific countries, representing National Tourism Authorities/Organisations (NTAs/NTOs), governments, sector leaders, development partners, NGOs, and community representatives to discuss how to align national policies with the Pacific Sustainable Tourism Standards and embed CE/SCP principles into tourism policies and practice. The full report from the workshop can be accessed at <https://www.switch-asia.eu/resource/regional-validation-workshop-on-sustainable-tourism-enhancement-in-the-pacific-step/>

The discussions reinforced a strong regional consensus around both the challenges and opportunities facing sustainable tourism in the Pacific. Discussions identified clear gaps in current standards, data systems, circular economy practices, and capacity-building support. Participants highlighted the need for targeted financing tools (such as SME grants, concessional credit lines, and green bonds) to enable more inclusive and sustainable enterprise development. The PSTPF and PSTS were provided as key reference points, supported by the STEP Project core concepts of CE/SCP. NTO and private sector leaders shared practical models already in operation, including sustainable accommodation, farm-to-fork supply chains, agritourism ventures, community-based initiatives, renewable energy adoption, and strengthened local sourcing strategies.

Throughout the dialogue, there was consistent emphasis on the importance of regional collaboration, stakeholder partnerships, and peer-to-peer learning. Leaders underlined the need for enabling policies, coherent planning frameworks, and improved data to inform investment and policy decisions. Discussions also addressed cross-cutting issues such as waste management, sustainable supply chains, youth engagement, technical training, cultural preservation, and the need to scale local innovations through aggregated supply mechanisms. Key outcomes included validation of common priorities across countries, agreement on focus areas for the Regional Roadmap, commitments to align national tourism policies and standards with regional frameworks, and recognition of the institutional and financial support needed to translate ambition into implementation.

### 6.2. Ranking and validation of Thematic Areas

The workshop used an interactive online poll to validate the six thematic areas for sustainable tourism previously identified. Participants were asked to help identify gaps, suggest improvements, and join breakout discussions. Cross-cutting issues like supply chains and green finance were also highlighted, aiming to shape the Regional Roadmap through collaborative input.

Participants were asked to rank the thematic areas in order of priority at the beginning, and again at the end of the workshop. The results indicated a clear preference for systemic and capacity-building approaches, with operational implementation tools ranked lower.

#### *Validated as highest need*

- **Destination Governance and Management (DGM)**  
Indicates a strong demand for clear, enabling policy environments and harmonised standards at national/regional levels
- **Capacity Building – Industry and Government**  
Emphasises the need for training and resourcing for both public agencies and private operators to implement sustainability standards
- **Agriculture and Tourism Linkages**  
Points to ongoing interest in inclusive, cross-sector development with potential to support local livelihoods and food security

- **Waste and Resource Efficiency**  
Reflects urgency around practical environmental sustainability, particularly in fragile island environments

*Validated as important but lower priority*

- **Monitoring and Evaluation (a subset of DGM)**  
Important and seen as less urgent until frameworks and capacity are in place
- **Sustainable Purchasing and Procurement**  
Perceived as a downstream priority that requires foundational systems first
- **Sustainable Buildings**  
Likely viewed as capital-intensive or more suited for long-term implementation phases



## SECTION 3. THEMATIC AREAS

Building on the validation exercise, and stakeholder insights gathered during the workshop, the thematic areas were further refined and analysed to capture the barriers, support needs, and opportunities identified. The six thematic areas were reframed and refined to five. Each represents a different aspect of systemic shift toward sustainable tourism in the Pacific and collectively they form the basis of both regional priorities and national implementation pathways.

### 1. Enabling Sector Transition

- Focuses on strengthening institutional systems, improving knowledge-sharing platforms, building SME and CBTE capacity, and embedding monitoring and evaluation
- Key initiatives support regional learning hubs, targeted grant schemes, and SCP communications strategies

### 2. National and Regional Policy Support

- Targets regulatory and governance reform to mainstream SCP and sustainable tourism into policy frameworks
- Supports policy dialogue, industry standards, self-assessment tools, and public-private dialogue platforms

### 3. Sustainable Consumption and Production (SCP) Practices

- Aims to reduce plastic use and promote circular economy practices through toolkits, supply chain development, and sustainable procurement models
- Empowers SMEs and governments to adopt SUP-free alternatives and eco-friendly supply systems

### 4. Sustainable Buildings and Infrastructure

- Advances climate-resilient and culturally grounded tourism infrastructure through traditional building methods and finance facilities
- Includes technical training, green infrastructure standards, and demonstration projects

### 5. Agriculture and Tourism Linkages

- Promotes agritourism through structured procurement platforms, aggregator hubs, and traceability tools
- Strengthens local livelihoods and food security through enhanced agriculture-tourism integration

The analysis is structured using a consistent and strategic format to support clarity, alignment with workshop feedback, and practical application in the Regional Roadmap and Demonstration Country Pathways. The following headings are used across all thematic areas:

1. Stating the Problem
2. Workshop Discussion Summary
3. Key Barriers
4. Support Required

## 6.3. Thematic Area 1: Enabling Sector Transition

### Stating the Problem

The transition to sustainable tourism in the Pacific is not achievable without targeted capacity-building efforts that empower institutions, businesses, and communities to adopt sustainable tourism and Sustainable Consumption and Production (SCP) practices. The initiatives under *Key Focus Area 1: Enabling Sector Transition* are not stand-alone projects: they address the underlying systems needed to activate, implement, and scale sustainable tourism and SCP across the region.

These enablers respond directly to priority barriers identified through consultation at the Regional Validation Workshop including weak institutional capacity, limited financing, fragmented regional coordination, and low SME and community readiness. They provide the scaffolding required to build resilient, inclusive, and sustainable tourism economies and are categorised as:

- Knowledge Sharing and Regional Coordination
- Institutional/Industry Communication and Awareness Raising
- Access to Financing for SCP Implementation
- Monitoring, Evaluation, Accountability and Learning (MEAL)

Together, these enablers:

- Bridge the gap between aspiration and implementation, making SCP concepts practical, accessible, and measurable
- Empower local actors, including CBTEs and SMEs, to lead the change from the ground up
- Support regional coherence, by facilitating peer learning and standard alignment across Pacific nations
- De-risk sustainability investments, offering tools, data, and finance mechanisms to support informed and confident decision-making
- Position sustainability as a win-win, ensuring that SCP adoption delivers cultural, economic, and environmental benefits across communities.

### Workshop Discussion Summary

To accelerate the transition to sustainable tourism in the Pacific, stakeholders recommended the development of a regional knowledge-sharing platform that would facilitate collaboration across government, businesses, and NGOs. This platform would draw upon successful examples from Samoa, Cook Islands, and Tonga, and promote South-South SIDS and Intra-Pacific cooperation and peer learning.

Consultation also highlighted that capacity-building efforts should be informed by targeted needs assessments and supported through initiatives such as a Pacific Sustainable Tourism Expo focused on small operators. Stakeholders also suggested that sharing local success stories and traditional practices (e.g. whale-watching, seafaring) will help preserve cultural heritage and inspire innovation. Acknowledgement was made of the need to cater to different learning styles and accessibility needs in the design and delivery of knowledge resources (e.g. availability online/offline, use of documents/videos/other). Strengthening data collection, monitoring, and evaluation systems, alongside efforts to protect Indigenous intellectual property, was also raised as essential.

Enhanced partnerships with regional and global organisations (e.g. SPREP, Pacific Community (SPC), United Nations Educational, Scientific and Cultural Organization (UNESCO), United Nations Institute for Training and Research (UNITAR), United Nations Tourism (UN Tourism), United Nations Environment Programme (UNEP), Pacific Asia Travel Association (PATA)) will support these goals. Stakeholders made it clear that transitioning to sustainable tourism practices must be positioned as a win-win for both communities and businesses to build long-term commitment and regional resilience.

## Key Barriers

The key barriers identified by stakeholders are summarised in Table 7.

**Table 7. Key barriers for enabling sector transition**

Barrier Category	Representative Issues
<b>Institutional Capacity</b>	NTOs lack tools, human resources, and dedicated funding to support and coordinate sustainable tourism actions
<b>Access to Finance</b>	Small operators face barriers in accessing funding, contestable grants, or affordable financing options
<b>Knowledge and Skills Gaps</b>	Limited training opportunities, lack of access to best practices, and minimal peer-to-peer learning
<b>Regional Coordination</b>	Weak regional knowledge-sharing mechanisms; reliance on a few countries (e.g. Fiji, Vanuatu) for innovation
<b>Incentive and Disincentive Frameworks</b>	Inadequate use of tax relief, import concessions, concessional financing or government subsidies to promote sustainable practices
<b>Public–Private Collaboration</b>	Limited engagement between NGOs, businesses, and government, leading to low trust and fragmented action
<b>Recognition of Local Practices</b>	Under-utilisation of traditional knowledge and success stories from across the Pacific
<b>Data and Monitoring</b>	Insufficient capacity for data collection, tracking, and evaluation of capacity-building outcomes

## Support Needed

Stakeholders identified the following areas where support is most needed.

- **A regional knowledge hub** to share training resources, best practices, and peer learning and to facilitate communication and engagement.
- **Enhanced policy levers** such as tax incentives and import duty concessions, to encourage sustainable private sector investment
- **Contestable funds and subsidised programmes** to provide accessible financial support, especially for small and medium-sized tourism enterprises
- **Address capacity gaps** in National Tourism Organisations (NTOs) by equipping them with tools—such as flexible funding mechanisms—to better support industry stakeholders
- **‘No regret financing’** that considers both immediate cost and long-term value to ensure low-risk, high-impact investment in sustainability
- **Strengthened partnerships** between NGOs and the private sector to foster knowledge-sharing, build technical know-how, and support collaborative action

## 6.4. Thematic Area 2: National & Regional Policy Support

### Stating the Problem

The transition toward Sustainable Consumption and Production (SCP) and Circular Economy (CE) in the Pacific's tourism sector is constrained by major regulatory and policy barriers. Despite growing awareness of sustainability imperatives, limited political will, frequent shifts in government priorities, and weak institutional stability undermine long-term commitment and follow-through. Governance remains fragmented, with poor coordination across tourism, environment, infrastructure, and economic ministries, resulting in inconsistent regulations and unclear accountability.

Many tourism policies lack clear mandates, enforcement pathways, or resourced implementation plans, while outdated or contradictory legislation fails to support integrated sustainability outcomes. Tourism operators - especially small and medium enterprises - are often excluded from policy design processes, leading to poor compliance and limited voluntary uptake. Additionally, efforts to align national frameworks with international sustainability standards are hampered by capacity gaps and insufficient localisation of global models.

Without addressing these structural barriers, the Pacific's tourism sector will struggle to implement effective SCP and CE practices, risking continued environmental degradation, economic leakage, and missed opportunities for community benefit.

### Workshop Discussion Summary

The workshop discussions highlighted two key priorities for accelerating sustainable tourism in the Pacific: improving destination management and advancing the implementation of sustainable tourism standards. Participants emphasised the importance of a strong legislative foundation to mandate and guide effective governance. Fiji's efforts in this area were cited as a leading example. However, policy creation alone is not sufficient; effective enforcement and interagency collaboration are also critical to overcoming siloed approaches and ensuring coherent decision-making. Enhanced data sharing and the establishment of inter-agency steering committees were recommended to support coordinated national efforts, while strong partnerships with the private sector and development partners were seen as vital to long-term success.

The second major theme focused on operationalising sustainable tourism standards. Stakeholders stressed that governments must move beyond simply setting standards to actively supporting their implementation. This includes offering incentives such as grants or low-interest loans to encourage uptake, and repositioning standards as adaptable guidelines (rather than 'rules') to increase industry buy-in. Participants called for practical, user-friendly tools and templates, along with access to regional best practices, to help tourism businesses understand and apply the standards in context.

### Key Barriers

The key barriers identified by stakeholders are summarised in Table 8.

**Table 8. Key Barriers for national and regional policy support**

Barrier	Representative Issues
<b>Political Commitment</b>	Lack of political will, instability, shifting priorities
<b>Fragmented Governance</b>	Siloed departments, unclear mandates, conflicting legislation
<b>Capacity and Resources</b>	Staffing shortages, lack of funding, limited implementation capacity
<b>Industry Engagement</b>	Weak consultation, uncertainty about compliance
<b>Regulatory Clarity</b>	Unclear regulations, lack of defined implementation steps
<b>Communication &amp; Coordination</b>	Poor cross-sector collaboration and stakeholder engagement
<b>Global-Local Alignment</b>	Difficulty integrating global standards into national frameworks



## Support Needed

Stakeholders identified the following areas where support is most needed.

- **Funding and Financing:** Foundational funding, technical assistance, and flexible 'no-regret' financing to de-risk implementation
- **Technical Capacity:** Support for policy design, coordination, enforcement, and stakeholder engagement skills
- **Governance Clarity:** Reform outdated legislation and clarify agency roles for more coherent sector coordination
- **Collaboration Platforms:** Inclusive public-private-community structures to ensure practical and supported policy outcomes
- **Strategic Alignment:** Align national and regional strategies with tools, incentives, and early 'quick win' actions to build momentum.

## 6.5. Thematic Area 3: Sustainable Consumption & Production Practices

### Stating the Problem

Pacific Island nations face significant challenges in tourism-related waste and resource use due to high levels of imports, limited infrastructure, high logistics costs, unclear mandates, and weak enforcement. These issues are compounded by fragmented procurement systems and limited access to sustainable alternatives. Capacity gaps, low public awareness, and minimal industry engagement further hinder progress – particularly in understanding, sourcing, and implementing sustainable purchasing practices.

### Workshop Discussion Summary

Workshop discussions on **waste and resource efficiency** highlighted the need for stronger environmental legislation and enforcement, alongside the promotion of circular tourism models and community-led initiatives. Participants called for practical interventions to support small businesses. Broader policy measures, including procurement schemes and extended producer responsibility for items like solar batteries, were seen as essential for long-term progress. Improving energy, water, and food efficiency, building local technical expertise, and recognising sustainability champions were also emphasised as vital to achieving scalable, community-supported outcomes. Circular economy models were encouraged, with a caution to avoid superficial greenwashing, and the financial benefits of sustainability measures were highlighted to support industry buy-in.

In the area of **sustainable procurement and purchasing**, discussions focused on reducing the sector's carbon footprint by phasing out single-use plastics and encouraging the uptake of eco-friendly products. Participants proposed the creation of a green supplier certification system, a Pacific procurement platform, and feasibility studies to identify gaps in supply and demand. Entrepreneurship support was also recommended to help local producers scale and meet tourism sector needs. Initiatives like the Pacific Island Food Revolution<sup>12</sup> were seen as powerful tools to celebrate local cuisine and integrate cultural heritage into sustainable supply chains.

### Key Barriers

The key barriers identified by stakeholders are summarised in Table 9.

---

12 <https://www.pacificislandfoodrevolution.com>

**Table 9. Key Barriers for sustainable consumption and production practices**

Barrier	Representative Issues
<b>Financial Constraints</b>	High costs, lack of funding, limited government support, and poor access to affordable finance.
<b>Capacity and Skills Gaps</b>	Limited local expertise, weak interdepartmental support, and lack of training or sourcing knowledge.
<b>Infrastructure and Systems</b>	Inadequate facilities, land limitations, and low prioritisation of tourism-related waste management.
<b>Governance and Regulation</b>	Unclear mandates, poor enforcement, fragmented coordination, and low political priority.
<b>Single-use Plastics Dependency</b>	Heavy reliance on SUPs in tourism, contributing to high levels of avoidable waste.
<b>Cultural and Behavioural Attitudes</b>	Low engagement in sustainable practices and limited community readiness, especially in rural areas.
<b>Information and Awareness</b>	Poor access to best practices, unclear guidelines, and minimal integration of traditional knowledge.
<b>Market and Supply Chain Barriers</b>	Limited sustainable suppliers, inconsistent quality, high input costs, and weak local procurement.
<b>Data and Monitoring Gaps</b>	Lack of robust data systems to track waste, procurement, and SCP performance.

### **Support Needed**

Stakeholders identified the following areas where support is most needed:

- **Policy and Regulation:** Strengthen environmental legislation, introduce polluter-pays and EPR schemes, and embed sustainability in procurement and tourism policies.
- **Capacity and Awareness:** Deliver training for tourism operators, suppliers, and procurement teams; raise awareness through toolkits, campaigns, and showcasing good practice.
- **Financial Incentives:** Provide grants, subsidies, and no-regret financing; support infrastructure and supplier development; highlight business benefits of SCP.
- **On-Site Solutions:** Fund practical sustainability upgrades such as composting, solar, and efficient water use within tourism businesses.
- **Supply Chain Development:** Conduct supply chain analyses, support local sustainable production, and create regional supplier directories, ensuring localised capacity and tools.
- **Monitoring and Tools:** Develop templates and dashboards to support SCP implementation, certification, and performance tracking.
- **Integrated Collaboration:** Foster coordinated action across government, business, and communities through scalable, culturally grounded models.

## 6.6. Thematic Area 4: Sustainable Buildings & Infrastructure

### Stating the Problem

Pacific Island Countries face major barriers in transitioning to sustainable, climate-resilient tourism infrastructure. Traditional building methods like Samoa's *fale* and Fiji's *bure* offer low-impact, climate-adapted solutions but are undervalued and largely excluded from formal planning and regulation. High costs, limited financing, and a lack of technical capacity deter uptake, while building codes are often outdated and poorly aligned with sustainability goals.

A critical disconnect remains between traditional knowledge and formal systems, with imported materials dominating tourism construction. Addressing these challenges requires investment in local skills, policy reform, and financing models that support culturally grounded, regenerative infrastructure across the region.

### Workshop Discussion Summary

Workshop discussions emphasised the importance of traditional knowledge integration in sustainable tourism infrastructure. Participants highlighted the need to value and use resilient local materials such as bamboo, timber, and rammed earth, alongside traditional Pacific construction methods. There was strong support for consolidating Indigenous knowledge from the Pacific, Africa, and Asia, and integrating it into education and vocational training systems to ensure its transmission and practical application across generations.

To support innovation and adoption, the group called for small-scale financial incentives and training to foster local entrepreneurship, particularly in areas like bamboo construction and biochar production from waste materials. Participants also stressed the need to revise building codes to better reflect local realities and climate resilience goals. Further priorities included backing renewable energy integration - especially solar - and promoting resource-efficient building practices that minimise environmental impact while increasing resilience to climate shocks.

### Key Barriers

The key barriers identified by stakeholders are summarised in Table 10.

**Table 10. Key Barriers for sustainable buildings and infrastructure**

Barrier	Representative Issues
Financial	Cost, lack of funding, insurance, affordability of local materials
Knowledge & Technical Gaps	Lack of expertise, business case understanding, traditional knowledge integration
Regulatory & Policy	Unclear building codes, fragmented government roles, low enforcement
Incentives & Governance	Lack of supportive policy tools, liability risks, no 'fast-track' mechanisms
Contextual/Environmental	Climate resilience, remoteness, community readiness

### Support Needed

Stakeholders identified the following areas where support is most needed:

- **Finance** - Seed funding, microgrants, regional investment facilities
- **Technical Assistance** - Update or co-develop building codes. Expert panels, toolkits, design templates, shared platforms
- **Capacity Building** - On-ground online training
- **Coordination Platforms** - Co-developed frameworks with private/public/NGO roles
- **Policy and Leadership** - Clear targets, political champions, and cross-ministerial alignment for streamlined decision-making. Promote local innovation hubs that integrate traditional and contemporary design.

## 6.7. Thematic Area 5: Agriculture & Tourism Linkages

### Stating the Problem

Agritourism presents a major opportunity for PICs to diversify their economies, support local farmers, and promote sustainable development. However, progress is limited by weak infrastructure, fragmented policies, and a lack of coordination between the agriculture and tourism sectors. Farmers often struggle with inconsistent supply, limited knowledge of tourism standards, and poor access to tourism markets. Policy gaps, trade constraints, and the absence of systems to monitor and scale initiatives further restrict impact. To realise agritourism's potential, PICs need targeted investment, cross-sector collaboration, capacity building, and formal mechanisms to connect agriculture with tourism in a sustainable and inclusive way.

### Workshop Discussion Summary

The workshop discussion on agritourism highlighted two key opportunities: strengthening the supply relationship between farmers and hotels, and using agricultural activities as engaging, culturally rich visitor experiences. However, challenges persist, particularly around inconsistent supply, seasonal availability, and pricing. Participants emphasised the value of strong partnerships – especially between hotels and farmer associations – to coordinate crop planning and ensure consistent supply and mutual commitment.

To address seasonality and add value, the group encouraged learning from international models such as frozen local produce, preserved goods like jams and chutneys, and the development of farm tours. Educating tourists about local crops and farming traditions was identified as both a cultural enrichment tool and a revenue opportunity. On the procurement side, participants recommended linking tax concessions for hotel developments to green building standards, including the use of non-toxic, locally sourced materials, certified suppliers, and renewable energy systems—thereby reinforcing sustainable practices in the tourism sector.

### Key Barriers

The key barriers identified by stakeholders are summarised below.

**Table 11. Key Barriers to agriculture and tourism linkages**

Barrier Category	Representative Issues
<b>Supply Chain and Capacity Constraints</b>	Limited regular supply; inconsistent quality and quantity; logistics and scale issues; reliance on imports; lack of aggregator hubs; limited production capacity.
<b>Knowledge and Standards Compliance</b>	Lack of awareness of safety and tourism standards; limited skills to develop agritourism products; no consistent policy guidance; weak monitoring and evaluation.
<b>Policy, Governance, and Coordination</b>	Fragmented sectoral approaches; absence of agritourism-specific policies; government focus on legacy industries; weak inter-agency collaboration; outdated trade agreements.
<b>Systems and Market Access</b>	No formal market systems linking agriculture and tourism; lack of tools to track agritourism impact; limited local trade systems; food sovereignty not prioritised.

### Support Needed

Stakeholders identified the following areas where support is most needed.

- **Financial Support:** Grants and targeted funding for local communities and businesses; investment to scale supply quality and establish community-based aggregator hubs
- **Policy and Institutional Strengthening:** Develop agritourism-specific policy frameworks; support from councils and ministries to integrate traditional knowledge and improve access to grants and tools; enhance cross-sector coordination
- **Capacity and Knowledge Transfer:** Deliver training on safety standards, supply systems, and market requirements; support for quality control and value-added product development; foster cooperatives to improve logistics and supply reliability

- Partnerships and Collaboration: Strengthen ties between farmers, tourism operators, and agrifood enterprises; build regional networks and public-private-community partnerships to support inclusive and scalable agritourism initiative

## 6.8. Next steps

To translate this research into tangible outcomes, the following next steps are proposed.

### Development of Regional Roadmap and Country Pathways

- Identify the interventions that will begin to address the barriers and support needs identified
- Formulate a structure and implementation model that will provide guidance but flexibility for SPTO, Demonstration Countries and Member Nations, and Donors and Partners
- Create adaptable Pathway models that will support adoption of the PSTS

### Formal Endorsement and Integration

- Present the Regional Roadmap to SPTO member countries and stakeholders for validation and endorsement.
- Integrate priority actions into SPTO workplans, regional frameworks, and national tourism strategies.

### Pilot Project Implementation

- Select pilot countries and partners to initiate the first phase of high-priority projects under each focus area.
- Mobilise technical assistance and seed funding to support project design, capacity building, and early delivery.

### Resource Mobilisation

- Engage development partners, donors, and regional funding mechanisms to align investment with priority project areas.
- Establish a coordinated approach to financing that includes grants, blended finance, and tailored support for MSMEs and CBTEs.

### Knowledge Sharing and Capacity Building

- Expand the SPTO Knowledge Hub and develop regionally tailored toolkits, training materials, and communication resources.
- Facilitate peer learning and exchanges to accelerate uptake and adaptation of good practices.

### Monitoring, Evaluation, Accountability and Learning (MEAL)

- Develop and deploy the dashboard and tools for Sustainable Tourism metrics.
- Support countries to strengthen data systems, track progress, and inform policy refinement over time.

### Ongoing Regional Coordination and Advocacy

- Convene regular forums to review progress, share lessons, and strengthen public-private-community collaboration.
- Advocate for the inclusion of tourism within broader climate, resilience, and sustainable Conclusion



## 6.9. Concluding comments

This STEP Background Paper has presented a clear and coordinated approach to advancing sustainable tourism and embedding CE/SCP principles across the Pacific tourism sector. It reflects extensive consultation, technical analysis, and regional consensus, and highlights both the strong commitment of Pacific Island Countries and the practical pathways needed to achieve long-term transformation.

The findings in this paper reaffirm that while many countries have embraced the Pacific Sustainable Tourism Policy Framework and the Pacific Sustainable Tourism Standards, significant challenges remain before policy can be transformed into practice. Issues include limited institutional capacity, fragmented governance, underdeveloped data and monitoring systems, and barriers to finance and implementation, particularly for MSMEs and community-based enterprises.

The Regional Roadmap and Demonstration Country Pathways aim to address these constraints through a package of high-impact, scalable projects that support system-wide change. Realising the ambition of the Roadmap and Pathways will require sustained collaboration among national governments, regional institutions, industry stakeholders, communities, and development partners. Implementation will not be uniform, because projects must be adapted to local contexts, capacities, and priorities. Strong coordination by the Pacific Tourism Organisation (SPTO) and regional partners will be crucial in driving collective progress and ensuring coherence with broader regional strategies, including the 2050 Strategy for the Blue Pacific Continent.

## 7. APPENDICES

### Appendix A. Fiji detailed country context

#### Country context

The Republic of Fiji is a Melanesian archipelago in the South Pacific, comprising more than 330 islands and 500 islets, of which approximately 110 are permanently inhabited. Spanning 1.3 million square kilometres of ocean territory, the country has a population of just under 900,000 people. Approximately 45% live in rural areas, relying heavily on subsistence agriculture, artisanal fishing, and informal economic activity. Suva, Nadi, and Lautoka are key administrative and commercial centres, providing essential infrastructure for transport, governance, and tourism development (Government of Fiji, 2024a).

Fiji's cultural landscape reflects a blend of Indigenous iTaukei, Indo-Fijian, Rotuman, and other Pacific Islander communities. Traditional ceremonies, meke dance, handicrafts, and festivals form a distinctive part of both community life and Fiji's tourism offering. The Fiji National Sustainable Tourism Framework 2024–2034 and Vision 2050 both place cultural preservation and community engagement at the centre of the country's long-term development model (GoF, 2024a; GoF, 2024b).

As a Small Island Developing State (SIDS), Fiji is exposed to extreme climate and geophysical risks - including cyclones, sea level rise, flooding, and landslides. Its geographic remoteness and limited market size constrain resilience and economic diversification. The Climate Change Act 2021, green growth policies, and the national adaptation plan frame resilience-building as a national imperative for sustainable development (GoF, 2024b).

Fiji's dispersed island geography also influences service delivery and economic participation. Outlying islands face infrastructure and connectivity challenges that restrict access to education, healthcare, finance, and markets. These geographic disparities reinforce rural–urban inequality and pose constraints for inclusive tourism development. Strengthening inter-island connectivity and infrastructure is a stated national priority, particularly through climate-resilient maritime and aviation investments (GoF, 2024a).

#### Economic overview

Fiji is a SIDS with an open, service-oriented economy shaped by geographic remoteness, climate vulnerability, and limited productive capacity. In 2024, GDP was estimated at FJD 13.2 billion (USD 5.8 billion), with GDP per capita at FJD 14,700 (USD 6,400). Agriculture and fisheries continue to support rural livelihoods but have declined in GDP share due to climate exposure, land degradation, and fluctuating commodity prices (WBG, 2024; GoF, 2024a).

The services sector - especially tourism, public administration, retail, and transport - makes up over 70% of GDP. Suva, Nadi, and Lautoka are the main economic hubs. Development finance, including ODA and climate funding, underpins major investments in renewable energy, digital infrastructure, and resilient transport systems (ADB, 2024; GoF, 2024a).

Remittances from labour mobility schemes in Australia and New Zealand remain vital - totalling over FJD 1 billion in 2023, or about 8% of GDP. These flows support household incomes, education, housing, and microenterprise activity, particularly in rural areas (PSDI, 2025a).

Tourism remains the largest source of foreign exchange earnings and a major employment generator, contributing nearly 40% of GDP and supporting over one-third of formal jobs. In 2024, Fiji welcomed more than 970,000 visitors and earned FJD 3.5 billion from tourism (Tourism Fiji, 2024a). The sector spans accommodation, food services, transport, and cultural industries, with downstream benefits for agriculture, logistics, and creative enterprises. It is also a priority sector for investment promotion and value chain development.

However, the economy remains highly vulnerable to external shocks. The combined effects of COVID-19, volatile energy markets, and extreme weather events underscore the urgency of building economic resilience.

The Fiji National Sustainable Tourism Framework and National Development Plan 2025–2029 frame tourism as a lever for low-emission, inclusive growth and regional economic integration (GoF, 2024a; GoF, 2024b).

### *CE/SCP related policies*

Fiji's commitment to CE/SCP principles is reflected in a robust set of national policies and legislative frameworks that provide a strong foundation for advancing sustainable tourism. **Fiji's Updated Nationally Determined Contribution (NDC) 2020** is the authoritative climate policy reflecting national adaptation and mitigation priorities, explicitly highlighting tourism as a priority sector for low-carbon transition. It details renewable energy targets and sustainable infrastructure development crucial to SCP in tourism (Government of Fiji, 2020).

**The Climate Change Act 2021** establishes the legal framework for Fiji's climate resilience and low-carbon development, directly affecting the tourism sector. It mandates climate risk assessments, adaptation planning, and emissions reduction across all sectors, including tourism. The Act assigns institutional responsibilities for climate coordination and requires tourism infrastructure and operations to adopt climate-resilient, sustainable practices.

The **National Environment Management Act 2019** establishes comprehensive environmental governance including pollution control and waste reduction. Fiji's Waste Management Strategy operationalises these provisions with a focus on circular economy outcomes such as single-use plastics reduction, consistent with regional approaches led by SPREP (Government of Fiji, 2019; SPREP, 2020).

**Fiji's National Energy Policy 2018–2030** targets energy efficiency and renewable uptake, including in rural and tourism-dependent areas, enabling sustainable tourism operations and reducing carbon footprints. The National Water Resources Policy 2011 ensures sustainable water use and sanitation standards critical for ecologically sensitive tourism sites (Government of Fiji, 2018; Government of Fiji, 2011).

### *Cross-cutting policies*

The **Fiji National Cultural Policy 2022–2032** prioritises cultural tourism as a key area for sustainable development, emphasising collaboration between the Ministry of iTaukei Affairs, affiliated agencies, and the Department of Tourism to create quality cultural experiences and equitable use of cultural assets. It outlines strategies such as building public-private networks, enhancing marketing of cultural products and festivals, improving heritage site accessibility, promoting biodiversity, and mitigating negative impacts on heritage and communities. Additionally, a **Fiji Indigenous Tourism Framework** aligned with the NSTF is in development to integrate indigenous values with tourism stakeholders, ensuring sustainable and authentic indigenous tourism.

### *Tourism as a growth sector and economic driver*

Tourism is one of Fiji's leading economic engines- contributing close to 40% of GDP and over one-third of formal employment in 2024 (Tourism Fiji, 2024a; GoF, 2024a). Arrivals totalled over 970,000, generating FJD 3.5 billion in revenue.

The sector is deeply integrated with the broader economy. It creates jobs across accommodation, food services, retail, creative industries, and transport. Its linkages extend to agriculture, fisheries, finance, construction, and trade. The diversity of roles supports participation from women, youth, and rural communities (PSDI, 2025a; PSDI, 2025b).

Tourism is also central to Fiji's inclusive green growth agenda. National policy frameworks position the sector as a vehicle for climate resilience and regional engagement. Strategic priorities include MSME competitiveness, domestic product development, market diversification, and sustainable practices throughout the value chain (Government of Fiji, 2024a; GoF, 2024b).

Yet tourism's growth path is not without risk. Vulnerabilities include natural disasters, supply chain disruptions, and geopolitical uncertainty. Future-proofing the sector will require stronger digital infrastructure, risk management systems, and inclusive business models.

Efforts to lift sector productivity and resilience are gaining traction through public–private investment platforms, regional partnerships, and targeted support for sustainable innovation. Programmes such as the Sustainable Tourism Investment Framework and Pacific digital tourism initiatives are beginning to address structural gaps in connectivity, financing, and market access. These approaches aim to position Fiji not just as a destination of choice, but as a model for climate-smart, community-led tourism development.

## **Governance and industry structure**

### **Governance**

Fiji's tourism sector is governed through a multi-agency framework led by the Ministry of Tourism and Civil Aviation (MTCA), supported by cross-cutting institutions such as the Ministry of Finance, Ministry of Environment and Climate Change, and the Ministry of Commerce, Trade, Tourism and Transport. Tourism Fiji serves as the national destination marketing organisation and contributes technical input to policy and planning processes. Coordination mechanisms include national development strategies, the Fiji National Sustainable Tourism Framework 2024-2034, and inter-agency platforms for climate action, MSME support, and resilience (GoF, 2024a; Tourism Fiji, 2024a).

The legislative foundation includes the Tourism Fiji Act 2004, which establishes Tourism Fiji's statutory role in marketing and branding. MTCA's authority is derived from broader mandates embedded in development policy and sectoral laws. However, Fiji does not yet have a comprehensive Tourism Act that consolidates regulatory powers or clarifies institutional mandates. The absence of a dedicated legal framework contributes to fragmented regulation and weak enforcement capacity. A proposed national tourism regulation - aligned with the NSTF - would help to formalise sustainability standards, introduce accreditation mechanisms, and enable regulatory coherence across agencies.

The COVID-19 pandemic revealed critical governance gaps, particularly in crisis preparedness and coordination. In response, the Government of Fiji implemented rapid-response initiatives such as the CareFIJI app, financial relief for tourism businesses, and structured engagement with private and development partners. These adaptive responses now inform disaster and climate resilience planning for the sector (GoF, 2024a).

Public–private partnerships remain a cornerstone of governance. The Fiji Hotel and Tourism Association (FHTA) plays a prominent role in policy feedback and coordination. MTCA also engages in regional initiatives through the SPTO, including implementation of the Pacific Sustainable Tourism Policy Framework (PSTPF) and the Pacific Sustainable Tourism Standards (PSTS). Despite this, overlapping mandates and institutional capacity gaps persist - particularly at the provincial level - undermining policy coherence and the consistent implementation of national priorities (GoF, 2024a).

Subnational governance presents additional challenges, particularly in outer island provinces where tourism oversight is led by municipal authorities or provincial councils. These bodies often lack the technical capacity and clear mandates to regulate planning, licensing, and compliance functions effectively. The absence of decentralised legislative authority limits implementation of sustainability measures in remote areas. Improving coordination and resourcing across all tiers of government is essential to ensure consistency and accountability in tourism governance, especially for community-based and eco-tourism initiatives (GoF, 2024a).

### **Industry structure**

Fiji's tourism industry is composed primarily of micro, small, and medium-sized enterprises (MSMEs), alongside a smaller number of large resorts and international operators concentrated in gateway destinations such as Nadi, Denarau, Coral Coast, and the Mamanuca and Yasawa islands. MSMEs form the economic backbone of the sector and include family-run guesthouses, dive shops, transport providers, handicraft producers, and tour guides. These businesses are embedded in local communities and play an essential role in distributing tourism benefits to rural and outer island areas (PSDI, 2025b).

Industry concentration in resort zones has led to uneven spatial development and over-reliance on a few core markets. The majority of formal jobs and infrastructure are clustered in well-established destinations, while remote regions face persistent investment gaps and limited tourism spillovers. Addressing this imbalance will require targeted support for tourism product development, infrastructure upgrades, and incentives to attract responsible investment beyond the main corridors (GoF, 2024a).

Fiji's tourism workforce is diverse, but structural inequities remain. Women are underrepresented in leadership and ownership roles, despite comprising a significant portion of the workforce. Youth face barriers to entry due to limited vocational training and skills mismatches. Informal enterprises often operate without access to finance, regulatory clarity, or formal market linkages. The NSTF prioritises actions to professionalise the industry through skills development, inclusive standards, and digital enablement (GoF, 2024a; PSDI, 2025b).

### *Tourism associations*

Fiji's tourism associations play a pivotal role in shaping the sector's development, advocacy, and sustainability. The Fiji Hotel and Tourism Association (FHTA), established in 1965, stands as the country's principal industry body, representing a broad membership that includes hotels, resorts, dive operators, and marine service providers. FHTA accounts for over 80% of the nation's room inventory and serves as a central platform for coordination and policy engagement with government. Its regional chapters - covering Suva, the Coral Coast, the West, Mamanuca/Yasawa, and the North - support decentralised engagement and ensure that national tourism strategies reflect regional diversity. FHTA also leads on sustainability awareness, capacity building, and industry data collection, working in alignment with national goals (FHTA, 2024).

Beyond FHTA, Fiji's tourism ecosystem includes a network of associations that contribute to the sector's inclusivity, resilience, and community alignment. These include the Society of Fiji Travel Associates, the Duavata Sustainable Tourism Collective, and regional networks such as the Savusavu Tourism Association and Tourism Suncoast. These entities promote community-based tourism, cultural integrity, and environmental responsibility while enhancing the voice of small operators in national planning. Many work in partnership with Tourism Fiji and the Ministry of Tourism and Civil Aviation to align local initiatives with the broader vision of sustainable, inclusive tourism development (MTCA, 2024; Tourism Fiji, 2024b).

### *Tourism training and business support*

#### **Tourism Fiji**

Tourism Fiji delivers a range of targeted training programmes to strengthen service quality, trade readiness, and business resilience across the tourism sector. Tourism Super Week is its flagship annual event, offering workshops, tour guide training, and networking for MSMEs and regional operators in collaboration with MTCA and domestic and international industry experts (Tourism Fiji, 2025a). Ongoing Destination Development support helps operators improve digital visibility, customer service, and market access through tailored coaching and partnerships with local councils (Tourism Fiji, 2024b). The 2024 AdventureEDU Programme, was delivered in partnership with the Adventure Travel Trade Association, providing training in sustainable tourism, branding, and trade engagement, with mentoring from international experts (Tourism Fiji, 2024c). Tourism Fiji has also been closely involved with the ygap/yher programme (see below).

#### **ygap/yher**

Entrepreneurial development is supported through accelerator programmes such as ygap and yher, which offer business coaching, funding, and peer support to early-stage ventures. These programmes have supported tourism entrepreneurs, especially women and youth, to formalise and grow businesses in areas such as eco-accommodation, wellness retreats, food tourism, and cultural products. By embedding sustainability and inclusivity into business models, these programmes contribute to the diversification and resilience of Fiji's tourism economy and complement formal education and training pathways (ygap, 2024).

#### **Australia Pacific Training Coalition (APTC) / Pacific Australia Skills Partnership**

APTC previously delivered Australian-accredited vocational training across the Pacific. In Fiji, it offered the Certificate III in Commercial Cookery, Certificate III in Hospitality, and Certificate III in Tourism, tailored to build practical competencies aligned with domestic and international job market requirements. Courses were designed in collaboration with TAFE Queensland and supported employment pathways both in Fiji and overseas (Australia Pacific Training Coalition, 2024). At the time of consultation, APTC was transitioning into Phase Four of the Australian Government's support under a new Pacific Australia Skills Partnership. This next phase aims to build on APTC's foundations by delivering demand-driven qualifications through local partnerships.



## Fiji National University (FNU)

FNU offers a comprehensive range of tourism and hospitality qualifications through its College of Business, Hospitality and Tourism Studies (CBHTS). These include certificates in Housekeeping, Cookery, Front Office Operations, and Restaurant Services; diplomas in Hospitality and Hotel Management, Culinary Arts, and Baking and Patisserie; and a Bachelor of Hospitality and Hotel Management. The National Training and Productivity Centre also delivers short courses and upskilling programmes in spa therapy, fashion, tourism sales, and guest service delivery, tailored for industry needs (Fiji National University, 2024a; Fiji National University, 2024b).

## University of the South Pacific (USP)

USP delivers certificate, diploma, undergraduate, and postgraduate qualifications in tourism and hospitality management through its School of Business and Management. Core programmes include the Bachelor of Commerce in Hotel Management, Tourism Management, and Tourism and Hospitality Management. USP also offers a Postgraduate Diploma and a Master of Commerce in Tourism and Hospitality Management, along with a PhD. In 2024, USP's tourism programmes were ranked first globally in the SDG 8 category (decent work and economic growth) for hospitality and leisure management (University of the South Pacific, 2024a; University of the South Pacific, 2024b).

## University of Fiji

The University of Fiji's School of Business and Economics offers a Bachelor of Commerce in Tourism Studies, preparing graduates for operational and strategic roles in tourism. Postgraduate options include a Postgraduate Certificate and Diploma in Business Administration with a major in Tourism and Hospitality Management, and a Master of Business Administration (MBA) in the same field. These programmes emphasise ethical tourism, sustainability, and destination management (University of Fiji, 2024a; University of Fiji, 2024b).

## Industry-based training and corporate Academies

In-house training programmes led by hotel groups such as Marriott and IHG play a significant role in workforce development. Programmes like the Marriott Voyage Leadership Development Programme and IHG's Future Leader Aspire offer pathways into supervisory and executive roles. These initiatives provide on-the-job training, mentorship, and structured career progression, helping to retain talent within the industry. Support for scaling such programmes and formalising partnerships with national institutions is a recognised priority under the NSTF to strengthen Fiji's hospitality skill base (Government of Fiji, 2023b).

## Specialist and private sector providers

Fiji also benefits from niche training providers that address gaps not currently covered by formal institutions. Rosie Travel Academy offers training for travel agents and tourism operators, while spa and wellness providers such as the Spa Academy Fiji, Nama Academy, and Pure Fiji offer professional certification in massage, skincare, and beauty therapy. These providers are particularly important in building capabilities for wellness tourism, cultural immersion experiences, and boutique accommodation services, especially among micro and community-based operators (GoF, 2023b).

## Tourism sector challenges

### *Institutional and regulatory limitations*

#### Regulatory fragmentation and legal gaps

Fiji does not yet have a comprehensive Tourism Act that consolidates institutional mandates and enforcement powers. This contributes to fragmented regulation and overlapping responsibilities across planning, environmental licensing, compliance, and investment promotion. Environmental oversight, for instance, is governed through a patchwork of statutes not tailored to tourism. A formal legislative framework - anchored in the NSTF - would help clarify agency roles, introduce accreditation mechanisms, and enable regulatory coherence across central and provincial institutions (GoF, 2024a).

### Lack of legal authority for standard enforcement

The absence of a national legal instrument underpinning sustainable tourism standards limits their enforceability across the sector. While the Fiji National Sustainable Tourism Framework outlines voluntary alignment with the Pacific Sustainable Tourism Standards (PSTS), there is currently no legal requirement for compliance. Establishing statutory backing for national standards would enhance institutional authority, provide regulatory clarity, and support the integration of environmental, social, and governance (ESG) benchmarks into investment pipelines (GoF, 2024a).

### Misalignment with regional standards and sustainability gaps

Although Fiji participates in regional frameworks such as the PSTS, national alignment remains uneven. Sustainability standards are not uniformly applied or enforced, and monitoring mechanisms are fragmented. This weakens Fiji's ability to meet regional sustainability benchmarks and reduces access to regional marketing, investment, and policy platforms (SPTO, 2022; GoF, 2024a).

### Limited enforcement capacity and provincial constraints

Despite clear policy objectives, enforcement at subnational levels remains weak. Provincial and municipal authorities often lack the mandates, tools, and human resources to regulate tourism development or implement sustainability requirements effectively. Roles for planning and licensing are inconsistently defined across jurisdictions, and institutional turnover erodes continuity. Building provincial capacity is a critical next step for decentralising governance and delivering sustainable outcomes in community and eco-tourism settings (GoF, 2024a).

### Institutional turnover and capacity retention

High staff turnover and underinvestment in long-term institutional capacity impede continuity and policy delivery. These challenges are particularly acute in local and sector-linked agencies, where recruitment, training, and retention frameworks remain underdeveloped. Capacity gaps in sustainable tourism, digital transformation, and climate adaptation remain persistent. Strengthening institutional memory and technical capability is critical to enabling long-term policy implementation and sector resilience (GoF, 2024a).

### Insufficient incentives for sustainable investment

Fiji's current fiscal and regulatory framework does not provide systematic incentives for low-impact tourism development. Concessions for eco-tourism investments, renewable energy adoption, or circular economy infrastructure remain ad hoc. This restricts uptake among MSMEs and discourages innovation in sustainable business models. A clearer set of fiscal and regulatory instruments - aligned with the NSTF- would catalyse responsible private investment and enable broader sector transformation (GoF, 2024a).

### Weak data systems and monitoring mechanisms

Tourism monitoring remains fragmented, with no integrated system to track environmental, economic, and social indicators across the sector. Data is not consistently disaggregated by gender, region, or business size, limiting its value for policy design or enforcement. Strengthening data architecture will be essential for tracking progress under the NSTF, meeting PSTPF indicators, and guiding investment and risk decisions (Tourism Fiji, 2024a; GoF, 2024a).

### *Private sector and MSME constraints*

#### Structural barriers to growth

Many tourism MSMEs in Fiji operate in a policy environment that lacks harmonisation, clarity, and long-term continuity. Regulatory burdens, unclear compliance requirements, and limited coordination between national and provincial agencies create friction for business operations and investment. These barriers disproportionately impact small businesses with limited administrative capacity and amplify inequalities between well-established operators and emerging enterprises. Structural gaps in infrastructure, market information, and administrative support further hinder the scale-up potential of local enterprises. Creating an enabling environment that includes streamlined regulatory processes, cross-agency coordination, and dedicated MSME service desks could support more inclusive growth across the sector (GoF, 2024a).

## Informality and access to markets

A large proportion of tourism-related enterprises in Fiji operate informally, particularly in rural and outer island areas. These businesses often lack legal registration, access to formal networks, and visibility in official data systems. Informality can prevent businesses from being recognised by tourism operators, included in itineraries, or featured on booking platforms. Women- and youth-led businesses are particularly affected, as informal operations are more common among these groups. Improving business formalisation pathways - through simplified registration processes, mobile outreach, and bundled business support services - and strengthening local procurement mechanisms are necessary to ensure more inclusive participation in the tourism economy (PSDI, 2025b).

## Access to finance and financial literacy

Access to finance remains one of the most significant barriers facing MSMEs in Fiji's tourism sector. Collateral requirements, high interest rates, and limited credit history often prevent small businesses from securing loans or investment. Financial literacy remains low among micro and informal operators, especially in areas such as cash flow management, record-keeping, and understanding loan terms. Financial institutions often lack tailored products for tourism MSMEs. Expanding financial products and embedding financial education into MSME support programmes are critical to building resilient tourism enterprises. Community-based savings groups, blended finance initiatives, and digital lending platforms could provide additional access points (ADB, 2024; GoF, 2024a).

## Gaps in business and technical capacity

Tourism MSMEs in Fiji often lack access to reliable, practical training in critical business and technical skills. Many rely on informal learning or short-term donor projects that do not foster long-term capability. Core areas of weakness include product development, customer service, marketing, and regulatory compliance. Technical capacity to manage waste, energy, and water systems is often limited. National programmes are underfunded or poorly aligned with market needs, especially in rural and outer island contexts. Coordinating industry-led training initiatives, technical internships, and accredited courses could help bridge these persistent gaps (GoF, 2024a).

## Limited business development services and skills gaps

Business development services for MSMEs remain fragmented and inconsistently available across Fiji. There is limited access to coaching, mentorship, marketing support, and product innovation services. The ecosystem of public and private support providers is not well coordinated. Skills gaps – particularly in digital marketing, customer service, sustainability practices, and financial management – reduce competitiveness. National strategies such as the NSTF identify clustering, regional hubs, and integrated training as priorities. Partnerships between technical colleges, NGOs, and private providers could strengthen reach and impact (GoF, 2024a; PSDI, 2025b).

## Digital divide and technological barriers

The tourism sector is increasingly digital, but MSMEs in Fiji face barriers to adopting new technologies. Challenges include limited internet connectivity in remote areas, low digital literacy, and high costs for hardware and software. This digital divide limits access to booking platforms, e-commerce, and digital marketing. It also constrains participation in training and financial services. Addressing these constraints will require investment in ICT infrastructure and digital capability-building. The NSTF supports digital readiness assessments and targeted interventions, especially for women- and youth-led enterprises (Tourism Fiji, 2024a).

## Access to sustainable technologies

The shift towards sustainable tourism practices is constrained by limited MSME access to green technologies. High upfront costs, limited information, and lack of distribution networks restrict adoption of solar power, energy-efficient appliances, water-saving systems, and waste treatment solutions. Many businesses are unaware of the financial or environmental benefits or lack the capacity to implement them effectively. Technology demonstration hubs, green financing instruments, and targeted subsidies could accelerate uptake (Tourism Fiji, 2024a; GoF, 2024a).

## Infrastructure and logistics constraints

Tourism MSMEs in outer islands face disproportionate challenges related to unreliable transport, energy, water, and waste systems. Poor road access, irregular shipping, and high freight costs increase operational risks. Limited availability of cold storage, composting, and clean water affects agritourism and eco-lodges. Investments in climate-resilient infrastructure and decentralised service delivery are critical to enabling enterprise growth in less-developed areas. Public-private partnerships and community-based infrastructure initiatives could deliver more inclusive and locally owned solutions (GoF, 2024a).

## Gender and youth barriers to participation

Women and youth face structural barriers to participation, including lack of access to land, limited networks, and gaps in education and skills. Social norms, care responsibilities, and safety concerns further restrict mobility. Women are underrepresented in leadership and ownership roles, while young people struggle to access vocational pathways aligned with industry needs. Both groups are overrepresented in the informal sector. Inclusive policy frameworks, gender-responsive budgeting, youth entrepreneurship schemes, and school-to-work tourism pathways are potential solutions (PSDI, 2025b).

## Vulnerability to external shocks

Tourism MSMEs are highly exposed to shocks from climate events, global crises, and public health emergencies. The COVID-19 pandemic illustrated the limited risk buffers among small enterprises, many of which lack business continuity plans, insurance, or savings. Similar vulnerabilities are evident in the face of cyclones and supply chain disruptions. Recovery support has often been uneven and inaccessible to informal or rural operators. Strengthening adaptive capacity through risk literacy, disaster planning, and social protection mechanisms is essential. Integrating resilience planning into business development support and community-based tourism models can improve preparedness (GoF, 2024a).

## Limited representation in policy and planning

While national policy frameworks increasingly recognise the role of MSMEs, mechanisms for direct engagement and consultation remain weak. Informal and community-based enterprises are often excluded from planning processes. Associations that represent MSMEs lack consistent funding and support. Strengthening representative associations and embedding MSME perspectives into regulatory dialogue are key to more equitable and participatory governance. Creating advisory councils, peer learning networks, and institutionalising MSME inclusion in tourism policy are essential (MTCA, 2024).

## Sustainability challenges

### *Environmental sustainability challenges in Tourism*

Fiji's tourism sector faces a range of sustainability challenges that threaten the long-term viability of the visitor economy and the ecosystems on which it depends. These issues are interconnected, spanning pollution, infrastructure deficits, and unsustainable production and consumption patterns. They require coordinated interventions aligned with the National Sustainable Tourism Framework 2024–2034 (Government of Fiji, 2024a), the Fiji National Development Plan 2025–2029 (Government of Fiji, 2024b), and regional frameworks such as the Pacific Sustainable Tourism Policy Framework (SPTO, 2021), Cleaner Pacific 2025 (SPREP, 2020), and complementary policy research (IFC, 2021; PTI NZ, 2022; SPREP, 2024; Lowy Institute, 2024).

### **Solid-waste management**

Solid waste management remains a critical issue in Fiji's tourism zones, with many operators – particularly those in outer islands and rural areas – lacking access to formal waste collection and disposal services. The volume of plastic, packaging, and food waste generated by tourism operations often exceeds the capacity of local landfills, resulting in open dumping and unregulated burning (SPREP, 2020). These practices are detrimental to local communities, ecosystems, and the destination brand image, especially in areas marketed as pristine and eco-friendly.

While the NSTF identifies waste minimisation and recycling as priority areas (Government of Fiji, 2024a), uptake of sustainable waste practices across the industry is uneven. Regional policy reviews call for integrated waste management systems, including separation at source, composting, and accessible recycling infrastructure (PTI NZ, 2022). Continued support is needed for MSMEs to adopt these approaches, including

targeted technical assistance, public-private waste solutions, and island-specific solid waste strategies (SPREP, 2024).

### Wastewater and sewage

Tourism development in coastal and marine areas places intense pressure on Fiji's limited wastewater infrastructure. Most tourism operators outside urban centres rely on septic tanks or pit latrines, many of which are undersized or poorly maintained. This contributes to nutrient leaching into nearshore environments, causing algal blooms and degrading coral reefs (Government of Fiji, 2024a).

National and regional strategies emphasise decentralised, low-impact treatment systems, such as biogas digesters and wetlands, as viable alternatives for tourism zones (SPREP, 2024). Coordinated investment in wastewater upgrades is critical to prevent health risks and protect ecosystems. However, infrastructure planning remains fragmented and underfunded, requiring long-term regulatory reform, industry education, and clear performance benchmarks (Government of Fiji, 2024b).

### Energy use

Energy consumption in Fiji's tourism sector is heavily reliant on imported fossil fuels, particularly in off-grid areas such as island resorts. Diesel generators remain the default source of electricity, contributing to greenhouse gas emissions and exposing operators to fluctuating fuel prices (IFC, 2021). Energy insecurity also affects business continuity, especially during cyclones or supply disruptions, which are becoming more frequent due to climate change.

Renewable energy investment is slowly emerging, with solar PV, hybrid systems, and efficiency upgrades trialled across leading resorts (Government of Fiji, 2024a). Pacific-wide evidence confirms strong emissions reductions and cost savings when such technologies are adopted at scale (IFC, 2021). However, uptake remains low due to lack of concessional finance, limited technical support, and uncertain returns on investment for small and medium operators.

### Water scarcity and quality

Tourism growth has increased water demand in Fiji, particularly in regions with limited freshwater resources such as the Yasawas, Mamanucas, and dry zones in western Viti Levu. Many resorts rely on rainwater harvesting or trucked water from the mainland - both expensive and unsustainable options (Government of Fiji, 2024a). Periods of drought place additional stress on these sources, resulting in operational challenges and conflict with local communities over shared resources.

A shift toward water-efficient infrastructure is underway, but not yet widespread. Regional best practices recommend greywater reuse, dual plumbing systems, and nature-based solutions for water management (SPREP, 2024). Improved water governance, pricing, and enforcement will be essential to ensure reliable access and equitable distribution, especially in shared-use watersheds and vulnerable island communities (Lowy Institute, 2024).

### Unsustainable consumption and production

Fiji's reliance on imported inputs for the tourism sector - particularly in food, beverages, furnishings, and toiletries - creates economic leakages and increases emissions from transport and packaging. This limits opportunities for local value chain development, despite government efforts to promote linkages through the 'Fijian Made' and 'Fijian Grown' initiatives (Government of Fiji, 2024b).

New regional studies recommend supplier aggregation platforms, quality assurance programmes, and tourism-agriculture linkages to reduce dependency on imports (PTI NZ, 2022). These mechanisms could increase consistency and visibility of local products, particularly in outer island destinations. Investment in distribution infrastructure, cold chains, and business development services is also needed to scale domestic sourcing.

### Limited adoption of sustainable procurement and local sourcing

Although sustainable procurement is prioritised in policy, it is not widely adopted in practice. Many operators, particularly MSMEs, report difficulty in identifying suppliers that meet sustainability standards, and face limited guidance on how to evaluate environmental or social criteria during purchasing (SPTO, 2021).



National efforts to introduce a tourism supplier directory and regional toolkits for sustainable sourcing offer a foundation for improvement (Government of Fiji, 2024a). However, implementation will require incentives for early adopters, standardised green criteria, and technical support for both buyers and suppliers. Case studies show that industry champions and peer networks can accelerate procurement shifts when linked to brand value and market recognition (PTI NZ, 2022).

### Absence of Circular Economy approaches in Tourism

Fiji's tourism industry has yet to meaningfully engage with circular economy principles. Most businesses follow linear models of take-make-dispose, with minimal attention to resource recovery, product design for longevity, or reuse systems (SPREP, 2020). Single-use plastics, imported packaging, and construction waste are commonly discarded, placing pressure on waste infrastructure and natural ecosystems.

Pacific-wide research highlights the tourism sector's role in advancing reuse, repair, and recycling systems through demonstration pilots and partnerships (PTI NZ, 2022; SPREP, 2024). Scaling circular solutions in Fiji will require clear national policy signals, access to finance for retrofitting, and collaborative learning environments for MSMEs. National and regional programmes alike stress the importance of cultural alignment and community ownership to embed circularity in practice.

## Appendix B. Kiribati detailed country context

### Country and Tourism context

Kiribati, a sovereign island nation in the Pacific Ocean, comprises 33 atolls and reef islands spanning an Exclusive Economic Zone (EEZ) of 3.55 million km<sup>2</sup>. The country's population of over 110,000 people is concentrated primarily in South and North Tarawa (nearly 60% of the total population) and Kiritimati Island (6,500 residents), with the remaining inhabitants dispersed across 20 other islands (World Bank Group, 2024).

Kiribati is one of the world's most remote nations, spread across vast areas of the Pacific. International access is limited, with only a few flights per week from Fiji and Hawaii. Its low-lying atolls, geographic isolation, and reliance on imported goods and services make it particularly vulnerable to external shocks. Rising sea levels, coastal erosion, and extreme weather events pose existential threats to the islands, jeopardising tourism infrastructure, freshwater security, and overall sustainability.

With a GDP of approximately USD 279 million, Kiribati has one of the smallest economies in the world (World Bank Group, 2025). The public sector dominates economic activity, with government spending contributing significantly to GDP. The fishing industry serves as the primary source of export revenue, generating income through foreign licensing agreements. Agriculture and small-scale farming play a role in subsistence livelihoods, but commercial agricultural production is limited due to poor soil conditions.

Tourism plays a modest but growing role in Kiribati's economy. In 2023, the country received 8,224 visitors, with the majority arriving from Pacific nations, Australia, and the USA (Pacific Tourism Organisation (SPTO), 2023). The USA has emerged as the top source market, primarily driven by the popularity of fly-fishing tourism in Kiritimati (Private Sector Development Initiative (PSDI), 2021).

The tourism sector employs approximately 1,785 people (5.5% of total employment) (SPTO, 2023). Tourism businesses are predominantly small-scale, locally owned, and community-based, offering a unique opportunity to develop a sustainable and culturally authentic tourism industry. The sector remains constrained by limited infrastructure, weak connectivity, and high operational costs (PSDI, 2021:1). The Government has outlined a long-term vision for high-yield, sustainable tourism growth, and has established a sustainable tourism policy and standards for the tourism industry known as Mauri Mark.

### Cross-cutting Policies

Government policy plays a central role in shaping and enhancing circular initiatives within Kiribati's tourism industry, as presented in Table 1. Through a combination of national strategies, regulatory frameworks, and targeted initiatives, the government and development partners aim to ensure tourism growth aligns with sustainability goals and protection of fragile ecosystems (TAK, 2023; SPTO, 2024).

Under the Environment Act 1999, all significant tourism developments must undergo Environmental Impact Assessments (EIAs), ensuring potential environmental risks are identified and mitigated before projects commence, particularly in sensitive coastal and marine areas (Republic of Kiribati, 2018).

The Waste Management and Resource Recovery Strategy (2020–2030), led by the Ministry of Environment, Lands, and Agricultural Development (MELAD), establishes clear targets and guidelines for solid and hazardous waste management (Environment Conservation Division (ECD), 2020). Tourism operators must comply with these standards, which include waste minimisation, recycling, and proper disposal practices to reduce environmental impacts from tourism activities.

The government has enacted regulations banning non-biodegradable plastic bags and is considering further bans on single-use plastics, in partnership with regional agencies such as SPREP (ECD, 2020).

### Water and Sanitation Standards

Policies encourage the adoption of water-efficient technologies and improved sanitation infrastructure in tourism facilities. Operators are incentivised to install rainwater harvesting systems and wastewater treatment solutions, reducing the sector's pressure on limited freshwater resources and minimising pollution (Government of Kiribati, 2008; Government of Kiribati, 2010).

Government policy also supports the establishment and management of protected areas, such as the Phoenix Islands Protected Area (PIPA), and promotes sustainable fishing practices and the development of eco-tourism products leveraging Kiribati's biodiversity (TAK, 2023).

### ***Nationally Determined Contributions***

Kiribati's Revised Nationally Determined Contribution (NDC) commits the country to reducing greenhouse gas emissions by 48.8% and fossil fuel consumption by 45% in South Tarawa and 60% on Kiritimati Island by 2025, primarily through renewable energy investments (Government of Kiribati, 2017; Government of Kiribati, 2009).

### ***National Energy Policy (2009)***

The policy aims to provide available, accessible, reliable, affordable, clean, and sustainable energy options, with a strong emphasis on promoting renewable energy for economic growth and improved livelihoods (Government of Kiribati, 2009).

### ***Kiribati Integrated Energy Roadmap (KIER) 2017–2025***

Outlines the country's medium-term strategy for scaling up renewable energy and energy efficiency across all sectors, focusing on solar PV, wind, and coconut oil as alternative fuels (Government of Kiribati, 2017).

### ***Green Public Procurement***

In 2023, 120 government and private sector staff were trained in sustainable procurement through the Global Green Growth Institute (GGGI). The Kiribati Public Procurement Reform Programme (KPPRP) aims to integrate environmental, social, and economic considerations into public procurement (TAK, 2023).

**Table 12. Kiribati legislation and policy related to water, waste, infrastructure and energy**

Category	Relevant legislation and policies	Purpose
<b>Water</b>	National Water Resources Policy (2008)	Provides a framework for sustainable water supply and management
	National Sanitation Policy (2010)	Focuses on improving sanitation facilities and protecting water quality
<b>Waste</b>	Environment Act (2021)	Establishes regulations for waste management, pollution control, and environmental protection
	Integrated Environment Policy (2013)	Incorporates waste management strategies to address chemical and waste issues
	Kiribati Waste Management Resource Recovery Strategy (KWMRRS 2020–2029)	The ultimate objective of the Strategy is to strengthen national capacity to ensure a safe and healthy environment targeting plastic waste, end of life vehicles, asbestos, used oil, e-waste, recyclables, disaster waste, organic waste, wastewater, laboratory chemical waste and used tire at the national level
<b>Infrastructure</b>	Building Act (2006)	Regulates construction practices to ensure safety and environmental sustainability
	National Building Code of Kiribati (2012) – <i>under review</i>	<p>Sets standards for building design and construction, promoting resilience and environmental considerations. Building Code &amp; Sustainability Reporting</p> <p>Construction projects exceeding AUD 200,000 must submit a Sustainability Report detailing: waste management, water conservation, power usage and efficiency</p>

Category	Relevant legislation and policies	Purpose
Energy	National Energy Policy (2009)	Aims to minimise adverse environmental impacts of energy production and consumption, promoting renewable energy
	Kiribati Integrated Energy Roadmap (2017–2025)	Outlines strategies for sustainable energy development and environmental protection
Agriculture	Kiribati Agriculture Strategy (KAS) 2020–2030	Promotes sustainable food production, improve nutrition, and increase household income
Climate Change	Disaster Risk Management and Climate Change Act 2019	Integrates disaster risk management and climate change adaptation efforts, aiming to enhance resilience against climate-related risks
	Kiribati Climate Change Policy (KCCP) 2018	Emphasises actions to address immediate and long-term adaptation needs, ensuring the nation's existence despite increasing climate change impacts
National Quality Standards	National Quality Policy (2017–2023)	This policy outlines Kiribati's commitment to aligning its products and services with regional and international standards. It emphasises the development of a robust Quality Infrastructure System (QIS) to enhance product quality, boost export growth, and improve citizen well-being.
	National Quality Infrastructure System (QIS)	Under the National Quality Policy, the QIS encompasses seven functions: metrology, standardisation, accreditation, inspection, testing, certification, and quality promotion. This system is designed to raise the quality and safety levels of both locally manufactured and imported products and services.
Import Regulations	Customs Act 2005	This Act governs the importation of goods into Kiribati, detailing the procedures, prohibitions, restrictions, and duties applicable to imported items. It ensures that all imports comply with national laws and standards to protect the country's interests.
Public Procurement	Public Procurement Act 2019	Emphasises principles such as value for money, integrity, and fair competition in government procurement activities.

## Governance and industry structure

### Governance

The tourism sector in Kiribati is overseen by the Ministry of Information, Communications, Transport and Tourism Development (MICTTD), which is responsible for setting national tourism policy, coordinating development strategies, and ensuring alignment with broader government objectives such as sustainability, cultural preservation, and economic development (Ministry of Information, Communications, Transport and Tourism Development (MICTTD), 2020).

The Kiribati Tourism Authority (TAK) operates as the main government agency dedicated to the promotion and marketing of Kiribati as a destination. The legal mandate and functions of TAK are set out in the Kiribati Tourism Act 2018, which includes promoting natural and cultural attractions, ensuring compliance with standards, licensing businesses, and providing training and guidance to tourism operators (Republic of Kiribati, 2018).

The governance model emphasises collaboration between government, local island councils, community groups, and the private sector. Community-based tourism initiatives are encouraged to ensure that benefits reach residents and that development is culturally appropriate.

International organisations such as the Pacific Tourism Organisation (SPTO) and donor agencies play a supporting role in capacity building, infrastructure development, and technical assistance (SPTO, 2023; Secretariat of the Pacific Regional Environment Programme (SPREP), 2023).

## ***Industry structure***

The tourism industry in Kiribati is small and primarily consists of locally owned guesthouses, small hotels, eco-lodges, and fishing lodges, especially on Kiritimati (Christmas Island). The sector is dominated by micro, small, and medium enterprises (MSMEs), with limited presence of large-scale or international operators (TAK, 2023). Accommodation ranges from basic guesthouses to modest hotels, with most facilities concentrated in South Tarawa and Kiritimati. A handful of local businesses offer fishing charters, cultural tours, birdwatching excursions, and WWII history tours. Inter-island travel is provided by small domestic airlines and government-run or private ferries, though services are often unreliable (TAK, 2023).

There is no formal national tourism industry association, but TAK works closely with local operators and councils to promote standards, training, and product development (TAK, 2023). Partnerships with regional tourism bodies, such as SPTO, help with marketing, training, and advocacy (SPTO, 2023).

## ***Development agency and NGO involvement***

Donor funding consistently targets several key areas critical to Kiribati's sustainable development objectives. Sustainable tourism development and marketing receive significant attention, alongside environmental impact assessment capacity and protected area management systems. Climate change adaptation and resilience measures, particularly for coastal and marine environments, represent another major focus area. Community-based and eco-tourism initiatives receive dedicated support, as do capacity building programmes for tourism operators and government agencies. Waste management and resource recovery strategies also attract donor investment as essential infrastructure for sustainable tourism growth (PATA, 2023).

## ***Multilateral and regional development partners***

The United Nations Development Programme (UNDP) serves as a key partner in supporting sustainable tourism initiatives, biodiversity conservation projects, and climate adaptation measures throughout Kiribati. The United Nations Environment Programme (UNEP) provides critical technical assistance and funding for environmental management initiatives, particularly marine conservation, waste management systems, and eco-tourism development (PATA, 2023). The South Pacific Regional Environment Programme (SPREP) coordinates environmental protection and climate change adaptation support, while the South Pacific Tourism Organisation (SPTO) provides specialised assistance in tourism marketing, product development, and capacity building (SPREP, 2023).

## ***Bilateral development cooperation***

The Australian Government, through the Department of Foreign Affairs and Trade, and New Zealand's aid programme provide funding and technical assistance for tourism development, environmental management, and capacity building. The United States Agency for International Development (USAID) supports climate adaptation, water resource management, and disaster preparedness initiatives that benefit tourism and the environment (PATA, 2023).

## ***Financial mechanisms and international finance***

The Global Environment Facility (GEF) is a major source of funding for large-scale environmental projects, often implemented with UN agencies and focused on biodiversity conservation, climate adaptation, and sustainable resource management. The World Bank and Asian Development Bank periodically finance infrastructure development, environmental protection measures, and climate resilience projects that generate benefits for the tourism sector (PATA, 2023).

## ***Civil society and non-governmental partners***

International conservation organisations, including Conservation International and WWF, collaborate with local communities and government agencies on marine conservation initiatives, eco-tourism development, and sustainable livelihood programmes, emphasising community ownership and environmental stewardship (PATA, 2023).



## Tourism sector challenges

Transitioning Kiribati's tourism sector towards sustainability is a complex process, shaped by significant economic, environmental, and institutional barriers. The following summary outlines the key challenges faced by tourism businesses and the broader sector as they seek to adopt sustainable practices and support long-term growth (Tourism Authority of Kiribati (TAK), 2021).

### *Institutional and regulatory limitations*

- Inefficiencies in licensing and regulation result from outdated legislation, slowing business development and innovation (Republic of Kiribati, 2018)
- Lack of Green Policy Framework: There is no clear national policy or fiscal incentives to support green tourism investments, discouraging businesses from adopting sustainable technologies or practices
- Institutional Capacity: Staff at the Tourism Authority of Kiribati (TAK) require additional training to effectively assess and promote sustainability among operators; enhanced collaboration with other government agencies is also needed for holistic business assessment
- Monitoring: No system exists to track progress on Kiribati's Sustainable Tourism Indicators as outlined in the Kiribati Sustainable Tourism Policy and to support aggregated data collection at regional level; lack of baseline data makes it difficult to assess the impact of sustainable tourism initiatives.

### *Private sector and MSME constraints*

Micro, small, and medium enterprises (MSMEs) are the backbone of Kiribati's tourism industry, but they face persistent barriers to sustainable development (Kiribati Ministry of Tourism, Commerce, Industry and Cooperatives (MTCIC), 2021), as follows:

- Geographic Isolation: Kiribati's dispersed population and remoteness result in high transportation costs and limited international flight options, restricting visitor arrivals and increasing the cost of doing business (MTCIC, 2021)
- Service Costs: High costs for internet, electricity, and imported goods further challenge the viability of tourism enterprises (MTCIC, 2021)
- Limited Access to Finance: While the Development Bank of Kiribati (DBK) offers business loans, many MSMEs lack the financial literacy required to successfully apply, hindering investment in sustainable upgrades (MTCIC, 2021)
- High Operational Costs: Businesses contend with elevated costs due to heavy reliance on imported goods, energy, and persistent infrastructure gaps (MTCIC, 2021)
- Skills Gaps: Many tourism operators lack essential knowledge in financial management, marketing, and digital skills, limiting their competitiveness and ability to implement sustainability measures (MTCIC, 2021)
- Technical Barriers: Tourism businesses face difficulties accessing advisory services for solar energy, biogas, and water filtration systems. Importing such equipment is expensive and logistically challenging (TAK, 2021).
- High Upfront Costs: The significant initial investment required for green infrastructure, combined with limited financing options and low uptake of DBK's energy efficiency loans, deters businesses from transitioning to sustainable operations (MTCIC, 2021).

## Sustainability challenges

- **Waste Management:** Kiribati struggles with limited landfill space and inadequate waste disposal infrastructure, leading to illegal dumping and marine pollution that threaten both public health and the country's tourism appeal. Only 25% of waste is collected, and recycling options are limited, especially on outer islands. Programmes like the Kaoki Mange Project, Materials Recovery Facility, and Green Bag Programme have improved waste recovery, but landfills remain donor-funded and financially unsustainable (TAK, 2021; Pacific Tourism Organisation (SPTO), 2023).

- **Plastic Waste:** Despite initiatives like the Kaoki Mange container deposit scheme and bans on non-biodegradable plastics, plastic waste remains a significant issue, with 9.7 tonnes generated daily (TAK, 2021).
- **Institutional Arrangements:** The Ministry of Environment, Lands, and Agricultural Development oversees waste management, while local councils enforce collection policies. SPREP coordinates regional initiatives under Cleaner Pacific 2025. Recent regulations ban non-biodegradable plastics, and further bans are being explored in collaboration with SPREP and the Pacific Ocean Litter Project (SPTO, 2023).
- **Water and Wastewater Management:** Poor sanitation infrastructure has resulted in polluted nearshore waters, affecting marine life, fisheries, and the tourism experience. Many accommodations rely on septic tanks, but proper disposal is inconsistent, and regulatory oversight is limited (TAK, 2021).
- **Water Scarcity and Quality:** Water supply is a major constraint, with poor water quality contributing to health risks. Tourism is a high-water-use sector, increasing competition for limited resources and driving up costs for both businesses and residents (TAK, 2021).
- **Energy Dependency:** Kiribati depends heavily on imported fossil fuels for electricity and transport. While the KV20 strategy promotes renewable energy, uptake in tourism remains low. Solar energy is available on outer islands but is hampered by limited maintenance support, while hotels in Tarawa have little incentive to switch from grid electricity (TAK, 2021).
- **Power Reliability:** Frequent outages force businesses to rely on diesel generators, increasing both costs and carbon emissions (TAK, 2021).

### *Unsustainable consumption and production*

Nearly 90% of tourism supplies are imported, reducing economic benefits for local producers and increasing costs. There is no clear strategy or procurement guidelines for integrating local producers into tourism supply chains, missing opportunities for community benefit and sustainability (TAK, 2021).

## Appendix C. Samoa detailed country context

### Country and Tourism context

Samoa is an independent nation situated to the north-east of Fiji just west of the international dateline. It consists of four inhabited islands nine smaller islands and outcrops (DFAT 2025). The two main islands of Samoa are Savai'i and Upolu with its capital, Apia situated on Upolu. Samoa has a total population of just over 215,000 people, both Upolu and Savai'i are home to 99% of Samoa's total population (PSDI 2024).

Around 70% of Samoa's population and key infrastructure are located on low-lying coastal areas, with sea-levels projected to continually rise over the next few years, this will exacerbate coastal erosion, loss of land and property and dislocation of the island inhabitants (UNDP 2023). Its geographical isolation and position along the Pacific 'Ring of Fire' increase the nations vulnerability to natural disasters such as tsunamis, cyclones, floods and earthquakes.

Samoa's GDP of approximately USD 938 billion and is the fifth largest economy in the Pacific. (Lowy Institute 2025). Tourism, agriculture and fishing are all major industries which help drive the Samoan economy with tourism alone employing 15% of the total population.

Although Samoa has some semi-developed industries, it relies heavily on financial aid from Australia, New Zealand and China.

Tourism remains a cornerstone of Samoa's economy. Tourism accounts for about 20% of GDP, underpinning growth and supporting employment, especially in hospitality, transport, and retail. Samoa welcomes over 200,000 visitors each year, mainly from New Zealand, Australia, USA, and American Samoa.

Samoa has 150 accommodation providers, the majority being located on Upolu. Samoa had 36 registered tour companies offering activities such as diving, snorkelling and fishing, as well as eco-tours and cultural activities.

Samoa offers a variety of accommodation options for tourists wishing to stay on the islands, including the traditional fales, which are traditional huts where tourists can stay and experience Fa'a Samoa, the traditional Samoan way of life that values family and communal lifestyle. Accommodation rates in fales are generally lower than those in hotels or resorts.

### Cross-cutting policies

A range of policies collectively shape the direction of Samoa's tourism industry, ensuring it remains a key driver of sustainable national development while protecting the country's unique cultural and natural heritage. Tourism policy intersects with multiple sectors through:

- Environmental Management: Resource conservation, waste management, pollution control
- Land and Investment Regulation: Land use planning, business licensing, investment facilitation
- Infrastructure Development: Transport, telecommunications, utilities
- Workforce Development: Education, training, skills enhancement
- Health and Safety: Public health, food safety, emergency preparedness
- Cultural Heritage: Fa'a-Samoa preservation, community engagement.

**Table 13. Samoa policy context**

Policy Area	Key Policies/Frameworks	Description and Impact
<b>Strategic Planning &amp; Sector Coordination</b>	Samoa Tourism Sector Plan (STSP) 2022–2027 National Development Strategy	Sets national vision and targets for sustainable tourism, resilience, and cultural branding; aligns tourism with broader national goals
<b>Environmental Management</b>	Environmental Guidelines & Minimum Standards Climate Change Adaptation Initiatives Resource & Waste Management Policies	Enforces sustainable practices, climate resilience, and waste management in tourism operations; protects natural assets
<b>Land &amp; Investment Regulation</b>	Tourism Development Act 2012 Land Use Planning & Zoning Regulations	Provides legal framework for licensing, investment facilitation, and sustainable land use; ensures tourism aligns with national priorities
<b>Infrastructure Development</b>	National and Sector Infrastructure Plans (Transport, Utilities, ICT)	Guides investment in roads, airports, utilities, and digital infrastructure to improve accessibility and visitor experience
<b>Workforce Development</b>	National Tourism & Hospitality Qualifications (SQA) Capacity Building Initiatives	Addresses skills gaps, enhances service quality, and ensures workforce readiness through training and qualifications
<b>Health &amp; Safety</b>	Public Health & Food Safety Standards Emergency Preparedness Guidelines	Ensures compliance with health, food safety, and emergency standards for visitor and community safety
<b>Cultural Heritage &amp; Community Engagement</b>	Fa’a-Samoa Preservation Policies Community-based Tourism Initiatives	Promotes cultural authenticity, community participation, and equitable benefit-sharing in tourism development

## **Governance and industry structure**

### **Governance**

Samoa’s tourism sector is made up of government agencies, industry associations, specialised committees, and international partnerships to coordinate tourism development and regulation across the country.

#### **Samoa Tourism Authority (STA)**

The Samoa Tourism Authority serves as the primary government body responsible for tourism policy, marketing, and regulation in Samoa. A specialised Climate Change Unit was reinstated within the STA in October 2023 to address climate-related challenges facing the tourism sector. This unit implements Programme Area 6 of the Samoa Tourism Sector Plan, focusing on education, training, disaster preparedness, and energy efficiency initiatives guided by the National Tourism Climate Change Adaptation Strategy.

The STA is supported by several Committees made up of private and public sector representatives.

### **Industry Structure**

Samoa has a network of Inbound Tour Operators (ITOs) that play a vital role in facilitating tourism. These operators offer a wide range of services including transfers, tours, travel coordination, and product advice. They are instrumental in ensuring high-quality visitor experiences and serve as key intermediaries for overseas travel companies (Samoa Tourism Authority (STA, 2025).

As of 2019, Samoa had approximately 150 accommodation providers, with the majority located on Upolu and a significant number on Savai'i (STA, 2025). Samoa's accommodation sector is notably diverse, ranging from traditional beach fale to modern hotels and luxury resorts. The iconic open-sided beach fale—often family-run and located directly on the beach—offers an authentic and affordable Samoan experience. In addition, there are boutique resorts, overwater bungalows, farmstays, and high-end properties. (Samoa Pocket Guide, 2024). Recent years have seen the opening of new properties and the expansion of luxury and boutique offerings, reflecting a trend toward higher-value tourism and increased international interest.

Cruise tourism is another growing segment, with 27 cruise ships scheduled to visit in 2025 and a recent milestone of Samoa's first overnight cruise ship visit. (STA, 2025).

### *Industry Associations*

#### **Samoa Hotels & Hospitality Association (SHHA)**

The Samoa Hotels & Hospitality Association represents the largest and most comprehensive industry organisation in Samoa's tourism sector. SHHA membership encompasses a wide range of accommodation providers, from traditional beach fale and budget accommodations to luxury resorts and hotels. The association operates a successful e-booking system for members and extends benefits to other tourism-related businesses including visitor attractions, handicraft retailers, rental cars, bars, and

SHHA advocates for industry-wide issues and works closely with the STA on policy development and implementation.

#### **The Savaii Samoa Tourism Association**

The Savaii Samoa Tourism Association (SSTA) represents tourism businesses primarily on the island of Savaii, operating as a non-government membership organisation since its incorporation in 2010.

### **Non-governmental organisations**

Local NGOs play a crucial role in implementing circular economy initiatives at the community level, bridging the gap between international support and local action.

Waste management represents the most developed area of circular economy implementation in Samoa, with multiple partners supporting initiatives to recover, reuse, and recycle various waste streams.

- **Samoa Recycling and Waste Management Association (SRWMA):** Established in 2017, SRWMA has become the primary implementation partner for numerous circular economy initiatives, coordinating efforts of recycling businesses and promoting the '3Rs Plus Return' approach.
- **Samoa and Tokelau Association of Recyclers (STAR):** Launched to address waste management challenges across both territories, STAR aims to reduce waste and create a greener future through collaborative approaches.

### **Development Partners**

#### **United Nations Development Programme (UNDP)**

The UNDP serves as a central coordinating partner for multiple circular economy initiatives in Samoa, with a particular focus on waste management, policy development, and Stakeholder engagement Primary Initiatives include:

- **CERO Waste Project:** The Circular Economy for the Recovery of Waste Programme that aims to create sustainable livelihood opportunities while accelerating the transition toward circular economy principles.
- **Circular Economy Policy Development:** UNDP is supporting the Ministry of Natural Resources and Environment (MNRE) in developing a dedicated Circular Economy Policy for Waste Management.
- **Public-Private Partnerships:** UNDP has established innovative partnerships bringing together international expertise with local implementation capacity, exemplified by the collaboration with CRDC Global for plastic waste transformation.



The UK government is a significant funding partner for circular economy initiatives in Samoa, with a particular emphasis on plastic waste management. Primary Contributions include co-funding of CERO Waste Project and Plastic Waste Management including the RESIN8 plastic upcycling technology deployment.

### ***Secretariat of the Pacific Regional Environment Programme (SPREP)***

As the primary regional environmental organisation, SPREP provides technical expertise, policy guidance, and implementation support for circular economy initiatives across the Pacific, with significant engagement in Samoa. Focus areas include the Pacific Ocean Litter Project and initiatives supporting alternatives to single-use plastics and Samoa Waste Oil Management Programme (SWOMP).

### ***Bilateral aid programmes***

New Zealand, Australia and Japan (through JICA) provide targeted assistance to community-level circular economy initiatives in Samoa, with a focus on practical implementation and capacity building including recycling infrastructure and capacity development.

## ***Tourism sector challenges***

Transitioning Samoa's tourism sector towards sustainability involves navigating a range of economic, environmental, and institutional challenges. These issues affect tourism businesses and the broader sector as they work to adopt sustainable practices and support long-term growth (Samoa Tourism Authority (STA, 2024).

### ***Institutional and regulatory limitations***

- Outdated legislation and regulatory inefficiencies hinder business development and innovation within Samoa's tourism sector (Government of Samoa, 2023).
- The absence of a comprehensive green tourism policy framework and limited fiscal incentives discourages businesses from investing in environmentally friendly technologies and practices (STA, 2024).
- Institutional capacity constraints persist, with the Samoa Tourism Authority requiring enhanced training and resources to effectively promote and assess sustainability among operators. Improved inter-agency collaboration is also needed for holistic business assessments (STA, 2024).
- Monitoring systems to track progress on sustainable tourism indicators are underdeveloped, limiting the ability to collect aggregated data and assess the impact of sustainability initiatives across the sector (STA, 2024).

### ***Private sector and MSME constraints***

Micro, small, and medium enterprises (MSMEs) form the backbone of Samoa's tourism industry but face persistent barriers to sustainable development (Ministry of Commerce, Industry and Labour (MCIL), 2023):

- Geographic isolation and limited transport connectivity increase operational costs and restrict visitor arrivals, impacting business viability (MCIL, 2023).
- High costs for utilities such as electricity and internet, along with reliance on imported goods, further challenge MSMEs' competitiveness (MCIL, 2023).
- Access to finance remains limited, with many MSMEs lacking the financial literacy and collateral needed to secure loans for sustainable upgrades (MCIL, 2023).
- Operational costs are elevated due to infrastructure gaps and dependence on imports (MCIL, 2023).
- Skills shortages in financial management, marketing, and digital capabilities limit MSMEs' ability to implement sustainability measures effectively (STA, 2024).
- Technical barriers exist in accessing advisory services for renewable energy, water treatment, and waste management technologies, compounded by high import costs and logistical challenges (STA, 2024).

- The upfront investment required for green infrastructure is often prohibitive, with limited financing options and low uptake of available support programmes (MCIL, 2023).

## ***Sustainability Challenges***

- Waste management infrastructure is limited, with inadequate landfill capacity and collection services leading to environmental pollution and health risks. Recycling programmes are emerging but remain underdeveloped, especially outside urban centres (STA, 2024; SPREP, 2023).
- Plastic waste remains a significant concern despite bans on single-use plastics and community awareness campaigns (STA, 2024).
- The Ministry of Natural Resources and Environment (MNRE) oversees waste management, with local councils responsible for enforcement. Regional coordination through SPREP supports national initiatives such as Cleaner Pacific 2025 (SPREP, 2023).
- Water and wastewater management challenges persist, with many accommodations relying on septic systems and facing inconsistent regulatory oversight. Pollution of nearshore waters affects marine ecosystems and tourism quality (STA, 2024).
- Water scarcity and quality issues are critical, with tourism's high water demand increasing competition for limited resources and raising costs (STA, 2024).
- Samoa's energy sector is heavily reliant on imported fossil fuels, though renewable energy adoption is growing slowly. Solar energy projects exist but face maintenance and uptake challenges, particularly in rural areas (STA, 2024).
- Power reliability issues lead some businesses to use diesel generators, increasing operational costs and carbon emissions (STA, 2024).

## ***Unsustainable consumption and production***

A large proportion of tourism supplies are imported, limiting economic benefits for local producers and increasing costs. There is no clear strategy or procurement guidelines to integrate local producers into tourism supply chains, missing opportunities for community benefit and sustainability (STA, 2024).

## ***Existing initiatives and opportunities***

Samoa is actively advancing its commitment to sustainable tourism and circular economy principles through a range of national policies, regional collaborations, and development partner support. The recently launched Samoa Tourism Sector Plan (STSP) and the National Development Strategy provide strategic frameworks for embedding sustainability across tourism policy and operations, aligned with Samoa's broader development goals (STA, 2024).

National strategies such as the Waste Management and Resource Recovery Strategy and active participation in regional initiatives like Cleaner Pacific 2025 have driven practical measures, including recycling programmes in hotels and guesthouses, bans on single-use plastics, and community-wide awareness campaigns targeting both residents and visitors (STA, 2024; SPREP, 2023).

Capacity-building for tourism operators is a key focus, led by the Samoa Tourism Authority (STA) in partnership with regional bodies such as the South Pacific Regional Environment Programme (SPREP) and development partners. These programmes support the adoption of regional sustainability standards, enhance financial and digital literacy, and promote best practices in waste, water, and energy management (SPREP, 2023).

Progress in renewable energy and resource efficiency is evident, underpinned by Samoa's National Energy Policy and commitments to climate resilience. Adoption of solar energy and rainwater harvesting systems is supported by donor-funded projects from the Asian Development Bank, World Bank, and bilateral partners. Advisory services and concessional financing for green investment are being expanded to help tourism SMEs transition to more sustainable operations (STA, 2024).

Major infrastructure projects, implemented with development agency support, are transforming the enabling environment for sustainable tourism and economic growth in Samoa:

- The World Bank-supported Upolu and Savai'i Infrastructure Projects are delivering climate-resilient transport links, road upgrades, and airport improvements to boost connectivity, access to services, and economic opportunities across Samoa (STA, 2024).
- The Samoa Water Sector Improvement Project, co-financed by the Asian Development Bank and other partners, is expanding access to safe, climate-resilient water through upgraded distribution networks and improved sanitation facilities (MNRE, 2023).
- The Outer Islands Transport and Infrastructure Project is enhancing maritime and inter-island transport safety, resilience, and access, supporting equitable development and improved visitor movement across the archipelago (STA, 2024).
- Renewable energy projects led by ADB and partners are increasing solar photovoltaic capacity and battery storage, bringing reliable, low-carbon electricity to communities and tourism businesses (STA, 2024).

Looking forward, the development of national tourism standards presents an opportunity to formalise performance thresholds for waste reduction, water and energy use, and responsible procurement. Establishing a centralised platform for sustainable procurement and circular economy partnerships—potentially in collaboration with SPREP and other regional agencies—could further accelerate innovation by connecting operators with local suppliers and green solutions (SPREP, 2023).

At the local level, strengthening the capacity of district and village councils and integrating sustainable tourism into subnational planning will be crucial for effective delivery. Coupled with targeted financing instruments for renewable energy and infrastructure upgrades, these reforms can unlock private sector investment and reduce environmental pressures (STA, 2024). With a growing ecosystem of policy, practice, partnership, and transformative infrastructure investment, Samoa is well positioned to advance sustainable tourism and circular economy practices (STA, 2024; SPREP, 2023).

## Appendix D. Vanuatu detailed country context

### Country Context

The Republic of Vanuatu is a Melanesian archipelago in the South Pacific, comprising approximately 83 islands, of which 65 are inhabited. Spanning over 1,300 kilometres, the nation is home to more than 320,000 people, with the majority residing in rural areas and relying on subsistence agriculture, artisanal fishing, and informal economic activities. Despite its predominantly rural demographic, Vanuatu's urban centres, particularly Port Vila on Efate and Luganville on Espiritu Santo, serve as key economic and tourism hubs, providing essential infrastructure, connectivity, and services (Government of Vanuatu, 2016a; SPREP, 2023).

Culturally, Vanuatu is one of the most linguistically and ethnically diverse countries in the world, with over 100 distinct indigenous languages spoken. This cultural richness forms a cornerstone of the country's tourism appeal, offering visitors immersive experiences grounded in *kastom* (traditional customs), storytelling, dance, and local festivals. National policies such as the Vanuatu Sustainable Tourism Policy 2019–030 and the National Sustainable Development Plan 2016–2030 emphasise the safeguarding of cultural heritage as a driver of sustainable development and community empowerment (GoV, 2019a; GoV, 2016a).

Geographically, Vanuatu is one of the world's most disaster-prone nations, positioned on the Pacific Ring of Fire and exposed to frequent cyclones, earthquakes, volcanic eruptions, and tsunamis. The World Bank and the World Risk Report have consistently ranked Vanuatu among the countries with the highest disaster risk due to its acute exposure to natural hazards and limited capacity for emergency response (WBG, 2022; SPREP, 2021). For the tourism sector, these vulnerabilities underscore the urgency of resilient infrastructure design and disaster preparedness planning.

### Economic overview

Vanuatu is a small island developing state (SIDS) with an open, aid-dependent economy shaped by its geography, climate vulnerability, and limited domestic production base. In 2023, the country's gross domestic product (GDP) was estimated at approximately USD 1.13 billion, with a GDP per capita of around USD 3,515 (World Bank, 2024). Agriculture remains the economic backbone, employing the majority of the rural population through both subsistence farming and the cultivation of key cash crops such as copra, kava, cocoa, and coffee. However, the sector is acutely vulnerable to climate change and natural disasters, which frequently damage crops, degrade arable land, and disrupt rural infrastructure (ADB, 2023). In response, the government has prioritised investment in climate-resilient agriculture and infrastructure to safeguard food security and improve rural livelihoods.

The services sector, including retail, telecommunications, transport, and financial services, has grown in importance, particularly in urban hubs like Port Vila and Luganville. Public administration and donor-funded programmes also provide a significant share of formal employment. Official development assistance (ODA) remains a cornerstone of Vanuatu's economic framework, accounting for approximately 11% of gross national income, among the highest ratios globally (Lowy Institute, n.d.). Foreign direct investment, while modest, is concentrated in strategic sectors such as banking, telecommunications, and tourism. Remittances from seasonal workers participating in labour mobility schemes in Australia and New Zealand represent a vital source of household income and foreign exchange, helping to cushion external shocks and support consumption.

Tourism, while not the largest contributor to GDP, plays a crucial role in foreign exchange earnings, employment creation, and service exports. In 2023, the sector employed over 22,900 people, representing 26.4% of total employment (World Bank, 2024; GoV, 2021b). However, Vanuatu's broader economic trajectory has been repeatedly disrupted by a series of external shocks. The COVID-19 pandemic, the May 2024 liquidation of Air Vanuatu, and successive climate-related disasters have highlighted critical structural vulnerabilities in the country's transport, health, and communications infrastructure (ADB, 2023; IMF, 2024). In response, the government has adopted a suite of macroeconomic stabilisation measures, expanded disaster risk reduction initiatives, and launched programmes to drive economic diversification through digital transformation, regional trade integration, and sustainable resource management (ADB, 2023; IMF, 2024).

## CE/SCP related policies

Vanuatu's commitment to circular economy (CE) and sustainable consumption and production (SCP) is reflected in several key national policies and sectoral strategies.

The **Revised and Enhanced First Nationally Determined Contribution (NDC) (2021–2030)** identifies tourism as a priority adaptation sector and sets conditional targets for 100% renewable electricity and a 30% reduction in total energy sector emissions by 2030, contingent on international support. The NDC provides a foundation for low-carbon transition in tourism through sustainable infrastructure, renewable energy adoption, and promotion of low-emission transport options.

The **National Environment Policy and Implementation Plan (2016–2030)** (NEPIP) applies the 'polluter pays' principle across sectors, including tourism. It includes specific targets for improving solid waste management, promoting sustainable infrastructure, and integrating environmental education into schools and communities. Tourism-specific actions include encouraging composting, banning harmful plastics, and developing green infrastructure standards for tourism businesses.

**Vanuatu's Waste Management Act (2014)** and **Waste Management Regulations (2018)** provide the legislative tools to reduce single-use plastics, regulate hazardous waste, and license private waste operators. These instruments are reinforced by public awareness campaigns and educational programmes supported by donor partners and NGOs.

The **National Energy Roadmap (2016–2030)** sets targets for increasing renewable energy uptake and improving energy access in rural areas, directly supporting sustainable tourism development on outer islands. Similarly, the **National Water Resources Policy (2008)** and **National Sanitation Policy (2010)** guide sustainable water use and sanitation standards for tourism operators, particularly in ecologically sensitive areas.

## Cross-cutting policies

Several national policies influence tourism development indirectly through infrastructure, procurement, quality standards, and cultural safeguarding. The **Building Act (2006)** and **National Building Code** promote safe and resilient construction, particularly important for climate-proofing tourism infrastructure. Public procurement legislation, notably the **Public Procurement Act (2019)**, enables integration of sustainability criteria into infrastructure investments that support the tourism sector.

The **Traditional Knowledge and Traditional Cultural Expression Bill (2012)** strengthens the protection of indigenous knowledge and supports community-led tourism by regulating the use of *kastom* and traditional narratives. It aligns with efforts to ensure authenticity and community benefit in cultural tourism experiences.

The **National Oceans Policy (2016)** includes strategic objectives for sustainable marine tourism, including anchoring restrictions, waste discharge regulations, and zoning for tourism development in marine environments; the aim is to balance tourism growth with conservation goals and climate resilience.

Complementary policies include the **National Quality Policy (2017–2023)**, which supports the introduction of internationally aligned standards and certification schemes applicable to tourism, and the Quality Infrastructure System, which provides a framework for accreditation and labelling of sustainable tourism products.

## Tourism as a growth sector and economic driver

Vanuatu's tourism vision is anchored in its extraordinary natural assets and rich cultural heritage. The country's appeal spans white and black sand beaches, coral reefs, freshwater swimming holes, active volcanoes, and *kastom* villages, positioning it as a distinctive destination in the Pacific. National tourism policy is framed by the **Vanuatu Sustainable Tourism Policy 2019–2030** and the **Vanuatu Sustainable Tourism Strategy 2021–2025**, both of which advocate for a high-value, low-impact tourism model that preserves natural and cultural assets while maximising community benefits (GoV, 2019; 2021).

This policy framework supports diversification into emerging tourism segments such as agritourism, cultural heritage, wellness travel, and eco-tourism. These approaches aim to extend visitor stays, increase



local spending, and distribute tourism benefits more equitably across provinces and population groups. Concurrently, infrastructure investments in roads, ports, renewable energy, and digital connectivity are being prioritised to improve access, reduce operational costs, and strengthen climate resilience. These ambitions are further supported by the **Vanuatu Tourism Human Resources Development Strategy 2021–2030** (Government of Vanuatu, 2020), which outlines a comprehensive capability framework for building skills in sustainability, health and safety, digital literacy, and service quality across the sector (GoV, 2021a). Section 3.3.2 provides further details about the sustainable tourism policy framework.

The tourism sector's vulnerability to external shocks remains one of the most significant constraints to sustainable growth in Vanuatu. The compounding crises of pandemic, multiple cyclones, the airline collapse and a major earthquake in Port Vila in December 2024, severely disrupted international air connectivity, cruise itineraries, and essential service delivery systems. Critical fragilities in the tourism value chain were exposed, including transport dependence, workforce precarity, and infrastructure limitations, which prompted targeted policy responses. These include enhanced support for micro, small, and medium enterprises (MSMEs), expanded access to concessional finance, and a renewed focus on crisis preparedness and business continuity planning (ADB, 2023; GoV, 2024).

Despite these setbacks, tourism continues to serve as a cornerstone of economic recovery and inclusive development. In 2023, the sector contributed 4.8% to GDP, approximately USD 46.6 million, and directly employed 22,900 people, representing 26.4% of the national workforce (World Bank, 2024). Beyond its direct impacts, tourism generates substantial multiplier effects across the broader economy, particularly in agriculture, handicrafts, transport, and construction. These intersectoral linkages reinforce the sector's role as a driver of rural livelihoods and small business development, justifying continued investment in resilient infrastructure, workforce capacity, and sustainable enterprise support (ADB, 2023; PSDI, 2022).

Looking ahead, the recovery and future growth of Vanuatu's tourism industry will hinge on its ability to build systemic resilience to economic, climate, and health-related shocks. The government's continued emphasis on inclusive, sustainable tourism – backed by regional cooperation and development partner support – positions Vanuatu to lead the Pacific in transitioning toward a climate-smart and circular tourism economy. Strategic opportunities include scaling community-based and domestic tourism, greening tourism infrastructure, strengthening digital marketing, and mainstreaming sustainability standards throughout the tourism supply chain (ADB, 2023; SPREP, 2023).

## **Governance and industry structure**

### **Governance**

Tourism governance in Vanuatu is led by the Department of Tourism (DoT), which operates under the Ministry of Tourism, Trade, Industry and Ni-Vanuatu Business. DoT is responsible for the development and implementation of tourism policy and planning, and for managing national tourism standards through the **Vanuatu Tourism Permit and Accreditation Programme (VTPAP)** and the **Vanuatu Tour Operator Minimum Standards (VTOMS)**. These frameworks classify tourism businesses and set tailored criteria relating to safety, service delivery, and sustainability (GoV, 2021a).

Destination marketing is managed by the Vanuatu Tourism Office (VTO), a statutory body established under the Vanuatu Tourism Office Act [Cap 142], and is governed by a 14-member multi-stakeholder board, with representation from the aviation, cruise, and tourism private sectors. The VTO plays a pivotal role in promoting Vanuatu as a tourism destination in both international and domestic markets (GoV, 2021a). Coordination between the VTO, DoT, and provincial tourism offices is essential to ensure policy coherence and effective implementation. However, challenges remain, particularly around data sharing, campaign alignment, and consistent messaging across platforms (PSDI, 2022).

While Vanuatu has established a comprehensive national tourism standards framework, its implementation across the archipelago remains uneven. Outer island businesses frequently lack the infrastructure, staffing, and logistical capacity required to meet VTOMS criteria. Provincial tourism offices, which are tasked with supporting and monitoring compliance at the local level, often face resource constraints that limit their effectiveness (GoV, 2021; ADB, 2023).

The **Vanuatu Tourism Human Resources Development Strategy 2021–2030 (VTHRDS)** underscores the need to strengthen sub-national governance and institutional capacity. It recommends formalising coordination mechanisms between provincial tourism officers and national agencies and expanding training programmes for officials, particularly in sustainability, health and safety, and quality assurance (GoV, 2021a).

### *Industry structure*

Vanuatu's tourism industry is predominantly composed of micro, small, and medium-sized enterprises (MSMEs), which make up more than 90% of all operators. As of 2019, there were approximately 1,656 registered tourism businesses (excluding handicraft producers), employing around 11,500 workers, 94% of whom worked in enterprises with fewer than 25 employees (GoV, 2021a). These MSMEs spanned a wide range of sub-sectors, including accommodation, transport, food services, and experience-based activities such as cultural tours, diving, hiking, and ecotourism.

Tourism activity was geographically concentrated in three primary hubs: Shefa Province (Efate/Port Vila) hosts 47% of businesses, followed by Sanma (Espiritu Santo) at 19.4%, and Tafea (Tanna) at 12.8%. These regions benefit from more developed infrastructure, airports (international airports in Port Vila, Efate island, and Luganville, Espiritu Santo island) and an ATR-capable airport at on Tanna island, and stronger integration into marketing and investment networks (GoV, 2021a). However, this spatial concentration also reinforces regional disparities in tourism development and limits participation from outer islands, where tourism potential remains largely underutilised due to accessibility and resource constraints.

The accommodation sector is highly diverse, ranging from branded international hotels in Port Vila such as Holiday Inn, Ramada, and Warwick, to small, family-run bungalows in rural and outer-island locations. As of 2023, there were 153 accommodation providers nationwide, offering a combined capacity of 3,551 beds. Outer-island accommodations are particularly important for cultural and nature-based tourism, yet face persistent challenges due to limited infrastructure, inconsistent service delivery, and the lingering impacts of the collapse of Air Vanuatu, which disrupted key domestic flight routes (STEP, 2024).

Vanuatu also hosts a vibrant network of more than 200 registered tour and activity operators, many of which are community-based or individually run. These businesses provide a wide array of visitor experiences from guided village and cultural tours, handicraft workshops, and traditional cooking demonstrations to marine excursions, volcano trekking, and aerial sightseeing. In addition to enhancing the country's tourism offering, they serve as a critical source of income and employment for communities in remote areas (GoV, 2021).

### *Tourism associations*

The landscape of tourism associations in Vanuatu is highly fragmented, with over 70 entities operating at national, provincial, and community levels. Many of these associations were established primarily to satisfy the VTOMS requirement that tourism businesses be affiliated with a recognised organisation to obtain a Tourism Permit and, by extension, a business licence. However, this regulatory trigger has led to the creation of numerous 'associations of convenience' that lack meaningful engagement, governance structures, or capacity to represent their members effectively (STEP, 2024). In contrast, national bodies such as the Vanuatu Hotels and Resorts Association (VHRA) and the Vanuatu Tourism Operators Association (VTOA) are comparatively well-resourced and play an influential role in sector governance, including holding seats on the Vanuatu Tourism Office (VTO) Board and contributing to policy dialogue.

Despite the presence of some functional associations, the overall system is hindered by duplication, poor coordination, and governance deficits at the local level. Many smaller, community-based associations operate with unclear mandates, limited leadership training, and insufficient accountability mechanisms, which restrict their ability to advocate for members or interface with government institutions. These challenges contribute to fragmented sector representation and underperformance in collective responsibilities such as the administration of the Tourism Marketing Development Fund (TMDF). Recognising these constraints, institutional reform is now a priority. Streamlining and rationalising the number of associations, while investing in capacity-building and compliance with VTOMS standards, will be critical to strengthening coordination, ensuring equitable representation, and improving the effectiveness of sector-wide initiatives (GoV, 2021a; STEP, 2024).

## Tourism Marketing Development Fund (TMDF)

The Tourism Marketing Development Fund (TMDF) is a private sector-led initiative designed to finance destination marketing and selected infrastructure projects that support tourism growth. Funded through a 0.5% levy on tourism income, the TMDF is intended to pool industry resources for coordinated promotion of Vanuatu, often in collaboration with the Vanuatu Tourism Office and, previously, Air Vanuatu. Governance of the fund rests with a TMDF Board comprising representatives from participating associations, with the Vanuatu Hotels and Resorts Association (VHRA) serving as chair and holding veto authority (GoV, 2021a). However, the fund's effectiveness has been undermined by weak enforcement of contribution requirements and the proliferation of inactive or nominal associations. While there is no formal membership fee to join a tourism association, the annual TMDF contribution remains a mandated obligation - one that is inconsistently applied.

Reform efforts are currently underway to streamline the association landscape and strengthen TMDF governance. VHRA and the Vanuatu Tourism Operators Association (VTOA) are leading calls for consolidation, enabling the Department of Tourism (DoT) to better engage with fewer, more accountable associations and to enforce compliance with VTOMS standards (STEP, 2024). Enhancing compliance and transparency within the TMDF framework is central to building a sustainable, industry-funded marketing platform for Vanuatu's tourism sector (GoV, 2021; Employment Vanuatu, n.d.).

### *Tourism training and business support*

## Vanuatu Institute of Technology (VIT)

The Vanuatu Institute of Technology (VIT) is the country's principal public provider of technical and vocational education, offering accredited qualifications in the tourism and hospitality sector. Core programmes include the Certificate II in Tourism (Customer Services), Certificate II in Tourism (Tour Operations), and Certificate II in Hospitality (Accommodation Services). These qualifications focus on building practical, job-ready skills in service delivery, guest relations, tour coordination, and accommodation operations, contributing to a more skilled and customer-focused tourism workforce across the country (Vanuatu Institute of Technology (VIT), 2024).

## Vanuatu Skills Partnership (VSP)

The Vanuatu Skills Partnership (VSP) plays a central role in supporting a more inclusive and sustainable tourism economy by strengthening the capabilities of local operators, particularly in rural and outer island communities. Closely aligned with national community-based tourism priorities, VSP has been instrumental in advancing inclusive economic participation, local resilience, and the practical application of sustainable tourism principles. Through its network of Provincial Skills Centres - established as decentralised service hubs under the Ministry of Education and Training - VSP provides place-based support for skills development and enterprise growth. In partnership with DoT and provincial stakeholders, it delivers targeted coaching, training, and business development services aligned with national policy objectives. The focus is on lifting service quality, improving product development, and expanding market access, while actively supporting the participation of women, youth, and people with disabilities. VSP also plays a critical role in preparing operators to meet VTOMS requirements and in supporting the transition from informal to formal business registration (Vanuatu Skills Partnership (VSP), 2024).

## Australia Pacific Training Coalition (APTC) / Pacific Australia Skills Partnership

The Australia Pacific Training Coalition (APTC) has supported professional development in Vanuatu by delivering internationally recognised Australian vocational qualifications, including the Certificate III in Tourism, Certificate III in Hospitality, and Certificate III in Commercial Cookery. These programmes focused on practical, industry-relevant competencies, ranging from food preparation and front office operations to tour guiding and accommodation services and contributing to a more skilled and work-ready tourism workforce (Australia Pacific Training Coalition (APTC), 2023).

At the time of consultation, APTC was transitioning into Phase Four of the Australian Government's support under a new Pacific Australia Skills Partnership. This next phase aims to build on APTC's foundations by delivering demand-driven qualifications through local partnerships, including partnering with VIT and the

Vanuatu Qualifications Authority (VQA). The programme is expected to expand into priority areas such as tourism, agritourism, renewable energy, and other sectors aligned with national development and sustainability goals.

### University of the South Pacific (USP)

USP's Emalus Campus in Port Vila offers academic pathways for students pursuing careers in tourism policy, planning, and management. Relevant qualifications include the Bachelor of Commerce in Tourism and Hospitality Management and the Bachelor of Commerce in Hotel Management. These programmes develop skills in destination planning, hospitality operations, and strategic sector development, preparing graduates for leadership roles in both the public and private sectors. USP's academic offerings complement vocational and technical pathways by building managerial, analytical, and policy capability within the tourism workforce (University of the South Pacific (USP), 2024).

### Vanuatu Tourism Office (VTO)

The Vanuatu Tourism Office (VTO) supports tourism business development by enhancing the market readiness and visibility of operators, particularly in rural and community-based settings. Through its digital training efforts, VTO provides support in online marketing, social media engagement, and customer-facing communications to improve operators' reach and competitiveness (VTO, 2023). VTO also works through Provincial Tourism Councils to deliver outreach and training tailored to local needs, including product development, service quality, and environmental management. These efforts are often aligned with the implementation of the VTPAP and support operators to meet the VTOMS. At the time of consultation, a new 'Market Ready Assessment' programme was in design, aimed at building broader business and marketing capability beyond VTOMS compliance (STEP, 2024).

## Tourism sector challenges

### *Institutional and Regulatory Limitations*

#### Limited enforcement capacity and provincial constraints

Vanuatu's tourism governance framework, while well-articulated, faces significant implementation challenges, particularly at the provincial level. The VTPAP and the VTOMS serve as the principal instruments for regulating safety, service quality, and business compliance in tourism. However, enforcement responsibilities are decentralised, placing considerable pressure on provincial tourism officers. These officers are often responsible for overseeing dozens of businesses spread across remote and geographically dispersed islands, with limited access to transport, digital systems, or operational support. This capacity gap results in inconsistent compliance monitoring and limits the overall effectiveness of national standards outside of established tourism hubs (GoV, 2021a).

#### Weak Industry Representation and Fragmented Governance

Industry associations are expected to play a key role in maintaining standards, delivering training, and facilitating dialogue between the tourism sector and government. In practice, however, the sector is hindered by over-fragmentation, and only a handful of national associations such as VHRA and VTOA, and the Vanuatu Scuba Operators Association (VSOA) actively participate in sector governance. The proliferation of underperforming associations undermines coordinated industry development and weakens delivery of core services such as training, permit support, and enforcement of the TMDF levy (GoV, 2021; STEP, 2024).

#### Misalignment with Regional Standards and Sustainability Gaps

While the VTOMS provide an important baseline for regulating tourism operations, it does not yet fully align with the PSTS. Critical sustainability dimensions - such as carbon footprint tracking, community benefit-sharing mechanisms, and protection of cultural heritage - are weakly integrated or entirely absent. These gaps hinder Vanuatu's capacity to demonstrate alignment with the Global Sustainable Tourism Council (GSTC) standards (a specific objective of the VSTS) and potentially limit the country's appeal to responsible tourism markets and development partners. Strengthening the VTOMS to fully reflect PSTS guidelines would improve market credibility and unlock greater opportunities for donor engagement and private sector investment in sustainable tourism (SPTO, 2021).

## Regulatory fragmentation and legal gaps in environmental oversight

Although Vanuatu has enacted key environmental laws such as the **Waste Management Act (2014)** and the **Pollution Control Act (2013)** these are not well integrated with the tourism regulatory framework. Small and medium-sized tourism enterprises (SMEs) are not legally required to undertake environmental impact assessments (EIAs), and sustainability criteria are not embedded within the business licensing regime. As a result, operators may be VTOMS-compliant but remain out of step with broader environmental requirements. This regulatory fragmentation generates uncertainty for businesses, weakens accountability, and undermines national sustainability objectives. Integrated, cross-referenced legal instruments are needed to embed sustainability in tourism operations (SPREP, 2023).

## Insufficient incentives for sustainable investment

The current fiscal and financial environment in Vanuatu does not sufficiently incentivise sustainable practices among tourism operators, particularly MSMEs. While general investment incentives such as tax exemptions and duty waivers exist, there are limited targeted measures to support businesses adopting environmentally responsible technologies like solar power, composting toilets, greywater recycling systems, or eco-certification (STEP, 2024). This gap disproportionately affects MSMEs, which typically face high upfront capital costs and lack access to concessional or blended finance. The absence of dedicated grants or sustainability-linked tax relief reinforces the perception that green investment is a cost rather than a value proposition. Recognising these barriers, the GoV has committed to integrating sustainability performance criteria into forthcoming revisions of the **National Investment Policy** and tourism incentive schemes. However, effective implementation will depend on developing tailored financial tools and increasing awareness among local tourism enterprises (Asian Development Bank, 2023).

## Weak data systems and monitoring mechanisms

Systemic limitations in data management hinder effective oversight and policy responsiveness. There is no centralised platform to track permit compliance, monitor sustainability performance, or consolidate reporting from provincial tourism offices (STEP, 2024). Existing data systems are often manual, inconsistent, and fragmented across multiple ministries. This hampers efforts to assess the effectiveness of VTPAP and VTOMS, evaluate tourism's broader economic and environmental impacts, or guide evidence-based decision-making. Developing integrated digital tools for permit tracking, performance monitoring, and inter-agency data sharing would significantly enhance enforcement, transparency, and long-term planning (STEP, 2024; PSDI, 2022; GoV, 2021).

## Private Sector and MSME Constraints

### Dependency on MSMEs as the backbone of the tourism economy

Micro, Small, and Medium Enterprises (MSMEs) form the foundation of Vanuatu's tourism sector, accounting for over 90% of all businesses. These enterprises are often family-run or community-based and span accommodation, food services, transport, cultural tours, and handicraft production. Embedded in local traditions and landscapes, MSMEs are essential for employment generation, cultural preservation, and rural development (PSDI; GoV). Despite their central role, tourism MSMEs remain highly vulnerable. Many operate informally and face ongoing exposure to climate shocks, supply chain disruptions, and economic volatility. Their limited access to finance, infrastructure, and market linkages makes them particularly susceptible to downturns (ADB).

### Structural barriers to growth

MSMEs in tourism face a combination of structural challenges that limit their ability to scale or professionalise. Many operate in outer islands or peri-urban areas where infrastructure deficits are most acute. Poor road access, high freight costs, unreliable energy supply, and digital exclusion inflate operating costs and constrain service quality. These barriers are further exacerbated by heavy dependence on imported goods and fossil fuels, which drive up costs and undermine environmental sustainability (ADB). Limited access to formal financial services is a major constraint. Only a small proportion of tourism MSMEs access commercial loans, largely due to a lack of collateral, high interest rates, and low financial literacy (PSDI). Without affordable finance or technical assistance, most are unable to invest in infrastructure upgrades, sustainability improvements, or digital systems that would enhance competitiveness.



## Gaps in business and technical capacity

Efforts to strengthen human capital among MSMEs have centred on the Department of Tourism's Customer Service Training Programme, delivered under the Vanuatu Tourism Human Resources Development Strategy (VTHRDS) 2021–2030. The programme provides foundational skills in hospitality, cultural engagement, and customer care, and is implemented through provincial offices and training providers (GoV). However, the programme's reach is limited, and the current curriculum lacks critical sustainability and business development content. MSMEs often lack capabilities in business planning, digital marketing, pricing, inventory management, and climate risk preparedness. Expanding the training programme to include circular economy principles, value chain integration, and low-carbon operations would significantly improve business resilience and sustainability outcomes (SPTO & SPC; PSDI).

## Access to sustainable technologies

Adoption of sustainable technologies across the tourism sector remains low. Solar energy systems, rainwater harvesting, composting toilets, and eco-design materials are often prohibitively expensive for small operators. Access to concessional finance, green procurement services, and trusted suppliers is particularly limited in remote areas (ADB). Moreover, the absence of sustainability-linked financial products – such as green loans or climate grants – deters investment in low-impact infrastructure. Many MSMEs lack the technical knowledge to assess technology options, and without targeted assistance, they view sustainability upgrades as risky or unaffordable. A coordinated ecosystem of policy incentives, technical support, and finance mobilisation is needed to accelerate uptake of green technologies (PSDI; SPREP).

## Market access and connectivity constraints

Tourism MSMEs located in outer islands face significant barriers to market access. Domestic air and sea connectivity is limited, irregular, and costly, making it difficult to attract visitors or access suppliers. These logistical issues also constrain participation in regional supply chains and tourism itineraries, reducing business visibility and revenue potential (ADB; PSDI). Digital connectivity is another major constraint. Many businesses lack access to internet infrastructure, digital tools, or the skills to leverage online platforms. As a result, they are often excluded from online travel agencies, social media marketing, and direct booking systems. Strengthening rural internet access and investing in digital literacy training, especially for youth and women-led enterprises, could significantly boost MSME participation in higher-value markets (SPTO & SPC; SPREP).

## Sustainability challenges

### *Environmental sustainability challenges in tourism*

#### Solid Waste Management

Solid waste management remains a pressing concern for Vanuatu's tourism sector. Urban centres like Port Vila and Luganville have limited municipal waste services, while outer islands frequently lack any formal collection infrastructure. As a result, tourism businesses—particularly in rural areas—often resort to open burning or burial of waste, including plastics and other non-biodegradable materials. This contributes to environmental pollution and health risks for local communities. SPREP's 2023 National Waste Audit confirmed that high volumes of tourism-generated waste—especially from cruise ship visits and resort operations—overwhelm local disposal systems during peak periods (SPREP, 2023).

In response, the GoV, with SPREP's support, has implemented measures under the Waste Management Act (2014) and subsequent regulations, including bans on single-use plastic bags and polystyrene containers, and penalties for illegal dumping (SPREP, 2021). However, enforcement is uneven, particularly in remote areas. Priority actions now include building provincial capacity, mandating waste segregation at source, and expanding community-based recycling initiatives to ensure more effective and decentralised waste management.

## Wastewater and Sewage

Inadequate wastewater infrastructure poses serious environmental and health risks, particularly in coastal areas where tourism infrastructure is clustered. Outside urban centres, most tourism businesses rely on basic septic systems, which are rarely inspected or maintained. This increases the risk of effluent leakage into groundwater and coastal ecosystems, degrading marine biodiversity and potentially deterring visitors (SPREP, 2021).

The National Environmental Policy and Implementation Plan (NEPIP) 2016–2030 prioritises improved sanitation for tourism operators (GoV, 2016). SPREP has recommended integrating wastewater protocols into VTOMS and promoting decentralised, eco-friendly treatment systems suitable for remote sites. These include composting toilets and constructed wetlands, which offer sustainable alternatives where centralised systems are not viable.

## Energy Use

Vanuatu's tourism sector remains heavily reliant on imported fossil fuels, making energy one of the most expensive inputs for businesses. Off-grid operations, particularly in outer islands, commonly use diesel generators, increasing both operating costs and carbon emissions. Although the National Energy Roadmap (NERM) targets a 65% renewable energy mix by 2030, adoption within the tourism sector has been slow (GoV, 2016).

A few pioneering operators have installed solar photovoltaic systems with battery storage, especially in locations like Tanna and Efate. However, high upfront costs, lack of concessional finance, and limited technical capacity remain barriers to wider uptake. Pilot projects supported by the Asian Development Bank (ADB) have demonstrated the viability of renewable solutions for remote tourism businesses and should be scaled to accelerate the sector's energy transition (ADB, 2023).

## Water Scarcity and Quality

Water availability and quality are increasingly critical issues for tourism operations, particularly on islands with limited freshwater resources. During dry periods, accommodations often rely on rainwater harvesting or bottled water, both of which are costly and vulnerable to supply disruption. Inadequate filtration and storage practices expose both guests and staff to health risks (SPREP, 2023).

The National Water Resources Policy (2008) identifies efficient and sustainable water use as a priority. SPREP and the Department of Tourism have recommended incorporating water efficiency standards into VTOMS, including requirements for safe water collection, treatment, and reuse (SPREP, 2021). Infrastructure upgrades—such as low-flow fixtures, greywater recycling, and dual plumbing systems—can reduce demand and enhance operational resilience.

## *Unsustainable consumption and production*

Vanuatu's tourism sector remains heavily dependent on imported goods—including food, beverages, construction materials, furnishings, and equipment—largely due to limited domestic production capacity, fragmented logistics, and underdeveloped inter-island distribution networks. This reliance increases operating costs and limits the sector's ability to generate local value, resulting in substantial economic leakage. According to PSDI (2022), a significant share of tourist spending ultimately leaves the country, undermining the multiplier effects of tourism and weakening backward linkages to local industries.

Efforts to localise tourism supply chains are growing. Policy frameworks such as the Vanuatu Sustainable Tourism Policy 2019–2030 and the Sustainable Infrastructure Scheme for Agritourism (2023–2028) call for stronger domestic sourcing. However, persistent constraints—including inconsistent product quality, limited year-round supply, and the absence of product certification systems—continue to discourage procurement from local producers. These challenges are particularly acute in the agriculture and handicraft sectors, where smallholder producers and artisans face barriers in meeting commercial standards or aggregating sufficient volume for tourism contracts (GoV, 2021a).

### Limited adoption of sustainable procurement and local sourcing

Despite clear policy direction promoting sustainable procurement, the tourism sector in Vanuatu has been slow to adopt responsible sourcing practices. Procurement decisions are typically driven by price and convenience rather than sustainability criteria. Most operators lack access to sustainability guidelines, eco-labelling systems, or life-cycle assessment tools that would enable them to evaluate the environmental and social impacts of their purchasing decisions (GoV, 2019).

While development partners and government reforms have focused on integrating green procurement into public sector operations, similar efforts in the tourism private sector remain underdeveloped. Training on sustainable procurement, value chain analysis, and local sourcing strategies is not yet standardised within tourism MSME capacity-building programmes. PSDI (2022) has identified an opportunity to introduce tourism-specific 'green procurement' guidelines and a 'Made in Vanuatu' certification system to incentivise responsible purchasing and support local economic development.

Embedding these tools within VTOMS or tourism business licensing requirements could provide a structured mechanism to increase uptake. Additionally, the development of supplier databases and match-making platforms – connecting tourism operators with vetted local producers – could facilitate more efficient and traceable procurement practices, especially in the food, beverage, textiles, and construction material sectors.

### Absence of circular economy approaches in tourism

Most tourism businesses in Vanuatu still operate under a linear model of consumption—where products are purchased, used, and discarded without consideration for waste reduction or resource recovery. This 'take-make-dispose' approach contributes to escalating waste volumes, particularly of packaging, plastic bottles, and imported goods, and undermines the environmental sustainability of the sector (SPREP, 2023).

# REFERENCES

- Asian Development Bank (2023), Asian Development Outlook – Vanuatu Update, Manila. Available at: <https://www.adb.org/sites/default/files/publication/863591/van-ado-april-2023.pdf> (Accessed: 26 May 2025).
- Asian Development Bank (ADB) (2024), Asian Development Outlook 2024: Enabling Recovery through Digitalisation, Manila. Available at: <https://www.adb.org/publications/asian-development-outlook-2024> (Accessed: 28 June 2025).
- Australia Pacific Training Coalition (2024), Our Courses – Fiji, Suva. Available at: <https://aptc.edu.au/courses> (Accessed: 30 June 2025).
- Australian Infrastructure Financing Facility for the Pacific (2024), Australia Supports Fiji's Rural Electrification Fund, Canberra. Available at: <https://www.aifff.gov.au/news/australia-supports-fijis-rural-electrification> (Accessed: 30 June 2025).
- British High Commission Samoa (2024), UK–Samoa Circular Economy Initiatives, Apia. Link unavailable.
- Environment Conservation Division (ECD) (2020), Kiribati Waste Management and Resource Recovery Strategy (KWMRRS 2020–2030), Tarawa. Available at: <https://newsletter.visitkiribati.travel/2021/09/30/sustainable-tourism-kiribati/> (Accessed: 28 June 2025).
- European Union (2024), EU SWITCH-Asia Pacific Policy Support Component: Programme Overview, Brussels. Available at: <https://www.switch-asia.eu/psc/> (Accessed: 28 June 2025).
- FAO (2025), Vanuatu iCOAST PPG Inception Workshop: Concept Note and Agenda, Port Vila. Link unavailable.
- Fiji Hotel and Tourism Association (2024), About FHTA – Our Members and Regional Chapters, Suva. Available at: <https://fhta.com.fj/about-fhta/> (Accessed: 2 June 2025).
- Fiji National University (2024a), College of Business, Hospitality and Tourism Studies (CBHTS), Suva. Available at: <https://www.fnu.ac.fj/business-hospitality-tourism-studies/> (Accessed: 30 June 2025).
- Fiji National University (2024b), NTPC: Hospitality, Fashion and Travel, Suva. Available at: <https://www.fnu.ac.fj/ntpc/departments/hospitality-tourism-hospitality-fashion-and-travel/> (Accessed: 30 June 2025).
- Global Green Growth Institute (GGGI) (2023), Kiribati Public Procurement Reform Program, Tarawa. Link unavailable.
- Government of Fiji (2018), National Climate Change Policy 2018–2030, Suva. Link unavailable.
- Government of Fiji (2020), Republic of Fiji's Updated Nationally Determined Contribution 2020, Suva. Available at: <https://unfccc.int/sites/default/files/NDC/2022-06/Republic%20of%20Fiji%27s%20Updated%20NDC%2020201.pdf> (Accessed: 3 June 2025).
- Government of Fiji (2021), Climate Change Act 2021, Suva. Available at: <https://fijiclimatechangeportal.gov.fj/publications/climate-change-act-2021> (Accessed: 3 June 2025).
- Government of Fiji (2023a), Code of Conduct for the Tourism Industry, Suva. Available at: <https://mcttt.gov.fj/wp-content/uploads/2023/03/Code-of-Conduct-Final.pdf> (Accessed: 4 June 2025).
- Government of Fiji (2023b), NSTF\_1.3 Regulatory Policy Framework, Suva. Internal report. Unpublished.
- Government of Fiji (2023c), NSTF\_1.7 Financing and Investment, Suva. Internal report. Unpublished.
- Government of Fiji (2023d), NSTF\_1.8 Workplace Skills and Assessment, Suva. Internal report. Unpublished.

Government of Fiji (2023e), NSTF\_1.11 Monitoring, Suva. Internal report. Unpublished.

Government of Fiji (2024a), Fiji National Sustainable Tourism Framework Phase A: Setting a Strategic Foundation, Suva. Available at: <https://mtca.gov.fj/wp-content/uploads/2024/03/NSTF-Phase-A-1.pdf> (Accessed: 3 June 2025).

Government of Fiji (2024b), Fiji National Sustainable Tourism Framework 2024–2034, Suva. Available at: <https://mtca.gov.fj/wp-content/uploads/2024/07/National-Sustainable-Tourism-Framework-2024-2034.pdf> (Accessed: 3 June 2025).

Government of Fiji (2024c), National Development Plan 2025–2029 and Vision 2050, Suva. Available at: [https://www.finance.gov.fj/wp-content/uploads/2024/09/NPDF\\_final-9.pdf](https://www.finance.gov.fj/wp-content/uploads/2024/09/NPDF_final-9.pdf) (Accessed: 3 June 2025).

Government of Fiji (2024d), Climate Finance Infographic: Fiji Rural Electrification Fund, Suva. Available at: <https://fijiclimatchangeportal.gov.fj/publication/climate-finance-infographic/> (Accessed: 30 June 2025).

Government of Fiji (2025), Fiji National Sustainable Tourism Framework 2024/2027 Action Plan, Suva. Available at: [https://mtca.gov.fj/wp-content/uploads/2025/01/NSTF\\_A4\\_Action-Plan.pdf](https://mtca.gov.fj/wp-content/uploads/2025/01/NSTF_A4_Action-Plan.pdf) (Accessed: 3 June 2025).

Government of Kiribati (1999), Environment Act 1999, Tarawa. Available at: [http://www.vertic.org/media/National-Legislation/Kiribati/KI\\_Environment\\_Act\\_1999.pdf](http://www.vertic.org/media/National-Legislation/Kiribati/KI_Environment_Act_1999.pdf) (Accessed: 28 June 2025).

Government of Kiribati (2008), National Water Resources Policy, Tarawa. Available at: <https://www.sprep.org/att/IRC/eCOPIES/Countries/Kiribati/94.pdf> (Accessed: 28 June 2025).

Government of Kiribati (2009), Kiribati National Energy Policy, Tarawa. Available at: <https://lpr.adb.org/resource/kiribati-national-energy-policy-2009> (Accessed: 28 June 2025).

Government of Kiribati (2010), National Sanitation Policy, Tarawa. Available at: <https://faolex.fao.org/docs/pdf/kir178964.pdf> (Accessed: 28 June 2025).

Government of Kiribati (2017), Kiribati Integrated Energy Roadmap 2017–2025, Tarawa. Available at: <https://lpr.adb.org/resource/kiribati-integrated-energy-roadmap-2017-2025-2017> (Accessed: 28 June 2025).

Government of Samoa (2012), Tourism Development Act 2012, Apia. Available at: <https://faolex.fao.org/docs/pdf/sam128259.pdf> (Accessed: 28 June 2025).

Government of Samoa (2022), Samoa National Infrastructure Strategic Plan 2022–2032, Apia. Available at: <https://www.mof.gov.ws/wp-content/uploads/2022/08/NISP-2022-2032.pdf> (Accessed: 28 June 2025).

Government of Samoa (2023), Green Tourism Policy Discussion Paper, Apia. Link unavailable.

Government of Vanuatu (2013), Vanuatu Island Bungalow Building Guide, Port Vila. Available at: <https://www.scribd.com/document/446142535/BungalowGuideline> (Accessed: 26 June 2026).

Government of Vanuatu (2016a), National Energy Roadmap 2016–2030, Port Vila. Available at: [https://doe.gov.vu/images/docs/publications/Implementation\\_Plan.pdf](https://doe.gov.vu/images/docs/publications/Implementation_Plan.pdf) (Accessed: 26 June 2025).

Government of Vanuatu (2016b), National Environment Policy and Implementation Plan 2016–2030 (NEPIP), Port Vila. Available at: <https://environment.gov.vu/images/Reports/VANUATU%20NEPIP-Final.pdf> (Accessed: 26 June 2025).

Government of Vanuatu (2016c), National Sustainable Development Plan 2016–2030, Port Vila. Available at: [https://policy.asiapacificenergy.org/sites/default/files/NSDP%20Final%20Print%20Ready%2022%2002%2017\\_0.pdf](https://policy.asiapacificenergy.org/sites/default/files/NSDP%20Final%20Print%20Ready%2022%2002%2017_0.pdf) (Accessed: 26 June 2025).



- Government of Vanuatu (2018), Decentralisation Implementation Plan 2018–2028, Port Vila. Available at: <https://dla.gov.vu/images/policies/5.%20Final%2010%20years%20Decentralisation%20Implementation%20Plan.pdf> (Accessed: 26 June 2025).
- Government of Vanuatu (2019), Vanuatu Sustainable Tourism Policy 2019–2030, Port Vila. Available at: [https://tourism.gov.vu/images/DoT-Documents/Policies/SUSTAINABLE\\_TOURISM\\_POLICY\\_2019-2030\\_New.pdf](https://tourism.gov.vu/images/DoT-Documents/Policies/SUSTAINABLE_TOURISM_POLICY_2019-2030_New.pdf) (Accessed: 26 June 2025).
- Government of Vanuatu (2020), Vanuatu Sustainable Cruise Tourism Development Strategy, Port Vila. Available at: <https://tourism.gov.vu/images/Cruise/494228700-DOT019-Cruise-Tourism-Strategy-1.pdf> (Accessed: 26 June 2025).
- Government of Vanuatu (2021a), Vanuatu Tourism Human Resources Development Strategy 2021–2030, Port Vila. Available at: [https://tourism.gov.vu/images/DoT-Documents/Plans/VANUATU\\_TOURISM\\_HUMAN\\_RESOURCES\\_DEVELOPMENT\\_STRATEGY\\_2021\\_\\_2030.pdf](https://tourism.gov.vu/images/DoT-Documents/Plans/VANUATU_TOURISM_HUMAN_RESOURCES_DEVELOPMENT_STRATEGY_2021__2030.pdf) (Accessed: 26 June 2025).
- Government of Vanuatu (2021b), Vanuatu Sustainable Tourism Strategy 2021–2025, Port Vila. Available at: [https://tourism.gov.vu/images/DoT-Documents/Plans/Vanuatu\\_Sustainable\\_Tourism\\_Strategy\\_LR.pdf](https://tourism.gov.vu/images/DoT-Documents/Plans/Vanuatu_Sustainable_Tourism_Strategy_LR.pdf) (Accessed: 26 June 2025).
- Government of Vanuatu (2022), National Energy Roadmap 2022–2030, Port Vila. <https://policy.asiapacificenergy.org/sites/default/files/Updated%20Vanuatu%20National%20Energy%20Road%20Map%202016-2030.pdf>. (Accessed: 26 June 2025)
- Government of Vanuatu (2023a), Vanuatu Tourism Product Classification System, Port Vila. Available at: <https://tourism.gov.vu/index.php/en/tourism-product-classification> (Accessed: 26 June 2025).
- Government of Vanuatu (2023b), Vanuatu Tourism Operators Minimum Standards, Port Vila. Available at: <https://tourism.gov.vu/index.php/en/operating-standards> (Accessed: 26 June 2025).
- Government of Vanuatu (2024), Vanuatu National Electrification Master Plan, Port Vila. Available at: <https://doe.gov.vu/index.php/news-events/news/169-vanuatu-national-electrification-master-plan-workshop-22-10-2024> (Accessed: 26 June 2025).
- Government of Vanuatu (2025), Vanuatu Tourism Accreditation Framework: Version 1 – 08 April 2025, Port Vila. DRAFT. Link unavailable.
- International Finance Corporation (2021), Powering the Pacific: The Role of Renewable Energy in Reducing Tourism’s Carbon Footprint, Washington D.C. <https://www.ifc.org/content/dam/ifc/doc/mgrt/ifc-powering-the-pacific-guide-final.pdf> (Accessed: 26 June 2025).
- International Monetary Fund (n.d.), IMF Country Report – Vanuatu, Washington, DC. Available at: <https://www.imf.org/en/Countries/VUT#featured>. (Accessed 26 June 2025)
- International Union for Conservation of Nature (2023), Plastic Waste-Free Islands: Synthesis of Plastic Pollution Policies – Vanuatu, Gland. Available at: <https://iucn.org/sites/default/files/2023-08/vanuatu-synthesis-plastic-pollution-policies-10.pdf> (Accessed: 26 June 2025).
- Kiribati Ministry of Tourism, Commerce, Industry and Cooperatives (MTCIC) (2021), Kiribati Investment Policy Framework, Tarawa. Available at: <https://mtcic.gov.ki/download/15/strategies-and-policies/3689/kiribati-investment-policy-framework.pdf> (Accessed: 28 June 2025).
- Lowy Institute (n.d.), Pacific Aid Map, Sydney. Available at: <https://pacificaidmap.lowyinstitute.org/> (Accessed: 26 May 2025).
- Market Development Facility (2024), Climate Change Market Snapshot: Fiji, Suva. Available at: [https://marketdevelopmentfacility.org/wp-content/uploads/2024/03/Climate-Change\\_Fiji.pdf](https://marketdevelopmentfacility.org/wp-content/uploads/2024/03/Climate-Change_Fiji.pdf) (Accessed: 30 June 2025).

- Ministry of Commerce, Industry and Labour (MCIL) (2023), Samoa MSME Policy Review, Apia. Link unavailable.
- Ministry of Information, Communications, Transport and Tourism Development (MICTTD) (2020), Ministry of Information, Communications, Transport and Tourism Development, Betio, South Tarawa. Available at: [https://en.wikipedia.org/wiki/Ministry\\_of\\_Information,\\_Communications,\\_Transport\\_and\\_Tourism\\_Development](https://en.wikipedia.org/wiki/Ministry_of_Information,_Communications,_Transport_and_Tourism_Development) (Accessed: 28 June 2025).
- Ministry of Natural Resources and Environment (MNRE) (2023), Samoa Water Sector Plan 2023–2028, Apia. Link unavailable.
- Pacific Asia Travel Association (PATA) (2023), Kiribati Recognises the Value in Sustainable & Regenerative Tourism, Bangkok. Available at: <https://www.pata.org/blog/kiribati-recognises-the-value-in-sustainable-regenerative-tourism> (Accessed: 28 June 2025).
- Pacific Private Sector Development Initiative (2021), Tourism Sector Snapshot – Vanuatu, Sydney. Available at: <https://pacificpsdi.org/publications-2/psdi-publications/read/vanuatu-pacific-tourism-sector-snapshot> (Accessed: 26 May 2025).
- Pacific Private Sector Development Initiative (2025a), Labour Mobility, Migration and Women's Private Sector Employment: An Exploratory Study of Fiji, Sydney. Available at: <https://www.pacificpsdi.org/assets/Uploads/Labour-Mobility-Migration-and-Womens-Private-Sector-Employment-An-Exploratory-Study-of-Fiji-Dr-Kirstie-Petrou.pdf> (Accessed: 2 June 2025).
- Pacific Private Sector Development Initiative (2025b), Empowering Entrepreneurs: Exploring Women's Role in Fiji's Informal Tourism Economy, Sydney. Available at: <https://www.pacificpsdi.org/publications-2/psdi-publications/read/empowering-entrepreneurs-exploring-womens-role-in-fijis-informal-tourism-economy> (Accessed: 2 June 2025).
- Pacific Tourism Organisation (2021), Pacific Sustainable Tourism Policy Framework, Suva. Available at: <https://southpacificislands.travel/wp-content/uploads/2024/10/Pacific-Sustainable-Tourism-Policy-Framework.pdf> (Accessed: 26 June 2025).
- Pacific Tourism Organisation (2022), Pacific Sustainable Tourism Indicators Framework, Suva. Available at: <https://southpacificislands.travel/wp-content/uploads/2025/01/SPTO-Pacific-Sustainable-Tourism-Indicators-Framework.pdf> (Accessed: 26 June 2025).
- Pacific Tourism Organisation (2023), Pacific Sustainable Tourism Standards, Suva. Available at: <https://southpacificislands.travel/home/sustainability-overview/standard/> (Accessed: 26 June 2025).
- Pacific Tourism Organisation (2024), Kiribati Tourism Takes a Sustainable Leap with Historic Policy Launch, Suva. Available at: <https://southpacificislands.travel/kiribati-tourism-takes-a-sustainable-leap-with-historic-policy-launch/> (Accessed: 28 June 2025).
- Pacific Tourism Organisation and Secretariat of the Pacific Regional Environment Programme (2025), Standards And Certification Programme For Phasing Out Single-Use Plastics In The Pacific Tourism Industry, Suva and Apia. Available at: <https://southpacificislands.travel/projects/standards-and-certification-programme-for-phasing-out-single-use-plastics-in-the-pacific-tourism-industry/> (Accessed: 26 June 2025).
- PacWastePlus National Waste Audit: Fiji Tourism Sector Analysis, Apia. Available at: <https://pacwasteplus.org/wp-content/uploads/2023/08/Fiji-National-Waste-Audit-Analysis-Report.pdf> (Accessed: 30 June 2025).
- Republic of Kiribati (2018), Kiribati Tourism Act 2018 (No. 17 of 2018), Tarawa. Available at: [https://www.pacii.org/ki/legis/num\\_act/cta2018200.pdf](https://www.pacii.org/ki/legis/num_act/cta2018200.pdf) (Accessed: 28 June 2025).
- Samoa Hotels & Hospitality Association (SHHA) (2024), SHHA E-Booking System Overview, Apia. Link unavailable.

- Samoa Pocket Guide (2024), 19 Most Unique Accommodations in Samoa, Auckland. Available at: <https://samoapocketguide.com/most-unique-accommodations-in-samoa/> (Accessed: 28 June 2025).
- Samoa Tourism Authority (STA) (2022), Samoa Tourism Sector Plan 2022–2027, Apia. Available at: <https://www.samoa.travel/downloads/sector-plan> (Accessed: 28 June 2025).
- Samoa Tourism Authority (STA) (2024), Samoa Tourism Annual Report 2023/24, Apia. Link unavailable.
- Secretariat of the Pacific Regional Environment Programme (2020), Cleaner Pacific 2025: Pacific Regional Waste and Pollution Management Strategy (2016–2025), Apia. Available at: <https://pacific-data.sprep.org/system/files/21751ac0-e418-4ba8-ad18-915d04dbca8a/cleaner-pacific-strategy-2025.pdf> (Accessed: 26 June 2025).
- Secretariat of the Pacific Regional Environment Programme (2021), PacWastePlus Country Profile – Vanuatu, Apia. Available at: <https://www.sprep.org/publications/pacwasteplus-country-profile-snapshot-vanuatu> (Accessed: 26 June 2025).
- Secretariat of the Pacific Regional Environment Programme (2023), Vanuatu National Waste Audit Analysis Report, Apia. Available at: [https://pacwasteplus.org/resources/?regional\\_project=&country\\_project=585&document\\_type=&keywords=Sustainable+Waste+Actions+in+the+Pacific#feed-resources](https://pacwasteplus.org/resources/?regional_project=&country_project=585&document_type=&keywords=Sustainable+Waste+Actions+in+the+Pacific#feed-resources) (Accessed: 26 June 2025).
- Secretariat of the Pacific Regional Environment Programme (2024)
- Secretariat of the Pacific Regional Environment Programme (SPREP) (2022), Cleaner Pacific 2025: Pacific Regional Waste and Pollution Management Strategy 2016–2025, Apia. Available at: <https://www.sprep.org/attachments/Publications/WMPC/cleaner-pacific-strategy-2025.pdf> (Accessed: 28 June 2025).
- Secretariat of the Pacific Regional Environment Programme (SPREP) (2023), SPREP and SPTO Place Sustainable Tourism Development on Centre Stage with MOU, Apia. Available at: <https://www.sprep.org/news/sprep-and-spto-place-sustainable-tourism-development-on-centre-stage-with-mou> (Accessed: 28 June 2025).
- Secretariat of the Pacific Regional Environment Programme (SPREP) (2023), SPREP Annual Report 2023, Apia. Available at: <https://www.sprep.org/publications/annual-report-2023> (Accessed: 28 June 2025).
- STEP Project Consultations (2024). In country consultations by project team. No link available.
- STEP Project Consultations (2025). In country consultations by project team. No link available.
- SWITCH Asia Pacific Policy Support Component, Sustainable Tourism Enhancement in the Pacific (STEP) (2024), Sustainable Tourism Enhancement in the Pacific (STEP). Available at: <https://www.switch-asia.eu/resource/sustainable-tourism-enhancement-in-the-pacific-step/> (Accessed: 26 June 2025).
- SWITCH Asia Pacific Policy Support Component, Sustainable Tourism Enhancement in the Pacific (STEP) (2025a), Regional Validation Workshop: Sustainable Tourism Enhancement in the Pacific (STEP) Workshop Agenda. Available at: [https://www.switch-asia.eu/site/assets/files/4392/step\\_regional\\_workshop\\_23-24\\_april\\_2025\\_fiji\\_agenda\\_final.pdf](https://www.switch-asia.eu/site/assets/files/4392/step_regional_workshop_23-24_april_2025_fiji_agenda_final.pdf) (Accessed: 26 June 2025).
- SWITCH Asia Pacific Policy Support Component, Sustainable Tourism Enhancement in the Pacific (STEP) (2025b), Regional Validation Workshop on Sustainable Tourism Enhancement in the Pacific (STEP): A Multi-Stakeholder Consultation for Strengthening Policy Ambitions on Tourism through Sustainable Consumption and Production and Circular Economy). Available at: [https://www.switch-asia.eu/site/assets/files/4392/step\\_workshop\\_21\\_may\\_final-1.pdf](https://www.switch-asia.eu/site/assets/files/4392/step_workshop_21_may_final-1.pdf) (Accessed: 26 June 2025).
- SWITCH-Asia Pacific Policy Support Component, Sustainable Tourism Enhancement in the Pacific (STEP) – Background Report: Samoa, Suva. Link unavailable.

- Tourism Authority of Kiribati (TAK) (2021), Sustainable Tourism Development Policy Framework, Tarawa. Available at: <https://corporate.visitkiribati.travel/wp-content/uploads/2021/10/Sustainable-Tourism-Kiribati-Towards-2036.pdf> (Accessed: 28 June 2025).
- Tourism Authority of Kiribati (TAK) (2023), TAK Strategic Plan 2024-2026, Tarawa. Available at: <https://newsletter.visitkiribati.travel/2023/10/07/kiribati-national-tourism-office-plans-for-sustainable-tourism-growth/> (Accessed: 28 June 2025).
- Tourism Fiji (2024a), Tourism Fiji Corporate Plan 2024–2027, Suva. Available at: <https://corporate.fiji.travel> (Accessed: 30 June 2025).
- Tourism Fiji (2024b), Destination Development and Market Readiness Support, Suva. Available at: <https://specialist.fiji.travel/news/tourism-potential> (Accessed: 30 June 2025).
- Tourism Fiji (2024c), AdventureEDU Capacity Building Program, Suva. Available at: <https://corporate.fiji.travel/news/adventure-edu> (Accessed: 30 June 2025).
- Tourism Fiji (2025a), Tourism Super Week 2025 – Empowering Fiji’s MSMEs, Suva. Available at: <https://corporate.fiji.travel/articles/media-releases/tourism-super-week-2025-empowering-fiji%E2%80%99s-msmes> (Accessed: 30 June 2025).
- United Nations Development Programme (2025), Gov4Res – Governance for Resilient Development in the Pacific, Suva. Available at: <https://www.fiji.gov.fj/Media-Centre/News/MINISTRY-OF-TOURISM-AND-CIVIL-AVIATION-PARTNERS-WI> (Accessed: 30 June 2025).
- United Nations Development Programme (UNDP) (2023), Enhancing Climate Resilience of Samoa’s Coastal Communities, Apia. Available at: <https://www.adaptation-undp.org/projects/enhancing-climate-resilience-samoas-coastal-communities> (Accessed: 28 June 2025).
- United Nations Development Programme (UNDP) (2023), Kiribati Country Programme Document 2023–2027, Suva. Link unavailable.
- University of Fiji (2024a), Bachelor of Commerce in Tourism Studies, Suva. Available at: <https://www.unifiji.ac.fj/bachelor-of-commerce-double-major-in-tourism-studies/> (Accessed: 30 June 2025).
- University of Fiji (2024b), Postgraduate and MBA Programmes in Tourism and Hospitality, Suva. Available at: <https://www.unifiji.ac.fj/master-of-business-administration-tourism-and-hospitality-management/> (Accessed: 30 June 2025).
- University of the South Pacific (2024a), Tourism and Hospitality Management Programmes, Suva. Available at: <https://www.usp.ac.fj/discipline-of-tourism-and-hospitality-management/faculty-programmes-and-courses/> (Accessed: 30 June 2025).
- University of the South Pacific (2024b), USP Celebrates Global No.1 Rankings for Tourism and Hospitality Programmes, Suva. Available at: <https://www.usp.ac.fj/news/usp-celebrates-global-no-1-rankings-for-tourism-and-hospitality-programmes/> (Accessed: 30 June 2025).
- Vanuatu Institute of Technology (2024), Course Descriptions: Tourism and Hospitality, Port Vila. Available at: <https://vit.edu.vu/1633-2/> (Accessed: 26 June 2025).
- Vanuatu Recycling and Waste Management Association (n.d.). Port Vila. Available at: <https://vanuatuercyclingandwaste.org/> (Accessed: 26 June 2025).
- Vanuatu Skills Partnership (2024), Tourism Sector Support, Port Vila. Available at: <https://www.vanuatutvet.org.vu/what-we-do/tourism> (Accessed: 26 June 2025).
- World Bank (2022), Climate Risk Profile: Vanuatu, Washington D.C. Available at: [https://climateknowledgeportal.worldbank.org/sites/default/files/country-profiles/15825-WB\\_Vanuatu%20Country%20Profile-WEB.pdf](https://climateknowledgeportal.worldbank.org/sites/default/files/country-profiles/15825-WB_Vanuatu%20Country%20Profile-WEB.pdf) (Accessed: 26 June 2025).

World Bank (2023), Major Boost for Sustainable Tourism in Vanua Levu under New World Bank Project, Washington D.C. Available at: <https://www.worldbank.org/en/news/press-release/2023/06/26/major-boost-for-sustainable-tourism-in-vanua-levu-fiji-under-new-world-bank-project> (Accessed: 30 June 2025).

World Bank Group (2024), World Development Indicators – Vanuatu, Washington, DC. Available at: <https://data.worldbank.org/>

World Bank Group (2024), Kiribati Country Data, Washington, D.C. Available at: <https://data.worldbank.org/country/kiribati> (Accessed: 28 June 2025).

ygap (2024), Fiji Program Overview, Melbourne. Available at: <https://ygappacificislands.org/fiji/> (Accessed: 30 June 2025).





**www.switch-asia.eu**



**EU SWITCH-Asia Programme**  
@EUSWITCHAsia



**SWITCH-Asia**  
@SWITCHAsia



**SWITCH-Asia Official**  
@switch-asia-official