

TANZANIA COASTAL MANAGEMENT PARTNERSHIP

TANZANIA Coastal Tourism Situation Analysis

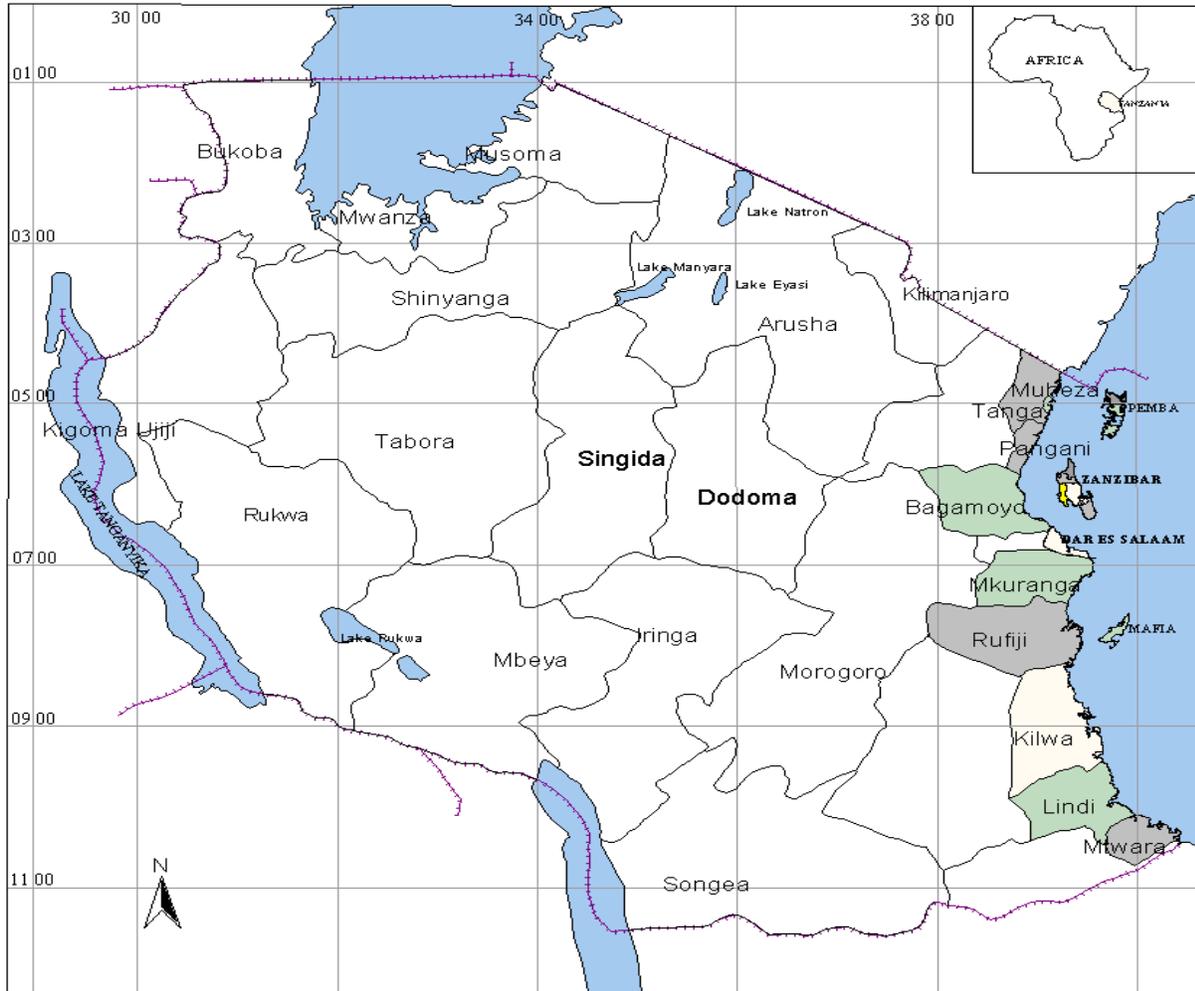
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PREFACE

This report provides a broad assessment of the current status of coastal tourism in Tanzania and identifies the priority actions that need to be taken in order to develop a sustainable coastal tourism industry. Tourism is one of Tanzania's leading economic sectors, providing employment, foreign exchange and international recognition. For many years, tourism has relied solely on the superb wildlife found in the country. It is only recently that the need to diversify away from wildlife tourism and focus on coastal and cultural tourism has been recognized. Blessed with world-class coastal natural and cultural attractions, the potential for coastal tourism development is unlimited. It is important, however, that this development is undertaken in an environmentally, socially and culturally sensitive manner.

The natural and cultural resources on which coastal tourism is based need to be conserved if the industry is to be sustainable. Since many different economic activities occur along the coast, it is imperative that all relevant resource users work together in a coordinated manner. This inter-sectoral coordination and management of the coastal zone is the primary goal of an Integrated Coastal Management (ICM) strategy. ICM strives to preserve, protect and develop coastal resources to ensure food security and support economic growth. Using an ICM approach to address the opportunities and constraints surrounding coastal tourism development ensures that the perspectives of all stakeholders along the coast are valued and incorporated into decision-making processes.

This document is relevant to a wide range of stakeholders with an interest in tourism and coastal management issues, including government decision-makers, private investors, local authorities and the donor community. While this document does not intend to serve as the definitive report on coastal tourism in Tanzania, it is hoped that the issues identified and actions recommended here will instigate an open and constructive dialogue that will lead to the improvement of coastal resources, both human and natural.

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ACRONYMS

CRC	Coastal Resources Center
CTWG	Coastal Tourism Working Group
DED	District Executive Director
DMT	District Management Team
DSM	Dar es Salaam
EIA	Environmental Impact Assessment
EU	European Union
FBD	Forestry and Beekeeping Division
GEF	Global Environment Facility
GOT	Government of Tanzania
HKAT	Hotel Keepers Association of Tanzania
ICM	Integrated Coastal Management
JICA	Japanese International Cooperation Agency
KICAMP	Kinondoni Coastal Area Management Programme
MIMP	Mafia Island Marine Park
MMP	Mangrove Management Project
MNRT	Ministry of Natural Resources and Tourism
MOW	Ministry of Works
MPRU	Marine Parks and Reserves Unit
NEMC	National Environment Management Council
NLUPC	National Land Use Planning Commission
NORAD	Norwegian Agency for Development Cooperation
NWA	Northern Wildlife Area
SNV	Netherlands Development Organization
TAHI	Tanzania Hotel Investment Co, Ltd.
TANAPA	Tanzanian National Parks Authority
TATO	Tanzanian Association of Tour Operators
TCMP	Tanzania Coastal Management Partnership
TCT	Tourism Confederation of Tanzania
TIC	Tanzania Investment Center
TTB	Tanzania Tourist Board
UNESCO	United Nations Education, Science and Culture Organization
URI	University of Rhode Island
USAID	United States Agency for International Development
VPO	Vice President's Office
WCST	Wildlife Conservation Society of Tanzania
WTO	World Tourism Organization
WWF	World Wide Fund for Nature

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EXECUTIVE SUMMARY

Tourism is currently one of the leading economic sectors in Tanzania and has unlimited potential to contribute even more to the development of the country. Blessed with unique natural and cultural attractions, Tanzania is well placed to become a leader of tourism in the region. To date, the tourism industry has been relying primarily on wildlife resources as the major attraction, with up to 90 percent of all tourists taking part in wildlife safaris or hunting. Recently, the need to diversify away from wildlife tourism (as well as complement it) and develop other attractions has been recognized by both the public and private sectors. The coastal zone is one of the areas that have vast, untapped potential to attract tourism investment. The opportunities and constraints to sustainable coastal tourism development are the focus of this report.

The coast of Tanzania is home to many excellent natural and cultural resources that have the potential to serve as world-class tourist attractions. In general, however, this potential has gone unrealized. The accommodation sector, outside of the urban area of Dar es Salaam, is relatively undeveloped, though a number of small hotels can be found along the coast. One of biggest constraints to the development of coastal tourism is the limited accessibility to many prime tourist areas. Investment is needed in attractions development and management, hotels and infrastructure in order for areas of the coast to become tourism destinations. Successful coastal tourism destinations are the areas that have the potential to develop a diverse array of cultural and natural attractions, quality accommodations at fair prices and reliable access to and from other tourist hubs in the country. The areas identified in this report as having the highest potential to develop into successful tourist destinations include the Pangani-Saadani-Bagamoyo area, the Kilwa area and Mafia Island.

In order for these areas to become world-class tourist destinations, strong partnerships need to be developed amongst government sectors, and between the national and local authorities, the private sector and local communities. The inter-sectoral coordination and management of coastal activities, especially coastal tourism, is crucial to the sustainable development of coastal peoples and management of coastal resources. Mechanisms to ensure that all relevant stakeholders' voices are recognized need to be developed and implemented so that actions are not taken in an isolated, sectoral context.

A number of specific issues and constraints are identified throughout the report. The priority recommendations are highlighted below.

PRIORITY RECOMMENDATIONS

1. Develop streamlined investment procedures for coastal hotel development.

Developing consistent and streamlined investment procedures for coastal hotel development will help guide investors, national and local governments and other stakeholders through the investment approval process. Such an activity would ensure inter-sectoral collaboration amongst all relevant sectors and facilitate investment into coastal tourism activities. All stakeholders would benefit from this process.

Investors would benefit from a less bureaucratic and more consistent process, which would facilitate new investment in the industry. Relevant national sectoral agencies would benefit from better clarification of their roles and responsibilities in the proposal review process. Local authorities would benefit from learning their rights and responsibilities regarding coastal tourism development under the Local Sector Reform Programme. Local communities would benefit from being included in the decision-making process from the initial stages of the investment process.

The streamlined procedures could take the form of Investment Guidelines for Coastal Hotel Development. These Guidelines would provide detailed information on the necessary steps and corresponding review criteria for each stage of the investment process. Key issues that would be highlighted in the Guidelines would be the acquisition of land, the roles of local authorities and communities in the review process and the importance of conducting Environmental Impact Assessments that take environmental, social and cultural factors into consideration.

By ensuring that the review process of coastal hotel investment proposals is well coordinated and involves all relevant stakeholders, a number of potential problems can be mitigated before they start having negative impacts on coastal resources, both human and natural. For example, strong relationships and economic linkages between hotels and local communities can be initiated during the initial phases of the review process. These relationships can help to minimize hotel operating costs through the provision of local products and prevent potential security problems for the hotel, as the local community will be deriving direct and tangible benefits and will work to ensure that the hotel, being their source of income, is protected.

Developing streamlined Investment Guidelines for Coastal Hotel Development will not only facilitate investment in the industry, but also ensure that any potential problems are solved before they cause negative impacts to the people and natural resources of the coast.

2. Identify priority areas for coastal tourism development and develop comprehensive tourism management plans for those areas.

While all areas of the coast have the potential to become excellent tourist destinations, given limited resources, it is necessary to identify the areas with the best potential and focus efforts and resources on those areas. Once these priority areas are identified, plans need to be developed to facilitate tourism investment and manage the entire tourist destination. The destination would be the focus of such a plan, as individual attractions or accommodations are usually insufficient to attract enough tourists to be successful. Further, as many attractions are under the supervision of different government sectors, a comprehensive plan that includes all natural and cultural attractions and accommodations needs to be developed.

To implement this recommendation, a comprehensive Tourism Management Plan for these priority areas could be developed. All relevant national and local stakeholders would be involved in the formulation of the plan, which would define the shared vision for that particular destination. Based on this shared vision, the Plan would provide detailed steps that need to be taken to ensure the sustainable development of that particular destination. The three key components of tourism (attractions, accommodations, and access) would receive special attention in the plan, as would the issue of cost- and benefit-sharing amongst all stakeholders. A

destination marketing plan would also feature in the overall Tourism Management Plan. To facilitate this participatory process, it is recommended that District Tourism Officers be assigned in these priority areas.

The completed Tourism Management Plan for specific destinations would then serve as a blueprint for tourism development in that area. It would guide investors, national and local authorities and local communities as to what specific needs must be met in the short- and long-term.

3. Improve Accessibility to Coastal Tourism Areas

That accessibility to the coast is quite limited is well known. It is an issue that has been raised numerous times in different fora. Accessibility is particularly important to the development of coastal tourism, because without safe and efficient modes of transport to coastal tourist areas from other tourist hubs, coastal tourism will remain quite limited. While accessibility has improved over the past few years, much needs to be done to improve all modes of transport, such as roads, ferries, sea travel and air services.

It is recommended that, in the long-term, the current and future plans to improve road infrastructure to the coastal areas be continued, particularly the coastal roads from Dar es Salaam-Bagamoyo-Saadani-Pangani-Tanga and from Dar es Salaam-Kilwa-Lindi. It is also recommended that consideration be given to the possibility of constructing bridges over the Pangani and Wami Rivers.

In the short-term, it is recommended that relevant public and private sector agencies focus on developing and/or improving alternative transport services. Priority should be given to the airport at Mafia and the ferries at Pangani, Wami and Rufiji Rivers. In addition, the flight schedules of all air service providers need to be rationalized so as to minimize the need for unwanted stopovers. Lastly, the feasibility of developing sea ferry services along the coast should be determined, especially from Dar es Salaam to Tanga (making stops at Bagamoyo, Saadani and Pangani) and between Dar es Salaam, Mafia and Kilwa. A ferry service on these routes would greatly improve the accessibility to coastal tourism areas in the short-and long-term.

4. Promote local investment in coastal tourism areas.

One of the ways to ensure that coastal tourism benefits the local communities along the coast, as well as other local investors, is to identify and promote specific enterprises that local people can undertake. Once these enterprises are identified, it is necessary to develop business training programs for local people as well as ensure that local investors have information about potential sources of capital. The types of enterprises that local communities could engage in include handicraft production, foodstuffs and other products using local materials to sell to hotels, and supporting services, such as tour guides, local transport, and restaurants. The small and medium enterprise needs of coastal tourism destinations could be determined during the development of the Tourism Management Plan, which could then outline the steps needed to promote local investment. The promotion of local investment would also be highlighted in the Investment Guidelines for Coastal Hotel Development.

5. Conduct economic analyses on the costs and benefits of different types of coastal accommodation and develop right mix of investment incentives.

The National Tourism Policy clearly states that Tanzania aims to attract and promote up-market tourism, avoiding mass tourism development. However, specific guidance in terms of size and type of hotel accommodation are not provided. Other issues to be considered in determining what types and sizes of accommodation should be promoted include the environmental impact of construction and operation, the degree to which local people are benefiting from different types of hotels and the need to ensure adequate airlift to the country as a whole, meaning the need to attract and provide services for enough tourists to maintain international airlift services. An assessment of these and other pertinent issues needs to be made in order to identify exactly which types of tourist accommodation should be promoted.

It is therefore recommended that an economic analysis of the costs and benefits of the different types of coastal hotels be conducted. The economic, environmental, social and cultural impacts would be assessed for a variety of hotels and then compared. The results of such an analysis would guide policy-makers and investment promotion agencies in terms of what incentives need to be offered to attract the appropriate types of investment. This type of analysis could also assist decision-makers in prioritizing infrastructure and utility investments.

INTRODUCTION

Purpose

This document assesses the current status of coastal tourism in Tanzania and identifies the opportunities for, and constraints to, its sustainable development. The report raises a number of issues that require attention, not only to facilitate development but also to ensure that coastal resources are utilized in a sustainable manner. It comes at a time when tourism is being considered as one of the lead economic sectors that will fuel the development of the country. At the same time, the pressures on fragile coastal resources are mounting due to the increased human activity seen all along the coast. The report aims to draw attention to the management and governance issues that will determine the success of the industry and, ultimately, the future well being of coastal communities and resources.

Methodology

The Coastal Tourism Working Group (CTWG), convened by the Tourism Division and the National Environment Management Council through TCMP, is comprised of members of government agencies and the private sector. All members have extensive experience in fields related to coastal tourism, including, land use planning, tourism development and marketing, infrastructure development, antiquities, security, and environmental management. The group has consulted experts from other fields, both nationally and internationally, as necessary.

The CTWG researched and reviewed available primary and secondary sources of information. Using issues and questions identified during this initial literature review, small teams from the group made field visits to the majority of coastal districts to learn the perspectives of local authorities, hotel owners and tour operators, and coastal communities. Members of the group also consulted representatives of public and private sectors and other TCMP Working Groups. The CTWG wrote this report in a collaborative manner, with each member contributing specific sections, and all members reviewing and revising the entire document. Drafts of the report were reviewed by national and foreign experts.

The limitations of data should be acknowledged. While the document does not pretend to be a comprehensive treatment of the subject, it provides a broad assessment of the current status of coastal tourism in Tanzania and identifies issues and needs that will be a starting point for the sustainable development of the coast.

Report Structure

The document is divided into three chapters. The first chapter provides a general overview of coastal tourism - its components, characteristics and potential impacts on the environment, economy and society. The concepts presented in the first chapter serve as the framework for analyzing the current status of coastal tourism, presented in Chapter Two. This chapter focuses on the three key components of coastal tourism and identifies specific issues and constraints that need to be addressed. Chapter Two ends with the identification of the areas of the coast that have the best potential for becoming successful tourism destinations. The third and final chapter provides an overview of the institutional and policy framework that currently governs the coastal tourism sector. The report then ends with a brief description of the initiatives currently in operation that relate to coastal tourism development in the country.

CHAPTER ONE

OVERVIEW OF COASTAL TOURISM

This section presents an overview of the tourism industry, focusing on the characteristics and potential impacts of tourism on the coastal environment, economy, society and culture.

Defining Tourism

Tourism is the sum of the phenomena and relationships arising from the travel and stay of non-residents¹ in so far as they do not lead to permanent residence and are not connected to any earning activity. The five main characteristics of tourism are as follows:

1. Tourism arises from the movement of people to, and their stay in, various destinations;
2. The two elements of tourism include (a) the journey to the destination; and (b) the stay at the destination, including all activities at the destination;
3. The journey and stay take place outside the normal place of residence and work;
4. The movement to destinations is of a temporary, short-term character, with the intention to return within a few days, weeks or months;
5. Destinations are visited for purposes other than taking up permanent residence or employment remunerated from that destination.

Incorporating economic, social and environmental dimensions provides the following definition of sustainable tourism:

Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems (World Tourism Organization).

Tourism Trends

Global Tourism Trends

Every year, more and more people are taking part in tourism activities and for the majority of countries, tourism has developed into one of the most dynamic and fastest growing sectors of their economy. In 2000, world tourism grew by 7.4 percent, its highest growth rate since 1992 and almost double the increase over 1999.² Receipts from international tourism reached US\$476 billion in 2000, an increase of 4.5 percent over the previous year. As Table 1 illustrates, all regions experienced growth, with East Asia and the Pacific region continuing to be the fastest developing area with a growth rate of 14.5 percent.

¹ Non-residents are people whose homes are not within the direct vicinity of the destination. For example, international travellers, or even Tanzanian residents living in Dar es Salaam, are considered tourists when travelling to, and staying over in, for example, Bagamoyo.

² Reasons for this large growth rate in 2000 include the summer Olympics, Vatican Jubilee, and other events marking the beginning of the third Millennium.

Table 1: International Tourist Arrivals

	Tourist Arrivals (millions)		Percentage Change	
	1999	2000	1999/1998	2000/1999
WORLD	649.9	698.3	3.8	7.4
Africa	26.5	26.9	6.1	1.5
Americas	130.2	122.3	2.3	6.5
East Asia and the Pacific	97.6	111.7	10.8	14.5
Europe	379.8	403.3	1.7	6.2
Middle East	18.1	20.0	18.1	10.2
South Asia	5.8	6.3	10.7	9.0

Source: World Tourism Organization: preliminary data for 2000.

Africa Tourism Trends

As Table 1 illustrates, Africa missed much of the tourism boom in 2000, experiencing its lowest growth rate ever of 1.5 percent. Currently, the bulk of tourism in Africa is located at the tips of the continent, with South Africa, Tunisia and Morocco making up the top three destinations in 2000, respectively.³ As Table 2 shows, the number of arrivals in other African countries drops off considerably after these top three.

Table 2: Arrivals in Africa's Top Destinations

Top Destinations in Africa	Arrivals 2000	% Change from 1999
South Africa	6,108,000	+1.4
Tunisia	5,057,000	+4.7
Morocco	4,100,000	+7.4
Kenya	1,226,000	+30.0
Algeria	859,000	+13.8
Zimbabwe	840,000	-60.0
Mauritius	636,000	+10.1
Zambia	574,000	+25.9
Tanzania⁴	501,669	-20.0

Source: Data for Tanzania (2000) from TTB. Data for other countries from World Tourism Organization: preliminary data for 2000.

Tanzania Tourism Trends

As Table 2 illustrates, Tanzania is ranked 9th in Africa in terms of international arrivals. This is remarkable given that tourism is a relatively new sector in the country. At independence, in 1961, tourist arrivals were 12,218, rising over the next decade to 200,000 in 1972. The period between 1973 and 1991 witnessed some fluctuations in tourist arrivals and hence unsteady growth in tourism revenues. Arrivals in 1992 reached about 200,000, the same level as 1972. From 1995 to 1999, tourism arrivals and corresponding tourism receipts have increased

³ Egypt, with 5,150,000 arrivals in 2000, is considered by WTO to be in the Middle East region, not Africa.

⁴ Data on international tourist arrivals in Tanzania are estimates. The Ministry of Natural Resources and Tourism and the Central Bank are currently working on developing a Tourism Satellite Account that will provide more accurate data once implemented.

exponentially. Arrivals grew from 295,312 to 627,325 over this period, while tourism's contribution to the economy rose from about US\$ 259.44 million to US\$ 733.28 million over this five-year period. In 1999, tourism's contribution to Tanzania's Gross Domestic Product (GDP) was estimated to be 13 percent.⁵

While tourist arrivals fell 20 percent in 2000, the sector's contribution to the economy rose slightly from US\$733.28 million in 1999 to US\$739.06 in 2000, resulting in a 16 percent contribution to GDP (2000). Though a sharp drop in arrivals is worrying, the fact that tourists' expenditures are increasing is a very good sign. This also shows that the strategy of attracting up-market tourists rather than mass tourism is starting to take hold.

International visitors to Tanzania come primarily from the UK (11% of all visitors), USA (9%), Scandinavia (7%), Germany (5%) and increasingly from East Asia, especially Japan. Average length of stay in the country is estimated at 7 nights with the main purposes of visit are leisure (62%), business and conferences (27%) and others (11%). Tanzania also receives a large number of regional visitors, primarily from Kenya. An estimated 66 percent of all visitors come into Tanzania via Kenya. These tourists usually spend only 4 nights inside the country before returning to Kenya.

The overwhelming majority of international tourists come to Tanzania for its impressive wildlife. Over 90% of visitors engage in holidays based on wildlife and nature, including photographic safaris, walking safaris, and hunting. Holidays based on marine or coastal resources are presently minimal, though a typical tourist itinerary normally includes a safari in the Northern Circuit followed by a few days of relaxation on the beach, primarily in Zanzibar. It is expected that this trend of wildlife-based holidays will continue, but there is unlimited potential for establishing beach or coastal 'add-ons'⁶ that will enhance a visitor's overall satisfaction and could, in time, become stand-alone tourist attractions in their own right. However, as Zanzibar receives most of the tourists from the mainland seeking beach add-ons, much work needs to be done to ensure that the mainland coastal areas can offer something different than the well-placed Spice Island.

It is this coastal region that is the primary focus of this document. In an effort to diversify the country's overall tourism product from reliance on the Northern Circuit and to promote the sustainable use of coastal resources, the current status of, and potential for, coastal tourism development is assessed.

Tanzania's Coastal Zone

Tanzania is fortunate in having large expanses of unspoiled coastal habitats. Many of these areas offer suitable sites for coastal tourism development if care is taken not to reduce their ecological or economic values.

⁵ While these are the official numbers from the MNRT, it is important to note that inadequate accounting methods and changes in the methods and quality of statistical data collection limit the accuracy of this data.

⁶ Add-ons are what travel agents call supplemental trips that complement the primary holiday activity. For example, a tourist wants to visit Selous Game Reserve as her primary holiday activity. A travel agent could suggest a three-day trip to Mafia Island as an add-on to supplement the safari experience.

Environmental Characteristics

The coast of Tanzania is tropical as Tanzania lies just south of the equator, between longitude 29°21'E and 40°25'E, and latitude 1°S and 11°45'S. Tanzania has a long coastline of about 800 km excluding nearshore islands, bays, lagoons and estuaries. About 10 rivers drain into the Indian Ocean, of which Pangani in the north, Rufiji in the middle and Ruvuma in the south are the main rivers. The smaller rivers include Zigi, Wami, Ruvu, Matandu, Mavuji, Mbwemkuru and Lukuledi.

Fringing coral reefs line the coast from north to south, hosting large fish populations and offering excellent sites for snorkeling and SCUBA diving. The inshore waters are characterized by wide range of tropical fish species ranging from coral reef fishes to oceanic species like the scombrids. Mammals, birds and turtles are present. The various coastal habitats like the mangrove forests, salt marshes, deltas, bays and lagoons are home to numerous species of fish, crustaceans mollusks, birds, and insects. In addition to the many small islands that dot the coastline, Mafia Island lies about 25 kilometers from the mouth of the Rufiji Delta.

Socio-economic Characteristics of the Coast

The five coastal regions encompass about 15 percent of the country's land area and are home to approximately 25 percent of the country's population. Recent estimates indicate that the population of the five coastal regions has increased to about eight million, with a growth rate ranging between two and six percent. A doubling of the coastal population can be expected in as little as 12 years.

Most rural coastal communities are very poor. Hence, addressing the issues associated with the small-scale, sustainable use of coastal resources is critical to poverty eradication and slowing rural to urban migration. The economy of the coastal communities depends mainly on smallholder farming, subsistence forestry, artisanal fishing, lime and salt production, seaweed farming, livestock husbandry, and small-scale trade handicrafts. Most families in the coastal regions must be involved in more than one economic activity so that if one income to the household—fishing for instance—fails, the family still has other sources of food and income. The daily struggle for food and household income keeps people from improving their situation. Underlying this difficult situation is the poor communication and transportation infrastructure, lack of social services and lack of non-resources dependant jobs.

Pressures on the coast are increasing. More and more people depend on the water and land to generate income and provide food. They are vying for the same limited resources; this competition, coupled with the desire to increase income, has increasingly led to destructive practices. Dynamite fishing, although in-check today, ran rampant just a few years ago. International fishing trawlers are impacting fishery resources key to local users. These resources have declined rapidly in the last five years. Fish catches steadily rose until 1990 when they reached 52,000 tons, 5,000 tons above the estimated optimal yield. Catches dropped by 32 percent from 1990 to 1994 while effort remained the same, a clear signal of over-fishing. Exploitation and uncontrolled use of forests and mangroves occurs every day. Coastal forests have been reduced from 59,300 km² to only 1,050 km² during the last two decades. Approvals for large-scale development, which threaten large tracks of coastal area and the people that live there, are becoming more frequent. Coral mining is increasing to feed construction along the coast. In

the south during 1998, in just two regions, 80,000 tons (the equivalent of 8,000 lorries) of live and dead coral were estimated to be mined and used for lime production.

In population centers, sprawl and uncontrolled land use is rampant. This is made worse by unplanned settlements, both in urban and rural areas, where there is no access to potable water and sanitary systems. In some regions, 15 to 23 percent of today's households do not have toilets, leading to health problems like cholera and diarrhea.

On the horizon is increased pressure from tourism, industry and population growth. As new infrastructure such as roads and airports is developed, quiet coastal communities will be facing the same challenges as Dar es Salaam or Mombassa, Kenya. These include severely degraded water quality (both marine and fresh), uncontrolled land use, restricted access to the coast for traditional users, and a resource base that can no longer support fishers and mangrove cutters. In less developed areas, pressures still pose a serious threat. Managing local resources will become increasingly challenging as the population grows and the number of investors, both foreign and domestic, increases.

Tanzania's 800 km of coast is of critical importance to the development of the country. The five coastal regions contribute about one third of the national gross domestic product. Currently, 75 percent of the country's industries are in these coastal regions. Newly initiated activities include coastal tourism, mariculture development and natural gas exploitation. These are seen as potential resources for national economic development.

Defining Coastal Tourism

Coastal tourism is the sum of activities relating to the travel and stay over of people visiting the coastal zone. Tourist activities are considered *coastal* tourism activities when they are based on or utilize coastal or marine resources, either natural or man-made, or located within the coastal strip.

Types of Tourism

People travel away from their homes for a variety of different reasons. Some of the most common reasons for traveling are leisure or recreation; visiting friends or relatives; business-related activities, including conferences; research or study tours; and health-related activities, including spas.

Increasingly, tourists are looking for a diversified product that allows them to engage in a number of different activities within a limited time frame, and therefore a relatively small geographic area. For example, a tourist may want to spend a week at a beach resort, relaxing in the sun and engaging in various water sports. In addition to these traditional sun and sand activities, a tourist may want to do some hiking, learn about the history and culture of the location, observe traditional cooking or farming methods, go bird-watching or see how local handicrafts are made. The destinations that can complement the traditional sun and sand activities with other unique experiences have a major advantage over one-dimensional beach destinations (though the market for these beach-only destinations will continue to exist).

Another type of tourism that is receiving increasing amounts of attention is cruise tourism. Cruise tourists typically spend from 3 to 14 days aboard a large cruise ship and make stops at different ports along a specified route. The stops are usually for one day and passengers can take organized tours for that day before returning to the ship for their overnight accommodation. It may be possible for some ships to stop in one port for two or three nights, allowing passengers to take longer trips into the interior.

Components of Coastal Tourism

As discussed above, tourism is the movement of people to and from their usual home and all the related activities that can be engaged in during the stay. In very simple terms, then, to develop tourism, one needs to provide a reason for someone to visit, a place for him or her to stay while away from home, and a means to get them from place to place. For the purposes of this document, the basic components of coastal tourism are as follows:

- Attractions
- Accommodations
- Accessibility

Attractions are arguably the most important component of coastal tourism - without them, very few people would even consider traveling long distances (except for business travelers or those visiting friends and relatives). Increasingly, business conferences are being located in close proximity to major attractions in an effort to increase attendance by providing participants opportunities to visit those attractions. The existence of a diverse array of quality attractions increases the potential for developing a sustainable tourism industry.

Attractions can be divided into two categories: natural and cultural. Natural attractions can include wildlife, beaches, forests, geological formations, or other natural resources that could be of interest to a tourist. Cultural attractions could include historical or archaeological sites, performing arts, traditional lifestyles or other cultural or human resources that could be of interest to a tourist.

The conservation, development, management and promotion of a diverse array of natural and cultural attractions are key ingredients of a successful and sustainable tourism industry.

Accommodations are extremely important since tourists require lodging while away from home. Accommodations can range from basic campsites to luxury hotels – some resorts and hotels are even attractions themselves. Tourists’ budgets range from “shoe-string” to unlimited, so a wide range of accommodation is often needed to cater to different types of tourists. Whether budget or luxury, hotels need to provide value for a tourist's money. Standards and a classification system are one way to ensure that hotels are providing quality accommodation at a fair price. Hotel owners and operators face constraints, however; high operating costs due to inadequate provision of utilities and telecommunications and taxes can often limit an investor's ability to do business successfully. Creating the right mix of incentives and taxes is important to the long-term sustainability of the accommodations sector.

Accommodations that provide value for money are important to the satisfaction of a visitor and the overall reputation of a destination. Mechanisms to ensure quality and market pricing in hotel development should be identified and implemented. The mix of incentives and tax burdens on the accommodation sector should be designed to promote high quality accommodations at fair prices.

Access to tourism attractions is also extremely important. Access can be by air, land or sea, but needs to be safe, a good value for the money, and reliable. Improving access to tourism sites allows more visitors to come, and also allows those visitors to go to more places. As the tourism industry grows, limits of acceptable use can be exceeded if tourists are restricted to one or two areas due to the inaccessibility of other potential tourist attractions. Improving this access is one area where public/private partnerships are needed and can have a great impact in a short time frame.

Improving access to coastal tourism areas needs to receive high priority in order to facilitate the movement of visitors. Value for money and reliability are the key factors that need to be considered when addressing accessibility.

From Components to Destinations

Each of these three key components is important to the development of coastal tourism. An area that possesses only one, or even two, of these components has limited potential to become a successful tourist destination. A successful destination is an area with diverse and unique attractions and activities, quality accommodation at reasonable prices and ease of access to and from other tourism areas. When one of these components is missing or inadequate, the entire destination can suffer. It is therefore important to take a comprehensive and holistic view of coastal tourism in order to determine how best to facilitate its sustainable development. Marketing of the destination, rather than one single attraction or resort, can be the best way to attract a steady stream of visitors.

Successful coastal tourism destinations require a diverse array of quality attractions, good value-for-money accommodation and reliable accessibility.

Key Characteristics of Coastal Tourism

While Attractions, Accommodations and Access form the basic building blocks of coastal tourism, certain key characteristics of tourism also need to be understood by policy makers and all other relevant stakeholders. From a planning perspective, it is important to understand that no single government sector can manage coastal tourism on its own. Also, the success of the tourism industry relies on solid relationships, or partnerships, between the public and private sectors and civil society. These ideas are expanded on below and are utilized throughout this document as guiding principles of coastal tourism development.

Multi-sectoral in Nature

Coastal tourism affects, and is affected by, many different economic activities and therefore many government sectors. It depends on many different factors, including adequate infrastructure, including utilities; a trained work force; a healthy, natural environment; a secure and peaceful setting; and well-maintained cultural sites, such as museums and monuments.

When one of these factors is missing, or breaks down, the entire tourism industry is affected. For example, the recent political violence in Zimbabwe was a major cause of that country's large decline in tourist arrivals in 2000. All these sectors need to work together to ensure that the tourism product is of consistently high quality. This calls for a common vision of coastal tourism that allows each sector to understand and appreciate its own role in creating an enabling environment for sustainable coastal tourism development.

A common vision and clarity about roles and responsibilities of relevant sectors is key to the planning, implementation and sustainability of coastal tourism.

Public/Private/Community partnerships

A successful coastal tourism industry relies on strong partnerships between government, the private sector and civil society. Government, or the public sector, has an extremely important role to play in creating an enabling environment for coastal tourism development. The public sector, both at the national and local level, is responsible for, among other things, developing a strategy for the long term development of the sector; formulating a mix of incentives to attract investment in coastal tourism; providing certain services, such as infrastructure, reliable utilities, security, and health; setting standards for development of hotels and other works and ensuring that those standards are adhered to; and maintaining and promoting natural and cultural attractions. As mentioned above, many different sectors need to be involved in ensuring that the roles and responsibilities of the public sector are carried out.

The actual development of the tourism industry is essentially led by the private sector. From airlines to tour operators, travel agents to hotel owners, private investors are the engines that move the industry forward – it is the government's role to ensure it is on the right track. The private sector provides capital for development and employment opportunities for local residents. It can stimulate growth in other ancillary services and provide much-needed foreign exchange. The private sector is in tune with the current and future demands of the market, so it is in the best position to make decisions regarding types of products that need to be developed. It is government's role to ensure that an environment is created that allows private investors to be flexible and innovative to keep up with the changing demands of international tourism.

With government playing the role of facilitator and regulator and the private sector serving as the engine of tourism growth, the role of civil society in sustainable tourism development is sometimes overlooked. However, local people have an important role to play, from the planning stages of tourism development to the implementation of projects, and finally, to the monitoring of tourism related activities. Tourism investments that include the local population from the beginning of the planning process have a much better chance of success and sustainability. For example, a private investor that involves the local community in the siting of a future hotel along the coast can benefit from local knowledge about the environmental processes of that area or the cultural importance of the area that should be respected and not altered. Building the hotel without consulting the local population could very well result in resource user conflicts in the future.

Government, the private sector and civil society all have important roles to play in creating a sustainable coastal tourism industry. Partnerships should be developed early on in the planning

stages to avoid potential resource user conflicts. Mechanisms to ensure local participation in all stages of the tourism life cycle should be developed and implemented.

Potential Impacts of Coastal Tourism

While assessing the potential for coastal tourism development, it is important to identify and understand the potential impacts such development will have on the human and natural resources of the coastal area. The development of coastal tourism can have a myriad of impacts on the coastal region, and can, in turn, be impacted by non-tourism-related activities. These impacts can be positive, such as job creation for local people, or negative, such as coastal degradation due to unplanned development of coastal hotels. The impacts of coastal tourism can best be analyzed by looking at the following dimensions of sustainability:

- Economic
- Social
- Environmental
- Cultural Heritage

The **economic impacts** of coastal tourism include both positive and negative aspects in terms of the local and national economy. At the local level, the construction and operation of hotels and other accommodations can provide direct employment opportunities.⁷ The presence of tourists can lead to the emergence of numerous types of supporting services and businesses, such as restaurants, tour agencies, etc., many of which can be developed and managed by the local population. These linkages to other ancillary or supporting services can serve as a multiplier effect throughout the local economy. Coastal tourist activities can provide revenue to local government authorities through taxation and other revenue bearing activities. At the national level, the development of coastal tourism can provide much-needed foreign exchange and tax revenue, contributing to the growth of the national economy.

The opportunity costs of developing coastal tourism are difficult to measure, but attention should be paid to the distribution of the economic benefits derived from the sector. The structure of the tourism industry is such that often times the revenues are not captured locally, and therefore do not benefit the local population. The extent of leakage⁸ of tourism revenues is an issue that deserves careful attention when planning and developing tourism along the coast.

Another potentially adverse impact of coastal tourism on the local economy is the potential increase in local prices for certain items, such as land, foodstuffs and other necessities. Areas with tourism potential may be targeted by speculators or developers, whose competition for finite resources can drive prices higher and higher, until only foreign investors are able to afford land.

⁷ Tourism-related job creation often occurs on an ad-hoc, or 'as needed' basis. Jobs in tourism are often seasonal in nature and can take skilled labour away from other sectors. The source of labour is another issue to keep in mind, as skilled labour tends to flow towards emerging opportunities and can displace local labour. The employment of women should also be considered.

⁸ Leakage refers to the revenues generated by tourism that are not captured in the destination (village or country). While it would be quite difficult to stop all leakage given the fact that most international tourists pay tour operators in their home countries for their holidays, efforts can be made to capture as much tourism revenue in the destination as possible.

Tourist demand for local agricultural products could cause prices to increase so much that local people are unable to meet their basic needs.

Coastal tourism can have positive economic impacts on the local and national economies if linkages are maximized and leakage is minimized.

The **social impacts** of coastal tourism are quite difficult to measure but often are fairly negative. On the positive side, tourism can promote inter-cultural understanding between host and visitor. However, more often than not, western values and ideas creep into the host populations, potentially eroding local value systems.⁹ Tourists are often perceived as wealthy to young persons, who then try to emulate their lifestyles without realizing the fact that most tourists work hard most of year in order to afford to take a holiday. Tourists are also seen as a source of easy money, which may lead some people to try and take advantage of them in order to make some quick cash. Conversely, tourists are often not aware of local values and customs, which can lead to conflicts between host and visitor.

Any negative social impacts of coastal tourism can be mitigated in part by educating both local people and visitors about their respective cultures. Ensuring local participation in the planning and benefits of tourism activities can help to alleviate potential problems.

The **environmental impacts** of coastal tourism can be numerous. Unplanned development of tourist-related facilities and infrastructure can adversely affect the natural resource base that local populations depend on for their livelihoods. Coastal tourism depends on a pristine and healthy coastal environment as its primary tourist attraction, so care needs to be taken to ensure that the development of tourism does not harm the very resources on which it is based. Appropriate siting of tourist hotels and other structures can minimize these negative impacts, as can the development of adequate waste disposal facilities. The carrying capacity of the ecosystems needs to be taken into account in order to ensure that tourist activities do not exceed the limits of acceptable use for that area. Critical ecosystems, such as mangroves, estuaries and reefs can be damaged by coastal tourism activities if not managed properly.

Tourism facilities can also exacerbate existing coastal resource problems. For example, tourism hotels often consume large amounts of fresh water in maintaining their grounds, filling swimming pools, cleaning rooms and washing linens, not to mention the daily consumption by guests. If freshwater resources are limited, tourism activities can come into conflict with other users, such as farmers and households.

Other activities, such as manufacturing and agriculture, can negatively affect the coastal environment as well and need to be managed in a coordinated manner so as to maintain the ecological integrity of coastal resources for the enjoyment and use of the local populations and tourists alike.

⁹ Changes in traditional culture can be attributed to a variety of factors, such as the increased exposure to mass media (television, soap operas, etc.) and the urbanization of rural areas in general. It is therefore difficult to pin down exactly what is causing these changes in local values; however, tourism planners and managers should be aware of the potential impacts their activities could have.

Coastal tourism can also have positive impacts on the environment. Employment and other tourism-related revenues can serve as alternatives for destructive, unsustainable resource use. Revenues from tourism can also be used to finance the conservation of specific resources, such as mangrove reserves and marine parks. The development and implementation of mechanisms that return some of the revenues generated from tourist activities to the conservation and protection of the natural resources on which tourism is based are a major step forward in developing a healthy and sustainable industry.

Coastal tourism, like mariculture, fishing and farming, depends on a healthy environment. Care must be taken to ensure that tourism itself does not contribute to the degradation of the resources on which it is based. Careful siting and construction of tourist structures and infrastructure can minimize some of these problems. Channeling some tourism revenues into the conservation of the resource base can contribute significantly to making the industry sustainable.

The impacts of coastal tourism on **cultural heritage** are also important. The development and promotion of cultural heritage attractions can lead to the further protection of those attractions through self-sustaining financing mechanisms. The process of identifying potential heritage attractions can lead to a better understanding within the local community of their unique history and culture. Demonstrations of local lifestyles and practices are often of interest to visitors and can provide income directly to local families. As with natural resources, cultural heritage sites and village attractions can be adversely affected if attention is not paid to the capacity for these sites and people to handle large amounts of tourists.

The conservation and promotion of cultural heritage can make a destination more attractive to visitors. Cultural sites and traditions need to be carefully managed to ensure that their values are not eroded in the process of becoming tourist attractions.

Principles of Sustainable Coastal Tourism¹⁰

Coastal tourism development should:

- be ecologically bearable in the long term, as well as economically viable, and ethically and socially equitable for local communities.
- be integrated with the natural, cultural and human environment; it must respect the fragile balances that characterize many tourist destinations along the coast.
- consider its effects on the cultural heritage and traditional elements, activities and dynamics of each local community.
- encourage the participation of all actors, both public and private, and should be based on efficient co-operation mechanisms at all levels: local, national, regional and international.
- support quality criteria both for the preservation of the tourist destination and for the capacity to satisfy tourists,
- be fully integrated into and contribute positively to local economic development and serve effectively to improve the quality of life of all people.
- promote measures that permit a more equitable distribution of the benefits and burdens.
- encourage the adoption and implementation of codes of conduct conducive to sustainability by the principle actors involved in tourism, particularly industry.

¹⁰ Adapted from the *Charter for Sustainable Tourism* by the World Conference on Sustainable Tourism, Lanzarote, 27-28 April 1995.

CHAPTER TWO: CURRENT STATUS OF COASTAL TOURISM IN TANZANIA

The issues and concepts presented in the previous chapter provide a framework for assessing the current status of coastal tourism in Tanzania. This chapter will assess the three basic components of coastal tourism (attractions, accommodations, and access), taking into consideration the economic, social, environmental and cultural impacts of tourism development. In each section, key issues are highlighted. At the end of the chapter, these three components are overlaid. By doing this, the areas with the most potential to become coastal tourism destinations are identified.

Attractions

Attractions form the basic building block of a coastal tourism destination. Except in rare cases, the locations of the best attractions attract the most private sector investment. Increasingly, tourists are demanding a range of attractions and activities at any one destination. Therefore, the more diverse the attractions are within a given area, the more potential for coastal tourism development exists. Attractions are broken down into natural and cultural attractions for the purposes of analysis; however, a good mix of both natural and cultural attractions is the best recipe for successful tourism development.

Natural attractions

The coastal zone consists of a myriad of ecosystems that can serve as potential tourism attractions. In addition to the natural sand beaches found at various places along the coast, the flora and fauna of the coastal zone can be considered attractions as well. Further, the extensive coral reefs that fringe the shoreline can be utilized by those tourists interested in snorkeling or diving. This section identifies the primary natural attractions along the coast and discusses some of the important issues relating to their management and promotion.

Attractive **beaches** can be found all along the coast and serve as one of the primary coastal tourism attractions. A number of beaches have already attracted tourism investment, such as Ushongo in Pangani District, Bagamoyo, Kunduchi in Kinondoni Municipality (DSM), Ras Kimbiji in Temeke Municipality (DSM), Jimbiza in Kilwa District, Mikindani in Mtwara District and selected beaches on Mafia Island. These beaches are home to numerous human activities, including tourism, fishing, mariculture, etc. Other attractive beaches with little or no tourism investment to date include Mjimwema in Temeke Municipality, Masoko Pwani in Kilwa District, Simba Ulanga and Jaja in Rufiji District, Msimbati in Mtwara District and the beaches found on numerous nearshore islands. The advent of tourism activities in these areas should take into account the existing human activities as early as possible in the planning process.

In general, these beach areas are in good condition, with the exception of sections of the Kunduchi area where beach erosion has reduced the beach area dramatically over the past decade. This beach area, as well as others, are affected by natural processes, such as erosion, which can in turn be exacerbated by human activities, such as beach-front construction, destruction of coral reefs or the cutting down of mangroves. All of these activities need to be co-ordinated in such a way that the ecological integrity of the area and the livelihoods of people depending on these resources are maintained. Inadequate planning of diverse activities can often lead to resource

user conflicts that can, in turn, damage not only the natural resource itself but also the economic activities that depend on that resource.

Prior to the initiation of beachfront development, an Environmental Impact Assessment needs to be undertaken to identify the potential isolated and cumulative impacts of the construction and operation of the facility on the environment and the human activities utilizing that environment. A plan then needs to be developed to mitigate any negative impacts.

One constraint to the development of coastal tourism is the often unattractive inter-tidal zone at neap tide. At these times, the sea may not be accessible for tourists interested in swimming, snorkeling or diving. This natural constraint gives more weight to the need for other tourist attractions in the immediate area so that tourists can plan their days based on the tide schedule. Other such attractions could include coastal forest areas, the next natural attraction discussed.

There are numerous **forest reserves** along the coast, including mangrove and coastal forests. These forests are protected primarily because they perform important ecological services, such as water catchments, erosion reduction, and housing for fauna and other bird life, but are under threat from expanding human activities. The primary mangrove reserves are found in areas such as the Rufiji Delta, the largest continuous block of mangrove forests along the eastern coast of Africa. Other extensive mangrove areas include Kilwa District and areas at the mouths of the Pangani, Ruvu, Wami and Ruvuma Rivers. Mangrove Forest Reserves are managed under the Mangrove Management Project, financed jointly by the Forestry Division, Ministry of Natural Resources and Tourism (MNRT) and NORAD.

Other coastal forest reserves include Zaraninge Forest Reserve in Bagamoyo District, and Pugu and Kazimzumbwi Forest Reserves in

Kisarawe District, which are the only coastal forests near Dar es Salaam. These forests house unique species of flora and fauna, but are currently not being widely visited. Management of Coastal Forest Reserves is supported by the World Wide Fund for Nature (WWF) and the Wildlife Conservation Society of Tanzania (WCST).

Threats to coastal forests

- Over- exploitation of coastal forests e.g. illegal harvesting and charcoal production
- Conversion of mangrove forests to rice or prawn farms
- Upstream economic activities e.g. intensive irrigation, settlements, etc.
- Natural disasters e.g. Floods, wild fires
- Pollution in mangroves through chemicals, oils, etc.
- Lack of awareness of ecological services provided by coastal forests

These coastal reserves could be developed into tourist attractions if managed and promoted properly. The Mangrove Management Project is currently assessing the possibility of developing eco-tourism facilities in selected Mangrove Reserves. Currently, in Pangani District, the mangrove forests found at the mouth of the Pangani River are one of the attractions of a river cruise organized by the Pangani Coast Cultural Tourism Program or through some of the hotels in the area. Other areas that have similar potential for boat trips include Kilwa, the Rufiji Delta, and the mouths of the Ruvuma and Wami River. The benefit of encouraging tourists to visit these reserves could be that the revenue from entry fees could be used to improve the protection of the reserves. However, inadequate tourism management of these reserves could cause serious

harm to the resources themselves from trampling of flora and disturbance of natural fauna life cycles.

Forest reserves have potential as tourist attractions but adequate infrastructure, tourism management plans, trained personnel and promotion efforts are not currently in place. A tourism management plan for one or two selected forest reserves could be developed and implemented on a pilot basis. This could develop into a sustainable financing mechanism for the management and protection of these important resources. The development of an information center, boardwalks, and signposts could be included in the plan, as could the training of local guides. Local communities could benefit from increased visitation to the reserves by serving as tour guides, providing accommodations and food and beverage services, and through the sale of traditional handicrafts.

Another type of reserve, the **Saadani Game Reserve**,¹¹ is a unique coastal tourism attraction. Bordering the Districts of Pangani, Bagamoyo and Handeni, this reserve is unique in that it includes the coastal zone as one of the primary habitats for game viewing. Saadani is the only place in eastern Africa where big game animals can be seen along the beach or bathing in the Indian Ocean. The reserve supports a wide variety of plant, animal and bird life and lives up to its promotional label, "*where the bush meets the beach.*" Since 1999, Saadani has been attracting roughly 420 visitors per year. These visitors, primarily residents of Dar es Salaam, stay from two or three nights inside the Game Reserve. With improved infrastructure and marketing efforts, the potential for increasing visitation in the short-term is excellent.

Saadani Game Reserve is currently managed under the Wildlife Division (MNRT). Threats to the successful management of the reserve include uncontrolled bush fires, poaching and encroachment by human activities such as agriculture. Promoting tourism to the reserve could supply much-needed financial resources for management and control, as well as provide the local communities with alternative sources of income.

Just north of Saadani Game Reserve, Madete Beach is another potential tourist attraction if managed and promoted properly. This little known and rarely visited nesting beach for green turtles could be developed into an interesting and informative night trip from either Pangani or the game reserve itself. This attraction would need to be developed and managed very carefully as nesting turtles are easily disturbed by unfamiliar light and sounds. However, successful turtle viewing tourism programs have been developed in many areas of the world and could be replicated here.

The **Marine Parks and Reserves** are tourist attractions with high potential. Currently, there are two Marine Parks, the Mafia Island Marine Park and the Mnazi Bay Ruvuma Estuary Marine Park¹² in Mtwara District. Marine Reserves include the islands of Bongoyo, Mbudya and Pangavini and the sandbank of Fungu Yasini in Dar es Salaam and Maziwi Island in Pangani

¹¹ The Tanzania National Parks Authority (TANAPA) is currently considering upgrading the Game Reserve to a National Park. This change in status could result in Saadani being promoted more as tourist attraction than is currently the case.

¹² Funds to support the development of this Marine Park have been approved by the GEF Governing Council. However, actual activities to establish the Marine Park have yet to begin.

District. The Marine Parks and Reserves Unit is currently in the process of developing tourism management plans for these areas. In 2000, Mafia Island Marine Park received roughly 4,000 visitors, Maziwi Marine Reserve 173, and the four Marine Reserves in Dar es Salaam 7,200. The Marine Parks and Reserves Unit is working to assess the carrying capacity of each to ensure that tourist activities do not upset the fragile ecological balances of the islands.

The current threats to marine resources include destructive fishing practices that destroy the coral reefs and capture unwanted species, harvesting of endangered species such as turtles and the potential pollution damage from passing ships and oil spills.

Visitors to Marine Parks and Reserves are charged a fee that is used for the management of the areas. The fee structure should be designed so that the amount does not discourage tourism investors as well as tourists from visiting the parks or reserves. Without revenue from tourists and hotel operators, the financial resources needed to manage these important reserves will have to come from continuous external support.

There is a need to build environmental constituencies for managing parks and reserves. The Marine Parks and Reserves Unit, the hotels and tour operators and the local communities utilizing the Parks and Reserves need to work together to ensure that all perspectives are taken into account. A comprehensive management plan can then be designed and implemented in a phased approach that can adapt to the changing needs of all stakeholders.

In addition to the beaches and established reserves, other unique natural attractions can be found along the coast. For example, in Tanga Municipality, the natural sulphur spring is an interesting attraction. At one time, the spring water was used for sulphur baths, which many people came to the area to enjoy. Since the nationalization of the attraction, however, the spring and baths have not been utilized. The Municipality would like to see the attraction developed and promoted, but is not in a position to do it alone. This is an area where strong public/private/local community partnerships could be developed. Other hot springs can be found in Rufiji and Mafia Districts. Sport fishing is another activity that could attract tourists. Excellent big game fishing can be found at various points along the coast, but very few operators are currently taking advantage of this resource.

Natural attractions are generally in good condition in terms of ecological and environmental health. Increasing pressures from expanding human activity, including tourism, could, however, start to degrade these natural attractions, effectively reducing their tourism values. The consistent and rigorous requirement of Environmental Impact Assessments (and the subsequent monitoring of the mitigation measures) for all coastal development is one of the most important steps towards conserving these valuable natural resources.

Cultural Attractions

Cultural heritage represents the identity of a community and its environment. Cultural heritage can include monuments or other buildings that represent important events or eras in local or national history, traditional lifestyles, such as the performing arts and handicrafts, and even the everyday activities of local people as they farm, fish or prepare food. Tourists are becoming increasingly interested in learning about the people that live in and around tourist destinations in

addition to more traditional tourist activities, such as game viewing and sun bathing. This cultural heritage can be developed into tourist attractions, which, in turn, can provide income-generating opportunities for people living along the coast.

The most prominent of the various potential cultural heritage attractions are the physical buildings and monuments that represent the history of place. The Swahili coast of Tanzania contains some world-class cultural sites that can be developed into stand-alone tourist attractions in time. In particular, the ruins at Kilwa Kisiwani and Songo Mnara, designated as UNESCO World Heritage Sites, have unlimited potential to attract tourists. The major cultural heritage sites, including museums, and recent visitation data along the coast are as follows:

Visitation at Selected Cultural Heritage Sites 1996 - 2000

Site	1996		1997		1998		1999		2000	
	Resident	Non-resident								
Bagamoyo town	383	882	407	964	425	1,025	205	472	198	624
Kaole Ruins	255	932	249	497	264	904	332	552	366	1,774
Bagamoyo Catholic Museum	-	-	-	-	-	-	-	-	5,120	4,191
Kilwa Kisiwani	574	11	642	22	788	36	974	43	885	68
Songo Mnara	24	8	15	4	18	9	36	18	45	32
Amboni Caves	444	207	471	168	507	188	538	185	581	292
Tongoni Ruins	55	28	72	39	54	23	34	19	63	44
Kunduchi Ruins	35	12	46	8	30	13	37	22	41	43
Mikindani	-	-	-	-	-	-	102	45	220	111
National Museum	5,380	2,339	5,409	2,932	5,483	3,279	10,362	4,280	1,3195	4,856
Village Museum	5,894	3,010	4,012	2,203	5,344	5,064	13,310	1,577	1,4836	2,257

Source: Antiquities Department and National Museums, MNRT

The trend over the past five years is promising; however, these numbers are quite low in relation to the potential of some of the sites. Other cultural attractions, such as local *taraab* music performances, artisanal fishing and agriculture and traditional handicraft production, exist but are not systematically managed or promoted so it is difficult to assess how many tourists are enjoying these types of experiences. However, in at least one coastal town, Pangani, a cultural tourism program has been developed to promote local, village-based tourism in that area (see current initiatives section for more details). This successful initiative could be replicated in other coastal areas to promote local culture.

It is important to note, however, that the development of traditional performing arts and culture into tourist attractions may have some impacts on the local culture itself. For example, a local *taraab* group could begin performing for tourists on a regular basis, so much that the original audience of the local community begins to feel that they are not as important to the group as the fee-paying tourists. Conflicts could then emerge and what was once a community event for the community has now changed into a group performance for foreign tourists. These types of cultural changes are inevitable when people of different backgrounds come together as they do in tourism. The degree of acceptable change in local values and culture can only be determined by the local people themselves. Education and awareness for both the local people and the tourists can help to enable the local community to maintain a sense of control over the changes in their unique culture and history.

In general, the cultural heritage sites along the coast are in poor condition and therefore are not currently set up to handle tourists. Most sites under the supervision of the Antiquities Department are supervised by one staff person; however, the necessary infrastructure and information that tourism demands is not in place. As a result, much work on the conservation and rehabilitation needs to be done, especially since these important sites are under numerous threats from both human activities and natural processes. The deterioration and decay of various sites are due to the following:

- uncontrolled economic development - lack of Environmental Impact Assessment that emphasizes cultural heritage assessment
- vegetation and plant growth
- rain water penetration and infiltration
- animals rubbing and jumping on ruins
- visitors walking on ruins
- natural degradation and structural failures
- inadequate trained personnel to manage sites
- lack of training institutions for conservation and management of cultural heritage

The Department of Antiquities, MNRT, is the government agency that is responsible for conserving and managing cultural heritage sites in the country. This institution was formed in 1964 under the Antiquities Act of the same year (and subsequent amendments made in 1979). For many years, the Antiquities Department has emphasized the conservation of heritage sites with very little concern with tourism. This preservation-for-the-sake-of-preservation approach effectively forced the Department to rely solely on its own meager budget to maintain all the sites in the country. As a result, the majority of sites were not conserved and managed very well.

Quite recently, the GOT has expanded its view of cultural heritage and determined that these sites can also serve as important tourist attractions, which could contribute much-needed financial revenue to conservation efforts. As a result, the Department of Antiquities was recently transferred from the Ministry of Education and Culture to the Ministry of Natural Resources and Tourism. This move has allowed both the Tourism Division and the Antiquities Department to benefit from closer contact and a shared agenda. In addition, this new approach has also encouraged cooperation between the GOT and other local and international institutions in carrying out conservation and management projects in different parts of the country, particularly

along the coast. Major conservation projects include Kilwa Kisiwani and Songo Mnara Conservation Project (joint effort of GOT, French and Japanese governments, with UNESCO); Conservation of Mikindani Old Building (Trade Aid NGO with support from GOT); preparation of a Conservation Master Plan for Bagamoyo historic town and the rehabilitation of the old buildings in Bagamoyo (Swedish and Tanzanian governments); and the conservation of Kaole Ruins (Urban Origin program under SAREC).

The government has introduced a policy encouraging community participation in the conservation of cultural heritage. Under the policy, it is possible for individuals, institutions or organizations to receive 'wardenship' to manage the cultural sites under the supervision and guidance of the Antiquities Department. This type of public/private/local community partnership needs to be encouraged as many potential attractions are in urgent need of rehabilitation, management and promotion. Guidelines or standards for permitted and prohibited activities in and around cultural heritage sites could be developed by the Antiquities Department, but the actual day-to-day operation could be carried out by private operators or even the local communities or governments.

The natural and cultural attractions along the coast present many opportunities and challenges for sustainable tourism development. The potential for many areas to develop into world-class tourism destinations is quite high. Many of the attractions, however, need a great deal of work in terms of rehabilitation, management and promotion. Since different attractions are under the supervision of many different government agencies, it is important to take a comprehensive approach that creates and sustains management constituencies. These management constituencies would be led by the supervising agency, which would establish standards for how the attractions can be used. All relevant stakeholders, including the local population, local and national governments, and the private sector should be included in this participatory management regime and share in the costs and benefits.

Summary

Taking into account the uniqueness and diversity of natural and cultural attractions found along the coast, these areas have the best potential for attracting tourism:

- Kilwa District, particularly Kilwa Kivinje, Kilwa Masoko, Kilwa Kisiwani, Songo Mnara, Sanje ya Kati and the adjacent Mangrove Reserves and nearby caves;
- Saadani Game Reserve, linked with Pangani District to the North and Bagamoyo District to the South;
- Mafia District, with its excellent dive sites and cultural heritage sites found throughout the area

These areas can be considered the 'jewels' of Tanzania's Swahili Coast. Other areas have excellent attractions as well, but these three priority areas have the most potential because of the uniqueness of the sites and resources and the diversity of attractions within a small area. In order for these priority areas to be successfully developed into world-class tourism destinations, the different sectors and stakeholders with jurisdiction over the diverse resources and sites need to work together towards a common goal - the sustainable conservation, management and promotion of the *destination*.

One way to achieve this synergy is to develop comprehensive tourism management plans for these priority areas that would ensure that all relevant stakeholders are participating in both the costs and benefits of coastal tourism development.

Accommodations

Accommodation is the second key component of coastal tourism. This section (i) assesses the current tourism plant along the coast; and (ii) identifies some of the key issues or impacts relating to the development of coastal hotels, such as land availability, investment incentives, operating costs, and relationships with local communities.

Value for Money

Tourists have many different tastes and ideas about what types of accommodation they prefer, but the one single factor that underlines all preferences is that the tourist must feel that he or she is getting good value for money. The concept of value for money contains two basic ingredients: quality and price. No price is too low or too high as long as the quality of accommodation and services matches that price. This concept is important to understanding the different types of tourist accommodation that currently exist and could potentially be developed along the coast.

For example, a small, locally owned and operated guesthouse that charges Tsh. 5,000 per night can be attractive to tourists on a tight budget; at this price range, the tourist does not expect many services, only a clean and secure room. Assuming these basics are provided, the tourist feels that he is getting value for money. At the other end of the scale, a luxury beach resort that charges US\$150 per person per night can attract a different type of tourist on a much larger budget. However, the expectations of this type of tourist would be much higher than the one staying in the local guesthouse. In either case, as long as the tourist feels that he or she is receiving services commensurate with the price paid, he or she will be satisfied.

Location and types of accommodation facilities¹³

The majority of accommodation facilities along the coast are located in and around the larger urban areas, particularly Dar es Salaam, Tanga, Bagamoyo, and Mtwara. In addition to these clusters of hotels and guesthouses in urban areas, a number of smaller hotels and guesthouses are scattered along the coast, primarily in and around Pangani, Kilwa and on Mafia Island. Each of these areas is now discussed in detail.

Dar es Salaam

Dar es Salaam is by far the largest urban center along the coast (and in the country) and therefore supports the largest number of hotels and other types of accommodation. About ten medium to large beach hotels and resorts are located north of the city center, in the Municipality of Kinondoni. In the city center, or Ilala Municipality, around seven large business hotels can be found; while they may not be located directly on the coast, they may attract business travelers and other guests who prefer to be near the seashore. In Temeke District, south of the city center, a

¹³ This document does not attempt to classify accommodations. A classification scheme is currently being developed for Tanzania (see Other Initiatives section for more details). For the purposes of this document, relational qualifiers are used (for example, in reference to size (large, medium, small); and type (luxury hotel, local guesthouse, business hotel, etc.)). These purely descriptive terms should not be considered as a classification scheme in any way.

number of small guesthouses have recently been developed, particularly in the vicinity of the Kigamboni ferry terminal. Also, two small, luxury beach resorts are located about 25 km south of the city center in Temeke District, and one more is being developed in the same area.

Tanga

The four or five hotels in Tanga are located in the town area and cannot be considered beach hotels, though one offers excellent views over the harbor area. These hotels primarily attract business travelers. A small beach hotel is currently being constructed in Mwarango village, about 15 kilometers south of Tanga town. Tanga is also home to numerous local guesthouses.

Pangani

In Pangani town itself, there are three hotels and guesthouses spread out along the coast north of the Pangani River and one medium-sized luxury hotel located on the cliff overlooking the river on the southern bank. In addition, three small beach hotels are located in Ushongo, about 12 kilometers south of Pangani town.

Bagamoyo

Bagamoyo is home to numerous hotels, ranging from small guesthouses catering mostly to resident tourists, to larger beach resorts, which attract both resident and international clientele. Around five medium to large hotels have been constructed on adjacent plots along the beach north of Bagamoyo town. A few smaller hotels and guesthouses can be found within the town itself or within a few kilometers south of town. One small safari tented camp is in operation in Saadani Game Reserve, though not in Bagamoyo District itself.

Mafia Island

There are four hotels in Mafia District and a small number of local guesthouses. Three of the hotels are located on Mafia Island itself at Utende; two are small, luxury beach resorts and one is a medium-sized lodge operated by TAHI. On nearby Chole Island, one small eco-tourist hotel has been established.

Kilwa

There are numerous small guesthouses in Kilwa Masoko and Kilwa Kivinje. These are all locally owned and operated establishments offering basic accommodation for less than 5,000 Tsh. A small, tented camp has recently been established on the beach at Jimbiza - the owners have plans to develop a luxury lodge at the same site in the near future.

Mtwara

There are five small to medium hotels in Mtwara and numerous local guesthouses. One luxury hotel has been developed in the old German Boma at Mikindani with support from a U.K.-based NGO (see Other Initiatives for more details).

Local guesthouses are scattered throughout the rest of the coast, including Muheza, Mkuranga, Rufiji and Lindi. These places can provide very basic accommodation, but are not currently set up to handle international tourist traffic.

Key Issues Relating to Coastal Hotel Development

Investment Incentives and Process

The Government of Tanzania has identified the tourism and travel industry as one of its lead sectors and is currently attempting to facilitate investment in this area. The Government, through the Tanzania Investment Center (TIC), provides a number of services to potential investors, from guidance through the relevant permit processes to providing investment incentive packages, such as tax holidays, import duty exemptions, and others. The TIC has established a threshold that determines whether or not an investor can receive certain incentives. Currently, the threshold is based solely on dollar amount of the investment; to receive the investment incentive packages, the investment must be more than US\$300,000 for foreigners and US\$100,000 for Tanzanians.

Basing the granting of the Certificate of Incentives solely on the dollar amount of investment may not be the best method to attract the type of investment that the Tourism Policy calls for, namely up-market and small-scale. Other factors, such as the use of environmentally friendly technologies and location could also be incorporated in order to attract appropriate investment.

In terms of coastal tourism development, no specific reference to coastal tourism is made in the Investor's Guide to Tanzania (1998); however, Tourism is identified as a lead sector after Mining; and Petroleum and Gas. Investors in tourism can receive a set of investment benefits and incentives as follows:

Sectors-->	Tourism & Tour Operators	Mining	Manufacturing
Incentives (%)			
Corporation Tax	30	30	30
Custom duty on capital goods	0	0	5
Capital Allowance deduction in years of income	100	100	100
Withholdings on tax dividends	10	10	10
Withholding tax on interest	0	0	0

The above table shows that Tourism is in line with other lead sectors in terms of investment benefit and incentive packages.

It is unclear how many investors in coastal hotels and resorts have contacted TIC and taken advantage of these investment incentives. Certainly, a number of small beach hotels have not contacted, and therefore not benefited from, the TIC. It is therefore difficult to assess the effectiveness of the range of investment incentives on offer to investors in coastal tourism development. Further, it is difficult to identify and assess the roles of local authorities in the investment process.

There is a need to assess the impact of the incentives offered by TIC to see if they are attracting the types of investment called for in the Tourism Policy. It is important that investment incentives are in line with sectoral policies. Local investors should be assisted to provide adequate accommodation.

The roles and responsibilities of different agencies in the review of investment proposals, particularly the Environmental Impact Assessment step, are not clearly defined. The TIC encourages investors to follow sectoral as well as local guidelines and legislation, but does not require compliance prior to granting a Certificate of Incentives.

There is an urgent need to develop a set of streamlined guidelines for coastal tourism investment. The guidelines would clarify the investment procedures depending on size, type and location of investment, as well as the roles and responsibilities of relevant government agencies at both the national and local levels. The guidelines would provide investors with a road map to guide them through the investment approval process while ensuring that the investment is subject to proper environmental, social and cultural assessments.

Land Act No. 4 and Village Land Act No. 5

The Land Act No. 4 and the Village Land Act No. 5, enacted in 1999 and operational in 2001, contain some changes that could affect the acquisition of land for coastal tourism investors. The four central land tenure according to the policy and legislation in support are:

- All land is public land vested in the president as a trustee on behalf of the citizen
- Land has value
- The rights and interests of citizens in Land shall not be taken without due process of law
- Full fair and prompt compensation shall be paid when land is acquired

Other policy statements that will have a bearing on investment in coastal tourism include:

- Village Lands are administered by village council
- Non-citizens and foreign companies will not be allowed to acquire land through transfer or purchase of customary land.
- Special areas for various investments will be identified and set aside for allocation to investors by the Government.
- Sensitive areas to be protected, these include water catchment areas, small islands, beaches rivers, river basins, areas of biodiversity national heritage etc. Marginal land areas will be defined as a tenure category requiring special development conditions.
- Before user rights are considered, existing land tenure rights should be recognized.
- Mechanism for protecting beaches coastline and islands will be created such as: construction of tourist hotels; recreational activities along the coastline/islands; preparation of a Coastal Zone Integrated Development and Management Programme
- Measures will be taken to prevent building on hazard lands and on all fragile environments. Hazard lands should be developed for public uses benefiting the local community.

Land Availability and Ease of Acquisition

Investment in accommodation anywhere in the world requires secure title to land and the coast of Tanzania is no exception. The process of acquiring land along the coast differs substantially from district to district. In some areas, all negotiations, surveys and consultation are done at the district level, with the central government only providing the final land title. In other districts, the local authorities have no contact with investors throughout the land acquisition process, which is essentially managed by the central government.

While processes differ from place to place, the typical investor first identifies the site where he would like to develop and then enters into negotiations with whoever has title to that land. Often times, the title holders are villagers who, for the most part, are quite willing to 'sell' their land for what seems to them like a good sum of money. From this point, the process is not uniform, meaning that some investors go directly to the central government while others deal directly with the district or regional authorities. Securing land title can take from three months up to five years in some cases.

There is a need to apply a uniform process of land acquisition in coastal areas, particularly with regard to the roles of local and central governments. The process should be streamlined to facilitate investment but include the necessary checks and balances to ensure proper application of the law.

Operating Costs

A key issue affecting the profitability of existing hotels and other accommodation providers as well as the potential to attract new investment in coastal tourism is the relatively high operating costs borne by the hotel sector. Some of the factors that contribute to these operating costs are discussed below.

Due to their location in remote areas of the coast, many hotels have to provide their own power, water, and waste disposal. The cost of developing and operating these services on an individual basis can be quite high. While the investor must take these factors into account when deciding whether to develop in a certain area, progress in terms of service delivery needs to be made not only to facilitate investment in tourism but also for the benefit of the people living in these areas. Another potential problem with the hotels developing their own waste management system is the possibility of ground and water pollution. If investors are going to develop their own systems of waste management, a proper technical review needs to be conducted to ensure that the ecological integrity of the area is not adversely affected.

The cost of transporting goods from markets is also a factor in determining a hotel's operating costs. Many hotels find they need to purchase their goods and products from established urban centers rather than from local producers due to inconsistent local supply and low quality products. While some durable goods cannot be produced locally, most produce and other agricultural products could be produced locally and sold to the hotels. This would provide much needed income to local communities while saving the hotel the cost of transporting goods from urban centers. However, in very few cases has the local community been able to provide the necessary products to the hotels in their area. Some villagers understand the potential for entering into a small business to supply vegetable and fruits to the hotels, but none have really started this type of business.

There is a need to encourage local communities to provide locally grown products to the hotels. The hotels, in turn, need to provide villagers with detailed information in terms of quality standards as well as quantity required. The district agricultural officer may be in the best position to facilitate this mutually beneficial process.

Most hotel owners and managers, who estimate that around 40% of gross revenues go to pay a variety of taxes, consider the total tax burden on the hotel sector to be too high. While this tax burden may or may not be too high relative to other sectors and other countries, the transaction costs of paying up to 15 different taxes at different times of year present an unnecessary constraint to the accommodation sector. In addition, many hotel owners and managers feel that more items need to be included in the list of VAT-exempted items. For example, a small hotel that purchases fish from a local fisherman, cooks it and serves the fish to guests for dinner must pay VAT on the sale of the dinner, because the process of cooking is considered to be adding value to the unprocessed product (the fish). This system could be a disincentive to hotel owners and managers purchasing locally harvested or produced items.

There is a need to streamline the taxes applicable to the hotel sector. The total tax burden on the tourism sector in Tanzania should be rationalized and put in line with related sectors and countries.

Poor communications services along the coast also negatively affect the hotel sector. Hotels cannot take reservation over the phone, nor can they provide contact to urban areas in case of emergency.

Another factor that contributes to a hotel's operating costs is the lack of trained staff in the country. While wages are quite low compared to many other destinations, the lack of trained staff can force managers to hire two unskilled workers to do the job of one skilled worker. Again, the transaction cost of repeatedly hiring and training unskilled workers adds to the overall operating costs of hotels.

There is a need to strengthen hotel training institutions and set and apply standards for curriculum and degree programs.

Relationships with Local Communities

The relationship between a hotel and the nearby coastal community begins once the investor identifies the site for hotel construction and starts negotiating with the land titleholder. How this relationship develops over time can have enormous impacts not only on the success of the hotel but also on the lives of the local communities. The local people can benefit directly from the construction and operation of the hotel through employment. They can also benefit indirectly through the provision of supporting services to tourists, such as being tour guides, making and selling handicrafts, or selling locally grown fruits and vegetables to the hotels (as mentioned above). Further, in many areas of the coast, the hotels have entered into written formal agreements whereby a percentage of the hotel's profits are channeled to the community, often through the village council or other committee set up to utilize these resources for the benefit of the community. Indeed, the local community in tourist areas can receive numerous benefits if the relationship with the hotels is strong.

On Chole Island, Mafia District, the local village has developed a strong relationship with the owners of a small, eco-tourist hotel. In exchange for permission to build and operate the hotel, the owners agreed to contribute financial resources to priority village development projects. To date, the village has been able to construct a new market, health clinic and primary school. Other initiatives developed include English classes, a library, an oral history project, and research on the archaeological ruins of the island. The community has also developed a fee scheme to collect money from visitors to the island. The revenues from this initiative are channeled into a community development fund under the auspices of two annually elected committees. Indeed, both the hotel and local community are benefiting from this strong relationship that has been growing over the past eight years.

In Ushongo, Pangani District, the three beach hotels have entered into an agreement with the local village. Two of the three hotels formally agreed when acquiring land titles and permission to develop hotels to channel a percentage of their revenue to the village for propriety projects. The third hotel, while not required as part of a formal agreement, has agreed to participate in this scheme as well. It was agreed between the village and hotels that the money would be used for the improvement of school facilities in the village. The money is provided to the village in cash and therefore it is difficult to monitor its end uses. A few minor obstacles still need to be overcome in order for this partnership to be a success, such as the issue of providing revenue during the low season, the investment in road maintenance by the hotels and the exclusion of the District authorities in this arrangement.

From these two mini-case studies, it can be concluded that building and maintaining strong relationships can take many years and require continuous efforts from both sides. It is important that as many details as possible, both large and small, are dealt with as early and as openly as possible to avoid potential pitfalls in the future. Last, building and maintaining a strong relationship between hotels and local communities is a long and continuous process, but one that can be greatly beneficial to both parties.

The hotels can also benefit from strong relationships with villagers. Problems such as security, which a number of tourist hotels are facing, may be mitigated through strong relationships with the people living in the surrounding area. If these people are benefiting from the hotel being there, they will be more likely to protect the source of the benefit and ensure that criminal elements, from both inside and outside the community, are stopped. Other ways in which the hotels can benefit from good relations with the local communities is through marketing. As more tourists are becoming interested in the culture and lifestyle of the people living in tourist destinations, hotels that can provide a direct link to this cultural attraction have a distinct advantage over those hotels that are operating in isolation from the local context.

The safety and security of tourists in coastal areas is of paramount concern to many hotel owners, tour operators and government. Breakdowns in security resulting in attacks on, or robberies of, tourists can result in a destination or area developing a damaging reputation, which, in turn, can

result in lower levels of visitation.¹⁴ A brief scan of the major guidebooks on Tanzania shows that many areas of the coast already have this reputation (e.g. Kaole Ruins in Bagamoyo). Currently, the majority coastal tourism areas have not made provisions for ensuring the security of their visitors. Tour operators and hotel owners warn their guests to always use a local guide for protection when walking in remote or relatively uninhabited areas. These problems are not restricted to hotels; many cultural attractions are in remote areas, a prime environment for robbery or other criminal acts. In Kunduchi, most hotels have signs warning guests not to stray along the beach beyond the boundaries of the hotels, warning that those areas are not safe. A number of hotels have reported incidents involving young men from local villages; these incidents do not usually occur on the hotel premises, only when guests leave the grounds to walk along the beach. The commonly shared opinion about the root causes of these robberies or attacks is poverty at the local level and the corresponding lack of opportunities for gainful employment for young people, particularly men.

There is a need to create and maintain a safe and secure environment in tourism areas. Local authorities and communities need to be made aware of the potential damage frequent incidents involving tourists can have on the local economy and work in partnership with hotels and other stakeholders to develop effective, low-cost solutions.

This risk of attacks on, or robberies of, tourists have forced many hotels to employ their own *askaris*, or watchmen, many of whom are armed. In Kunduchi, the Bahari Beach Hotel and its neighbors have pooled some money together to build a police post in an attempt to deter future criminal acts in the area. In the past, hotel management would wait until things were getting out of control and then go to the police, who would then conduct an operation to round up the suspected robbers. Following such an operation, no problems would occur for five to six months; but soon the cycle would start all over again. The community response to develop a more permanent solution by pooling resources to build a police post is one potential solution to the security problem. In fact, the government encourages local communities to develop ideas and methods of improving security, and pledges to support those initiatives.

It follows that poor relations between hotels and local communities can have negative impacts on both parties. For example, one of the remedies often used by hotels facing security problems is to restrict access to the property to all non-guests of the hotel. This may restrict local fishermen's, or other coastal resource users, access to fish landing sites or other important resources.

There is a need to identify the best mechanisms for strengthening relationships between hotels and local communities. Consulting the local population from the first stages of the investment process is one of the best ways to accomplish this. In any case, the more tangible the benefits to

¹⁴ It is important to note that tourists do not necessarily have to be the targets of robberies or assaults in order for a destination to gain a bad reputation. For example, in the recent political violence in Zanzibar and Zimbabwe, tourists were not specifically targeted. However, the overall insecurity of the areas led to declines in tourist arrivals. This issue of creating and maintaining a secure and stable socio-economic environment to sustain tourism is extremely important; however, it is beyond the scope of this document. This report focuses on the security issues that directly affect tourists and tourist activities.

both parties, the stronger the relationship and the better chance for success for the hotel enterprise and the development of the local community.

Summary

More investment in the accommodations sector along the coast is required. Streamlining the investment process and reviewing the investment incentives can assist in attracting both local and foreign investors. Mechanisms, such as EIA, to ensure that environmental, social and cultural impacts of hotel investment are positive need to be implemented. Also, it is necessary to promote strong partnerships between hotels and local communities. An environmental, social and economic analysis of the different types of accommodation needs to be conducted to determine which types are appropriate to conditions at the local level.

Accessibility

The third and final key component of coastal tourism is accessibility. Even with world-class attractions and accommodations, an area cannot become a world-class tourist destination if proper access to that area is unavailable. Comfort and time are two of the key factors in assessing the accessibility of tourist destinations. Another consideration in developing reliable access to coastal areas is the linkage with other tourist destinations, both within the country and without. If coastal tourism is to become a complement to the already healthy wildlife tourism, then it is the access from those wildlife areas to the coastal destinations that must be improved. The primary connection routes include the roads from the Northern Circuit through the Usumbara Mountains to Pangani or Saadani and the road from the Selous Game Reserve to Kilwa. In addition, air access needs to be coordinated to ensure that connecting flights are scheduled in a rational manner.

In general, accessibility to the coastal areas of Tanzania is substandard in all respects. This section identifies some of the key constraints in terms of improving road, water and air accessibility for coastal tourism.

Road Access

All areas of the coast are accessible by road; however, the majority of roads are in poor condition and many are impassable during the rainy seasons. Road access to the coast north of Dar es Salaam is generally better than in the south. However, the coastal roads in the north, Dar es Salaam-Bagamoyo-Saadani-Pangani-Tanga, urgently need to be improved. Financing, in the form of donor support, for the improvement of these roads has been obtained by the GOT; however, the schedule of construction is not very clear at this point in time.

A similar situation exists in the south. The Dar es Salaam - Lindi road will be completed by a variety of different contractors, with the completion of the Rufiji Bridge being the cornerstone of this route. At present, however, very few tour operators are willing to take tourists by road to the southern attractions due to the uncertainty of road conditions and the discomfort of traveling.

In addition to these trunk roads along the coast, feeder and other local access roads also need attention in order to promote tourist traffic in coastal areas. For example, the feeder roads to the beach hotels in Kunduchi are in extremely poor condition. A recent initiative has pooled public and private sector resources in order to solve this problem. A successful public/private

partnership here could very well lay the groundwork for future collaboration in other areas of the coast. In some areas, the hotels have taken things into their own hands. For example, in Ushongo, Pangani District, the hotels have improved the access road to their facilities. Local communities enjoy the benefits of this improved road, but the hotels are finding that the cost of periodic grading is too high. As a result, a partnership between the hotels, the local communities and the government needs to be strengthened so as to share the costs, and not just the benefits, of road improvements.

Another constraint of road travel along the coast is the crossing of rivers, particularly at Pangani and Wami Rivers (the bridge over the Rufiji discussed above should solve this problem in the south). There is a working ferry at the Pangani River; however, it often breaks down, sometimes for days at a time, which greatly restricts tourist movement, and therefore tourism development. In addition, the hotels rely on the ferry to access markets and are greatly inconvenienced when the ferry is not working properly. The ferry at the Wami River, just south of Saadani Game Reserve, is not working at all. This greatly restricts the movement of tourists from Dar es Salaam or Bagamoyo to Saadani, one of the top natural attractions along the coast. These ferry services need to be urgently improved to allow tourists to visit the best attractions along the coast. Potential solutions could be to privatize the management of ferry services or to introduce low-tech, back-up methods of operation, such as a rope and pulley system.

Water Access

By definition, coastal tourism is located near, and depends on, the coastline and sea. However, water transport is not an option for those tourists who wish to visit the coastal areas, but do not want to tackle the poor road conditions on land. While ferry transport is available to Zanzibar from Dar es Salaam, no such service exists for traveling up the coast to Bagamoyo, Saadani, Pangani or Tanga, or down the coast to the Rufiji Delta, Mafia Island or Kilwa Masoko. Boat transportation is used around the world by tourists wishing to visit areas difficult to reach by land. In some parts of the world, luxury sailing vessels serve as small, exclusive 'cruise ships' that transport passengers from one tourist attraction to another, while offering meals and other water sport activities on board. This type of water access could be one way to facilitate tourism along the coast in the short-term while the roads are being improved, though it could also prove to be quite popular in the long-term as well.

Air Access

Many coastal areas are currently accessible by air services. Three or four companies now offer scheduled flights to coastal areas, including Mtwara (three per week), Lindi (two per week), Kilwa (two per week), Mafia (daily), and Tanga (three per week). Private charter planes utilize airstrips in Pangani and Saadani in addition to the locations receiving scheduled flights. While air access has improved in recent years, flights are sometimes cancelled or delayed, which reduces tour operator and tourist confidence in this mode of travel.

Another issue regarding air accessibility is the scheduling of flights. For example, flights bringing tourists from the Northern Circuit often land in Dar es Salaam after the flight from Dar es Salaam to Mafia has departed. This results in tourists having to stay overnight to wait for the next day's flight, a prospect that may deter them from going to Mafia at all. There is a need to

coordinate the flight schedules of all air transport providers to better link coastal tourism destinations to other up-country attractions.

Accessibility is particularly important to the development of coastal tourism, because without safe and efficient modes of transport to coastal tourist areas from other tourist hubs, coastal tourism will remain quite limited. While accessibility has improved over the past few years, especially in terms of air services, much needs to be done to improve all modes of transport, such as roads, ferries, sea travel and air services. In the long-term, the current and future plans to improve road infrastructure to the coastal areas should be continued, particularly the coastal roads from Dar es Salaam-Bagamoyo-Saadani-Pangani-Tanga and from Dar es Salaam-Kilwa-Lindi. The possibility of constructing bridges over the Pangani and Wami Rivers could also be considered. In the short-term, relevant public and private sector agencies should focus on developing and/or improving alternative transport services. Priority should be given to the airport at Mafia and the ferries at Pangani, Wami and Rufiji Rivers. In addition, the flight schedules of all air service providers need to be rationalized so as to minimize the need for unwanted stopovers. Lastly, the feasibility of developing sea ferry services along the coast should be determined, especially from Dar es Salaam to Tanga (making stops at Bagamoyo, Saadani and Pangani) and between Dar es Salaam, Mafia and Kilwa. A ferry service on these routes would greatly improve the accessibility to coastal tourism areas in the short-and long-term.

Priority Coastal Tourism Destinations

The previous sections have addressed the three key components of coastal tourism development, namely attractions, accommodation and access. Tourism can exist in areas where only two, or even one, key components are in place. However, in order for a coastal area to become a successful tourist destination, all three components need to be of high quality and at reasonable cost. The application of this value-for-money concept to a *destination* can provide decision makers with an idea of where their focus should be both in the short- and long-term. It is important to note that not all areas along the coast can become successful tourist destinations, not least because the coastal zone has many different users and uses, but also because it is not economically viable. Therefore, priority should be given to the coastal areas with the best potential to become world-class tourism destinations. This is not to say that other coastal areas do not have the potential to develop into excellent tourist destinations, but given limited resources, areas with the greatest potential should be given priority.

Using the analysis of the three components in earlier sections, the priority areas for coastal tourism development are as follows¹⁵:

Saadani Game Reserve, linking to Pangani in the north and Bagamoyo/Kinondoni in the south

The linkage of Saadani and Pangani or Saadani and Bagamoyo/Kinondoni would provide tourists with many diverse and unique attractions and activities within a relatively small area. Saadani Game Reserve is an excellent attraction but suffers from a lack of accommodation and poor

¹⁵ Dar es Salaam and environs can also be considered a priority destination in that coastal tourism development is fairly advanced. However, due to its level of development and the existence of plans for future development, it was decided that this area is already a 'gateway' to the coast and the rest of the country and therefore would not be considered as a priority area for tourism development for the purposes of this report.

access. Both Pangani and Bagamoyo towns have good attractions and accommodations, but access needs to be improved. Saadani, Pangani and Bagamoyo, on their own, cannot truly develop into world-class tourist destinations.

Priority actions to develop this region into a tourist destination include the following:

- Improve investment climate for private developers while ensuring environmental, social and cultural considerations are taken into account. It is recommended that Bagamoyo/Kinondoni should try to attract medium to large hotels, while Pangani should continue to attract small to medium sized hotels; however, an assessment of the levels of acceptable use of specific sites needs to be conducted prior to any such development.
- Development of a comprehensive tourism management plan to guide tourist activities. This plan would focus on the development and management of a diverse set of attractions and activities and identify potential entry points for small and medium sized local investment. The plan would also feature a joint marketing effort by all stakeholders to attract visitors to the region, and not one single town or hotel.
- Improvement of road and possibly water access to all three areas, focusing on the coastal road between Bagamoyo and Pangani (passing through or around Saadani) and the Muheza-Pangani road which would provide an important link to the Usambara Mountains, an extension of the Northern Circuit.

Kilwa area

The ancient ruins found in Kilwa District are quite extensive and unique which is why UNESCO named them as a World Heritage Site in 1981. The ruins are located in beautiful tropical island settings, so the journey to the islands of Kilwa Kisiwani and Songo Mnara is just as enjoyable as touring the ruins. While these ruins, not to mention the old town of Kilwa Kivinje, are the corner stone of this area in terms of tourism, the natural attractions, such as the beaches, mangroves and hippo pools, and local lifestyles, such as *taraab* and artisanal fishing, are excellent attractions in their own right.

The diversity of these attractions has the potential to make the Kilwa area one of the best coastal destinations in the region. However, as stated above, having one key component without the other two can hinder an area's tourism development. Relatively poor access and the lack of adequate accommodation in the area need to be addressed before Kilwa truly becomes a world-class tourism destination.

The current initiative of the GOT, with support from UNESCO, and the French and Japanese governments, provides an excellent start to this process. The rehabilitation of the ruins is the primary focus of the initiative and rightly so; without some rehabilitation, the potential to attract tourists will be quite limited.

Other important actions needed to complement this initiative include the following:

- Improve investment climate for private developers while ensuring environmental, social and cultural considerations are taken into account. Private investment in accommodations is extremely important to this area in the short-term; however, care needs to be taken to ensure that development is done in a coordinated and environmentally and socially sensitive manner.

- Development of a comprehensive tourism management plan to guide tourist activities. This would bring all stakeholders, including mangroves and wildlife managers, local communities, etc. together to develop a common vision and synergistic strategy for development. This plan would focus on activities to complement the UNESCO initiative mentioned above, such as assisting in the development of eco-tourism activities in the mangroves. This plan would also identify entry points for small and medium enterprise development to support the tourism sector.
- Improvement of road, and possibly water, access to the area, especially from the Selous Game Reserve and Mafia Island. The possibility of taking a river cruise from the Selous to Ndundu needs to be evaluated (the car would pick the tourists up at the ferry crossing and continue on to Kilwa).

Mafia Island area

Mafia Island is increasingly becoming known as having the best dive sites in the eastern Indian Ocean. The development of the Mafia Island Marine Park has assisted in putting the island on the tourist map, as has word of mouth from satisfied visitors. The excellent diving and snorkeling are the primary attractions, but the area has many other excellent attractions as well, including nice beaches on the western side of the main island, the smaller islands surrounding the main island, a few ruins of early inhabitants and the relatively untouched feel of the area as a whole. Other attractions include the Rufiji Delta, a short boat ride away, and unique bird and animal species, such as the Comoros Fruit Bat and dugongs.

Accommodation on the island is primarily up-market, but the TAHI lodge could be improved to provide middle-market tourists with a less expensive option. One of the major constraints to this area becoming a world-class destination is the high transport cost associated with remote island tourism development. Add to that the cost and unreliability of air travel and many tourists will opt for the less expensive and easier route and go to Zanzibar instead. Improving transport may bring a relatively rapid pace of investment, however; measures need to be put in place in the short-term to ensure that the fragile coastal ecosystems are preserved.

Priority actions to develop Mafia Island into a tourist destination include the following:

- Improve investment climate for private developers while ensuring environmental, social and cultural considerations are taken into account.
- Development of a comprehensive tourism management plan to guide tourist activities. This plan would include areas both within and without of the MIMP boundaries and include all stakeholders, such as the hotel owners and managers, local communities, Marine Park Officials, and district authorities. This plan would focus on diversifying away from diving in order to attract more visitors and to encourage them to stay on the island longer. Also, a joint marketing effort could be developed within this plan to sell the destination as an untouched tropical paradise for those tourists who want to get off the beaten path.
- Improvement of air, and possibly water, access to the island, as well as local roads on the island. The airstrip needs to be improved to all-weather standards. Also, the road from Kilindoni to Utende needs to be graded at least twice per year. Alternatives to heavy machinery should be explored, such as labor-based road maintenance.

Other areas of the coast can also be developed into tourist destinations, such as Tanga, linking with Mombassa or Mkomazi Game Reserve; Dar es Salaam, particularly small, boutique resort development in Temeke Municipality; and Mtwara, linking with Mozambique and the Southern Highlands. Improving access and management of attractions is the first step towards tourism development in these areas.

CHAPTER THREE

INSTITUTIONAL AND POLICY FRAMEWORK

The public sector plays an important role in creating an enabling environment for the sustainable development of coastal tourism. Government should put in place the necessary policies and legislation that not only attracts investment in the sector, but also ensures that any and all development maximizes the benefits to society and minimizes the costs, or negative impacts.

As coastal tourism is a complex industry affecting many sectors, a number of government institutions have important roles to play. However, one agency or institution needs to play the lead role in developing the overall strategy of coastal tourism development. For tourism, the lead agency is the Ministry of Natural Resources and Tourism (MNRT). Within MNRT, the lead department for tourism is the Tourism Division. Other departments within MNRT are mandated with managing specific resources, most of which can also be considered tourist attractions. These departments include the Fisheries Division, Forestry and Beekeeping Division, Wildlife Division and Antiquities Department. Other key departments under the MNRT include the Marine Parks and Reserves Unit and the Tanzania Tourist Board.

In addition to the MNRT, there are many other agencies or institutions whose work is relevant to coastal tourism. These supporting agencies need to work together in a coordinated manner to ensure that the guiding tourism strategy is implemented properly. Profiles of the lead and other relevant institutions are provided below.

Lead Agency

Tourism Division

The Tourism Division is the government agency primarily responsible for the formulation and enhancement of sectoral policy and regulatory functions. The National Tourism Policy (September 1999) charges the Tourism Division with the following specific duties:

- Formulation of the tourism policy and overseeing its implementation
- Sectoral planning and budgeting
- Formulating and reviewing legislation
- Monitoring and evaluation of sectoral performance
- Management of information systems
- Manpower planning and human resource development
- Researching, training and curriculum development
- Licensing and control of tourist agency businesses
- International cooperation and collaboration
- Identification of tourist attractions and diversification of tourism activities
- Undertaking impact assessments on cultural and socio-economic activities
- Setting and reviewing license fees and monitoring their issuance
- Controlling quality of tourism facilities and services by carrying out inspection, classification and grading
- taking legal action against violators
- appraising investment proposals
- undertaking resource mobilization from within and external

- developing and promoting domestic tourism

The roles and responsibilities given to the Tourism Division are quite vast and diverse, including policy work, monitoring and evaluation, human resources development, licensing, tourism attraction development, impact assessments, and marketing. The Division is split into the following three sections, Tourism Development; Research, Training and Statistics; and Licensing and Control.

MNRT Collaborating Agencies: Caretakers of natural and cultural attractions

Wildlife Division

The Wildlife Division is mandated to protect wildlife habitats in the country. Under the Wildlife Act of 1998, this division is responsible for managing all Game Reserves, including Saadani Game Reserve. The Division is also responsible for supervising all game hunting activities.

Forestry And Beekeeping Division

The Forestry and Beekeeping Division (FBD) is responsible for developing policies and regulations to ensure that forest and bee resources are conserved and used in a sustainable manner. The FBD manages forest reserves, including mangrove reserves. The Regional Natural Resources Officer represents the FBD at the regional level, at the district level by the District Forestry, and at the village level by the Assistant Forestry Officer. The Mangrove Management Project is responsible for mangrove management along the coast while the district councils are responsible for local authority or village forest reserves.

Fisheries Division

Established by the Fisheries Act of 1970, the Fisheries Division is responsible for the formulation of policies, development and management of the fisheries sector. This includes improving resource management and control; promoting efficient resource utilization and marketing; and collecting and managing information relevant to fisheries resources. It also is charged with strengthening collaboration on cross-sectoral issues relevant to the fisheries sector, including tourism.

Marine Parks And Reserves

Marine Parks and Reserves Unit (MPRU) was established by the parliament Act No: 29 of 1994 and formally became operational in July 1995; Marine Parks and Reserves has the mandate to establish, monitor, conserve, control and manage marine and freshwater protected areas in mainland Tanzania. Marine Parks and Reserves have the following objectives:

- 1) To protect, conserve and restore the species and genetic diversity of living and non-living marine resources and ecosystem processes of marine and coastal areas.
- 2) To stimulate the rational development of under utilized natural resources.
- 3) To manage marine and coastal areas so as to promote sustainability of existing resources use and recovery of areas and resources that have been over exploited or other wise damaged.
- 4) To ensure that villages and other local resident user in the vicinity of, or dependant on the Marine Park or Marine Reserves are involved in all phases of the planning, development and management of the Marine Parks or Marine Reserve, share benefits

of the operation of the protected area and have priority over the resource use and economic opportunity afforded by the establishment of Marine Park or Reserve.

- 5) To promote community oriented education and dissemination of information concerning conservation and sustainable use of the Marine Park and Reserves.
- 6) To facilitate research and to monitor resource conditions and uses within the Marine Park and Reserve.

Currently, the MPRU is assisting the local residents living in or within the vicinity of Marine Park or close to Marine Reserve to play a big role in coastal tourism so as to benefit from the tourism activities as well as conserving the fragile marine ecosystem. MPRU is also working in collaboration with the community within the marine Parks to prepare and implement general management plans that provide for sustainable resource use plan which includes: areas for coastal tourism development, mariculture development, core zone (no-take zones) and specific or regulated resource use zones.

Antiquities Department

The Antiquities Department is mandated to be the custodian of Tanzania's cultural heritage and is responsible for the identification, preservation, conservation and protection of sites, buildings and articles of paleontological, archaeological, historical or natural interest. The Antiquities Department is currently managing rehabilitation projects in Bagamoyo and Kilwa and is working on developing mechanisms for private sector and local community involvement in the conservation, management and promotion of heritage sites as tourist attractions.

National Museum of Tanzania

The National Museum of Tanzania, a parastatal organization under the Antiquities Department, is responsible for providing information to communities, visitors, scholars and schoolchildren about cultural and natural heritage; conducting research; conserving and preserving the museum collection; and maintaining public museum services. There are four branches in addition to the National Museum in Dar es Salaam, namely the National Natural History Museum and Arusha Declaration Museum (Arusha); the Butiama Museum in Butiama village, Musoma District; and the Village Museum in Dar es Salaam.

Tanzanian National Parks Authority (TANAPA)

This semi-autonomous agency is responsible for managing the country's national parks. It is mandated to manage and regulate the use of areas designated as National Parks to preserve the country's heritage, encompassing both natural and cultural resources. All Parks have a General Management Plan/Environmental Impact Assessment that utilizes limits of acceptable use as a guiding principle. TANAPA's policy is to promote the development of high quality tourism and de-emphasize mass tourism.

There is a need to coordinate the efforts of all caretaker agencies to ensure that all coastal tourist attractions are developed and managed in a comprehensive manner. Once all attractions under the supervision of the different agencies in a specific area are being managed in a coordinated manner, that area can become a successful tourist destination.

Lead Marketing and Promotion Agency:

Tanzania Tourist Board, MNRT

The Tanzania Tourist Board (TTB) was established by Act of Parliament, Act No. 18 (1992) and formally began operations in June 1993. The primary objective of the TTB is to spearhead the marketing and promotion of Tanzania's tourism attractions both internally and abroad. TTB is responsible for advising stakeholders and custodians of tourism products regarding the type and quality of services that are preferred by both current and potential markets. TTB is also responsible for providing advice or other inputs into the government policy and planning processes.

TTB has a staff of twenty-seven, divided into six departments: Marketing; Research and Development; Finance; Administration; Legal; and Tourism Services.

TTB is working with the Dutch consulting firm (SNV) on the Cultural Tourism Program. In addition, it has recently been decided that the TTB should expand its scope and take on more responsibility in terms of attracting investors, working closely with TIC. To date, the exact role of TTB in attracting investment has not been determined.

Collaborating Agencies outside MNRT

Tanzania Investment Center (TIC)

The Tanzania Investment Center (TIC) is the One Stop Agency of the GOT established to promote, coordinate and facilitate investment in Tanzania. Formerly created by the Tanzania Investment Act, No. 26 of 1997, TIC is housed under the Office of the President. TIC is administered by a 7-member Board of Directors representing both the public and private sector and is headed by an Executive Director who is the Chief Executive. TIC has no representation at the regional, district or village level.

The primary functions of TIC are as follows:

- enhance the investment climate for both foreign and local investors
- collect, analyze and disseminate information about investment opportunities and sources of capital
- identify investment sites, estates or land together with associated facilities
- assist all investors to obtain all permits and authorizations required to set up and operate an enterprise, and to enable certificates issued by TIC to be fully effective
- creation and management of export processing zones
- provide up-to-date information on incentives available to investors
- carry out and support local investment promotion activities

TIC assists all investors in obtaining the necessary permits, licenses and other items needed to start a business in the country. For those investors whose minimum capital investment is more than US\$300,000 for foreign investors and US\$100,000 for local investors, TIC provides a Certificate of Incentives. The TIC assists all investors to obtain permits, authorization, etc. required by other laws to set up and operate investment in Tanzania. All government departments and agencies are required by law to cooperate fully with TIC in facilitating investors. Key agencies, such as TRA, Lands and Immigration, have seconded a staff person to TIC in order to

facilitate investors. Currently, there is no representative from the Tourism Division housed at TIC to assist potential investors in tourism.

TIC is given responsibility for all lands determined to be suitable for investment as determined by the Ministry of Lands under the Land Act No: 4 of 1999. This provision allows TIC to attract investors for specific plots of land already acquired by the government for investment purposes. The Commissioner of Lands gives the final land title to the investor, but TIC facilitates and speeds up the process.

Human Settlements Development Department, Ministry of Lands and Human Settlements Development

The Human Settlements Development Department (HSDD) is responsible for creating a conducive environment and institutional framework to support the human settlements development process. The HSDD works with local authorities to develop land use plans and grants land titles to investors.

HSDD in collaboration with the respective local communities and local authorities is responsible for:

- identification and setting aside important pre historic/historic sites and buildings for conservation and preservation purposes.
- the proper use of small islands and the exploitation of the resources found therein so as to facilitate their environmental protection, sustainable development and national security
- identification, classification and development control of beaches according to the current and potential uses and ecological characteristics in order to safeguard the environment.
- ensuring that recreational beaches are accessible to all members of the public.

National Land Use Planning Commission

The National Land Use Planning Commission (NLUPC) is responsible for harmonizing and coordinating all land-related policies and legislation in order to promote sustainable land use.

Currently, the NLUPC is assisting districts and village authorities to prepare and implement land use plans based on the guidelines for participatory village land use management. Also, the NLUPC is working to sensitize local authorities about the impact of the New Land Act No.4 and the Village Land Act No. 5 which became operational on 01 May 2001. Particularly important is the categorization of village, general, reserved and hazardous land provided for under the new laws. The NLUPC is also facilitating the preparation of strategic zonal land use management plans for special areas such as river basins; wildlife corridors and buffer zones; coastal belts, etc. The NLUPC is responsible for monitoring land degradation countrywide.

Ministry of Works

The Ministry of Works (MOW) is responsible for the formulation of policies on the design, construction and maintenance, and management of roads, bridges, ferries, and government plants, buildings and vehicles. The MOW prepares short and long terms plans and programs pertaining to the development and maintenance needs of these infrastructure services. The MOW carries out and supervises the construction of these works, using contractors or Regional Road Engineers

(RRE). In addition, the MOW establishes relevant standards, specifications and regulations for the construction industry.

The MOW works with donor agencies and private investors to implement infrastructure construction and maintenance. Investment opportunities for the private sector exist for road and bridge construction under the Build, Operate and Transfer (BOT) scheme.

National Environment Management Council, Vice President's Office

The National Environment Management Council (NEMC) was established by parliamentary Act No: 19 of 1983. NEMC is the leading advisory, coordinating and regulatory agency responsible for the protection of the environment and sustainable use of natural resources. In this Act, NEMC is vested with the following mandates:

- advise government on all matters related to the effective management of the environment;
- coordinate technical activities of all bodies concerned with environmental matters
- enforce environmental regulations
- assess, monitor and evaluate all activities that have an impact on the environment
- promote and facilitate environmental information and capacity building
- seek advancement of scientific knowledge and encourage development of environmentally sound technology

NEMC is responsible for determining whether or not a proposed development requires an EIA to be conducted. If an EIA is required, NEMC is responsible for reviewing EIA statements. However, it is important to note that without an environmental law in place, NEMC has no legal authority to require an EIA.

Environment Division, Vice President's Office

The Environment Division is responsible for environmental policy formulation, environmental coordination and monitoring, and environmental planning. In terms of coastal tourism, the Environment Division is responsible for approving environmental impact statements on projects that might have impacts to coastal environment. Currently, the Division has no legal mandate, as the environmental law is not yet in place. However, existing sector legislations are being applied to address the environmental issues.

Marine Police Unit, Ministry Of Home Affairs

The Marine Police Unit is responsible for the security and safety of the people and their properties along the coast. This unit is working with the Fisheries Division and the Navy in patrolling coastal waters to protect marine resources from environmental destruction, such as dynamite fishing. Currently, no special training is given for maintaining peace and security in tourism areas.

Tanzania Harbors Authority

Tanzania Harbors Authority (THA) was established by the Tanzania Harbors Authority Act of 1977, with the mandate of handling sea-borne traffic at the three major ports of Dar es Salaam, Tanga, and Mtwara. The authority was established soon after the collapse of the then East African Harbors Corporation. Apart from handling bulk cargo as the main activity of the

Authority, THA also handles passenger boats and ships, including cruise ships. Regarding coastal tourism, THA has been cooperating with the Ports Management Association of Eastern and Southern Africa in strategizing on how best the region could be marketed as a worthwhile cruise destination. Their effort have led to the formation of the Cruise Indian Ocean Association to promote international cruise operation in the entire region.

Ministry of Communications and Transport

This Ministry is responsible for formulating policies and regulating issues relevant to communications and transport. In terms of coastal tourism, this agency is responsible for the ferry services, as well as planning and managing communication systems along the coast.

Local Authorities

District Council institutional framework

At the District level, the District Council is the primary agency responsible for all activities at the local level. It is composed of the Council Director's office and the Full Council. The Council Director's office is responsible for the implementation and follow-up of decisions reached by the Full Council. The Council Director, the top executive, and the Heads of Divisions forms the technical wing of the office. Collectively the Heads of Divisions forms the District Management Team (DMT).

The full Council is the supreme body of the District. Its major roles are to approve revenue and expenditure reports, and development projects of the District. The Full Council is composed of all elected Councilors, special seats for women Councilors and Member(s) of Parliament of that constituency. Within the Full Council, there are Standing Committees including; finance committee; administration and personnel; economic, works and environmental committee; social services; and education and culture. The number of committees is not limited and may expand, as necessary.

Village Councils

At village level the Village Council represents the technical body of the village. The main function of the village council is to receive and discuss proposals submitted by village committees.

Village committees are responsible for the day to day activities of the village. These committees are finance, economy and planning; social welfare; and defense and security. The number of committees is not limited and may expand, as necessary.

The Village Assembly includes all villagers. It is the ratifying body of all proposals tabled by the village council. It is also responsible for approving reports on revenue and expenditure and village projects.

Legal Mandates of District and Village Councils

Various principal legislations have been formulated to regulate functioning of Local Authorities. These legislations among other areas govern District and Village Councils in terms of regulating access and protection of resources and environment.

Principal legislation on land, fisheries, forestry, mining wildlife and water are relevant to issues related to coastal tourism at the District and Village level. The Local Government Finance Act No. 9, 1982 provides for Districts and Village Councils to formulate by-laws. Some districts have enacted by-laws regulating tourism, including a tourist head tax. Local Government Laws (Miscellaneous Amendment) Act of 1998 amends all local government and related laws and aims at making local authorities autonomous in managing their own affairs.

Business associations and other commissions and committees

Tourism Confederation Of Tanzania

Officially launched on 23 March 2001, the Tourism Confederation of Tanzania (TCT) is the permanent body recognized by the government that represents all associations or organizations whose members are directly engaged in the tourism business. The key constituents of TCT include TATO, HKAT, All Africa Travel and Tourism Association (AATTA), Tanzanian Association of Travel Agents (TASOTA), Tanzanian Hunters Association (TAHOA), and Tanzania Air Operators Association (TAOA). The primary purpose of the TCT is to facilitate and assist its members in the development of legal and responsible tourism in Tanzania with due consideration of the overall development of its people and the conservation of the environment and cultural values.

Hotel Keepers Association of Tanzania (HKAT)

HKAT is charged with representing the interests of its members, primarily resident hotel and restaurant owners. Most foreign owners of coastal hotels visited by the group either were not aware of HKAT or had decided not to join.

Tanzania Association of Tour Operators (TATO)

TATO was established in 1983 to represent the interests of its members in all spheres, which entail collective representation. Headquartered in Arusha, TATO currently has over 90 members. TATO is governed by a Management Council and served by 5 council sub-committees, focusing on the following areas: Manpower and Human Resources Development; Campsites, National Parks, Conservation Areas and Reserves; Tourist Safety and Security; Tax and Taxation; and Public Affairs and Promotion. The objectives of TATO are as follows:

- To establish and maintain high quality and standards of service among its members and other tourism intermediaries, e.g. Hotels, reserved areas, airlines, marine transport, etc.
- To provide a common and comprehensive stand (link) and input for government and its institutions in matters pertaining to the formulation of tourism policy, plans and programs.
- To strive for the enactment of fiscal and physical laws conducive to tourism investment and growth
- To develop and promote public awareness of the positive role of tourism in the national economy
- To promote and market socially responsible tourism products
- To facilitate arbitration among members
- To update its members on relevant information on tourism growth in Tanzania
- To formulate rules and regulations governing the activities of the Association and its members

Tourism Facilitation Committee

Formed in 1975, the Tourism Facilitation Committee consists of members from various tourism-related sectors (institutions). The major functions of the Committee are to facilitate all matters concerning tourism development, including issues of security, taxation, visas, health, promotion, accessibility, etc.

Relevant Policies and Strategies

Sector	Policies
National Tourism Policy	<p>The tourism policy seeks to assist in effort to promote the economy and livelihood of the people, essentially poverty alleviation, through encouraging the development of sustainable and quality tourism that is culturally and socially acceptable ecologically friendly.</p> <ul style="list-style-type: none"> • Putting in place mechanism that will ensure tourist activities respect use of beaches. • Develop tourism plan for specific areas e.g. beaches.
Integrated Tourism Master Plan	<p>Tanzania endorsed the Integrated Tourism Master Plan in 1996. This Plan, funded by the EU, provided a roadmap for future tourism development in Tanzania, focusing on the following areas: expanding the tourism product; maximizing linkages and minimizing leakage's; provision of training; and the regulatory environment surrounding tourism development. The Master Plan identified priority zones as shown below:</p> <ul style="list-style-type: none"> • Further enhancement and diversification of the Northern Wildlife Area (NWA); • Extension of NWA through the Usambara Mountains to Tanga and Pangani • Development of Southern Circuit (Selous, Mikumi, Ruaha, Udzungwa) • Development of beach tourism along the coast and Mafia • Enhancement of Dar es Salaam area (urban water front and near-shore islands) • Long-term development of the link corridor.
National Investment Promotion Policy	<p>Encourages investment in areas of national priority that includes natural resources and tourism.</p>

National Land Policy	<p>Policy strategies relevant to coastal tourism focus on shorefront planning resources and tourism.</p> <ul style="list-style-type: none"> • Construction of tourist hotels, residential building and recreational activities along the coastline shall be regulated to prevent coastline erosion and ensure public access. • Coastal development shall be done after EIA study has been carried out. • A coastal zone integrated development Management Programme will be prepared for conservation of both land and aquatic environment.
Local Government Reform Program	<p>The overall objective is to improve public services delivery through decentralization by making local Authorities more democratic and autonomous within framework established by central government. The objective provides an opportunity for local authorities to perform its role on implementation of the tourism policy in particular:</p> <ul style="list-style-type: none"> • Land and resource use planning. • Control over land use and allocation. • Provision and maintenance of tourism services, sites and attraction. <p>Conservation and sustainable utilization of marine and coastal resources.</p>
National Environmental Policy	<p>The policy provide guidance on tourism development with particular attention to:</p> <ul style="list-style-type: none"> • Tourism development based on careful assessment of the carrying capacity and prior EIA application. • Promotion of eco-tourism and diversification of tourism activities e.g. Conservation and promotion of cultural heritage sites.
National Human Settlement Development Policy	<p>The policy recognizes that beaches and coastline are potential tourism attraction sites and for that matter there is an ever-increasing demand of these sites for tourism development. Further the policy acknowledges that proper development and management of these areas will have socio-economic and environmental benefit. The main focus of coastal tourism are:</p> <ul style="list-style-type: none"> • To regulate development along the coastline in order to preserve the environment. • To ensure that recreational beaches are accessible to all members of the public.
National Fisheries Sector Policy and Strategy Statement	<p>The Fisheries Policy focuses on the promotion of sustainable exploitation, utilization, and marketing of fish resources and the effective production of the aquatic environment. The main goal is to promote conservation, development and sustainable management of the Fisheries Resources for the benefit of present and future generations. The policy does not directly cover coastal tourism but provides opportunities to the private sector to develop ecotourism based on the aquatic environment.</p>

<p>Forest Policy</p>	<p>The forest policy focuses on the sustainable utilization of forests products and services, foreign exchange earnings, conservation of forest biodiversity, water catchments and soil fertility. The Forestry Policy encourages community participation as a strategy of managing the Mangroves and other coastal forests. One of the strategies of the Mangrove Management Project (MMP) is to increase involvement and awareness of the local communities in mangrove ecosystems. Through this strategy, the project has supported the formulation of Village Natural Resources Committees (VNRCs), which are responsible for management on behalf of the rest of the communities in the villages. Modalities of benefit sharing from the resources are underway. The strategy ensures sustainable conservation of the mangroves, similarly to other coastal forests. The policy does not directly cover coastal tourism; however, it calls for protection of the coastal and mangrove forests, which are among the coastal tourism attractions.</p>
<p>Wildlife Policy</p>	<p>The policy reiterates that wildlife resources should be protected and utilized in a sustainable manner on the basis of assessment of natural heritage (flora and fauna), fragile ecosystems, sites under pressure species, with participation of and benefits to, the local communities.</p>
<p>Health Policy</p>	<p>Policy objectives for this sector relevant to Coastal tourism are:</p> <ul style="list-style-type: none"> • The provision of community needs for environmental infrastructure, such as safe water supplies, sewerage treatment and waste disposal services. • Promotion of other health related programmes such as food hygiene, separation of toxic/hazardous waste and pollution control at the hotels and households.
<p>Water Policy</p>	<p>The policy calls for sustainable development of water supply and sanitation in Tanzania. The policy aims at managing and developing the water resources in co-ordinated and integrated manner so as to provide water of acceptable quality.</p>
<p>Cultural Policy (<i>Sera ya Utamaduni</i>)</p>	<p>The cultural policy emphasizes that:</p> <ul style="list-style-type: none"> • The protection and promotion of our cultural heritage is a civic responsibility; • Cultural heritage sites shall be used as educational resources and tourist attractions; • All man made objects shall become national monuments on attaining the age of one hundred years; • Government shall encourage regions districts, villages, private and public institutions to establish and manage museums and archival centers; and • A Cultural Resource Impact Study should precede all land development.

Most relevant policies allow for the development of economic activities based on the specific

resource covered under the policy. However, clear guidance in terms of how this development could take place or what conditions would need to be met before activities could begin is missing. So, while no policy excludes the possibility of coastal tourism development, there is a lack of a shared vision of how coastal tourism should be developed.

Current Management Tools and Methods

Government agencies can use a variety of tools to manage an array of activities. The primary management tools and methods are discussed briefly below.

Spatial Planning

Planning can take many forms, including zoning, land use planning and, more generally, strategic planning. The purpose of all forms of planning is to lay the foundation for the management of different economic and other uses in a coordinated manner. Zoning could be done to demarcate areas for commercial or residential development, or to specify levels of use of specific areas, such as Marine Parks. Land use planning is similar in that it provides specific guidance for an area in terms of who has title to land as well as what areas of land are available for certain kinds of development. Strategic planning can be useful in that it provides conditions for development of a specific area, meaning that investors are free to develop anywhere they choose as long as they meet the development conditions of that area. Areas of ecological or national importance would most likely have strict development conditions so as to ensure that any development does not alter or degrade the environment or important structure.

The advantage of using strategic planning is that the private sector is free to choose where investment takes place, as long as it meets the development conditions. This type of strategic planning is being done in Dar es Salaam under the Sustainable Cities Program and could be used along the coast when developing comprehensive tourism management plans.

Licensing

Licensing is a tool that grants formal permission to conduct any types of business. For the tourism sector, there are two types of licenses:

- Licensing for operating as a Tourist Agent.
This licensing was granted under the authority of Tourist Agent Licensing Act, 1969. It gives permission for a company to operate as a tourist agent. The Tourism Division has the entire mandate to offer this kind of license.
- Licensing for building a tourist hotel.
License to build a tourist hotel is also offered by Tourism Division under Tourist Agents Licensing Act of 1969. This type of license is granted to any interested company or individual who has already got a title deed for a specified plot from the Ministry of Lands and Human Settlement. This kind of license is granted for hotels, exclusive clubs and restaurants under the Tourist Agent Act.

EIA

Environmental Impact Assessment (EIA) is a management tool that is being applied around the world. An EIA is not limited to assessing environmental impacts; it also should assess the potential impacts of a particular activity on the communities in the project area. The purpose of an EIA is to identify ways to improve project or development proposals through the following

aspects:

- Prediction and evaluation of both beneficial and adverse impacts;
- Recommendations for preventing and mitigating negative impacts and enhancing positive impacts;
- Identification of alternatives;
- Recommendations for managing, monitoring and auditing implementation;
- Ensuring accountable and transparent decision-making;
- Providing for stakeholder and specialist participation in decision-making.¹⁶

EIA is a process that should be participatory and transparent. There are generally three possible outcomes once the EIA is reviewed by the authorizing agency:

1. if the level of impacts is minimal, approval may be granted immediately;
2. if impacts that can be addressed with mitigation are found, then the project may be conditionally approved if mitigation measures are undertaken by the proponents;
3. if numerous and severe impacts are found which cannot be addressed through mitigation, then the project as proposed may be denied approval and the proponents must redesign the project.

The EIA procedure as described above has not been fully utilized as a management tool in the country to date because of several constraints described below.

The EIA draft guidelines have not yet been legally adopted.

EIA guidelines exist in draft form, but still need to be legally adopted. Legal recognition of the mandate for EIA procedures and official acceptance of the guidelines will strengthen the authority of NEMC in its role in the approval process.

EIA guidelines need to be adapted to coastal tourism.

The EIA guidelines are progressive in that they include social factors. On the environmental side, while a number of environmental considerations are specified in the guidelines, many of the standards and criteria needed for the final assessment of impacts are not established (i.e. water quality standards). The EIA guidelines need to be expanded to take into account environmental impacts on a larger scale, i.e. on the watershed or ecosystem. NEMC is currently developing industry-specific checklists. To date, a checklist for the Mining sector has been completed and there are plans in place to develop specific checklists for coastal tourism.

EIA guidelines need to be adapted to assessments of the impact on entire industries.

To date, EIA guidelines are project specific. There is currently no means of assessing the impact of a growing industry on the environment. EIAs could eventually be used to set limits on the total number of operations, or scale of an industry, to cap the maximum allowable impacts in a given ecosystem.

EIAs are paid for, and conducted by the business under study.

¹⁶ Adapted from *Guidelines for Environmental Assessment of Coastal Tourism*, SEACAM 1999.

The current role of the government is to provide guidelines, suggest qualified consultants and approve or reject the EIA. The EIA is carried out under direction of the proponents, with the generally expected result that few EIAs will be negative. Some system of quality assurance is needed for the EIA process, perhaps utilizing the oversight of a neutral party.

Since EIAs are conducted after the land is obtained, their influence on the approval process is reduced, since implementation of a project mainly dependent upon obtaining the land and business permits from TIC.

Since the approval process currently hinges on the matter of obtaining land for use in one of the three main use categories (industrial, agricultural or residential), and obtaining the financially necessary approvals from TIC, the EIA only serve to suggest mitigation measures, rather than act as a basis for denial or approval of the project.

Although the current EIA guidelines specify that social factors must be considered, this does not mean that a participatory process is required.

The affected community may not be included in preparation of the EIA and may only hear of the proposed project once the EIA is completed. The principal role of the public to date has been to react to finished EIA reports rather than being consulted in the preparation of the reports.

EIAs are not currently linked to subsequent monitoring with the result that it remains unknown whether the predicted impacts occur or whether the recommended mitigation measures are effective.

Unless EIAs and monitoring are linked under a comprehensive environmental protection scheme, assessment and reduction of impacts will be difficult.

Monitoring and Enforcement

There is very little monitoring and enforcement occurring in relations to coastal tourism activities. Baseline data does not exist for most coastal areas, so it is difficult to monitor the environmental, social and economic impacts of tourism. The Science and Technical Working Group, also under TCMP, is preparing a State of the Coast report that provides a starting point for future monitoring efforts. In terms of the hotel industry along the coast, very few have undergone Environmental Impact Assessments, so it follows that very little, if any, monitoring is taking place. Once EIA is required by law, it may be possible to encourage hotels to conduct annual environmental audits to ensure that the mitigation measures laid out in the Environmental Management Plan are being implemented adequately. Due to the lack of monitoring, enforcement measures are basically non-existent.

Current Initiatives and Activities

A number of initiatives related to coastal tourism development are currently being undertaken by various agencies. Summaries of the primary initiatives are presented below.

Integrated Tourism Master Plan

Tanzania endorsed the Integrated Tourism Master Plan in 1996. This Plan, funded by the EU, provided a roadmap for future tourism development in Tanzania, focusing on the following areas: expanding the tourism product; maximizing linkages and minimizing leakages; provision of training; and the regulatory environment surrounding tourism development.

To date, much activity has taken place in many of the zones mentioned above; however, these activities have not been part of the comprehensive program envisioned by the developers of the Master Plan. Recently, the Tourism Division, with support from the EU, has been working on revising the Master Plan to take these activities into account and determine what steps should be taken over the next five years. The primary lines of action under this program include the following:

- Improving knowledge and know-how;
- Attracting investment capital;
- Enhancing and expanding the tourism product;
- Improving service standards;
- Improving access;
- Creating greater market awareness; and
- Strengthening institutions and economic linkages.

Kilwa District Cultural Development Project

This project, supported by the French Embassy, the Japanese International Cooperation Agency (JICA) and UNESCO, is designed to rehabilitate the historical ruins of Kilwa Kisiwani, Kivinje and Songo Mnara in Kilwa District in order to promote local development, including tourism. The district authorities and the Antiquities Division (MNRT) are managing this three-year, US\$1.5 million project. Project components include the rehabilitation of the ruins; the development of tourist facilities; the development of land use plans for the target area; and the provision of basic infrastructure services. The project will be launched in early 2002.

Cultural Tourism Program

The Cultural Tourism Program is a joint initiative of the Tanzania Tourist Board (TTB) and the Netherlands Development Organization (SNV). The program assists local men and women to organize tours in the areas in which they live, showing tourists various facets of their daily life and culture. This program has assisted the coastal communities of Pangani and Gezaulole in training tour guides and developing itineraries for tourists to follow. Proceeds from these activities are split between the guides themselves, the administrative costs of running a cultural tourism office and a development project identified by the local community. For example, in Pangani, the proceeds earmarked for development are used to purchase supplies for the local schools through the Pangani District Educational Fund.

The support of SNV and TTB is scheduled to end in late 2001; however, the communities will be able to continue running their own programs due to the revenues generated from the tours. This type of program could be replicated along the coast, serving not only to generate income for local communities, but also to increase awareness and publicity of the cultural attractions found in these areas.

Kinondoni Coastal Area Management Programme (KICAMP)

The overall objective of KICAMP is to improve understanding and management of marine and coastal area resources in the District of Kinondoni. This programme, implemented by the

Kinondoni Municipal Commission and supported by the Swedish International Development Agency (SIDA), is divided into the following four components:

- Coastal land and water use planning
- Coastal community development
- Coastal surveys, assessments and monitoring
- Education, information and communications

The programme is expected to conduct pilot projects in Kunduchi and Mbweni Wards.

Bagamoyo Master Plan For Conservation Of Historical Buildings

The Department of Antiquities, with support from SIDA and GTZ, is developing this plan to conserve the historical buildings of Bagamoyo.

Marine Action Conservation Of Tanzania (MACT)

MACT is an NGO run by students and professors from the University of Dar es Salaam in Kinondoni Municipality. The primary activity is operating an eco-tourism enterprise that offers tourists a historical walking tour of the Kunduchi area, a short presentation about marine conservation issues and an opportunity to assist local fishermen in replanting coral at Mbudya Island Marine Reserve. The program is currently inactive, but plans to link with KICAMP and begin operations later this year.

Tanga Coastal Zone Development Program

The Tanga Coastal Zone Conservation and Development Programme is Tanzania's largest local ICM programme. Supported by the Tanga Regional Fisheries Office, the programme works at the district and village levels to address critical coastal management issues like dynamite fishing, mangrove conservation, and the development of alternative livelihoods. The programme is a partnership between the regional authorities, along with district governments of Tanga, Pangani and Muheza, Irish Aid and the Eastern African Regional Office of IUCN – the World Conservation Union. Established in 1994, the programme has built the foundations of integrated coastal area management.

The overall objective of the programme is to achieve sustainable use of the coastal resources of the Tanga Region for the benefit of present and future generations of residents as well as other people in Tanzania and the Eastern African Region in general. In phase one (July 1994-June 1997), the programme successfully conducted participatory socio-economic and resource appraisals. Also, it achieved positive results using specific management actions. Government officers were trained in problem analysis, work planning, facilitation, basic coastal ecology, coastal culture and communications skills. These activities have led to a noticeable change in attitudes and behavior on the part of villagers and government staff. The programme is further successfully addressing a broad spectrum of identified issues that range from resource conservation to socio-economic services to the general livelihoods of the Tanga people. In Phase Two, the programme will focus on establishing district collaborative resource management programmes, incorporating gender consideration into all levels of programme planning, and encouraging sustainable fishery and agriculture practices in order to improve the well being of coastal communities at the grassroots level.

Rehabilitation of German BOMA at Mikindani

A UK-based NGO, TradeAid, has worked with the local communities in Mikindani, Mtwara Region, to renovate the German BOMA building into a small luxury hotel. The hotel has been operating for about 18 months and there are plans in place to expand operations to other old buildings in the area. All staff persons are from the local community and have been trained under this initiative.

Hotel Classification System

The Tourism Division, in conjunction with HKAT and other partners, is developing a classification system for hotels in the country that will put Tanzania in line with its East African neighbors. Different types of hotels will be graded according to predetermined criteria. The goal of the grading system is to encourage hotel owners to meet regional and international quality standards.

Tourism Satellite Account

The Tourism Division is working with the Bank of Tanzania, Immigration, Planning and the Statistics Bureau to develop a comprehensive system of data collection for key tourism indicators, such as arrivals, foreign exchange earned, percentage contributed to GDP, attractions visited, etc. This improvement in accounting methods will assist government in taking more informed decisions about how to improve the enabling environment for tourism development.

Salama Waterfront Development Project

This is a private sector initiative to reclaim up to 220 hectares of sea in Dar es Salaam, primarily in Ilala Municipality. The new land would be developed for a variety of uses, including several medium- to large-sized hotels.

Mtwara Corridor Initiative

Started in 1998, this initiative aims to identify areas for cooperation between Tanzania, Mozambique, Malawi and Zambia. Its long-term objective is to generate economic activity in this region and tourism development is one of the economic activities with great potential.

Pew Fellowship Project on Community-based Coastal and Marine Conservation in Kilwa

This initiative, spearheaded by the Director General of NEMC, aims to improve the quality of life of people in Kilwa while maintaining the biological diversity and productivity of coastal ecosystems through the sustainable utilization and conservation of coastal and marine resources. With support from the Pew Fellows Program, a promotional brochure and short book highlighting the area's natural and cultural beauty have been produced. Other activities include the assessment of potential sites for the development of a Marine Protected Area in Kilwa.

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