

TOURISM & IMAGE WORKING GROUP

REPORT ON TOURISM ISSUES AND RECOMMENDATIONS BY THE WORKING GROUP

EXECUTIVE SUMMARY

A. BUSINESS ENVIRONMENT STRATEGY

Tourism & Image Working Group (TIWG) was formed in 2007 to identify *quick win* tourism issues, and when addressed will spur further tourism development in Tanzania.

Tourism is one sector that Tanzania can and should effectively be able to manage and which will and should undoubtedly produce positive results and impacts in the economy and society - subject to getting a number of key issues right. TIWG has identified key issues under quick wins, medium and long term wins that must be addressed for further tourism growth and development.

The quick win issues identified and which are to be addressed by 2010 are:

1. Develop urgently a clear strategy and action plan to mitigate the adverse impact of the Global Financial Crisis on tourism.
2. Develop a sensitization program to foster a positive mind set and culture for quality services.
3. Streamline, harmonise, and simplify regulations and licensing regimes in the sector.
4. Finalize the national curriculum on tourism and hospitality training.
5. Streamline skills development levy to support key training institutes in the sector.
6. Streamline the roles of VETA and NACTE.
7. Develop and promote annual calendar for sports tourism events.
8. Start implementing the Hotel Classification and Grading Scheme.
9. Boost the national promotion and marketing budget.
10. Ensure consistency in implementing laid down policies, laws & regulations.

11. Develop a tourism growth strategy linking Tourism Policy, Master Plan and Private Sector initiatives.
12. Develop both domestic and regional tourism markets.
13. Develop an affirmative action program to boost local investments in tourism.
14. Re-capitalise and strengthen management of Air Tanzania Co. Ltd.

The Group also identified medium and long term measures which are to be implemented by 2012 and 2015 respectively.

Medium term measures are:

1. Designate land/ areas specifically for tourism investment and development.
2. Diversify tourism development and products to other areas of Tanzania to relieve pressure in the north.

Long term measure is:

1. Create mechanism to facilitate Public – Private Partnership investments on roads, airports, power and services (infrastructure).

a. BACKGROUND

The Tourism and Image Working Group (TIWG) set itself three objectives:

- i. To increase the contribution of the tourism sector to GDP from the current 17.2% to 30% by the year 2015
- ii. To improve the image of Tanzania as a crucial aspect in attracting tourists
- iii. To improve the Sector's competitiveness in the global arena and increase the sector's foreign exchange earnings.

To address these issues the Tourism and Image Working Group formed three Sub Committees:

- i. Tourism Business Environment Sub Committee
- ii. Branding Tanzania Sub Committee
- iii. FIFA 2010 Project Sub Committee

In the last two years, TIWG has been able to review and follow up key broad issues affecting the Tourism Sector in the following areas:

- i. Human Capital Development
- ii. Tourism SME Financing
- iii. Tourism Destination Audit
- iv. e-Tourism
- v. Accommodation & Hotel Classification
- vi. Infrastructural Development
- vii. Pricing Policy & Regulations for Competitiveness

b. TANZANIA TOURISM ASSETS

- **Tourism Assets'**

Tanzania Tourism continues to have unparalleled tourism assets in the region having been endowed with a variety of world class tourism assets (wildlife, mountains, resort, archaeological, cultural and historical). Among those that have received international recognition as prime tourist attractions, seven are World Heritage Sites:

- i. Ngorongoro Conservation Area
- ii. Serengeti National Park
- iii. Kilimanjaro National Park
- iv. Selous Game Reserve
- v. Stone Town of Zanzibar
- vi. Ruins of Kilwa Kisiwani and Ruins of Songo Mnara
- vii. Rock Paintings of Kondoa Irangi.

The prime tourism attractions are still mainly wildlife photo safari in Serengeti and Ngorongoro, mountain climbing (Kilimanjaro) all in the north of Tanzania and marine tourism in Zanzibar. Other new destinations particularly the South (Selous Game Reserve, Ruaha etc) are slowly attracting more interest to visitors.

Tanzania continues to target low volume, high yield tourism in line with the image of exclusivity because of the outstanding assets.

In addition to the broad categories of wildlife and resort tourism, Tanzania offers other tourism assets that appeal to specialized segments (niche markets):

- i. Bird watching (Northern & Southern Circuits)
- ii. Adventure Tourism (including climbing/trekking)
- iii. Deep-sea-fishing (Mafia & Pemba Channel), Lake Victoria)
- iv. Scuba diving (Pemba, Mafia & parts of Zanzibar)

- v. Cultural tourism (notably Stone Town in Zanzibar, Bagamoyo, Kilwa & island of Kilwa Kisiwani, Olduvai Gorge, Laetoli, Isimila & Tarangire. Cultural assets also include Tanzania's people.
- vi. Trophy Hunting.

Tanzania therefore offers different combinations of high quality wildlife, resort, archaeological, cultural and historical tourism assets that are in demand in the international tourism market.

- **Tourism Value**

The travel and tourism industry is one of the largest and most dynamic industries in today's global economy. Travel and tourism is human resource intensive and was expected by the end of 2007 to account for 10.3 % of global GDP.

According to World Tourism Organization (WTO), international tourism arrivals reached 900 million in 2007, up by 6.6% on 2006. Receipt from international tourism grew to US\$ 856 billion in 2007 corresponding to an increase in real terms of 5.6% on 2006. International receipts from international passengers were US\$ 165 billion.

However, distribution of these receipts is skewed. Europe gets about 51.1%, Asia and Pacific 20.8%, Americas 21%, Africa 3.4% and Middle East 3.7%.

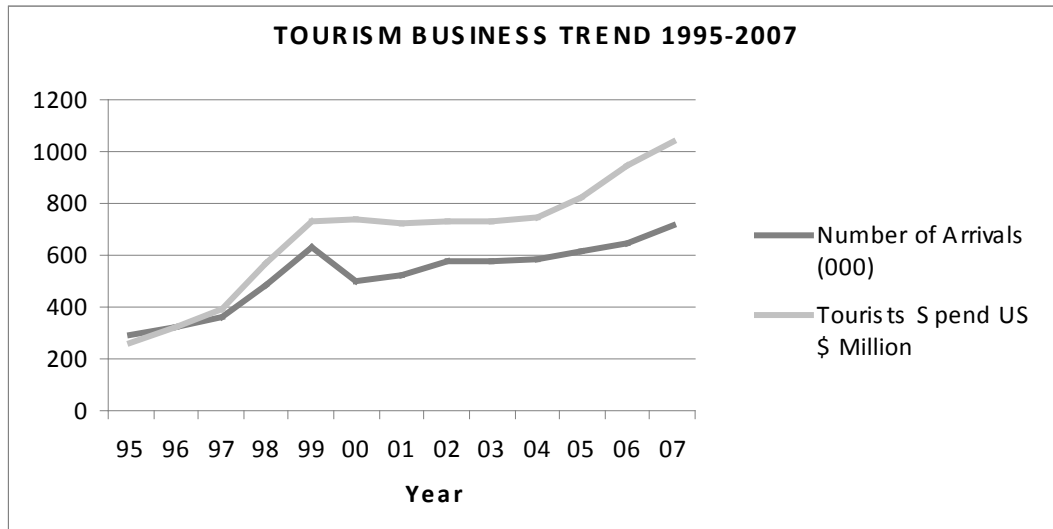
According to ILO study, one job in the core tourism industry creates roughly one and a half additional (indirect) jobs in the tourism related economy.

The travel and tourism economy therefore creates (directly and indirectly) more than 230 million jobs, which represent some 8% of the global workforce. Women make up between 60 and 70% of the labour force and half of the workers are age 25 or under. The industry is growing worldwide by over 4% per year.

Tanzania has also registered positive trend in the last decade:

Tourism receipts have increased from USD 259.44 million (1995) to USD 1,037 Million (2007). Tourism arrivals have increased from 295,312 (1995) to 719,000 (2007).

Tourism is now contributing 17% to the GDP. The sector today employs directly around 300,000 people.



As the sector continues to grow, its role and contribution in stimulating the economy in a number of areas is also generally increasing:

- i. It is stimulating additional value-added activities (leisure, entertainment, shopping – traditional cultural activities, tourist services, handicrafts and SME's).
- ii. It is increasing value added content of existing locally produced goods and services and strengthening linkages with other productive and service sectors (backward & forward linkages – such as agriculture, manufacturing, transport, construction).
- iii. It is generating employment directly in the tourism sector and indirectly in production and services sectors linked to tourism.
- iv. It is generally increasing the earnings of people (local) involved in the sector and also its related activities.

c. CHALLENGES FACING TANZANIA TOURISM

In spite of the positive growth and trend recorded by the sector, there are still a number of challenges besetting the industry and especially now with the global financial crisis.

TIWG has been able to identify a number of key challenges and issues that are impacting the tourism sector:

- i. The adverse impact of Global Financial Crisis on Tanzanian Tourism.
- ii. Concentration of tourism (traffic) is mainly in the northern circuit.
- iii. Limited new investments & expansion of existing investments in new areas.
- iv. Limited investments in other tourism product lines for example tourism conference; and other tourism products to cater and address the needs and interests of the different tourist age groups etc.
- v. Delayed implementation of a grading and classification system and resultant effect on quality standards.
- vi. Weak supply chain and market linkages to enable SME's and smallholder farmers supply goods and services into the main tourism supply chain.
- vii. Inadequate public investment in tourism infrastructure. For example main Airports which are gateways into and out of Tanzania lack the necessary infrastructure to facilitate smooth inflow and outflow of arrivals (Mwl J.K. Nyerere Dsm, Kilimanjaro International Airport - KIA and Zanzibar International Airport, all have serious issues relating to limited passenger capacity, runway, poor service facilities).
- viii. Burdensome regulatory and licensing regime (multiplicity of fees, levies and bodies collecting the same).
- ix. Weak National Airline that faces serious capital, management and operational limitations.
- x. Poor customer service culture due to a negative mind-set.
- xi. Shortage of skilled and trained manpower for the industry. Lack of good quality tourism training institutions.
- xii. Inconsistencies in implementing laid down policies, laws and regulations which adversely affect investments and cost of doing business. The industry has been facing cases of indecisive decisions swinging from one course of action to another. A case in point is the recent allocation of investment areas in National Parks and Conservation Area.

- xiii. Limited national tourism promotion and marketing budget. Tanzania national tourism promotion budget is 4 million USD; Kenya has a budget of over 15 million USD; Namibia USD 40 million; South Africa 60 million USD.
- xiv. Undeveloped domestic tourism market.
- xv. Limited local investments in strategic tourism areas and in the main tourism supply chain.

d. MEASURES TO ADDRESS CHALLENGES

In addressing these challenges, TIWG has grouped them into three categories:

- **Category One – Quick Win Measures**

Issues under this category are mainly on-going and which do require concerted push to ensure they are finalised by the Year 2010.

Quick Wins - Issues to be addressed by 2010

Nos.	Issue	Recommended Action	Responsible
1.	Adverse impact of Global Financial Crisis on Tanzanian Tourism	Develop a strategy and an action plan to combat the situation that will make Tanzania more competitive by addressing the following: a) All service providers offer <i>better value for money</i> . b) Reduce costs and prices of services offered (by Private & Public). c) Develop a targeted promotion campaign in key markets to attract tourists.	MFP, MNRT, TTB, TCT, TIC
2.	Poor Customer Service Culture	Develop a <i>sensitization program</i> (through training, seminars, workshops, radio and plays) to change the mind set and culture which will result in offering good and quality service.	MNRT, TPSF, TCT, TTB
3.	Burdensome regulatory and licensing regime (multiplicity of fees, levies and bodies collecting the same).	All regulations are subjected to pass the test of <i>Principles of Good Regulation</i> being championed by The Better Regulation Unit under the Ministry of Planning Commission. Streamline, harmonise, simplify and limit the number of regulations and licensing regimes in the Sector.	MNRT BRU TCT
4.	Shortage of skilled and trained manpower Lack of good quality tourism training institutions	Finalize the <i>National Curriculum on Tourism and Hospitality</i> Industry. Ensure the construction and completion of the new Tourism and Hospitality College in Dsm is on schedule. <i>Streamline skill developing levy</i> . VETA is currently getting 2%. All accredited tourism training institutions be allowed to source funds from the remaining 4% of the skills development levy. NACTE be charged with sole responsibility of <i>accrediting vocational and technical training institutions</i> . VETA to continue with <i>role of training service provider</i> .	MNRT NACTE ILO – DSM MFP, MNRT NACTE

5.	Lack of promotion for Sports Tourism	Develop an <i>annual calendar of all major sports events</i> in Tanzania and promote them internationally targeting the special interest groups.	MICS, TTB, TCT
6.	Delayed Hotel Classification and Grading System	Finalise <i>administrative and regulatory processes</i> and start the exercise.	MNRT, TCT, HAT
7.	Limited National Tourism Promotion Budget	Thorough consultations with the Stakeholders, <i>industry to support promotion budget.</i>	MNRT, TTB, TCT, MFP
8.	Inconsistencies in implementing laid down policies, laws and regulations	Government establish mechanism to ensure consistency, harmonisation and coordination in implementing laid down Policies, Laws and Regulations. Strengthen <i>PPP and improve Transparency</i> in Government administration.	PM TPSF
9.	Absence of an industry wide tourism growth strategy linking the Policy, Master plan, Private Sector initiatives	Through an industry wide consultative process and partnership (Public, Private, and Stakeholders etc) <i>formulate a tourism growth strategy.</i>	MNRT TCT TPSF
10.	Undeveloped domestic tourism market	Develop sensitization program to change the culture and mind-set in order to interest Tanzanians to consume local tourism products; interest local tourism service providers to package tourism products based on tourist profiles (age groups, gender, income, interests, and regions).	TPSF, TCT, MNRT, TANAPA, NCAA, TTB
11.	Limited local investments in strategic tourism areas and in the main tourism supply chain	Develop an affirmative action program within the tourism sector.	MNRT, TPSF, TCT
12.	Weak supply chains and marketing linkages for SME's to supply goods & services to main tourism supply chains	Encourage formation of marketing associations to supply goods and services based industry requirements' and standards (packaging, quality and delivery time etc).	TCCIA, TCT, MNRT MTI MAF
13.	Weak National Airline – Air Tanzania Co. Ltd	Re-capitalise the Airline and privatise management in order to operate on commercial basis.	MID, MFP

- **Category Two – Medium term measures**

Category two are issues that require specific initiatives and interventions and are to be implemented up to 2012.

Medium Term Wins - Issues to be addressed by 2012

No.	Issue	Recommended Action	Responsible
1.	Tanzania Tourism concentrated in the Northern Circuit	By <i>Presidential decree designate land/areas free from encumbrances for tourism investment & development</i> Develop a concerted and coordinated implementation program of all existing plans and strategies for the <i>promotion and development of Southern and Western Circuits.</i> Develop a <i>conservation strategy to relieve pressure</i> on high concentration of tourist traffic to <i>Northern Circuit.</i>	TNBC MLH MNRT MNRT, TTB, TCT, MID TANAPA TANAPA NCAA
2.	Limited investments in new tourism product lines (niche markets) and in new areas	Develop a <i>strategy with incentives to attract investments in new niche tourism product lines and areas.</i> Align investment incentives with Govt's medium and long term infrastructure development plans.	MNRT TIC

- **Category Three - Long term measures**

Category three is an issue that is of long term and is to be implemented up to 2015

Long Term Wins – Issues to be addressed by 2015

No.	Issue	Recommended Action	Responsible
1.	Lack of adequate public investment in tourism infrastructure	<i>Accelerate completion of regulatory mechanism to facilitate PPP (public and private) investments in roads, airports, power etc (including services). Introduce financial incentives for private sector investments. Ensure incentives are aligned to both medium and long-term infrastructure development plans.</i>	MID, MFP TIC MNRT

- **Measures requiring special emphasis and action**

In addition to all the above issues and measures identified, TIWG has singled out two critical challenges which need special attention and addressing. If these two challenges are successfully addressed, they will have major and wide ranging impact in unlocking further growth.

e. DIVERSIFICATION OF TANZANIA TOURISM PRODUCTS

Tanzania Tourism is mainly characterized by wildlife safari, mountain climbing in the north and beach tourism in Zanzibar. The reason for this development is historical. Tourism developments in these areas will soon be reaching maximum carrying capacity.

During 2007, 719,000 tourists visited Tanzania. Over 80% visited Tanzania for holidays (Safari, mountain climbing and beach). Where did many of these tourists visit? According to statistics from the Ministry (MNRT), TANAPA and NCAA the top destinations visited by tourists are:

- i. Ngorongoro over 55% of tourists
- ii. Zanzibar 45%
- iii. Serengeti 45%
- iv. Mountain Kilimanjaro 26%
- v. Selous Game Reserve less than 10%

These figures confirm that a high concentration of tourists visit mainly the northern circuit followed by Zanzibar.

Tanzania is aiming to attract one million tourists (arrivals) by 2010. In the absence of opening up new and developing other tourism areas (tourism products, lodges, hotels, restaurants and supporting infrastructure etc) the increased tourism traffic

will mainly concentrate in the north with resultant effect and pressure on the existing tourism assets, facilities, infrastructure and the tourism experience. On the long run and mostly likely, tourism development in Tanzania will start to suffer and decline.

In order for Tanzania to continue to have a sustainable industry, competitive destination and at the same time fully exploiting all the products available, deliberate decision backed up by concerted efforts are required to diversify and broaden the base of tourism assets and encourage the development of specialized segments for the niche markets in other new areas of Tanzania.

- i. Bird watching (Northern & Southern Circuits especially Kitulo National Park)
- ii. Adventure Tourism (including climbing/trekking)
- iii. Sport fishing (Mafia & Pemba Channel), Lake Victoria)
- iv. Scuba diving (Pemba, Mafia, Kilwa, Msimbati Bay & parts of Zanzibar)
- v. Cultural and Heritage tourism (notably Stone Town in Zanzibar, Bagamoyo, Kilwa & island of Kilwa Kisiwani, Dar es salaam, Ujiji, Olduvai Gorge, Laetoli, Isimila & Tarangire. Cultural assets also include Tanzania's people.
- vi. Trophy Hunting.
- vii. Sports Tourism.
- viii. Beach Tourism.
- ix. Integrated Tourism Development

This move will have the following impact:

- i. Initiating tourism infrastructure development in new areas (roads, communication, water, power, transport, accommodation facilities).
- ii. Initiating additional Promotion & Publicity of Tanzania Tourism by Stakeholders (investors).
- iii. Increasing additional tourism arrivals in numbers and value.
- iv. Enhance segmentation of the tourism products to cater and address the needs and interests of the different tourist groups.
- v. Wider involvement of Communities in the tourism value chain (addressing pro poor tourism).

To achieve this, the **critical challenge** that has to initially be addressed immediately is to **designate areas specifically for tourism investments centres**.

To place this issue in perspective, in order to diversify the tourist activities/products it is essential that also the numbers of hotel rooms/beds are increased.

Currently, one of the bottlenecks in accommodation development and investment is the non availability of readily demarcated and surveyed areas.

The Ministry of Natural Resources and Tourism (MNRT) has started taking steps to increase number of rooms/beds in National Parks. Appendix A is a list of tourism investment opportunities in National Parks. However, there is still a serious problem in acquiring areas for development and investment outside National Parks and Game Reserves, which fall under Regional and District Administrative organs.

As a way forward to address the challenge of designating tourism areas, it is proposed that the Government by Presidential decree, earmark land/areas that are free of any encumbrances to allow the development of tourism investment centres. Such centres will allow opportunity for integrated tourism developments (tourism products and attractions and associated services – hotels, restaurants, curio & craft shops, entertainment, banks, shops etc) and attract investments both foreign and local.

Such a concept has been developed in Egypt along the Suez Canal where they have over eight tourism investment centres.

In Tanzania such centres can be started in the following tourism zones:

- i. Tanga Region (North East Mountain and Coastal area)
- ii. Bagamoyo, Dar es Salaam and Pwani Regions
- iii. Southern Coast and Mafia Island areas
- iv. Southern Wildlife Zone (Morogoro, Selous, Iringa & Ruaha areas)
- v. Southern Highlands (Mbeya and surrounding areas)
- vi. Lake Tanganyika area

Refer to appendix B (Tourism map of Tanzania).

Prioritizing tourism developing in these areas will lead to the following advantages:

- i. Diversification from the Northern Circuit
- ii. Development of the Southern Circuit comprising wildlife areas (Selous, Udzungwa, Mikumi, Ruaha, Mbeya etc)
- iii. Development of a Coastal Circuit involving beach resort along the coast, including Mafia and other offshore Islands.
- iv. Developing tourism in Dar es Salaam and surrounding areas (waterfront developments etc)
- v. Development of the Western Circuit

Tourism investment centre is a fairly new concept that involves integrated development containing various types of tourist accommodations (hotels, motels, tourist villages, apartments, eco-lodges etc.) recreational, commercial and cultural facilities ,together with housing and urban services (entertainment , banks, schools, medical services, shops and schools etc.)

This is a new niche that international investors teaming up with local investors can develop.

f. Need for a strong local based airline

In terms of in-bound tourism, leading destinations in Africa include the following countries:

International Arrivals-selected countries 2007.		
Country	Arrivals	Source of Data
Egypt	10,000,000	WTO
South Africa	9,700,000	Website
Morocco	7,400,000	Website
Tunisia	6,800,000	Website
Kenya	2,000,000	Govt. Kenya
Algeria	1,700,000	WTO
Tanzania	750,000	MNRT

One of the reasons behind this growth for both Kenya and South Africa compared to Tanzania is easier accessibility (direct flights) to the two countries and consequently the costs of air fares are much lower.

Tanzania has more and a variety of tourism products than Kenya or South Africa. However, up to now it has not been able to fully maximize tourism numbers and receipts from the superior products advantage. The reasons for this are several, but the starting point is accessibility to and fro Tanzania.

In most of the tourism value chains, international airline travel accounts for between 16 - 35% of the entire tourism value chain expenditures. In the case of Tanzania, there is no local airline that services most major markets in Europe, Asia and North America. The impact of this is that Tanzania fails to capture air travel tourist expenditures and therefore failing to maximise tourism based revenue generation.

A number of Airlines fly to Tanzania from Europe, Middle East & Asia and East and Southern Africa. See below Table.

Nos	Airline	From	To
1	KLM	Amsterdam	Dsm & Kilimanjaro
2	BA	London	Dsm
3.	Swiss Airline	Zurich	Dsm
4.	Ethiopian Airline	Addis Ababa	Dsm
5.	Air India	Mumbai	Dsm
6.	Emirates	Dubai	Dsm
7.	Qatar	Doha	Dsm
8.	Air Europe	Malpensa	Zanzibar
9.	South African Airways	Johannesburg	Dsm
10.	Kenya Airways	Nairobi	Dsm
11.	Uganda Airline	Entebbe	Dsm
12.	Air Malawi	Lilongwe	Dsm
13.	Air Zimbabwe	Harare	Dsm
14.	LAM Airline	Maputo	Dsm
15.	Rwanda Express	Kigali	Kilimanjaro (KIA)

America is now an important source of tourists for Tanzania. There is no direct flight from US to Tanzania.

To put this issue into perspective, Tanzanian airlines have not been able to service a majority of tourists coming in from Europe and North America who visited Tanzania during 2007 and the years before. Translated into revenue, Tanzania missed out during 2007 capturing approximately \$100 million dollars (plus) in additional revenue from the tourism sector.

In addition, the lack of a local based Tanzanian Airline flying to key tourist source markets inhibits promoting Tanzania as a destination and scheduling convenient flight connections. Inconvenient accessibility to Tanzania impact air fares making Tanzania destination among other things expensive. All this goes towards undermining the competitiveness of Tanzania as a tourist destination and as such the ability to generate more tourism dollars.

It is important therefore that Tanzania addresses the need to develop a strong local airline that will eventually fly to key tourist source markets. By having its own airline, Tanzania stands to benefit greatly in terms of promoting Tanzania destination; easing flight accessibility into and out of the country; developing competitive air fares; facilitating the increase of tourists arrivals;

Developing an air-network hub and retaining value lost through purchase of airline tickets (to other airlines).

The increase of tourist arrivals will have a spin off effect:

- i. Development of new circuits and sites for visitors/tourists to visit.
- ii. Development of added services – accommodations (hotels, lodges, camps, home-stays etc); restaurants; entertainment centre’s and activities; ground transport;

g. WAY FORWARD AND CONCLUSION

In order to move the process forward that will eventually unlock further tourism growth in Tanzania the following actions are required:

- i. Approval of all TIWG recommended measures by TNBC.
- ii. Quick Win Measures – All indentified Institutions for follow action be directed to implement issues as recommended and submit regular reports to TNBC/TIWG.
- iii. Medium Term Win Measures – By Presidential decree designate identified areas for tourism investment. Identified Institutions for follow up be directed to implement and submit regular reports to TNBC/TIWG.
- iv. Long Term Win Measures - Identified Institutions for follow up be directed to implement and submit regular reports to TNBC/TIWG.
- v. TNBC/TPSF/TTB/TCT/TIC prepares targeted promotional campaign to attract both local and foreign investments in areas identified.

B. SUMMARY OF STRATEGY FOR 2010 FIFA WORLD CUP

Background

1. Following the selection of South Africa on May 17, 2004 as host country for the 2010 FIFA World Cup, African countries, notably SADC countries, have expectations of economic impact of the event.
2. FIFA and the host country (South Africa) consider 2010 FIFA World Cup as an event for the entire continent and has urged African states to develop national strategies for benefiting in three aspects namely the activities leading up to the 2010 World Cup, the month long event itself (11th June through 11th July, 2010) and the beyond 2010 phase.
3. Members of the TNBC Tourism and FIFA 2010 Working Group have taken the challenge to asses how Tanzania can benefit from the event and have participated in various FIFA meetings and preparatory events which have assisted in preparing this document.
4. The TNBC Executive Committee approved Working Group strategy on how the 2010 FIFA World Cup South Africa could benefit the people of Tanzania at large. The strategy proposes six strategic steps namely:
 - i. To provide training camps;
 - ii. To host friendly matches for the 2010 World Cup qualifiers;
 - iii. To provide base camps for competing teams during the competition;
 - iv. To provide general and specialist volunteer workers;
 - v. To provide World Cup season tour packages; and
 - vi. To establish event parks (i.e. public viewing venues).

Strategic Steps

A: Training Camps

1. One of the strategic objectives of the South Africa World Cup Local Organising Committee (SA-LOC) is to encourage participation by all African countries, particularly by providing training camps to qualified FIFA 2010 World Cup teams.
2. The Federation (FIFA) plans to establish 2010 World Cup training camps not only in South Africa, but also in other African countries, thus spreading the benefits of the event across the continent. Each country wishing to host a training camp must meet FIFA selection criteria and promote their own candidature to the countries that have qualified to compete in South Africa.
3. Tanzania has the capability to offer training camps to three teams stationed in three locations, i.e. Dar es Salaam, Arusha, and Zanzibar.

- **FIFA Requirements**

The essential elements of a potential training host-city as per preliminary criteria provided by FIFA to the South African Local Organizing Committee include:

- i. Availability of training fields (that meet FIFA technical and security requirements);
 - ii. Similarity of climatic conditions to the host country (one of the reasons national teams train in the World Cup preparation camp is to adjust their bodies to the climatic conditions of the host country);
 - iii. Personal security
4. Ten stadiums will be used in nine cities in South Africa. The climatic conditions, notably altitudes, of those cities in South Africa are compared with those of Dar es Salaam, Arusha and Zanzibar.
 5. The New National Stadium in Dar es Salaam is fully compliant to current FIFA standards and has been approved by FIFA. However, during the June 2008 FIFA Congress in Australia attended by a member of the TNBC Working Group, it was realised that apart from FIFA and CAF officials, very few people outside Tanzania knew of the new 60,000 capacity stadium.

6. There is an urgent need to advertise the stadium and one of most effective ways of advertising the stadium is to use it as a venue for as many televised international competitive and friendly matches as possible.
7. The Australia Congress revealed that at the moment most countries would wish to prepare for the qualifying games and because the qualifications competition is organized on continental basis, many countries were acclimatizing themselves with conditions prevailing in the competing countries.
8. The Congress revealed also that the international calendar prepared by FIFA was so tight to the extent that teams will not have ample time for friendly matches and that the big clubs were compounding the problem by making it difficult to get the professional players who form the backbone of the national teams released for international friendly matches organized on dates other than those set by FIFA.
9. Conclusively, it is felt that training camps for European, Asian or American national teams can only be considered after the qualification stage is over. The challenge is therefore to secure commitments prior to qualification for finals, which calls for casting a fairly wide net of potentials.
10. Violence in South Africa and the issue of xenophobia engulfing South Africa was a major concern raised by the Congress and albeit assurances, this is where Tanzania, a heaven of peace, makes a difference from all countries competing for training camps.
11. South Africa and Kenya are far ahead with marketing themselves in relation to the 2010 World Cup. Apart from the SALOC which markets South Africa as a nation, the state governments are already waging very active marketing campaigns to lure teams to use their states for training and as a base camp and to get fans from different countries in the world to stay in their states during the World Cup.

B: Friendly Matches for the 2010 World Cup Qualifiers

To enable Tanzania host international friendly matches, the following are recommended strategic activities:

1. Over and above meeting the requirements of attracting teams for training camps as stipulated above, Tanzania must enter the frenzy of systematically targeting national team coaches and officials of different countries to present

its candidature as a competitive venue for international friendly matches. Serious lobbying is required.

2. This endeavour should be undertaken in full partnership between the public sector, private sector (domestic and international) and development partners including UNWTO, ST-EP Foundation, UNDP, ILO, EU, as well as bilateral agencies for the countries targeted. Thus, high Level Workshop to sensitise and get buy-in should be considered.

C: Base Camps for Competing Teams (Through Matches)

1. Among standard FIFA requirements in World Cup competitions is that competing teams must arrive in the host city within 7 days prior to the kick-off. This would mean that all other African states could not be eligible for **base camps** during the competition.
 2. At the meeting of the UNWTO-FIFA Steering Committee held in Colombia, November 2007 attended by members of the TNBC Working Group, the South Africa Local Organising Committee (SA-LOC) informed members that they (SA-LOC) have requested FIFA to relax the requirement for teams to be within South Africa during the competition, so that countries which are geographically closer to the South Africa could provide base camps for team(s) during the competition.
 3. The SA-LOC envisages that countries that are within 3 hours, preferably within 2 hours of flight, between the base camp country and the host city in South Africa could be eligible. Countries that are much closer to South Africa are Angola, Namibia, Botswana, Lesotho, Zimbabwe, Mozambique, and Swaziland. The disadvantaged SADC countries are Zambia, Mauritius, and Tanzania
 4. During the FIFA Congress in Australia in June 2008, it was apparent that the possibility of FIFA being flexible with the 3-hour flight requirement was very low. This is due to pressure set on FIFA by sports medicine practitioners that players are not able to recover and be ready to play on the same day after a 3-hour flight. Some sports medicine practitioners advocate further that players should not fly on the day of the match or travel on a bus for more than one hour to the stadium. The problem with relaxing this requirement is not FIFA but technicians of the respective teams.
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Submission

This proposed strategy was submitted to TNBC Executive Committee and approved the following:

Institutional Framework Recommendations

1. The Tanzania Local Organising Committee (TLOC) has been formed to take over from the TNBC Tourism and FIFA 2010 Working Group.
2. Composition of the Tanzania Local Organising Committee (TLOC) is as follows:
 - i. Chairman: *PS Ministry for Information Culture and Sports*
 - ii. Co-Chairman: *PS Ministry for Natural Resources and Tourism*
 - iii. Champion: *Mr. Elvis Musiba – Tanzania Private Sector Foundation*
 - iv. Public Sector: *State House, MICS, MNRT, MOF.*
 - v. Private Sector: *Corporates, TFF, TPSF and TCT*
 - vi. Coordinating Agency: *TNBC*
3. The President of the United Republic of Tanzania to launch Tanzania Local Organizing Committee (TLOC) at a high-visibility private sector event where key stakeholders and potential sponsors will be invited.

Recommended Immediate Activities of TLOC:

4. To transfer TNBC FIFA 2010 Sub-Group Tasks to TLOC including the following:
 - i. The TNBC FIFA 2010 Sub-Group has identified M/s Silver Stone International of Alabama USA as a potential partner in lobbying for USA and other American and European teams. TLOC should evaluate terms and conditions of the partnership and pursue the teams.
 - ii. The TNBC Sub-Group has contacted Director of International Relations of FIFA on the possibility of the President of FIFA to visit Tanzania and meet top Government officials and take the opportunity to officially open the Karume Technical Centre constructed under the FIFA funded Goal Project. TLOC to take over subsequent activities.
 - iii. The TNBC Sub-Group has embarked on mobilisation of private sector support to promote the initiative. TLOC should take over the task without delay to enable preparation of a comprehensive budget and raise funds.

5. To enable Tanzania provide training camps, host friendly matches and provide base camps, the following are recommended strategic activities:
 - i. Resource mobilisation and strategic planning
 - ii. Engage in aggressive lobbying directly with teams' coaches and officials
 - iii. Confirmation and documentation of training camps.
 - iv. Mass advertisements and promotion campaign overseas
 - v. Identify prospective host hotels for teams.
 - vi. Major local training on smooth entry procedures for teams and fans.

**Presented by Mr. Elvis Musiba
Champion
Tourism & Image Working Group
March 2009**

Appendix A

Investment Opportunities in Tanzania National Parks (TANAPA)

1. Operation of Balloon Safaris in Ruaha, Tarangire and Mikumi National Parks
 - 1.1 Ruaha – 2 Balloons
 - 1.2 Mikumi – 2 Balloons
 - 1.3 Tarangire – 2 Balloons

Advertised in the press – Closing date is 20th March 2009.

2. Construction of Permanent Tented Camps and Lodges in Ruaha National Park
 - 2.1 Chaugigima Area One PTC Maximum 40 Beds.
 - 2.2 Ndatambulwa Area One PTC Max 40 Beds.
 - 2.3 Chamkwata Area One PTC Max 40 Beds
 - 2.4 Makinde Area One PTC Max 40 Beds
 - 2.5 Makorogo Area One PTC Max 40 Beds
 - 2.6 Lupati-Mzombe Area One PTC Max 40 Beds
 - 2.7 Itiku Area One PTC Max 40 Beds
 - 2.8 Nyiriga Area One PTC Max 40 Beds
 - 2.9 Matekenya Area One PTC Max 40 Beds

Advertised in the Press – Closing date 14th April 2009.

Contacts for TANAPA are:

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Appendix B
Tanzania Tourism Map



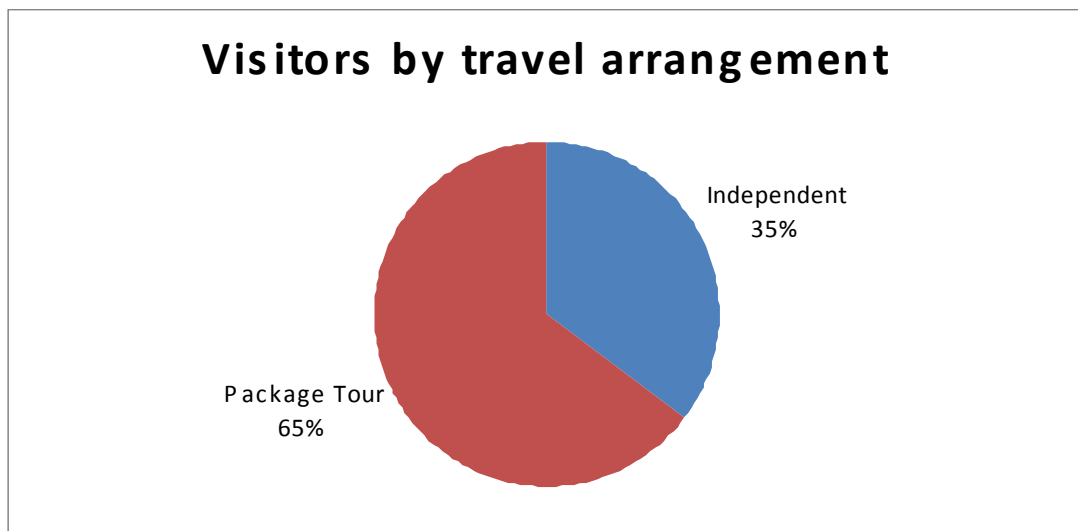
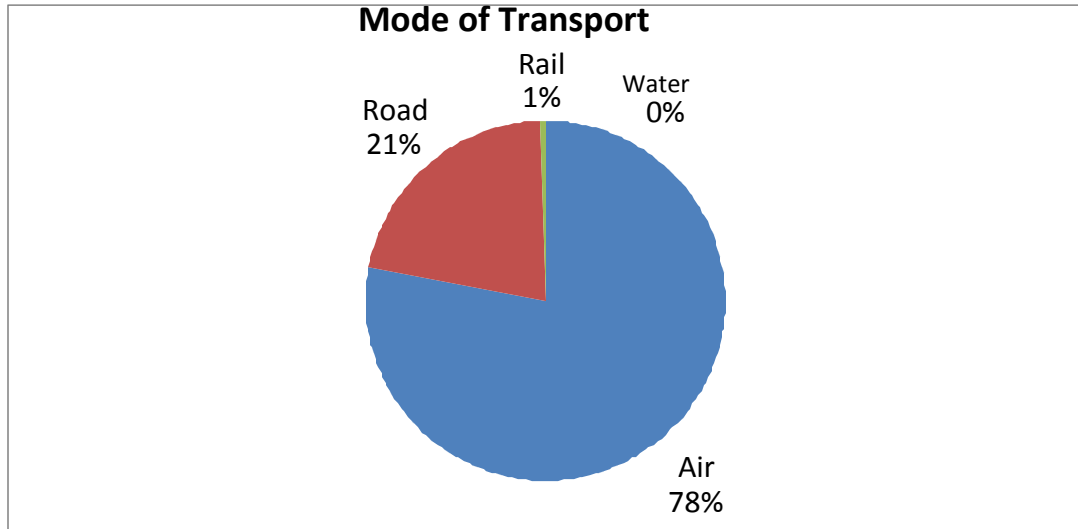
Tourism Development Zones

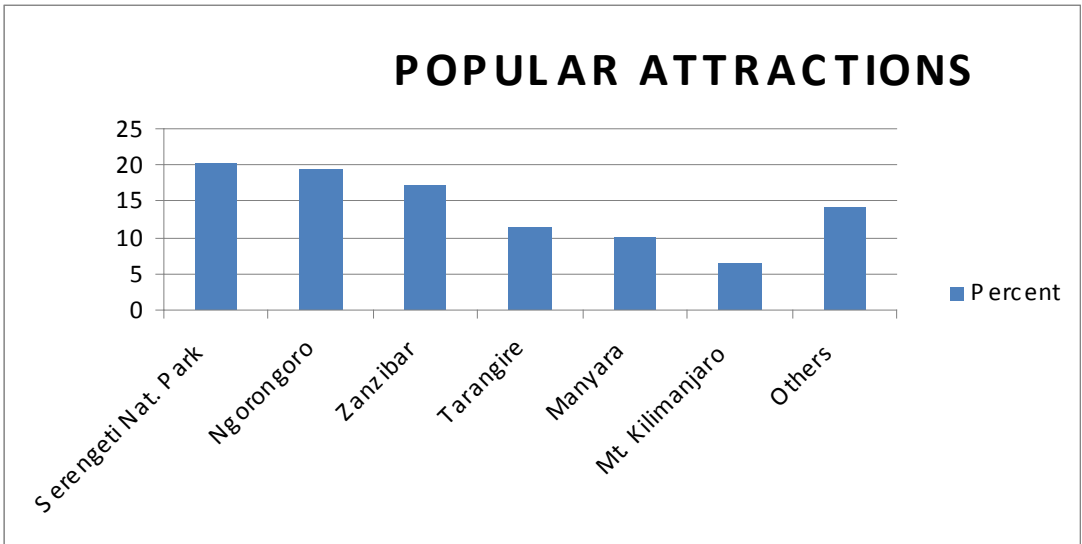
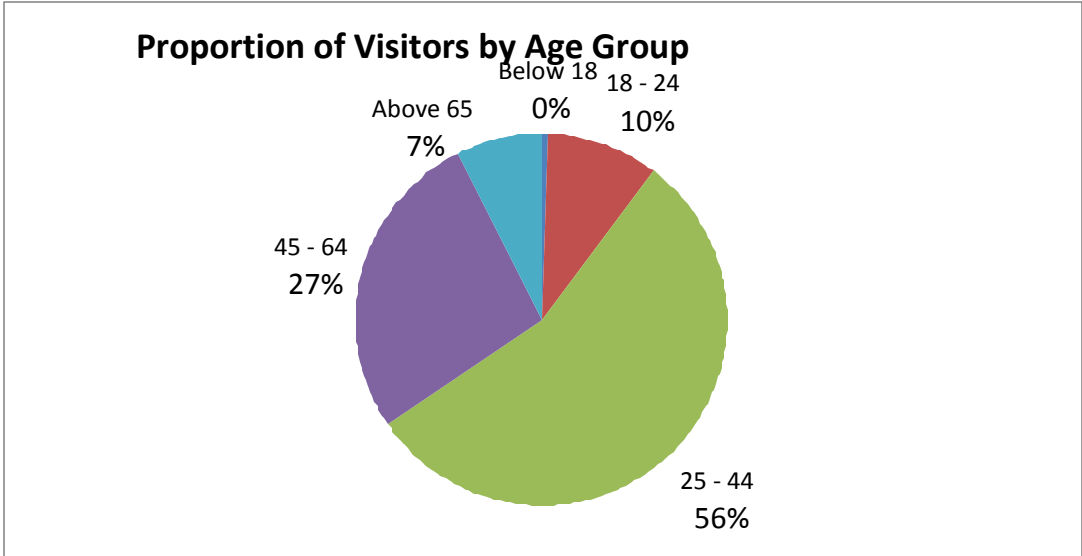
Tourism Development Zones



Appendix C

Graphical Presentation:

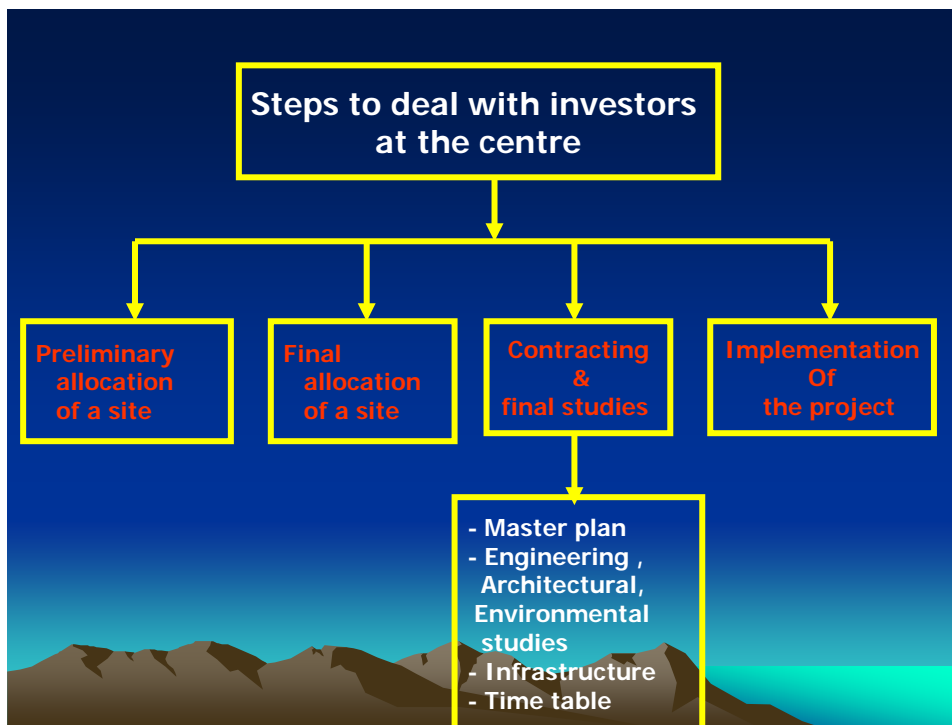


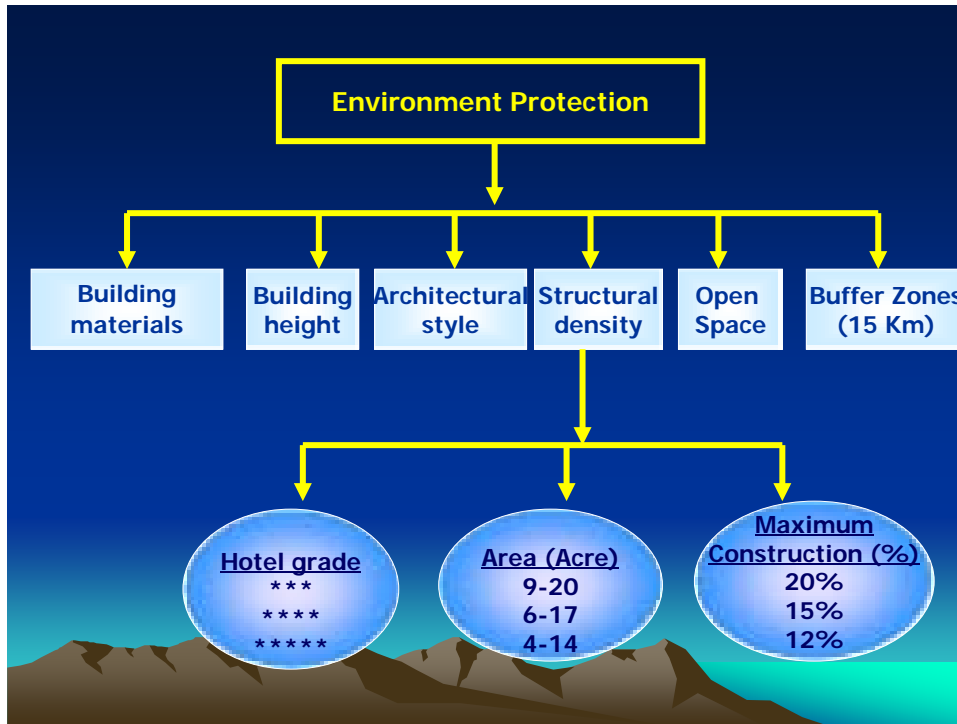


Appendix D

Tourism Investment Centers

- A tourism investment center is an **integrated entity** containing **all types of accommodations** (traditional hotels, motels, tourist villages and apartments, ecoldges etc.) and **several recreational, commercial and cultural facilities** ,together with **labor housing and urban services** (schools, medical services and shops) within its boundaries.





Management in the Tourism Investment Center

A mother company for each center is formed by a group of investors with limited development projects within the tourist center.

The mother company takes care of:

- Management of the planning, development and extension of projects in the tourist center.
- Management of infrastructure (energy, potable water, sewage, communications and transportation).
- Management and coordination of tourism development projects.
- Management of labor housing areas and urban services (schools, sanitary services, hospitals and commercial services).
- Marketing the center abroad separately and / or jointly with the government.