

Summary: PPT Facilitation at Ker & Downey, Tanzania

Summary of initial scoping report

INTRODUCTION

The aim of the Pro-Poor Tourism (PPT) Pilots project is for the PPT team and site partners to identify and implement linkages that bring benefits to poor people, and make business sense to the operator. The initial ('scoping') stage of PPT facilitation involves understanding the current linkages between the tourism company and local (poor) stakeholders, and identifying the needs and assets of the company and local stakeholders. Building on this, the next key step is to identify the type of linkage or linkages that should be developed and with which local partners. From there, PPT facilitation supports the partnership through stages - from making joint commitments into implementation.

The PPT Pilots project is working with 5 industry partners. During 2003, initial scoping reports have been prepared for each partner site by compiling information ^{1[1]} for prioritisation and implementation of PPT actions. These cover

1. stakeholder analysis (identification of needs and assets of company and community);
2. assessment of existing linkages between stakeholders;
3. discussion of potential linkages.

This report summarises this information in relation to the Ker and Downey pilot site in Tanzania. The 'site' is not in fact one site, but covers K&D's work with communities across their hunting blocks via the Friedkin Conservation Fund.

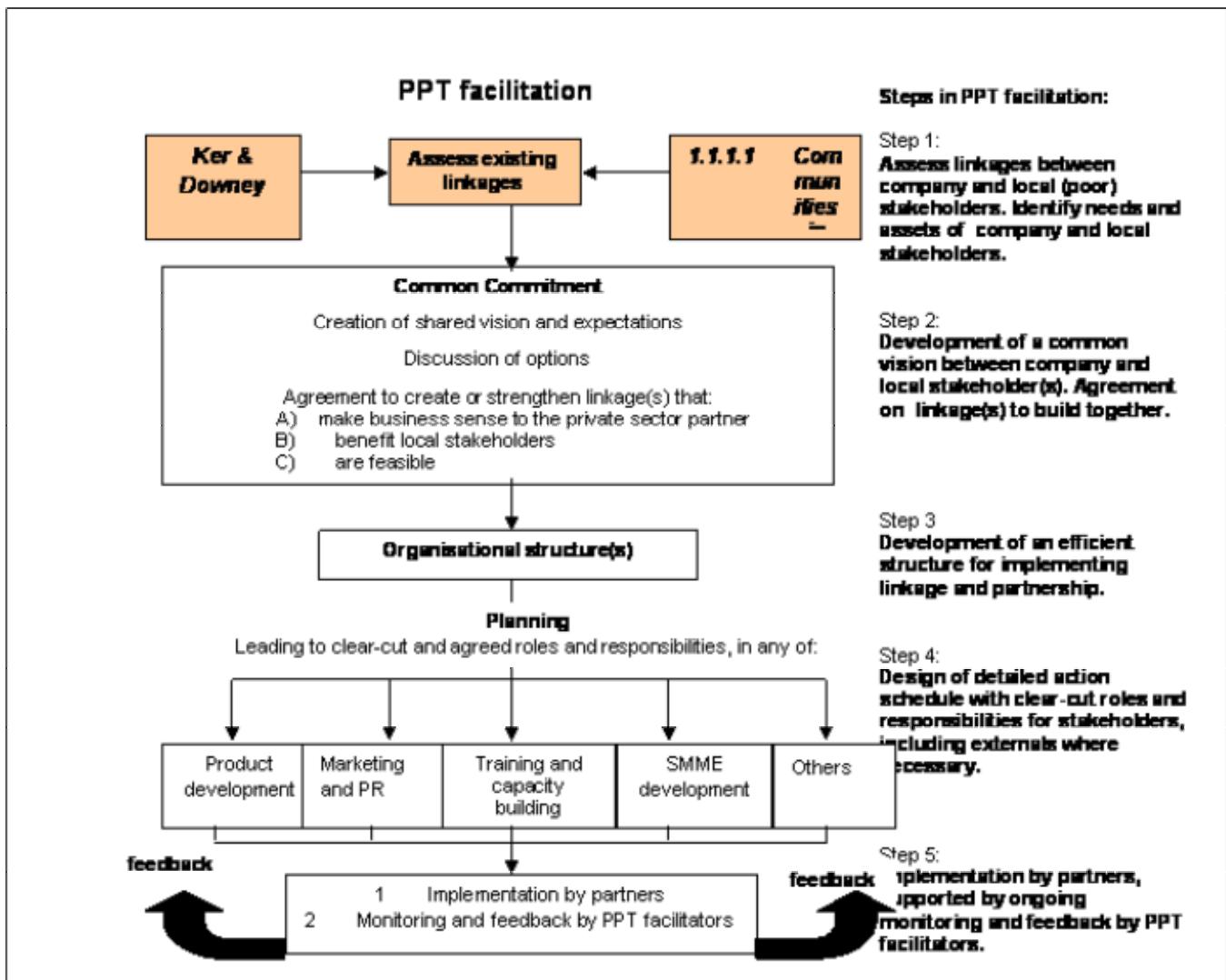
What is PPT facilitation?

PPT facilitation is a service provided to a tourism company and its local stakeholders, to assist in building linkage(s) between them. The support facilitates the process of developing a joint vision, exploring mutually beneficial linkages, planning tasks, and achieving successful implementation.

The facilitation format is flexible but provides a generic tool that will be adapted to each site. It can be applied to the creation of a very specific linkage concerning one product, or to building a long-lasting partnership with many components. As a point of departure and drawing on the programme's skills base, PPT facilitation helps create agreement between partners on what could be achieved, and then focuses on developing the organisational structure(s) needed to deliver the linkage(s) they have prioritised. Efficient organisational structure(s) are pivotal to the parties achieving their vision in partnership. From this, clear planning of tasks and support for implementation follows.

The facilitation format is designed as an implementing tool. It demystifies PPT and provides an operational guide to site developments. The figure below highlights the way in which PPT is facilitated. The shaded areas symbolise the current focus of PPT facilitation at the Ker & Downey sites.

^{1[1]} This report has been finalised in December 2003 and distributed in January 2004, however, the background information on tourism flows and business details was gathered during 2003 and thus some parts may not be the most up to date.



The facilitation format thus follows the following steps:

- 1. Identification of stakeholders and current linkages**
- 2. Establishment of a common vision – agreements and commitment for its implementation**
- 3. Development of an organisational structure to implement the vision**
- 4. Structuring the Linkages**
- 5. Monitoring**

This report summarises information and discussion from step 1.

1. Stakeholder identification and assessment of needs and assets

a. Ker & Downey, Tanzania: the company's priorities, needs and assets relevant to PPT

Ker & Downey Tanzania operates exclusive trophy hunting safaris in fourteen private concessions and photographic safaris in the country's National Parks. Ker & Downey, Tanzania, furthermore operates the Friedkin Conservation Fund through which the PPT partnership is structured (see graph 1 below).

Ker & Downey the company have expanded considerably in 2003, roughly doubling the size of their hunting operation. The umbrella company, Ker & Downey Tanzania comprises Tanzanian Game Trackers Safari (TGTS), Wengert Windrose Safaris (WWS), Ker & Downey (photographics) and Northern Air. Tanzania Game Trackers operate the core business, hunting, and host photographic tours under the umbrella of Ker & Downey. TGTS has recently merged with Wengert Windrose Safaris, increasing the size of the hunting operation through including its client base & and hunting blocks into one business. TGTS has nine hunting blocks allocated to it and WWS has four, bringing the total number of blocks under management to 13 and the area to over 32,000 sq km.

Ker & Downey support 'The Friedkin Conservation Fund' (FCF), which in turn supports community development projects and the Tanzanian Wildlife Department in its anti-poaching activities. The Wildlife Department is responsible for the anti poaching activities with FCF providing the vehicle and staff and all logistical backup. FCF is also responsible for negotiating and distributing benefits to the communities residing in or around those blocks.

Graph 1: Organigram - Ker & Downey Tanzania

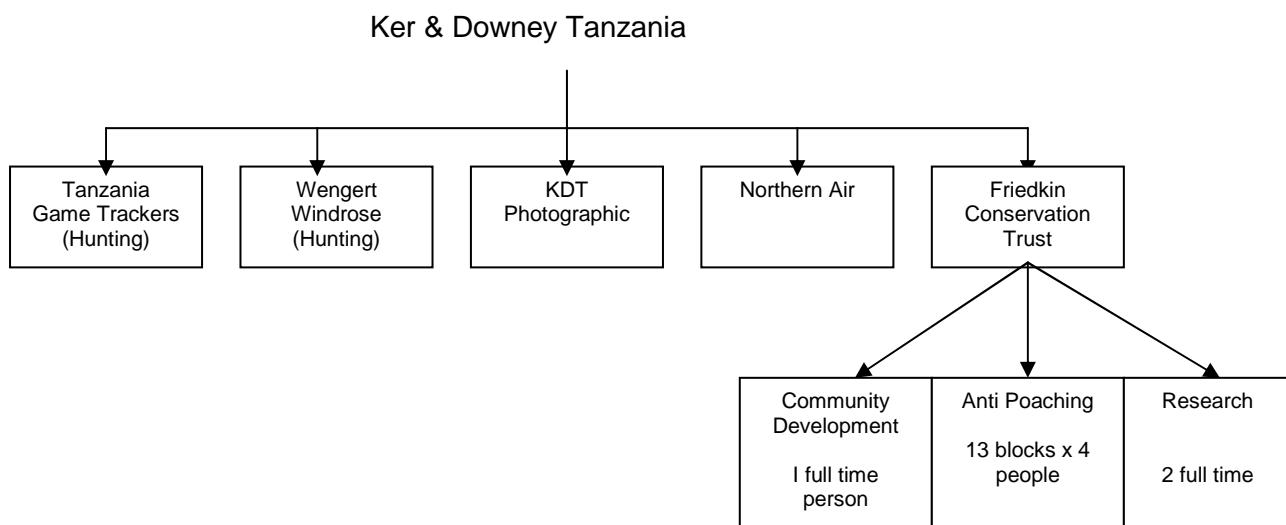


Table 1: key company characteristics of Ker & Downey Tanzania

Name	Ker & Downey, Tanzania
Location	Head Quarters in Arusha, plus 14 hunting sites
Size of operation	Hunting concessions that cover 32 000 km ² . Photographic safaris and air transport
Type of company	Private
Annual turnover of Ker & Downey	
Type of product(s)	Hunting and photographic safaris
Size	
Pricing structures	Tourist hunting generates far fewer tourists than photographic safaris but although low in volume, it achieves high income with a classic safari costing a tourist hunter around \$ 75 000 per hunting safari.
Number of visitors annually	n.a.
Socio-demographic characteristics of visitor segment	Very up-market, tailor-made
Seasonality of demand	Very high
Origin of visitors	US, Germany and Spain
Number of Employees	170 locally, approximately 10 per camp
Source of employees	Locally
Seasonality of employment	High

The hunting company has established a fund [FCF} that contributes to community development. The proceeds from trophy hunting, which are 20% on each trophy animal shot, goes into the Friedkin Conservation Fund (FCF) where it is used for anti poaching, research and community development. From the perspective of hunting management, the resources that flow towards the community are important in rewarding communities for protecting hunting habitat. However, there is also recognition, particularly within FCF, that the current arrangements are too narrow, and are insufficient in creating linkages which will provide opportunities that will eventuate in better resource management rather than just rewards as an incentive for conservation. As indicated in Table 2, K&D has several business needs which would be met by a more systematic and effective partnership with communities.

FCF have agreed to work with PPT in establishing PPT linkages. This has also been agreed to by K&D management, who also need certain recognition and benefit from the linkages proposed. It is within this context that PPT will assist FCF in facilitating more efficient community structures and broadening the range of more substantive linkages that can be generated through FCF.

Table 2: Ker & Downey's assets and needs relevant to PPT

K&D assets relevant to PPT	K&D needs relevant to PPT
<ul style="list-style-type: none"> Hunting and to a lesser extent photographic safaris Claims most ethical outfit in the business FCF and funds for community development Culture heritage as products seen as becoming increasingly popular in Maasailand Networking muscle in US Influence on the wider industry 	<ul style="list-style-type: none"> Need to protect the industry and its resource base, and hence collaborate with communities to increase profile of hunting in its contribution to economic growth and development To systematise and manage the beneficiation of the hunting into affected communities in a manner which secures wildlife conservation, sustains and diversifies benefits in those areas To develop the photographic component of the operation which can be run from the same properties in some instances To Link to community based cultural and heritage attractions to create a longer-stay incentive particularly where more permanent hunting camps are being built and not used in the off season

The Friedkin Conservation Fund (FCF)

The Friedkin Conservation Fund is a non governmental organisation registered in Tanzania and the US which was established by Tanzania Game Tracker Safaris (TGTS) in 1994. From 2003 the association was extended to include Wengert Windrose Safaris {WWS} when the holding company Ker and Downey Tanzania acquired WWS. FCF's mission as stated in their publication "is to assist the government and people of Tanzania in their efforts to conserve and protect the indigenous flora and fauna of the country. In order to achieve this, FCF actively involves local people in sustainable conservation practices in order to improve their economic conditions."

The fund supports anti poaching and community development research. The Rapid Action Teams or RATS are made up of a driver, two or three rangers, and two government game officers. These teams work in association with the government Department of Wildlife and are co-ordinated by the Project Managers in Game Reserves and the District Anti Poaching Personnel in game control or open areas. In each area the company has a camp manager who assists the teams. There is also a mobile Anti Poaching Unit consisting of 7 FCF rangers and 4 Government Wildlife Officers which are deployed mostly for heavy duty poaching control, such as during the large migrations of wildebeest out of the Serengeti into game reserve areas like Maswa. These teams are equipped with vehicles and communication systems which supplement the capacity of the state wildlife service to control poaching. For example in 2002 in over a total of 977 patrol days there were 258 arrests made.

The research unit is an extremely valuable resource and uses geographic information systems to collect data about hunting areas from information fed in by the camp managers and hunters where this contributes to anti poaching activities, road construction and can also be used to map out and monitor community projects. They have also proposed to the Wildlife Department that, with the assistance of GIS mapping, better decisions can be achieved in terms of resource management of the hunting areas and settlements around them. Co-

operation extends to the Tanzanian Wildlife Research Institute where game counts to determine density and distribution are used to establish and monitor quotas.

Community development extends to school support in buildings and bursaries as well as in providing watering points to support local Maasai cattle herds.

b. Local stakeholders:

Stakeholders have been identified by the hunting company, Dept. of Wildlife, district and village councils. Local stakeholders that have linkages with K&D are people resident in the game control areas as well as people on the periphery of the game reserve areas in which the 14 hunting blocks are situated (see graph 2 as an example).

While the communities in these different hunting areas are distinct, the PPT facilitation to be undertaken applies to all these developments in one way or another since they are all part of the broader aggregate of concessions awarded to K&D and would have to be administered and managed as a regional unit within a revised FCF strategy.

The residents of the northern blocks are Maasai. Historically the Maasai are pastoralists, closely dependent on the land and flexible resource management. They have been dispossessed from much of their previous pastoral area, and thus hostility and suspicion are inevitable in approaching hunting companies. That said, they have several needs that could be served by PPT linkages, such as the need for entrepreneurial development (Table 3 below). They also bring important assets to PPT, including their ecological and cultural knowledge.

Table 3 outlines some of the local stakeholders' assets and needs relevant to PPT development.

Table 3: Maasailand assets and needs in relation to PPT

Stakeholder assets	Stakeholder needs
<ul style="list-style-type: none">• Land and natural resources needed for hunting• Cultural heritage, as a basis for a tourist product to supplement existing hunting and photo safaris• Knowledge of natural resource management• 	<ul style="list-style-type: none">• Entrepreneurial activity and business development• Opportunities that go beyond those generated by hunting• Secure access to land and natural resources• Marketing, link to existing routes & access to tourists/markets for new products• Training and education• Need for more effective co-ordination of a number of existing organisations such as village councils WMA councils and FCF structures

Within each hunting block, the 'community' involved needs to be further defined - and can be a matter of dispute. For example, during the site visit there was serious disagreement about the extent of a hunting concession where it was claimed that there needed to be another village included. As it happened, it was hunters from a non-K&D block that had encroached and now K&D were being held to account. A mechanism that verifies the extent of hunting

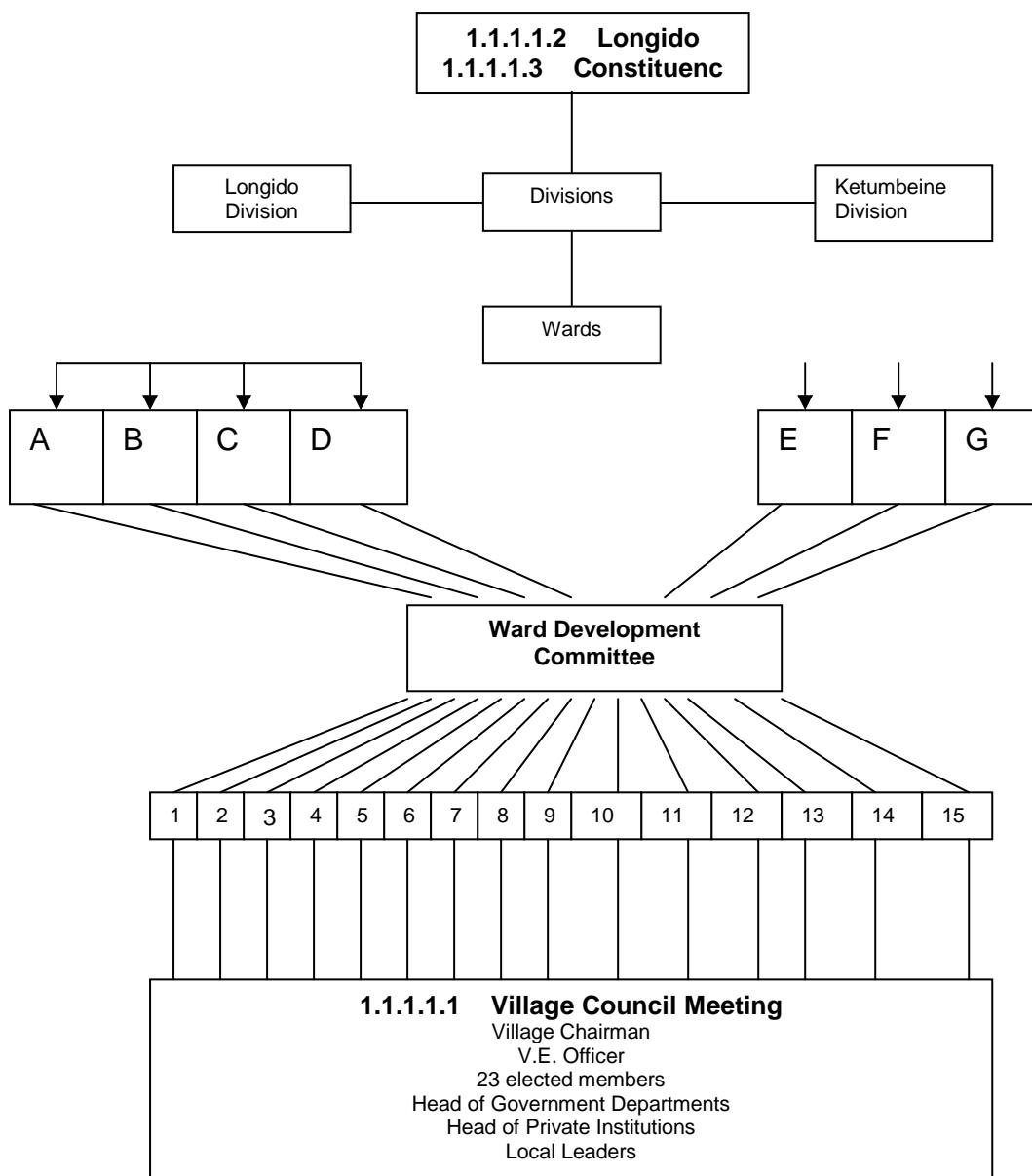
concession and activity needs to be established and linked to partnerships in resource management being advocated by PPT.

Within a local area, there are already a number of institutions that relate to ward and village level activity. For example, in Lake Natron Game Controlled area, the existing support organisations within the community include:

- District Council Divisions:
- Ward Structures
- Village Councils
- FCF Field Community Officers (1 at this point)

As depicted in Graph 2 detailing the Lake Natron Game controlled area which falls within the Longido district demarcation, each village has a village council. The 15 villages have a representative on the Ward Development Committee.

Graph 2: Leadership Structure – Lake Natron Game Controlled Area



c. Existing PPT linkages between K&D and neighbouring communities

There are already a number of linkages between K&D and local stakeholders in the hunting areas. The main linkage is the flow of funds via FCF for community development and anti-poaching and resource protection. The fund distributes trophy dividends {20% on each trophy} to the village in concession where the trophy was bagged.

These are summarised in Table 4.

Table 4: existing linkages between K&D and local stakeholders

Economic linkages	Non-financial livelihood linkages	Information and partnership linkages
<i>More specifically:</i>		
Local enterprise linkages ^{2[2]} : <ul style="list-style-type: none"> ○ Casual labour for routine maintenance work ○ community tours organised Jobs <ul style="list-style-type: none"> ○ 170 people seasonally employed Collective income sources <ul style="list-style-type: none"> ○ Community development fund from 20% of trophy fee distributed to villages in or around hunting concessions 	Local access to infrastructure and services <ul style="list-style-type: none"> ○ Policing Forum – for threat posed by terrorist threats Mitigation of environmental impacts and competing use of natural resources Capacity building, training <ul style="list-style-type: none"> ○ In house training ○ Student scholarships Sackman Trust support of girls to school ○ Project Noah started with Pretoria University on conservation and sustainable use of wildlife resources 	Participation of the poor in decision-making <ul style="list-style-type: none"> ○ Local participation on Village Councils. ○ FCF Field co-ordinator appointed to represent community needs on FCF board.

d. Potential for developing additional PPT linkages at K&D

There are many different ways in which existing PPT linkages can be strengthened or new ones created. This section briefly reviews them, and then focuses on the main option discussed so far – organisational development of the community partners. In considering different options, 3 criteria (among others) are particularly important. Any linkage should:

- i. Make business sense to the operator – generate benefits that (over time) will outweigh transaction costs or financial costs, and ideally be integral to the top commercial priorities and business developments on which the operator is focusing in the medium term.
- ii. Impact on a significant number of poor people in the area and meet one or more priority development needs.
- iii. Be feasible – likely to be implemented and succeed.

^{2[2]} Local enterprise linkages may be either (1) direct trade between the company and providers of inputs to the tourism business, such as farmers (these are 'upstream' linkages) or (2) a business or support relationship between the company and providers of tourist facilities and products, such as craft-makers or local guides, who supply tourists themselves (these are downstream linkages).

Table 5 presents a variety of possible strategies that could be developed or strengthened. These are not prioritised in terms of the criteria or necessarily recommended, but serve as a basis for stimulating discussion.

Table 5: Examples of possible strategies for expanding and strengthening existing linkages ^{3[3]}

Increase economic benefits	Enhance non-financial livelihood impacts	Enhance information-sharing and partnership
<p>Stimulate local enterprise linkages</p> <ul style="list-style-type: none"> ○ Back-up for better local craft production and small business to supply utility items to lodge ○ Better organisation of cultural and heritage tours ○ Camp Construction companies on each block ○ Support development of NR-based enterprises – honey, weaving, etc ○ Support enterprises that service hunting and local markets – tyre repair, crafts. <p>Jobs</p> <ul style="list-style-type: none"> ○ Jobs – any measures to increase local take up of jobs at the hunting camps are good, but given the nature and seasonality of the business will be limited. Training to enable local recruits to move up to professional positions (as a professional hunter or in business management) would be very welcome, though will only affect very few local individuals. ○ Increase Field Community Development Officers to 10 – one per hunting block <p>Create collective income sources</p> <ul style="list-style-type: none"> ○ Royalties, revenue-shares, etc ○ Better re-distribution of revenues from hunting ○ Rearrangement of distribution systems for trophy dividends and donations through FCF. Possible core business shareholding 	<p>Increase local access to infrastructure and services</p> <ul style="list-style-type: none"> ○ Roads and Water as has been provided by FCF (so current?) <p>Mitigate environmental impacts and addressing competing use of natural resources</p> <ul style="list-style-type: none"> ○ shift beyond anti-poaching to shared strategies for NRM. With better resource management the ecological system can be better used for a variety of economic activities which compliment rather than being mutually destructive. <p>Capacity building, training</p> <ul style="list-style-type: none"> ○ Intensify training in enterprise other than limited opportunities generated through hunting. Support to schools, training bursaries, enterprise training ○ Increase Field Community Development Officers to 10 <p>Improve social, cultural impacts</p> <ul style="list-style-type: none"> ○ Better understanding of indigenous social and economic systems for benefit of guests and to generate investment into those systems 	<p>Increase flows of information, communication to local stakeholders</p> <ul style="list-style-type: none"> ○ Through resource management exchange information to better plan resource use to benefit both parties. <p>Increase participation of local stakeholders in decision-making</p> <ul style="list-style-type: none"> ○ Hunting block reps from villages participate on FCF board. ○ Establish NR partnership with agreed vision, as a basis for practical links ○ Strengthen local position in village and district councils through providing critical info and support. Build partnerships between local stakeholders and private sector <p>Encourage more pro-poor policy/planning framework</p> <ul style="list-style-type: none"> ○ Assist local Stakeholders in representing their priorities to government in relation to their NR-enterprises.

^{3[3]} some of these may already be done or underway, given that our information is incomplete.

e. Discussion of Options

As Table 5 shows, there is scope to expand existing PPT linkages in several areas. The choice needs to be made strategically, in terms of what is acceptable, feasible and deliverable for the partners, and needs to evolve from a stronger organisational partnership between the stakeholders and clear discussion of where there are shared objectives.

A conservation-driven motive for benefiting local people is different from a rural development-driven strategy for maximising benefits from wildlife. It doesn't mean that common ground cannot be found and utilised, but different starting points need recognition. Winning acceptance for anti-poaching is different from maximising development benefits – although the two may coincide if the anti-poaching strategy is based on the need for a hunting operation to stimulate local livelihoods and become an integral part of the local economy.

Community development via voluntary benefit-sharing or charity is unlikely to ever be 'enough' – enough to either make wildlife a substantial contribution to livelihoods, or in turn to win over secure support for wildlife locally.

So either:

- ◆ More substantive financial benefits are needed, such as derive from financial partnerships, or leasing quotas from communities
- ◆ Or other forms of partnership are needed which integrate the hunting business into local economic life and livelihoods. For example, business linkages, support for local industry, land management, natural resource harvesting and agro-processing, training linkages... or the less tangible but important sense of partnership that comes from sharing planning and decision-making, and makes people feel involved.

As outlined above, benefits from the conservation and development approach have generally, to date, been focused on direct hand-outs and donations, on the assumption these will change attitudes to wildlife. However, they are unlikely to suffice, from either a conservation or development perspective. There has been less done from a starting point of providing rural development engines or building on (still nascent) community rights over resources.

There are six different types of benefits, or levels, at which we can look to increase local benefits from hunting:

- i Direct flows/donations. E.g. contributions towards local development projects. Distribution of carcass meat.
- ii Financial partnership. Payment of lease, rental, profit share to community bodies. This depends on government policy towards devolution of wildlife rights, and not just on PPT action by companies.
- iii Practical measures to reduce the *trade-offs* between wildlife use and local livelihoods. E.g. measures to protect crops more effectively from wildlife, adaptation of hunting seasons, space, timing, and adaptation of restrictions on local use of land, grazing, reeds, bush, honey, grass, so as to get maximum use out of the natural resources for both the hunters and local people.
- iv Development of a natural resource management (NRM) partnership. This would entail practical measures in (3) to reduce the costs of commercial wildlife use to residents,

but would also go further. An NRM partnership would work out how partners can gain most value from the sustained resource base, and also support them to develop resource-based activities that fit within the overall sustainability framework (e.g. via enterprise development support).

- v Jobs – any measures to increase local take up of jobs at the hunting camps are good, but given the nature and seasonality of the business will be limited. Training to enable local recruits to move up to professional positions (as a professional hunter or in business management) might be one of the ways to increase benefit through employment.
- vi Economic linkages to the local economy. The normal linkages between hunting and other sectors of the economy tend to happen away from the local sphere. Tanning, taxidermy, air transport etc benefit from the hunting industry but do not involve local people. Local linkages could be created in two ways:
 - a. supporting the emergence of local enterprise that provides direct inputs to hunting and could also develop to serve a wider market. E.g. tyre repair/vehicle maintenance, crafts for tourists, sewing of logos/embroidery/camp decorations. However, given the very up-market nature of most international safari hunts, opportunities may be limited.
 - b. support from the hunting company channelled to other local enterprises particularly those related to natural resource use and thus to shared management of resources. Examples here include honey production, reed weaving, leather production, craft making, wood carving etc.

Given the undeveloped nature of much of the local economic infrastructure, inputs from a hunting company could be very valuable on issues such:

- ◆ Transport – road development and use of vehicles for moving products
- ◆ Entrepreneurial and business training
- ◆ Liaising with government; getting information, making things happen, speeding through red tape.
- ◆ Physical facilities – storage space, power supply,
- ◆ Marketing – advice, production of materials/labels, contacting customers

There is so much support that is needed locally, that it clearly goes way beyond the remit or interests of a company. The challenge then is to find the very practical measures that can be relatively easily provided because they build on the hunting company's existing assets or activities, and which also provide critical help for enterprise

- vii Partnership: sharing of information, shared decision-making in for example planning locations or timing are examples here. The community giving its backing to K&D's next tender when the 5 year concession is up, and K&D giving the community backing or practical help for their submission to the local council or government ministry for their latest request.

The recommended focus is on resource management and streamlining the FCF partnership to undertake a joint resource management which extends to other economic activity such as pastoralism, farming and small enterprises. With this approach, strategic alliances which characterised a history of mixed economy and specialisation are implemented to mutual benefit. Thus, natural resource management would need to be ecologically and economically feasible and sustainable.

2. Establishment of a common vision – agreements and commitment for its implementation

One of the most important factors in developing a collaborative approach in tourism is creating a shared vision where stakeholders share a common goal or share a problem they need each other to solve. This allows stakeholders to act in a co-ordinated manner and direct their efforts towards a common goal. In order to create a common vision PPT facilitation involves mediation between different interests, the exchange of information and the development of collaborative agreements. The vision must be based on three prerequisites: a) it makes business sense for all parties; b) it impacts positively on ‘poor’ stakeholders; and c) it is feasible, likely to be implemented and successful in the long-term.

The key issue here is to win wider recognition from K&D company staff that achieving business success depends on making a more vibrant and strategic contribution to local development. This perhaps should be the first area where PPT facilitation can help. At the same time, we have to make sure that the contribution is developed in a way that maximises visibility of the link to K&D and to the wildlife resource.

In establishing a shared vision between K&D/FCF and local residents, it is important to recognise the differences in their perspectives and starting points, as well as to recognise their potential mutual support. A solid partnership structure needs to be established in order to implement the programme. The partnership needs to be premised on reconciling different resource use such as agro pastoralism, hunting and conservation.

The PPT input to date has had to establish common ground where hunting companies are suspicious of NGO's and organisations which they perceive as not understanding hunting and fuelling anti hunting lobbies which of course undermine their industry. Some of the hunters are also suspicious of the communities, in particular the Maasai, who they see as wanting to use all the best land for cattle. And communities are suspicious of hunters and conservationists due to the losses they have historically suffered to wildlife protection.

Part of the approach is to establish a common cause with K&D pro poor partners who in the north are the Maasai. There is historical precedent in interdependent socio economic systems and this needs to form the basis of a joint vision.

It is also important to recognise that FCF's community partners are not one homogenous group with one shared vision. There will be strong differences between areas, and within areas, that will need to be reconciled in the process of building a vision for the partnership.

Once a vision is agreed, further steps in PPT facilitation relate to the organisational structure, formation of linkages, and then monitoring and implementation.

3. Development of an organisational structure to implement the vision

In terms of helping K&D move forward on their PPT approach, enhanced local structures which devolve responsibility and benefit through resource management to area level structures need to be introduced. Various roles and responsibilities need to be defined in such a partnership that goes beyond simply receiving benefits. In fact it is the joint taking of responsibilities that will sustain and increase benefits from the partnership. The partnership has to be structured in such a way that it can sustain the partners through changing ecological and socio economic and political circumstances.

PPT facilitation will design and implement an organisational structure comprising stakeholders that offers the best possible chance to secure the long-term implementation of the common vision and structures the linkage between stakeholders. These linkages can range from loose, informal and ad hoc activities to formalised structured arrangements.

In that way the industry will be sustained and developed in an interdependent manner with other resource users, who will receive benefits that flow from such as partnership. These include pro poor dividends, which range from economic to livelihood and other benefits.

In some of the proposed new Wildlife Management Areas, area structures are being proposed, which will take on this planning and implementation function. The government is unlikely to have the capacity or resources to see the efficient and effective functioning of these proposed structures. The FCF could support the role and functioning of these structures and similar structures where they are not proposed, in order to influence the zonation of resource use.

4. Structuring the Linkages

In developing the structure through which the linkages are introduced, PPT facilitation can help to develop a detailed schedule of roles and responsibilities around various components such as product development, capacity building and training, while also offering advise and input into various components. It is however essential that the main tasks are carried out by the stakeholders so as to provide stakeholders with ownership over the product and outcome and to ensure sustainability of the linkage once the facilitation process is completed.

With regard to historical precedent, there are a number of interactive models rooted in the historical study of regional interdependence. These models have the important advantage of being inherently dynamic and are capable of expressing the fluidity of small-scale society. If the premise of resource management through partnerships is based on common cause in interdependent socio economic and socio ecological factors the linkages have reasonable chance of working.

The anticipated outcome of the FCF/PPT programme is a model of structured community partnerships that maximises beneficiation from the linkage into the industry, can be replicated within the industry and can demonstrate the importance of hunting in poverty reduction and rural economic growth.

5. Monitoring and implementation

The PPT facilitation team will monitor, advise and analyse the linkages and report back to stakeholders to suggest improvements during the agreed time of interaction.

Appendix

Tourism in Tanzania

Over the past 50 years, tourism has been one of the most consistent global growth industries. In 1950, there were around 25 million global international tourist arrivals. By 2001, there were an estimated 693 million international tourist arrivals, and international tourism receipts (excluding international transport) were estimated to exceed US\$463 billion. Tourism is now considered to be the world's largest industry, and arrivals are expected to exceed 1.6 billion by the year 2020 (WTO, 2002). Tanzania has been experiencing a strong and steady growth over the last ten years.

Since Tanzania opened up its tourism market in mid 1980s, a lot of changes have taken place. Noting what used to retard tourism growth, the government repealed the National Investment Promotion and Protection Act of 1990, replacing it with the Tanzania Investment Act of 1997. This Act offers competitive terms to investors by liberalising the current account regime and repatriation of profits. Others include a 5 per cent custom duty on capital goods, 10 per cent withholding tax on dividends, and an immigration quota of 5 key personnel in an enterprise. Further improvement was done in areas of infrastructure. Since 1999, infrastructure has been improved at a rapid pace, so rapid that within a short period of time it has revealed the sector's potential. So far international air access has been expanded, i.e. KLM's flight schedule is weekly, British Airways has increased capacity on other routes by upgrading from Boeing 777 to Boeing 747-400, British Airways has direct flights to Tanzania. Similarly tourist facilities keep coming in. Most recent examples include the 152-room Holiday Inn and the 100-room Golden Tulip (Indian Ocean) Hotel in Dar es Salaam. Likewise, the road network continues to be improved and other projects are underway. All this rehabilitation and restructuring is intended to facilitate the strategic development of the priority Tourism Development Areas under the Integrated Tourism Master Plan.

According to the Minister for Natural Resources and Tourism, Zakia Meghji, the plan focuses on product development, tourism zones/ circuits development, institutional capacity building, destination and marketing strategies. Under the plan, sustainable tourism development is emphasised with a view that the country promotes "sustainable tourism and improves the living conditions of the people, especially in poverty alleviation." The plan was drawn in 1996 with the assistance of the European Union (EU).

As one of the major foreign exchange earners sector, it is an undeniable fact that now, tourism plays a vital role in the national economy. Statistics show that foreign exchange receipts from tourism grew from \$259.4 million in 1995 to \$739.06 million in 2000. This is nearly a quarter of total export earnings. These came from tourist arrivals and other investments related to the industry. According to statistics, tourist arrivals have shown a steady growth from 295,312 in 1995 to 627,325 in 1999. Peter Mwenguo, the Managing Director of the Tanzania Tourist Board (TTB) says Tanzania projects an income of \$1.7 billion by the year 2006. This will be achieved through diversification to widen attractions through cultural tourism, rural tourism, eco-tourism and increased marketing, both locally and internationally.

Apart from its direct contribution to the GDP, which is 16%, tourism offers employment opportunities either directly or indirectly through its multiplier effect. In 1999 tourism

supported an estimated 148,000 direct jobs. However, the nation has yet to exploit the sector's potential of making it the favourite tourist destination. This is so despite having immense tourist attractions and resources not to mention the 23.5 million hectares of land (about the size of the United Kingdom) set aside for its world famous wildlife and botanical sanctuaries, mountains, pristine beaches and marine attractions. As stipulated in the National Tourism Policy (revised in September 1999), the infrastructure needs to be strengthened further, especially in the southern circuit that is richer than the northern circuit. This includes strengthening roads, airports and telecommunication. The Southern Circuit attractions include coastal beaches, the Selous Game Reserve, Mikumi, Ruaha, Udzungwa, Katavi, Mahale and Gombe national parks.

Sikoyo (2002) estimates that the value of hunting safaris/tourists in particular is very considerable for the country:

Year	type	Number of tourist	Total value	Value per tourist
1996/97	hunting	937	US\$ 8.15 million	US\$ 8,689
1995/96	photo	326,194	US\$322 million	US\$987
