



Western Province Tourism Investment Needs Assessment

EXECUTIVE SUMMARY - October 2018

AN IFC REPORT FOR THE
SOLOMON ISLANDS MINISTRY OF CULTURE AND TOURISM
IN PARTNERSHIP WITH



BARRIERS TO DEVELOPING TOURISM IN WESTERN PROVINCE



**A LACK OF IDENTIFIED
INVESTIBLE SITES**



**URGENT, OVERARCHING
INFRASTRUCTURE NEEDS**



**A CHALLENGING AND UNPROVEN
OPERATING ENVIRONMENT**

TOURISM DEVELOPMENT OF WESTERN PROVINCE, SOLOMON ISLANDS

1



STRENGTHEN ACCOMMODATION SUPPLY

Requires investments in upgraded and new properties in Western Province's tourism hubs and spokes, to meet target market demand for location, volume, style, quality and value for money.

2



IMPROVE ACCESS AND TRANSPORT CONNECTIVITY

Requires investments in new and improved transport infrastructure and services that enable more visitors to access Western Province's tourism hubs and spokes safely, on regular and reliable schedules, and at a price-point that the market can bear.

3



ENHANCE DESTINATION OFFER AND EXPERIENCE

Requires investments in tourism products (attractions, tours), visitor infrastructure and services, and other programs that combine to boost Western Province's destination appeal to target markets, and maximise visitor satisfaction.

4

STIMULATE AND CONVERT MARKET DEMAND

Requires investments in marketing programs that reach and convert clearly-defined target markets (geographic, special interest, and psychographic), using the most relevant and cost-effective means.

5

PREPARE HOST COMMUNITIES

Requires investments in programs that raise community awareness about tourism and its benefits and impacts, set realistic expectations, build a skilled tourism workforce, and enable (suitable) tourism enterprise development.

TOURISM INVESTMENT NEEDS IN WESTERN PROVINCE

The Western Province Tourism Investment Needs Assessment has been prepared by the IFC, a member of the World Bank Group, for the Solomon Islands Ministry of Tourism and Culture. It is intended as a guiding document for the development of the Western Province as a tourism destination, to be used by the government, the donor community and the private sector for investment planning purposes.

The study identifies three significant barriers to tourism development: a lack of identified investible sites; urgent overarching infrastructure needs; and a challenging and unproven operating environment. It then recognises five tourism-related investment strategies: 1 – strengthening accommodation supply; 2 – improving access and connectivity; 3 – enhancing the destination offer and experience; 4 – stimulating market demand; and 5 – preparing host communities. Together, the five investment strategies support Western Province's ambition to demonstrate best practices in destination development, ultimately serving as a model and catalyzing the expansion of opportunities in other provinces. Whilst all five strategies are critical, the study is focused on the first three¹, identifying specific investments in infrastructure, services and related programs that can help sustain current growth rates into the future, increase yield, and reposition Western Province as a competitive international tourism destination. These require the commitment of the private sector, the Solomon Islands Government and development partners, commencing now and into the long term.

The focus is on 'bundles' of complementary investments, which, together, could significantly improve Western Province's tourism proposition in the areas of accommodation supply, improving access and connectivity and enhancing the destination offer. The study provides an analysis of the current situation, and summarizes priorities for investment by public, private and development partner stakeholders. It provides recommendations to sequence and coordinate the activities of the government and development partners, establishing a shared priority for infrastructure and essential services investments. While the larger barriers are being addressed by government and development partners, the private sector must also play a critical role. The study will assist local and regional investors to understand the destination context prior to identifying opportunities for investment and conducting subsequent, comprehensive feasibility studies for specific sites or projects of interest.

¹ Strategy 3 (stimulating and converting market demand) and Strategy 4 (preparing host communities) are addressed through complementary government and donor programs.

Guiding Principles for Recommendations

The prioritization of investments for inclusion in this study are shaped by the following principles:

1. **A focus on the needs of best prospect target markets.** Investments should be focused on products and services that appeal to special interest travelers seeking marine experiences, nature-based experiences, and experiences based on Solomon Islands' culture or World War II history. Investments should grow the demand from Australia and emerging international markets.
2. **A geographic focus on three high-potential tourism hubs.** Investments should concentrate on developing the hubs of Munda, Gizo and Seghe, through which tourists access Western Province. These hubs can be supported by connected, surrounding 'spokes', offering accessible products to visitors.
3. **Planning for a high growth scenario, in line with recent trends and in preparation for the launch of a direct weekly flight from Brisbane to Munda.** Investments should cater for a possible 7,500 international visitor arrivals to Western Province in 2019, which has the potential to reach 9,700 international arrivals by 2022. These visitors are in addition to domestic travelers, who currently represent 84 percent of passengers on Solomon Airlines flights to the three Western Province hubs.
4. **A focus on increasing visitor spend.** Investments should focus on offering better quality supply and more compelling activities and experiences to purchase.



STRATEGY 1: STRENGTHEN ACCOMMODATION

SUB-STRATEGY 1.1

Map and assess the environmental and social risks of developments near the gateway cities of Western Province to support the subsequent preparation of a long-list of sites that meet the identified needs of investors.

PRIORITY INVESTMENTS

- a) Identify and categorize available land sites, conduct environmental and social mapping and assess viability of tourism development at high potential sites

SUB-STRATEGY 1.2

Upgrade existing properties and room stock in Western Province hubs and spokes to meet international tourism market-ready quality benchmarks.

(Target: 135 market-ready rooms by mid-2019)

PRIORITY INVESTMENTS

- a) Upgrade Western Province's gateway hotels to provide a critical mass of 92 international tourism market-ready rooms.
- b) Upgrade the bedding, furnishings, public spaces and/or sanitation facilities at almost market-ready tourist accommodations to ensure total supply of 135 market-ready rooms in Western Province.
- c) Identify and introduce affordable water supply solutions for accommodation properties facing water shortages.
- d) Identify and introduce affordable and sustainable energy solutions for accommodation providers.
- e) Deliver training for accommodation providers and staff to establish and maintain high quality standards in maintaining an accommodation operation (alongside customer-service).

SUB-STRATEGY 1.3

Expand existing properties, where suitable land is already available, the proponent is willing, and the business case stacks up.

(Target: 170 market-ready rooms by end of 2020).

PRIORITY INVESTMENTS

- a) Expand existing properties and other operating properties where upgrades have been completed, suitable land is already available, the proponent is willing, and the business case stacks up.

Strategy 1: Strengthening Accommodation Supply

This study identifies three sub-strategies addressing seven specific investment priorities to overcome the prevailing issues in accommodation supply near the hub cities of Western Province. If all these are supported as part of a destination development effort, Western Province will offer a supply of compelling, high-quality visitor experiences to cater for continued high rates of international tourist growth and achieve high levels of visitor satisfaction.

In the first instance, international standard rooms are required in Western Province's gateway cities of Munda and Gizo. This can be achieved by immediate upgrades to existing properties with new investment coming in over time. For current properties, upgrades are required to furnishings, equipment and facilities to bring them to an international standard. This study identifies a high-level estimate of SBD 12 million for investment in upgrades to existing properties. Determining an overall value for such accommodation investment requires detailed project-specific assessments. This estimate excludes water and energy solutions for the sector, which need to be scoped and costed.

Two critical utility infrastructure constraints that affect Western Province businesses – unreliable water and energy supply – need to be addressed. The lack of running water for tourism businesses is a crisis for some accommodation establishments, especially around Gizo. Accommodation upgrades will need to include water supply solutions, even if temporary remedies are implemented until the broader issue is addressed by agencies working on solving the problem at provincial level. Energy supply presents a second major challenge to accommodation providers.

Those using town or generator power face high costs and low reliability, while most businesses that have attempted to convert to solar do not have adequate power generation capacity to run a tourism operation of any scale. Upgrading accommodation to meet current and future demand will require an integrated solution; investing in just one area of need will be wasted if the whole offer is not improved. Difficulty in accessing suitable commercial finance is preventing owners from undertaking needed investments.

Strengthening accommodation supply will require adding new room stock. For greenfield investments, the environmental and social risks of developments near the gateway cities of Western Province should be mapped and carefully assessed, to support the subsequent preparation of a long list of sites that meet the identified needs of investors. Suitable land plots with clear title and acceptable lease terms can then be identified and discussed with potential investors. Adding new room stock can also include expanding supply at existing establishments, where these have potential to be market-ready in the short term; two opportunities requiring an estimated combined investment of SBD 6.5 million have been identified.

Accommodation investment is led by the private sector, yet there is a critical need for government and development partner support to overcome binding constraints to new investment. Examples of support needs include: enabling investor access to affordable commercial finance for upgrades, expansions and greenfield projects; support for investment generation (including identifying suitable sites for new developments, conducting commercial tourism awareness for landowners, and undertaking targeted investor outreach); providing technical advice to local investors (for example, on appropriate style, sourcing items, maintaining equipment); and related tourism skills training.



STRATEGY 2: IMPROVE ACCESS AND TRANSPORT CONNECTIVITY

SUB-STRATEGY 2.1

Develop airport infrastructure in Western Province tourism hubs and spokes, to enable suitable air services and offer facilities that meet market needs.

PRIORITY INVESTMENTS

- a) Construct a temporary international terminal at Munda Airport to meet immediate needs, and a permanent structure in the medium term.
- b) Upgrade Seghe Airport with an all-weather airstrip to improve accessibility and increase capacity.
- c) Upgrade Gizo Airport with night lights and better-quality terminal facilities.
- d) Open a new airport in South Marovo Lagoon.

SUB-STRATEGY 2.2

Improve the quality and capacity of air services to key hubs and spokes, to meet (and stimulate) market demand.

PRIORITY INVESTMENTS

- a) Upgrade Solomon Airlines' fleet to maintain a supply of safe, comfortable aircraft with adequate passenger capacity.
- b) Introduce additional domestic routes to Western Province in response to market demand.
- c) Introduce additional routes to Australia, and other international ports, in response to market demand.

SUB-STRATEGY 2.3

Improve ports and boat landings at priority locations in Western Province tourism hubs and spokes, to meet capacity needs and safety requirements.

PRIORITY INVESTMENTS

- a) Upgrade Gizo Airport jetty to provide safer access for more boats.
- b) Upgrade Gizo town harbor with improved visitor facilities.
- c) Upgrade port at Seghe airstrip to provide safer access for passenger transfers.
- d) Upgrade port/boat landing facilities in Munda to improve conditions for guest transfers.
- e) Upgrade boat landings at market-ready guesthouses to ensure safe landing (e.g. Tetapare).

SUB-STRATEGY 2.4

Develop sea transport services that provide regular, reliable, comfortable, safe and cost-effective transport connections for visitors, linking tourism hubs and spokes.

PRIORITY INVESTMENTS

- a) Increase the supply, and improve the reliability, comfort and safety of boats for local transfers and tours.
- b) Introduce a scheduled fast-boat transfer service connecting Munda and Gizo.
- c) Introduce a temporary boat transfer service or sea-plane service connecting Munda, Ramata, Seghe and Gatokae during closure of Seghe Airport.
- d) Introduce boat-based tourism products which make sites around Western Province more accessible to visitors and provide compelling visitor experiences.

SUB-STRATEGY 2.5

Develop ports and maritime infrastructure to allow for the growth of the cruise sector and private yachting.

PRIORITY INVESTMENTS

- a) Maintain and develop cruise infrastructure, products and services in response to emerging needs.
- b) Develop boat mooring facilities in the long term, pending market demand.

SUB-STRATEGY 2.6

Improve road transport access connecting key tourism hubs and spokes.

PRIORITY INVESTMENTS

- a) Seal 15 km road from Gizo, via Titiana, to Sagheraghi.
- b) Introduce mini-buses to Gizo and to Munda as demand for seats increases.

Strategy 2: Improve Access and Transport Connectivity

Improving access and transport connectivity to and within Western Province requires more, and sustained, public and private sector investment. Under seven sub-strategies, this study identifies 20 investment priorities that, if pursued, will see adequate transport options offered for the province to cater for continued (and desired) high rates of tourism growth. For international air arrivals alone, visitor numbers could reach 7,500 in 2019, 8,200 in 2020, 8,900 in 2021, and 9,600 in 2022. Based on recent trends, similar numbers could be expected from the cruise market. The identified investments would also result in increased visitor satisfaction with transport services. For many of the transport infrastructure and services priorities identified in this study, investment values have yet to be determined by relevant agencies.

The recent upgrading of Munda Airport to receive international flights is a catalyst for the Western Province tourism sector. The weekly flight from Brisbane to Munda commencing late 2018 is expected to attract approximately 2,000 additional international visitors in its first year of operation. This opportunity highlights the urgency in establishing international clearance and processing facilities in Munda Airport, with a view to a longer-term investment in a permanent international terminal. It is critical that plans to upgrade the airports at Western Province's other two hubs, Gizo (with night lights) and Seghe (with a new all-weather airstrip) be realized as soon as possible, along with terminal upgrades in both locations. The anticipated 2019 closure of Seghe Airport for runway reconstruction also calls for an alternative air access solution to sustain the tourism industry in southern Marovo Lagoon. In terms of meeting demand for flights, inbound capacity is sufficient for the short to medium term, but meeting demand and safety requirements for domestic services will require upgrading and expanding the Solomon Airlines fleet over the same period.

With 11 main islands and countless smaller islands, Western Province relies heavily on marine transport infrastructure and services. There is a critical need for investment in the public ports and private jetties used by tourists in order to cater for the growing volume of traffic and meet the standards expected of an international tourism destination. This includes increasing the capacity and improving the safety and comfort of boat embarkation/disembarkation at the main ports used for passenger transfers in Munda, Gizo (at both Gizo Airport and the town pier serving cruise passengers), and Seghe. It also includes the upgrading of island guesthouse boat landings that are not safe for guest transfers. Similarly, investing in transfer boats to increase the capacity and improve the safety of sea transfers around each of the hubs is an immediate priority. The need and opportunity for investing in inter-hub services should be monitored closely after the introduction of the international flight to Munda. Past attempts to run a scheduled service between Munda and Gizo were not financially viable but the opportunity is likely to arise as the destination develops. Finally, although the passage between Seghe and the southern area of the lagoon is considered by many operators to not be conducive to operating a regular sea transfer service (due to travel time, cost, and lack of demand), it may need to be delivered as a temporary solution during the closure of Seghe Airport. This, or alternative options (for example, a seaplane⁽²⁾), require consideration.

Public and private sector investment in cruise ship-related infrastructure in the past few years has positioned Western Province, particularly Gizo, well able to cater for large cruise ships and for smaller expeditionary vessels. Maintaining the marine and navigation systems required by cruise operators will be critical to maintaining this market, as well as ongoing development of shore products. New shore products will in turn necessitate increased bus availability and services on cruise days.

2 Solomon Airlines has done early scoping for seaplane services but there are marine-area ownership issues (similar to the land ownership issues) that have to date limited these opportunities.



STRATEGY 3: ENHANCE THE DESTINATION OFFER AND EXPERIENCE

SUB-STRATEGY 3.1

Improve waste management infrastructure and practices across Western Province

PRIORITY INVESTMENTS

- a) Develop sanitary land-fill sites in Munda and Gizo and undertake an associated community education program.
- b) Identify and introduce affordable and sustainable waste reduction and management solutions for accommodation providers in Western Province.

SUB-STRATEGY 3.2

Develop existing and new quality tour products that highlight Western Province's attributes and appeal to target markets

PRIORITY INVESTMENTS

- a) Introduce a Marovo Lagoon Safari linking guest-houses and sites around the lagoon.
- b) Introduce a Munda-based multi-night live-aboard cruise product visiting Western Province's existing and emerging spokes
- c) Develop short and multi-day, nature-based treks with accommodation linked to conservation areas, e.g. Tetepare and Kolombangara Islands.
- d) Strengthen existing tours and experience products to improve safety and comfort, increase and enhance options for tourists, and improve tourism products.
- e) Develop emerging/new tour products that appeal to target markets, e.g. war heritage trail, pontoon sunset cruise, dining experiences.

SUB-STRATEGY 3.3

Upgrade locations frequented by tourists with the necessary small-scale infrastructure, amenities and beautification

PRIORITY INVESTMENTS

- a) Develop Gizo town harbor and surrounds with street beautification, upgrading of toilets and rubbish bins and installation of signage.
- b) Develop the Munda streetscape between the airport and harbor with street beautification, installation of signage and rubbish bins.
- c) Invest in the sustainable development and presentation of high potential tourist attractions and sites.
- d) Upgrade and maintain visitor facilities at all airports/airstrips and ports to provide clean amenities, functioning toilets, sheltered waiting areas, rubbish bins, visitor information services, and refreshments.

SUB-STRATEGY 3.4

Introduce destination management services that develop Western Province tourism experiences

PRIORITY INVESTMENTS

- a) Coordinate the activities of the MCT, the Provincial Government and the Western Province Tourism Association to become a quasi-destination management organization (DMO), prior to formally establishing a DMO to drive product and destination development under an existing business or new (public/private) partnership.

Strategy 3: Enhance the Destination Offer and Experience

The quality of the Western Province visitor experience reflects how well it packages and delivers its destination 'offer' – i.e. the sum of tangible raw assets, infrastructure, products and services – as well as intangible experiences.

Western Province has the raw foundations for an outstanding visitor experience and it receives high satisfaction ratings, but several factors are undermining the experience, thereby limiting the sustainable development of the sector. This study identifies 12 specific investment priorities to overcome the prevailing issues and enhance the destination overall.

Western Province's most valuable tourism assets are its unspoiled nature and its marine and cultural experiences; these are being harmed by poor waste management infrastructure and practices.

Poor waste management presents a critical risk to tourism in Western Province, as the negative impact of current practices on the available visitor experience is significant. There is an urgent need for investment in waste management infrastructure, services and programs to change practices at government, community and business level.

Public and private sector investment is required at airports and ports for upgrades to visitor services. These include providing clean amenities, functioning toilets, sheltered waiting areas, rubbish bins, and visitor information services.

In addition, town beautification requires designing and maintaining streetscapes, and installing toilets, rubbish bins and directional signage in all hubs.

To improve the destination offer and visitor experience, investments are required in diversified tourism products that meet customer quality, safety, pricing and sustainability needs. Existing tourism products and experiences should be strengthened, while new products and experiences can be developed based on visitor feedback and preferences.

Making targeted investments in special interest products will enable the private sector to meet the demand for experiences such as diving (positioned to reach 3,900 travelers in 2019 and up to 5,000 in 2022); sight-seeing/cultural tours (positioned to reach 3,600 in 2019 and up to 4,600 in 2022); nature/landscape touring (positioned to reach 1,800 in 2019 and up to 2,400 in 2022); and hiking/trekking (positioned to reach 1,900 in 2019 and up to 2,400 in 2022). Project-specific feasibility studies are needed to determine investment needs, but this study provides some high-level investment scenarios. The most viable products will be those that respond to evolving customer needs. Visitor feedback can be systematically gathered from the new International Visitor's Survey and from sites such as Trip Advisor, as well as from additional focused research on visitor preferences.

Visitor spend on activities in Western Province could double from an average SBD 836 per person per day (USD 104.50) if there were more good quality products to purchase. Through developing new activities and experiences, from tours to attractions and restaurants, operators in Western Province can increase tourism yield. If current arrival growth trends are sustained, and enough relevant products are available for an increasing number of visitors, visitor expenditure on activities in Western Province could double from an estimated SBD 3.49 million in 2016 to SBD 7.70 million in 2020.

Bringing together and managing all aspects of developing Western Province as a competitive tourism destination requires a dedicated destination management organization (DMO). Currently, there are three entities acting in varying degrees in this function: MCT, the Provincial Government and the Western Province Tourism Association. All are currently or will soon be recipients of technical expertise. They will advise public and private sector stakeholders on developing accommodation, touring and site products and experiences in a manner that bridges market needs with the local supply and operating context. A longer-term option for developing or coordinating these entities to become an appropriate public-private Western Province DMO should be scoped.

THE TOURISM DEVELOPMENT OF WESTERN PROVINCE, SOLOMON ISLANDS

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PREPARE HOST COMMUNITIES

Requires investments in programs that raise community awareness about tourism and its benefits and impacts, set realistic expectations, build a skilled tourism workforce, and enable (suitable) tourism enterprise development.

Western Province will be positioned to build on its tourism foundations and attract more visitors and tourism revenues. Western Province will serve as a 'model' province, demonstrating best practice in destination development for Solomon Islands, and catalysing the expansion of opportunities in other provinces.

The economic contribution of tourism to Solomon Islands as a whole will increase, in line with the national vision for tourism to: "Enhance economic growth through sustainable tourism development for a better Solomon Islands". (*National Tourism Strategy, 2015*)

IFC's Tourism Investment Needs Assessment for Western Province focuses on strategies 1, 2 and 3.

Strategies 4 and 5 – which need to be progressed alongside strategies 1, 2 and 3 – are the focus of complementary development partner support.

RECOMMENDATIONS FOR STRENGTHENING GOVERNMENT CAPACITY

The barriers to developing tourism in Western Province can be categorized into three themes: a challenging and unproven operating environment; a lack of identified investible sites and; urgent, overarching infrastructure needs. Recognizing the magnitude of these barriers, this study focuses its recommendations on short- to medium-term interventions that can overcome financial, institutional and regulatory barriers to the priority tourism investments proposed in this study. In keeping with this focused approach, below are additional recommendations for strengthening the capacity of government that the study has generated.

- Strengthen coordination amongst agencies and public and private sector investment in the highest priority tourism infrastructure areas: water, power and waste management.
- Introduce linkages and accountabilities within agencies to support MCT. For example, improve cooperation with the Ministry of Lands in identifying registered land available for investment and improve cooperation with the ministries responsible for major infrastructure development (such as ports and airports) to ensure that tourism needs are considered⁽³⁾.
- Use targeted technical assistance to build tourism investment generation capacity within MCT and the Ministry of Commerce, Industry, Labour, and Immigration and identify a focal point for investor assistance.
- Develop clear tourism policies (e.g. investment policy, national aviation policy) and tools to signal the country's receptiveness to investment and allow investor outreach activities to commence.
- Identify and document models of engagement to assist investors and landowners to understand how to negotiate commercial agreements for a tourism investment.
- Develop and disseminate information to local tourism investors to answer common questions, e.g. how to style accommodation, how to source items, how to maintain equipment.
- Improve the collection, analysis and dissemination of Western Province tourism industry data – both supply and demand data for domestic and international visitors – to inform tourism investment decisions for local small and medium enterprises (which are unable to conduct extensive research independently) and for prospective foreign investors⁽⁴⁾.
- Develop and implement a transparent destination marketing plan for Western Province that applies the limited resources to the most cost-effective and targeted channels, facilitates public/private cooperative marketing, and truly reflects (evolving) access and product supply. Track results to secure more private and public funding for marketing in the future.
- Strengthen the tourism workforce in Western Province, increasing the number of skilled people and the quality of skills⁽⁵⁾.
- Explore options for improving access to longer-term commercial finance for tourism enterprises, including focusing on the constraints of both the demand side (e.g. strengthening MSME competencies in book-keeping and financial reporting) and the supply side (e.g. creating suitable commercial finance products).

3 The Tourism Working Group has started to achieve coordination amongst agencies, and an IFC Technical Advisor commenced work in September 2018 on developing an implementation plan based on the findings of this study.

4 Additional efforts will be required to understand domestic tourism trends and track supply data, to complement the international demand research supported by Strongim Bisnis and the Regional Tourism Data Initiative.

5 The scope of this recommendation is broad. The IFC Market Assessment of the Tourism Sector Skills and Training Supply in Solomon Islands (IFC, to be released in November 2018) addresses this topic further.

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About the Pacific Partnership

IFC's work in Solomon Islands is guided by the Pacific Partnership. Australia, New Zealand and IFC are working together through the Pacific Partnership to stimulate private sector investment and reduce poverty in the Pacific.

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