



TANZANIA NATIONAL PARKS

INVESTMENT PROSPECTUS

2019



INTRODUCTION

Tanzania is recognized globally for its natural heritage. Second only to Brazil in terms of attractiveness for natural resources in the world, Tanzania is well known for Mount Kilimanjaro, Serengeti National Park, The Ngorongoro Crater, Selous Game Reserve and The Islands of Zanzibar and Pemba. Mount Kilimanjaro, which is the highest mountain in Africa, is also the highest freestanding mountain in the world. Serengeti National Park is home to the world's longest wildebeest migration.

Tanzania has set aside 40.5% of its land as protected areas, which include national parks, game reserves, a conservation area, forest reserves, marine parks and reserves, game reserves and open areas. Home to some of East Africa's most charismatic species and wild landscapes, Tanzania's national parks make Tanzania the destination of choice for thousands of tourists each year. For those seeking big game on pristine savanna land or a view from the roof of Africa from the top of Mount Kilimanjaro, the experience from these parks is unmatched.

Tanzania National Parks (TANAPA) allows investments in the national parks to provide accommodation facilities to tourists, generate income to support conservation activities and provide opportunities for human enjoyment and employment. To achieve this, the organization has identified investment sites for accommodation facilities in various national parks that are presented in this prospectus. Potential investors are invited to invest in Tanzania's national parks and contribute to the growth of our tourism industry.

TANZANIA: A BRIEF OVERVIEW

Tanzania lies on the eastern side of Africa and is bordered by the Indian Ocean on the East; Malawi, Mozambique and Zambia on the South; Kenya and Uganda on the North; and Democratic Republic of Congo, Burundi and Rwanda on the West. It has an area of 942,849 km², of which 883, 749 km² is inland and 59,100 km² is water.

The climate is tropical along the coast (up to 31⁰C) with the exception of highland areas that have semi-temperate climate (down to below 16⁰C). The country experiences a bimodal rainfall pattern for northern, eastern and northern coast. Low rainfall season ('vuli') from October to December and high season ('masika') from March to May. The southern and western parts of the country receive one season (unimodal rainfall pattern locally known as 'musumi' or 'masika' rains) from December to April. Annual rainfall varies from 200mm to 1000mm over most parts of the country.

Tanzania is the largest and most populous nation in East Africa with an estimated population of more than 45 million people. The country has more than 120 ethnic groups but almost all speak Swahili. English and Swahili are the official languages. The country has a variety of traditional main export commodities namely: cashew nuts, coffee, cotton, tea, tobacco, sisal, cloves, minerals (gold, coal, uranium, bauxite, tanzanite and diamond). It is also increasingly gaining fame as an exporter of cut-flowers.

Despite the economic problems facing the country since the 1980s, Tanzania's economy has grown at an average rate of 6 percent per annum. This makes Tanzania among the fast growing economies in Africa. The trend of growth is due to a solid macro-economic base.

Tanzania enjoys a diversity of natural resources including minerals, wildlife and fisheries. The Tourism Sector, with a growth rate of 12 per cent for the last

four years is one of the fastest growing sectors, contributing about 17.2% of the GDP and 41.7% of foreign exchange earnings in the last five years. Most tourists now fly directly to Tanzania. Tanzania received 957,536 tourists in the national parks in the year 2015/2016 with 171,093,772,452 TZS in revenue in 2015/2016 compared to 46,903,437,365 in 2013/2014. With the development of other attractions and the promotion of domestic tourism, the tourism trend is geared to increase in the future.

Tanzania hosts 7 World Heritage Sites both natural and cultural, namely the Serengeti National Park, Ngorongoro Crater, Mount Kilimanjaro, Selous Game Reserve, Stone town of Zanzibar, Ruins of Kilwa Kisiwani and Songo Mnara, and Kondoa Rock Art Paintings. There are equally many more attractions located all over the country including unexplored beaches along the more than 800km stretch of the Indian Ocean coastline.

Tanzania's untapped natural resources

Tanzania offers a wide range of investment opportunities: arable land, minerals and natural tourist attractions that are all awaiting potential investors. Tanzania is internationally renowned for its abundance of wildlife attractions and unexploited mineral reserves. These sectors (mining and tourism) are the leading recipient of foreign investment flow and are tipped to become the “growth sectors” of the economy.

With its 19 National parks, 28 Game reserves, 38 Game controlled areas, a Conservation area and Marine park, Tanzanians wildlife resources are considered among the supreme in the world and have been widely known for many years. They include the great Serengeti Plains, the spectacular Ngorongoro Crater, Lake Manyara and Africa's highest mountain, Kilimanjaro, in the north, Mikumi, Udzungwa and Ruaha National parks and Selous game Reserve in the south. Other natural attractions include the sandy beaches in the north and south of Dar es Salaam and the excellent deep-sea fishing at

Mafia. Tanzania's tourist attractions make one of the world's fast growing holiday destinations.

Opportunities for investment are immense in Tanzania including hotels construction, leisure parks, ground golf courses, conference tourism, air/ground transport, wildlife farming, tour operations, trophy hunting, sea and lake cruising, deep sea fishing, development of eco-tourism facilities, beach tourism, cultural and historical sites, etc; just to mention a few. The Government therefore encourages investments in, both private and joint ventures.

Tanzania is free of ideological confrontations, ethnic problems and labour disputes. It is a centre of economic and political stability in Sub Saharan Africa that comfort many of her neighbors. Multi party democracy adopted in 1992 has not disturbed the peaceful political climate of the country. The political scene is characterized by parliamentary democracy and public consensus on key social and economic priorities.



TANZANIA NATIONAL PARKS: AN OVERVIEW

TANAPA is a parastatal organization (100% owned by the Government) under the Ministry of Natural Resources and Tourism and has the mandate to establish and manage national parks. The organization was established in 1959 with a single park, Serengeti National Park. Today, the organization has expanded and manages 19 gazetted national parks.

Vision:

Sustainable conservation of national park resources and values for the benefits of mankind.

Mission:

To sustainably conserve National parks through innovative approaches for maximization of ecosystem services and optimizing tourism development.

Mission statement:

To sustainably conserve and manage park resources and their aesthetic values, for the benefit of present and future generations of mankind, as well as efficiently provide high-quality tourism products and services.

Mandate

To manage and regulate the use of areas designated as national parks by such means and measures to preserve the country's heritage, encompassing natural and cultural resources both tangible and intangible resource values, including the Fauna and Flora, wildlife Habitat, natural Processes, wilderness quality, and scenery therein and to provide for human benefit and enjoyment of the same in such manner and by such means as will leave them unimpaired for future generations.

The purpose of National Parks in Tanzania

To Preserve:

- Areas possessing exceptional value or quality illustrating the natural or cultural resources of Tanzania's heritage;
- Areas with outstanding examples of a particular type of resource;
- Water and soil resources critical to maintain ecological integrity and which support the subsistence needs of people outside park boundaries; and
- Areas that offer superlative opportunities for public benefit, enjoyment or scientific study.

To Ensure:

- National Parks retain a high degree of integrity as a true, accurate and unspoiled example of a resource;
- Management Plans for parks are developed by interdisciplinary teams comprised of appropriate professionals with the best available information to achieve a balance between preservation and use that does not adversely impact park resources and values;
- A quality visitor experience, rather than emphasizing "mass-tourism" at the expense of park resources and values; and
- Optimum levels of revenue and benefits accrue to the national economy, the parks and communities without impairing park resources.

Investing in Tanzania National Parks: *TANAPA's Investment guiding tools*

National Policies for National Parks in Tanzania:

According to the National Policies for National Parks in Tanzania of 2012, TANAPA will encourage all major developments only if:

- All the criteria are met for specific park uses.

- The development will be located in development zones established in the park's approved GMP
- There is a complete and thorough site-specific environmental impact assessment of the action.
- Facilities or structures do not exceed one-storey in height (no occupancy above ground level).

General Management Plans

A General Management Plan (GMP) is a document that sets forth the basic management and development philosophy of the park and provides the strategies for solving problems and achieving identified management objectives over a 10 years period. The GMP is organized into four main programs namely Ecosystem, Tourism, Outreach and Park Operations. All TANAPA investment ventures are entailed in the Tourism program of each national park GMP.

Development Action License Procedures [DALP] 2012

This is a document which provides a step by step procedure for seeking approval to develop facilities in the National Parks. All investments in the National Parks are guided by this document from project design, implementation, up to monitoring and evaluation stages.

License Agreements

All developers are issued a license agreement with specific requirements on how construction and operation of the investment would be carried out. Licenses can be renewed after the license term ends.

TANAPA investment incentives

TANAPA offers the following incentives to investors:-

- Free park entry during mobilization and construction stage.
- All staff living in the parks are given free entry permits
- All administrative vehicles are given free entry permits

- Directors pass with a minimal annual fee of US \$ 100
- A grace period of not paying concession fees for a period of six months after opening the facility

TANAPA advertises all available investment opportunities such as accommodation facilities and tourism activities to the public through print and electronic media. Site selection for all investments will be done by TANAPA during the preparation of park specific GMP. Procedures for applying are explained in the DALP. Failure to show investment progress within three months after site allocation, the site offer will be revoked.



INVESTMENT OPPORTUNITIES

MKOMAZI NATIONAL PARK

Mkomazi National Park is situated at the slopes of the Usambara and Pare Eastern Arc Mountain ranges with the size of 3,245 sq km. The park, which borders Tsavo West National Park in Kenya, is a bridge between the northern circuit and the coastal attractions in Tanzania. It is a semi arid savannah and home of large herds of giraffe, eland, hartebeest, zebra, lion, buffalo and elephant. Mkomazi is also a refuge to two highly endangered species, the black rhinos and African wild dogs, both of which were successfully reintroduced in the 1990s. Mkomazi is also home to the rare fringe eared oryx, spiral horned lesser kudu and gerenuk. It is a destination for bird watchers for the park has over 450 species of birds.

One can go for a game drive, camping, bird watching, walking safari or hiking at Mkomazi National Park. There is also a lot to learn about conservation of endangered species from the Mkomazi rhino and wild dog sanctuary.

Mkomazi is easily accessible by road through Same town which is on the main road from Arusha to Dar es Salaam. There are two landing strips in the park which cater to chartered flights.

Available tourist accommodation investment sites in Mkomazi National Park:

Site Name	Type of Investment	Maximum bed capacity
Vitewini	Permanent Tented Camp	50
Ngurunga	Permanent Tented Camp	50
Maore	Permanent Tented Camp	50
Maji tatu	Permanent Tented Camp	50
Kamakota	Lodge	80
Ngiloriti	Lodge	80
Mzara north	Lodge	80
Ndea	Lodge	80

RUBONDO ISLAND NATIONAL PARK

The island is located on the south-western corner of Lake Victoria. It is surrounded by 11 islets which make part of the park and breeding ground for both migratory birds and fish species especially Tilapia and Nile perch. The park also comprises of a dense forest which is home to sitatungas, bushbucks, velvet monkeys, genet cats, spotted necked otters, hippopotamus and crocodiles, which share the ecological niches with other introduced species such as chimpanzees, elephants, giraffes, black and white colubus monkeys, suni and African grey parrots.

Park attractions include the magnificent view of one of the last remaining representatives of evergreen dense primary lowland Congolese forest with a unique habitat mosaic in the midst of high biodiversity value; spectacular beaches at Mchangani and Michikoko; high density of African fish eagles. Cultural sites such as “Ntungamirwe”, “Maji Matakatifu”, “Altare” and “Solo” which explain the life of natives who once stayed in the park.

The park can be reached by chartered flights, road and boat. By road it takes approximately a 4 hours drive from Mwanza to Nkome where visitors can be picked up by the park boat at Nkome, and thereafter picked by the park boat on a one hour boat trip to Rubondo Island. Visitors can also be picked by boat from Kasenda village which is a 25 minutes boat trip to Rubondo island. By road Kasenda village is five hours from Mwanza and two hours from Bukoba.

Visitors who prefer to reach Rubondo by flights should check in advance with the tour operators in Bukoba, Mwanza, Arusha and Dar es Salaam for flight schedules to the island. Currently, Auric Air and Coastal air fly to Rubondo from Mwanza, Bukoba or Serengeti. The park has a well-maintained waiting

lounge with toilet facilities where visitors can wait for appropriate service upon arrival (being picked up by a vehicle to the point of accommodation) or for a flight during departure.

Available tourist accommodation investment sites in Rubondo Island National Park:

Site name	Type of facility	Maximum bed capacity
Michikoko	Permanent Tented Camp	30
Kambi ya sokwe	Permanent Tented Camp	30
Michungwani	Permanent Tented Camp	30
Izilambuba	Permanent Tented Camp	30
Rubiso	Lodge	60



KATAVI NATIONAL PARK

Katavi National Park provides a unique experience where one enjoys the true wilderness of Africa and great game viewing especially along the Katuma and Katisunga rivers, Lakes Katavi and Chada and at the paradise plains. Katavi has a high population of hippos and an estimated number of 4,000 elephants, some 1000 buffalo as well as other animals like giraffe, zebra, impala, reedbuck, lions and spotted hyena with a high number of bird species as well.

Tourism activities taking place at Katavi National include game viewing, walking safaris, camping, picnics as well as bush meals. Cultural tourism is also popular at the park where near Lake Katavi one can visit the tamarind tree where the locals believe is inhabited by the spirit of the legendary hunter Katabi (for whom the park is named) and offerings are still left by locals seeking the spirit's blessings.

Katavi can be reached through chartered flights from Dar Es Salaam or Arusha and also by road which is some 550 km from Mbeya and 390 km from Kigoma, Tabora and Msembe. You can also get to Katavi by rail from Dar es Salaam via Tabora and then take a bus to Katavi National Park.

Available tourist accommodation investment sites in Katavi National Park:

Site Name	Type of Investment	Maximum bed capacity
Wamweru	Lodge	80
Lukima	Lodge	80
Chorangwa	Permanent Tented Camp	30
Katsunga	Permanent Tented Camp	30

KITULO NATIONAL PARK

Kitulo National Park is also known as The Garden of God because of its spectacular floral plains, it is a botanical heaven where more than 350 species of vascular plants which include 45 varieties of terrestrial orchids bloom especially in the rainy season of late November to April. The park is located on the peaks of Kipengere, Poroto and Livingstone Mountains. The park is also a watershed for the Great Ruaha River.

The park has a few species of big game but occasionally reedbuck and eland can be spotted. The park is great for landscape and flower lovers. Witness orchids and other flowers like the yellow-orange red-hot poker, aloes, proteas, geraniums, giant lobelias, lilies and aster daisies, of which more than 30 species are endemic to southern Tanzania cover the landscapes of Kitulo. Endemic birds and butterfly, frogs, lizards and chameleons are also found in the park.

The park has great hiking trails and walking safaris are an enjoyable activity at this park. The walking trails are connected to the beautiful Matema beach on Lake Nyasa. Horseback riding is in the process of being introduced at this park. The park is accessible by road through Chimala which is 78km east of Mbeya along the surfaced main road to Dar es Salaam and by air from Mbeya from Songwe airport.

Available tourist accommodation investment sites in Kitulo National Park:

Site Name	Type of Investment	Maximum bed capacity
Usalama	Lodge	80
Ilala	Lodge	80
Itweli	Permanent Tented Camp	50

MIKUMI NATIONAL PARK

Mikumi National Park is lies just to the North of the famous Selous Game Reserve. Gazetted in 1964 covering an area of 1070 km², it was later extended in 1975 to cover the current area of 3,230 km². The park is the fifth largest National Park in Tanzania, it Shares the name 'Mikumi' with the village just beyond its Western border of the Dar es Salaam – Iringa highway, which traverse the park for 50km. The small town in turn takes the name from the palm tree (*Borassus* spp.) which once grew there in profusion but no stem is visible in the village.

The park is a four hours drive from Dar es Salaam through the 288 km highway to Iringa. By railway it can be reached from Dar es Salaam to Man'gula and then from Man'gula by road to the park gate. By air the park can be reached through charter flights.

The best time to visit the park is during the dry season (May- October). However, the Northern part of the park is accessible throughout the year. Tourism activities in the park include game drives and walking safaris.

Available tourist accommodation investment sites in Mikumi National Park:

Site Name	Type of Investment	Maximum bed capacity
Mahondo	Lodge	80
Kizorobi	Lodge	150
Lumanga	Permanent Tented Camp	40
Mzombe	Permanent Tented Camp	40
Kambi ya Masai	Permanent Tented Camp	40
Ngotwike	Permanent Tented Camp	50

RUAHA NATIONAL PARK

Ruaha National Park, one of the largest parks in Africa has fascinating landscapes characterised by the Great Ruaha river and Mzombe, Mwangusi and Mdonya perennial rivers which are the lifeline of the park. The park is great for game viewing and bird watching with more than 571 bird species some of them being migratory birds from Europe, Asia, Australian rim and Madagascar.

Ruaha has the highest concentration of elephants in East Africa. Other animals like kudu, sable, roan antelopes, wild , lions, leopards, cheetah, giraffes, zebras, elands, impala, bat eared foxes and jackals can be spotted. Crocodiles and other reptiles and amphibians are also easily seen along the rivers. Park visitors can go for game viewing, walking safaris, bird watching, picnics or have bush meals at the wilderness.

The park can be accessed by air and road. By air through scheduled and chartered flights to the park are mainly from Arusha, Dodoma, Kigoma and Dar-es-salaam. The park's airstrips are located at Msembe and Jongomero. By road the park is a 130km drive from Iringa town and 625km from Dar-es-salaam city.

Available tourist accommodation investment sites in Ruaha National Park:

Site Name	Type of Investment		Maximum
Lyangasa	Permanent	Tented	50
Mabata Makali	Lodge		100
Kalengakelu	Lodge		100
Majimoto	Permanent	Tented	50