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2016 CNMI Economic Report

Regional Center for Public Policy

School of Business and Public Administration
Master of Public Administration

Maria Claret M. Ruane, Ph.D.
John J. Rivera, Ph.D.
Janelle Santos, MPA

with support from:

Trina Apatang, MPA
Reedwin Edwin, MPA
Sabu Kallingal, MPA
Oreng Ngemaes, MPA
Sanya Olkeriil, MPA
Robert Tarkong, MPA
Tyra Tevid, MPA
and
Maria "Dondi" Quintans, MPA

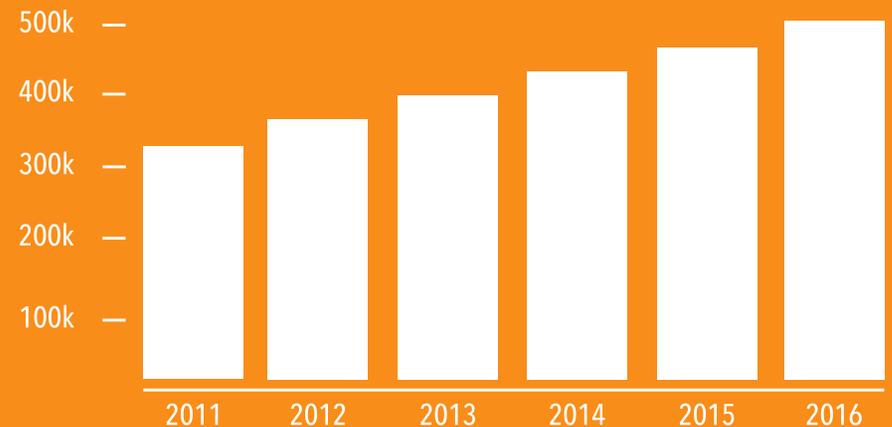
EXECUTIVE SUMMARY

The economy of the Commonwealth of the Northern Marianas Islands (CNMI) has once again sustained its growth momentum for the fourth-straight year. Key economic developments that affected the CNMI in 2016 included the following:

- Continuous growth in tourism
- Minimum wage increase on September 30, 2016
- The transition period to phase out the CW-1 visa category continues until December 31, 2019
- Job growth from the casino industry
- Signing of the Record of Decision on U.S. military plans for Tinian as a divert airfield and exercises
- Indications of no or low inflation threat (despite lack of data later than 1st Qtr. 2015)



Chart 1: CNMI Arrivals by Fiscal Year (FY)



Source: Marianas Visitors Authority

TOURISM Chart 1 shows a growth of 4.5% in total visitor arrivals between FY 2015 and FY 2016, with 501,179 visitors to CNMI during FY 2016. This has been the highest figure since FY 2011, fueling expectations that this growth trend will be sustained in the coming years. Data for FY 2016 shows a 14% growth in visitors from China to 206,538, which comprised 41% of all visitors during that period, followed by a 10% growth in visitors from Korea to 200,875 or 40% of all visitors during the same period.

The latest data is for November 2016 compared to November 2015, which show a 25% increase in visitors' arrivals to the CNMI, with the Korean tourist markets growing more than 40%. Surprisingly, visitor arrivals from Japan increased 6% compared to one year earlier, thanks to the Marianas Visitors Authority's new marketing tagline "Three-day Weekend in the Marianas" and a one-off charter flight by the Shizuoka Prefecture government. (Saipan Tribune, 2016, December 30)

Chart 2 presents data from January to August in 2016, compared to the same period in 2015, and shows the CNMI's tourism market shifting away from the Japan market, which declined by 29%, making up only 12% of total arrivals in January to August 2016 compared to 18% during the same period in the prior year. As noted earlier, the biggest tourism markets are from China and Korea, which made up 42% and 40%, respectively, of the total visitor arrivals during January to August 2016, and with each market posting 14% growth over the same period in 2015.

Increased availability in daily flights between Seoul and Saipan on-board several airlines such as Asiana Airlines, as well as, budget airlines Jeju Air, Jin Air, Eastar and T'way Air (which landed its first flight to Saipan on December 24, www.anna.aero, 2017 January 3) has been a major factor in increasing the number of Korean visitors in 2016. Visitor arrivals from China have been helped by the partnership between Century Tours and Tinian Dynasty Holidays, which promoted CNMI as a tourist destination in the Chinese market (2016 Key Market Update, Marianas Visitors Authority). The year 2017 is expecting to see new flights between Beijing and Saipan and new charter flights by Dynamic Airways planned for the Chinese New Year Holiday (Marianas Variety, 2016, October 21). Low-cost air carrier, Hong Kong Express, launched its first flight from Hong Kong to Saipan on January 18, 2017 (Saipan Tribune, 2017 January 19).

Hotel occupancy rates had been higher in 2016 compared to 2015. Based on a recent press release from the Hotel Association of Northern

Mariana Islands (HANMI), hotel occupancy rate averaged 87.63% in 2016 compared to 87.2% in 2015. From the same source, the average hotel room rate for 2016 was \$140.12, which was higher than the \$132.93 average for 2015.

On a monthly basis, the latest data was for December 2016, which show occupancy rate at 94.24% compared to 88.3% one year earlier; and average hotel room rate increasing to \$148.16 in December 2016 compared to \$142.89 in December 2015.

The latest press release from HANMI also reported an increase in the number of U.S.-eligible employees in 2016 compared to 2015. As of December 2016, 1,668 were employed by the 11 hotels members of HANMI, comprised of 44.4% NMI/U.S. employees, 6.4% Freely Associated States (FAS) citizens, and 49.2% foreign contract workers. The 2016 total is 2.14% higher than the 1,633 employees of HANMI-member hotels one year earlier, among which 41.9% were from NMI/U.S., 4.9% from FAS, and 53.2% foreign contract workers. (Saipan Tribune, 2017 January 12)

Chart 2

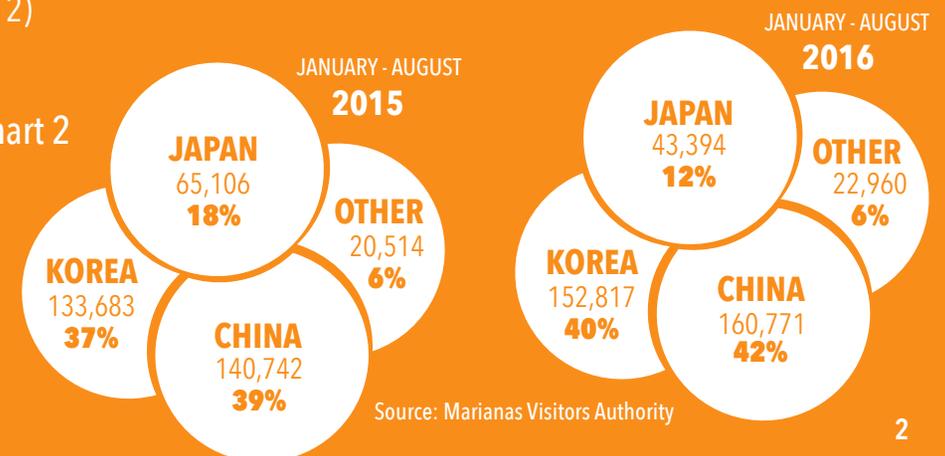
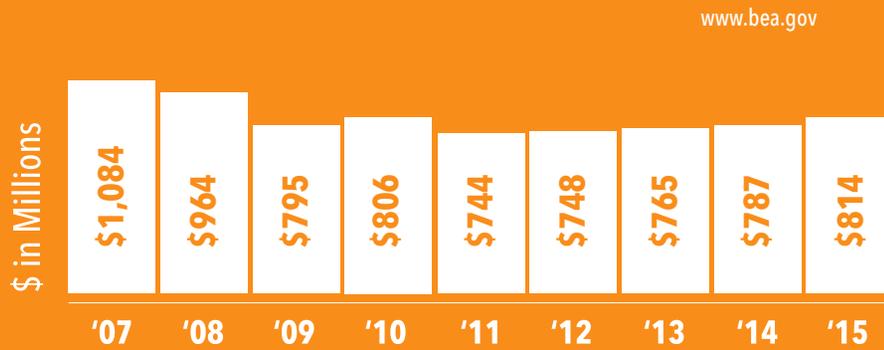


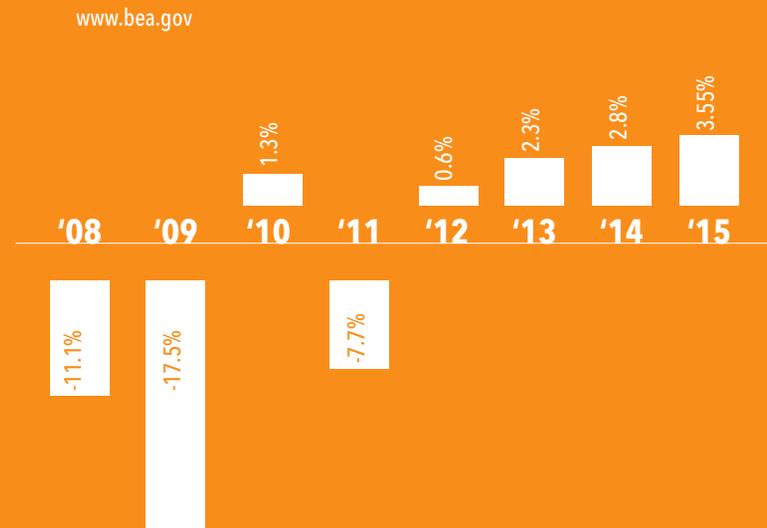
Chart 3: Real Gross Domestic Product Chained 2009 Dollars



INCOME AND SPENDING The U.S. Department of Commerce Bureau of Economic Analysis presented an estimated 3.5% increase in 2015 in Real Gross Domestic Product (GDP in 2009 prices) from 2014, measuring CNMI's economy at \$814 million in 2015. As shown in Chart 3 the CNMI's GDP has been growing steadily since 2011, with annual growth rates increasing from 0.6% in 2012 to 3.5% in 2015 (see Chart 4). This is a distinct departure from the negative growth rates in 2008, 2009 and 2011. With an estimated 52,300 population in the CNMI, this real GDP estimate in 2015 translates to per capita income of \$15,564, or 1.85% higher than the figure one year earlier.

Like many economies, consumers make up the largest source of local spending, contributing \$512 million worth of spending by local households, or 63% to CNMI's 2015 real GDP. In comparison, exports (where 97% represented purchases of services in the CNMI by foreign buyers, including tourists) made up 49% while the business sector spending accounted for 27% of spending in 2015.

Chart 4: Real Gross Domestic Product Annual Growth Rate



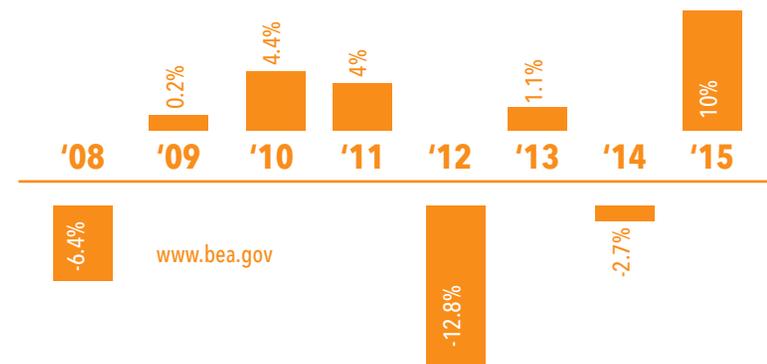
The government sector spending on both current and capital expenses, i.e., government consumption expenditures and gross investment, amounted to \$306 million in 2015 (38% of CNMI's Real GDP), comprised of \$26 million of U.S. federal government spending in the CNMI and \$283 million of CNMI government spending. It is important to note that the contribution of the U.S. federal government to the CNMI is much higher than what these figures suggest as this contribution represented funds that paid for the CNMI government spending and hence was instead included in the CNMI government spending figures. For example, the audited Financial Statement of the CNMI government in 2012 show that \$92.3 million (38.25%) of the \$241.3 million of total CNMI government revenues that year were contributions by the U.S. federal government. (CNMI Office of Public Auditor, 2014).

More to this point, data from the USASpending.gov shows that for FY 2016, the U.S. federal government awarded \$220.34 million to fund programs (including those administered by the CNMI government) and projects in the CNMI. The top five U.S. bureaus in terms of funds to support these programs and projects were the Food and Nutrition Services under USDA for \$43.35 million, the Federal Emergency Management Agency (FEMA) under the U.S. Department of Homeland Security for \$37.39 million, the Social Security Administration for \$30 million, the U.S. Department of Education for \$23.44 million and the Office of the Insular Affairs under the U.S. Department of the Interior for \$16.35 million. The U.S. federal funds that CNMI received in FY 2016 was 15.5% higher than it was in FY 2015 (or \$190.76 million). For FY 2017-to-date (from October 1, 2016 to January 11, 2017), the U.S. federal government awarded \$34.45 million to the CNMI.

Chart 5 presents the combined spending by the CNMI and U.S. federal governments and shows a 10% growth in 2015, which is in stark contrast to the figures in the earlier years. This specific year is not a typical year, as it was heavily influenced by spending related to the recovery of infrastructure and government operations due to Typhoon Soudelor in early August 2015. This typhoon caused serious damage to the island leaving much of the utility infrastructure destroyed. On August 6, 2015, President Barack Obama signed a major disaster declaration for the CNMI (Pacific News Center, 2015, August 6). On December 21, 2016 the FEMA CNMI Federal Disaster Declaration Fact Sheet (Declaration Number FEMA-4235-DR) noted that President

Obama declared that the federal government would cover 100% of the hazard mitigation grant program in relation to Typhoon Soudelor. Usually, the hazard mitigation grant funds are on a 75 federal / 25 local cost-share basis. To-date, FEMA provided \$49.7 million in grants to individuals and the CNMI to recover from Soudelor. Small Business Administration disaster loans amounted to \$24.3 million.

Chart 5: Gross Consumption Expenditures and Gross Investment, Annual Growth Rate



The Commonwealth Ports Authority (CPA) will start on several projects in 2017 for the Saipan International Airport including:

- Updating the runway light system and installing runway end identifier lights in accordance with Federal Aviation Administration (FAA) requirements.
- Expanding the public parking area, including the relocation of car rental parking slots.

- Replacing two computer tomography X-ray machines, used to detect explosives, at the baggage conveyor system basement, with funding from the Transportation Security Administration (TSA).
- Renovating car rental building, including roof replacement.
- Rehabilitating two of the taxiways on the airfield in accordance with FAA requirements, with funding from FAA.
- Replacing passenger loading bridges 2, 3 and 6.
- Replacing eight air conditioners at the Saipan International Departure Terminal, the Customs and Border Patrol processing area and the Saipan Commuter Terminal.

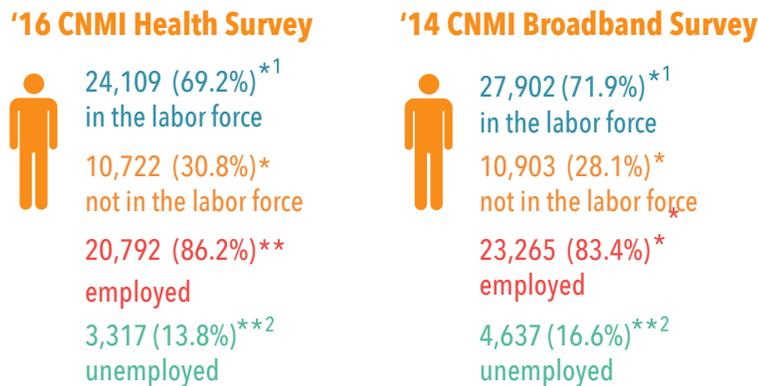
Source: Marianas Business Journal, 2017, February 6a

EMPLOYMENT Chart 6 shows CNMI’s labor force participation rate (LFPR) in 2016 was 69.2% of the working-aged, non-institutionalized population in the CNMI (or 24,109 individuals) who were in the labor force, leaving 30.8% (or 10,700 individuals) who chose not to enter the labor force. Corresponding figures in numbers and percent are higher for 2014, with the LFPR at 71.9%.

Data for 2016 presented in Chart 7 shows some variations in the labor force participation rate among the three main islands (Saipan at 68.9%, Tinian closer to the CNMI average at 69.1% and Rota at 76.8%), with differences in labor force participation rates between men and women in these islands.

Chart 6 also shows that, among the 24,109 individuals in the CNMI labor force in 2016, 20,792 (or 86.2%) were employed 3,317 (or 13.8%) were unemployed, with some variations among the major islands: 13.7% of Saipan’s population was unemployed, 15.6% in Tinian, and 12% in Rota. The unemployment rate for CNMI was at a higher rate of 16.6% in 2014. Chart 8 presents the latest (2016) unemployment rates among men and women in the three main island, with unemployment worst among women in Tinian at 21.9% while among men in Saipan at 11.6%.

Chart 6: Labor Force Participation
Working-aged and non-institutionalized



* as percent of working age, non-institutionalized population

** as percent of the labor force

¹ Labor Force Participation (LFPR)

² Unemployed Rate

Chart 7: Labor Force Participation by Island & Sex

CNMI AVERAGE: 69.2%

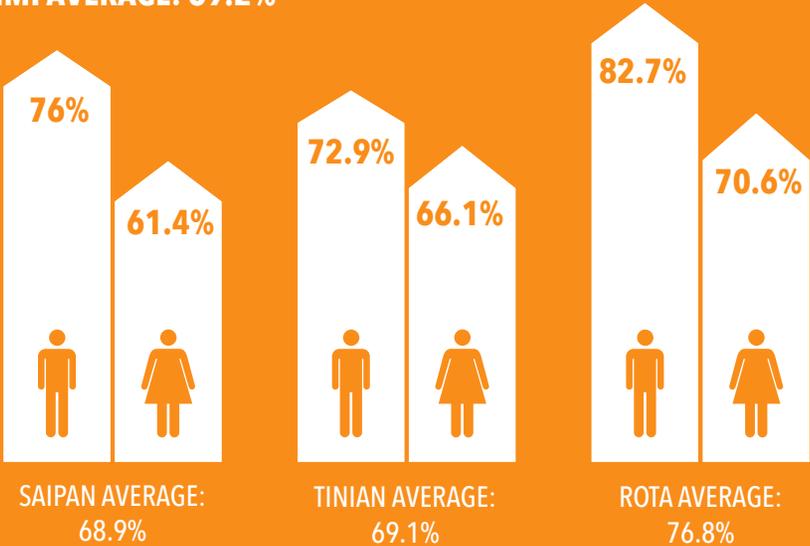
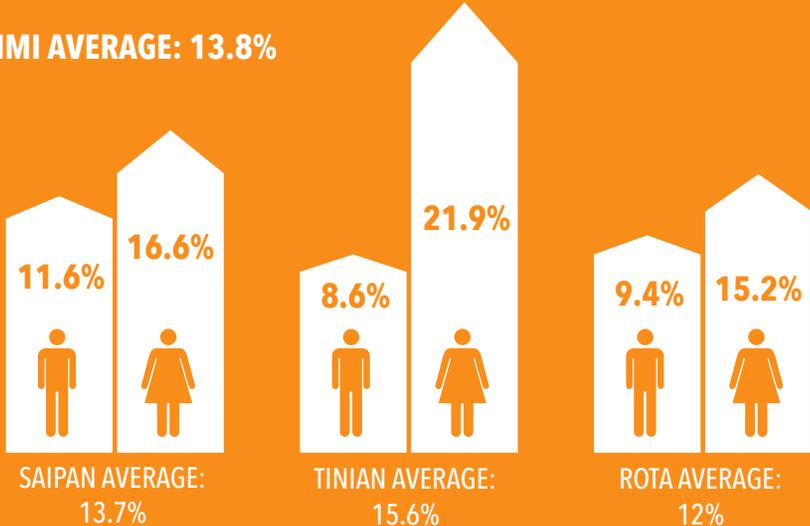


Chart 8: Unemployment Rate by Island & Sex

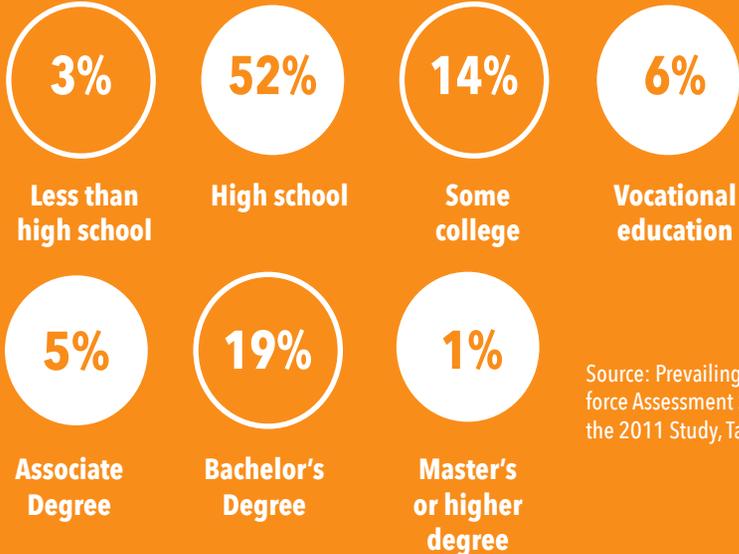
CNMI AVERAGE: 13.8%



Source: 2016 CNMI Health Survey

Among those employed in 2016, 96.56% were employed elsewhere while 3.44% were self-employed. In addition, data from the 2014 CNMI Prevailing Wage and Workforce Assessment Study (PWWAS) show that 25,658 were employed, with 84% of them in the private sector and 16% with the public sector. Chart 9 presents data from the same survey regarding the educational attainment of CNMI employees in 2014, which shows that the majority (52%) of those employed held a high school diploma while 19% had bachelor degrees.

Chart 9: Educational Attainment Based on a 25,658 Population



Source: Prevailing Wage & Workforce Assessment Study Update to the 2011 Study, Table 2-3

This year saw positive developments in job growth with continuing favorable prospects in the near future, thanks to the millions of dollars invested in casino and hotel resorts, with more plans for construction anticipated in the next years. The Saipan-based casino hotel, Best Sunshine International, which operates under Imperial Pacific International LLC anticipated a need of about 1,500 to 2,000 workers by 2016 to facilitate the construction of phase two of its project, which has been stated to be “at least 10 times bigger” than phase one. It will feature thousands of rooms in about 20 hotels, multiple casinos, the world’s largest water park, and a kilometer-long shopping mall (Saipan Tribune, 2016, February 5). Best Sunshine International is currently working to meet the 65% hiring requirement for local/U.S. workers, but acknowledges the difficulty of doing so.

Imperial Pacific’s former CEO and current Board chair, Mark Brown, was confident that this requirement would be met once the six-star casino hotel called Imperial Pacific Resort (formerly known as the Grand Mariana Casino & Hotel Resort) opens in March 2017. As of June 2016, the company reported a total of 1,307 employees. Unfortunately, this March 2017 opening has now been delayed, a development that was noted by two credit-rating agencies, Fitch’s and Moody’s, and contributed to the downgrade of Imperial Pacific’s bond rating in January 2017. (Marianas Business Journal, 2017, February 6b) Other

sources of job growth are the Kensington Hotel, which opened on July 25, had plans to hire 331 employees, and the Plumeria Golf & Casino Resort, in Tinian, is expected to require 5,000 employees over the next 12 years of its development. (Marianas Business Journal, 2016, November 14; Marianas Variety, 2017 January 13).

On the other hand, actual and planned investments by existing hotels have been dampened, as several of them near the end of their 40-year lease agreement with the Department of Public Land, and by the uncertainty of the renegotiation process (Marianas Business Journal, 2017, January 9).



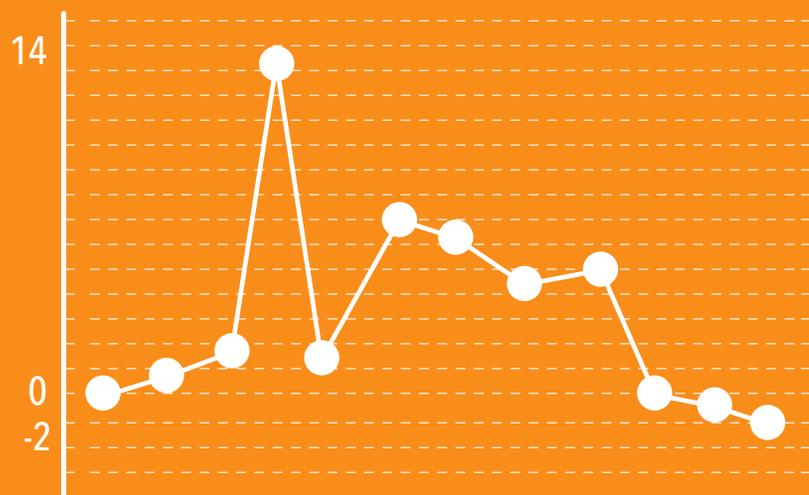
INFLATION Chart 10 shows the inflation rate in Saipan having a decreasing trend since its peak of 12.5% in the First Quarter of 2007, and posting negative figures in 2013-2015, with the latest figure of -2.1% in the First Quarter of 2015 compared to the same period in 2014. Despite the absence of comparable inflation data in the past two years, most are not worried about it and expect to be low or absent. Contributing to this observation is the “almost 54-percent decline in power prices compared to the fuel rate in mid-2014.” (Saipan Tribune, 2016, December 5). Also pulling prices downward for the entire CNMI are lower prices of commodities on Rota from 30-35% higher than Saipan’s to 25% higher, resulting from the operation of cargo ship M/V Luta. (Saipan Tribune, 2016, October 12).

FEDERALIZATION This year the CNMI continues its Federalization process. This process began in 2007 with the intent to move toward a “tighter relationship with the United States” as noted in the 2014 Guam-CNMI Economic Forecast.

In 2007, the minimum wage, at an hourly rate of \$3.05, started a series of increases. The original intent was to annually raise the minimum wage by \$0.50 until the CNMI rate reached the prevailing U.S. Federal minimum wage rate. In September of 2010 the rate was \$5.05. In 2011, the CNMI and American Samoa was allowed to skip the \$0.50 increase. In 2012, the minimum wage rose to \$5.55. The next increase to \$6.05 happened in September of 2014. On September 30, 2016, the seventh minimum wage increase since 2007 was implemented. This increased the minimum wage to the current \$6.55 rate. Three more wage increases are anticipated each year till 2019.

Concerns about potential adverse effects of the minimum wage increases on local employers and employees have been previously raised (First Hawaiian Bank, 2013). The worry included loss of jobs and/or reduction in work hours. As the minimum wages continue to increase, this will cause an effect on the percentage of hourly workers in the hotel industry (2014, U.S. General Accountability Office). CNMI Governor Ralph Torres was supportive of a minimum wage increase

Chart 10: Annual Inflation Rate



Annual Inflation Rate - SAIPAN
 Quarter_1 2004 to Quarter_1 2015

Source: Department of Commerce (2015, June)

even ahead of the September 30 schedule (The Guam Post, 2016 July 11). In response to the 2016 minimum wage increase of \$6.55 U.S. Congressman Gregorio Kilili Camacho Sablan and CNMI Congress remained optimistic, stating that "(t)he more money that workers have to spend, the better off our entire economy will be". The Government Accountability Office issued a report stating, "...raising the minimum wage has allowed workers' incomes to stay ahead of price inflation over time and that of job loses..." The Government Accountability Office was ordered by Congress to monitor the impact of the wage increases. Another report is expected in April of 2017 (Saipan Tribune, 2016, September 30).

Second, the December 31, 2019 deadline for the complete phase out of the CW-1 visa category is in place. The December 31, 2019 date was an extension of the original December 31, 2014 deadline, and no further extension will be granted. The extension allowed for the renewal of visas for foreign workers currently employed or those hired for the first time. The federal caps for this category were 12, 999 in fiscal year 2016 and 12, 998 for fiscal year 2017 (www.uscis.gov).

Currently, House Resolution 6401 (also HR H339), which aims to amend Public Law 94-241 and is also known as the Northern Mariana Islands Economic Expansion Act was introduced, passed the House in December and is on hold with the U.S. Senate and awaits further

action when the 115th U.S. Congress convenes on January 3, 2017 (Saipan Tribune, 2017 January 10). This resolution seeks to increase the number of CW permits from 12,998 to 15,000 for fiscal year 2017. The proposed 15,000 increase will bring the cap to the FY 2013 level- and represents an effort to provide short-term relief for local businesses that continue to employ foreign workers in the CNMI. These businesses currently have to compete with businesses in the U.S. to apply for H1-B and H2-B visas, which have annual quotas set by the US Congress at 65,000 and 66,000, respectively.

The first 902 Consultations Report was transmitted to Congressional Leaders on January 17, 2017 by special representatives U.S. Department of Interior Assistant Secretary of the Insular Areas, Esther Kia'aina, and CNMI Governor Ralph Torres. Recommendations in this report include "extending the CW Program beyond 2019" and "raising the CW cap to 18,000" as opposed to the 15,000 mentioned above. (Marianas Business Journal, 2017, February 6c).

U.S. MILITARY PLANS The United States military had made proposals to locate a live-fire training range in Tinian and/or Pagan. Opposition surfaces for the proposal as the concern of the use of mortars and grenades would cause an impact to the community. After discussions between the U.S. and the CNMI governments, the

issued the Record of Decision (ROD) for the Final Environmental Impact Statement (EIS) regarding divert activities and exercises initiative in the CNMI on December 7, 2016, which will entail the construction of "facilities and infrastructure to support cargo, tanker, and similar aircraft and associated support personnel for divert operations, periodic exercises, and humanitarian assistance and disaster relief".

The ROD stated that the U.S. Air Force plans to construct the following on the north side of the Tinian International Airport, which would be in addition to the \$2.3 million of improvements underway and which began on June 22, 2015. (Marianas Business Journal, 2016, November 28)

- A parking apron with ballfield-type lighting that could accommodate up to 12 KC-135s
- A cargo pad
- A maintenance facility
- An access road to provide an entrance to the proposed infrastructure and specifically the fuel tanks, parking apron, and cargo pad
- A fire suppression system that would consist of fire water pumps, tanks, and well(s)
- Taxiways to provide access between the runway, parking apron, and cargo pad
- Realignment of 8th Avenue to accommodate the taxiway

- 220,000 bbls of fuel storage. The fuel storage tanks system will include fuel pumps, valves, filtration systems, an emergency generator, and concrete work. Additional fuels-related infrastructure to facilitate receipt and offload of fuel into the fuel tanks will include a fuel transfer pump house and pumps; truck offload fill stands; a refueler parking area; and associated piping, filtration, and valves. A Hydrant Refueling System will be installed as a part of the proposed fuel tanks

(U.S. Department of the Air Force, 2016 December 7; Pacific Daily News, 2016 December 13)

The same document revealed the selection of Tinian International Airport among alternatives, which included the Guam International Airport, as well as, those in Saipan and Rota as a divert airfield, where military flights can be diverted "in the event that access to Andersen Air Force Base (AFB) or other western Pacific locations is limited or denied".

The selection of Tinian International Airport as a divert airfield was welcomed by CNMI Governor Torres, who saw it as an opportunity to support the Tinian economy, as well as, the airport facility, while "preserving the economic importance of the Saipan airport to the overall CNMI economy". (Marianas Variety, 2016, December 9)

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Dean
UOG School of Business and Public Administration

The Honorable Madeleine Z. Bordallo

Member of Congress

The Honorable Gregorio Kili Camacho Sablan

Member of Congress

Vinney Atalig-Hocog

Compliance Officer
Imperial Pacific International Holdings Ltd.

Oscar Camacho

Loan Manager
Commonwealth Development Authority

Natasha Cruz, PMBA

Program Coordinator III
UOG School of Business and Public Administration

Jesse J. Quenga, MPA

Joshua Diaz

BS in Criminal Justice, Fall 2017
UOG School of Business and Public Administration

Mark Rabauliman

Secretary of Commerce
Department of Commerce, CNMI

Janiece Sablan

Executive Director
UOG Endowment Foundation

Pedro Palomo Ada Jr. & Fe Perez Ada Seed Fund

Tommy A. Torres

ITU Supervisor
Department of Commerce, CNMI

Faculty of the UOG Public Administration and Legal Studies (PALS) Division.

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The 2016 CNMI Economic Report is the first official publication from the newly formed University of Guam's Regional Center for Public Policy. Dr. Maria Claret Ruane, Dr. John J.

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Approved in November of 2016, the Regional Center for Public Policy (RCPP) aims to be the regional nexus in Micronesia where leaders converge to address, collaborate and solve crucial issues in relation governance, leadership and public policy.

Purpose: The Regional Center for Public Policy (RCPP) will create a globally minded and locally relevant strategic conduit whose purpose is to effectuate policy review, innovation, and change.

Vision Statement: The Center aims to become the premier policy research nexus in the region.

Mission Statement: It is our mission to innovate and improve governance, leadership and public policy for the people and institutions of Guam, the Asia-Pacific, and the world. Through education, research, professional development and public service we will be the premier catalyst for excellence and a repository of indigenously relevant knowledge.



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