DEVELOPMENT OF TOURISM AND MARKETING STRATEGY FOR 
THE SOUTHERN CIRCUIT 
SOUTHERN CIRCUIT OF TANZANIA - SPANEST PROJECT 
TERMS OF REFERENCE

OVERVIEW 
Project Name: Strengthening the Protected Area Network in Southern Tanzania – (SPANEST): Improving the Effectiveness of National Parks in Addressing Threats to Biodiversity

Project Duration: 5 years

Executing Entity/Implementing Partner: Tanzania National Parks Authority (TANAPA)

Other Responsible Partners: Ministry of Natural Resources and Tourism; Vice President’s Office; PMORALG, LGAs

Duty Station: Ruaha National Park, Tanzania

Project Background
The Global Environment Facility (GEF) in collaboration with UNDP has committed funds to support strengthening the Protected Area Networks in Southern Tanzania; by implementing measures that will contribute to improving the effectiveness of National Parks in addressing threats to biodiversity conservation. This project aims at creating a coordinated landscape management approach in the Greater Ruaha landscape (GRL) and Greater Kitulo-Kipengere landscape (GKKL) to serve as a shield against human-induced pressures on southern Tanzania’s threatened biodiversity.

In addition, the project will provide planned, targeted and effective support to the operational capacity of core protected areas within those landscapes. These two landscapes will be managed for the conservation of biodiversity and landscape values, including aligned revenue generation opportunities and enhanced economic performance for ecosystem services (better managed at landscape level), for optimum ecosystem functioning, and for sustainable protected area management.
CONTEXT TO ASSIGNMENT

Tourism and Marketing Challenges
With domestic commercial agriculture that has not developed to its full potential, market opportunities in the Tanzanian economy are to a large extent dependent on direct foreign investment and trade. Tanzania has experienced a steady rise of foreign direct investment over the last decade. In 2007, the value of Foreign Direct Investment (FDI) Flow was USD 600 million compared to USD 474.5 million in 2006. In the last decade the total Foreign Direct Investment (FDI) stock in Tanzania exceeded USD 6 billion, making the country a leading FDI destination in the East Africa region. Tanzania’s strategic location also makes it a natural East African hub for investors seeking to exploit not only resources but also a growing market of 527 million consumers in East and Southern Africa.

Tourism is a key prospective sector for FDI, important for developing economies in general and its importance in wildlife conservation is recognised by Tanzania’s National Parks Authority (TANAPA). Tourism can provide a sustainable alternative income for local communities and revenues generated also fund the management and conservation of wildlife. However, poor infrastructure development, poor marketing and communications, limited access to training in tourism skills, poor customer service skills and other factors have hindered the expansion of tourism within the Southern Circuit.

The National Parks that comprise the Southern Circuit are Mikumi, Ruaha, Udzungwa Mountains and Kitulo. Of the four, Ruaha National Park (RUNAPA) is the largest with coverage of 20,226 km². There are several other Protected Areas (PAs) and additional documented attractions including the Selous Game Reserve; Mpanga Kipengere Game Reserve, the Livingstone Mountains; Kalambo Falls; Isimila Stone Age Site; the Mbozi Meteorite; Tendenguru; Mafia Island; Ruvuma River; Lake Nyasa, and Lake Rukwa.

Until late 2008, Tanzania’s National Parks Authority had seen more than 10 years growth in revenues, of which 98% came from tourism activities. The 2006/2007 annual financial report showed an income of 69 billion TZS, (57.5million $ at 2008 rates). This was 69% over 2005/6 figures, and three times that of 2002/03. However, there are large differentials in revenue earnings between parks. From the 14 parks documented in the 2006/2007 annual financial statement, two parks (Kilimanjaro 42% and Serengeti 33%) raised over 75% of all revenue. The 7 southern parks collectively raised more than 1.5% of all revenue.

Whilst southern park revenues have steadily increased in recent years, this has been minor, and proportionally less than the pattern of increase in the north. Currently, TANAPA covers its costs through the cross subsidization of operations in PAs with limited income from PAs such as the Serengeti and Kilimanjaro NP, which run at a surplus. However, the income received covers direct costs estimated at 50 billion shillings and is not sufficient to fully cover the costs of managing the parks of the Southern Circuit.
There is a need to increase the income earning potential of the southern circuit, through the promotion of tourism or other means, while also ensuring that operations are moulded to ensure cost effectiveness and maximise threat abatement per dollar invested. This will improve the efficacy of the existing budgetary cross subsidisation scheme between the Northern and Southern NPs. There is huge scope for communities to benefit from wildlife, principally but not exclusively, by sharing the benefits of sport hunting and photographic tourism.

At the moment, the tourism products offered within RUNAPA are limited to game viewing, hiking and walking safaris. Although the tourism trend at the RUNAPA shows progressive increment, the tourism revenues are still very low and so far have not been able to support the park operational expenses.

TANAPA takes responsibility for wildlife management and sustainable tourism development very seriously. As a result, utilising the financial and technical support of its SPANEST project and associated contractors, TANAPA is seeking to develop a tourism and marketing strategy for the Southern Circuit for domestic and international tourism trade in Ruaha, Kitulo and surrounding areas.

THE ASSIGNMENT

Development of a Tourism and Marketing Strategy
TANAPA recognises that with infrastructure development in the southern circuit, there is greater potential for tourism. This has necessitated the expansion of tourism products available as well as improving tourism services within the region. Improved tourism services will therefore require enhancing the infrastructure and capacity of service providers; and the development of a tourism and marketing strategy is a key part of that process.

A contractor is sought to develop a comprehensive Tourism and Marketing Strategy for TANAPA, centred on the Southern Circuit, particularly Ruaha and Kitulo National Parks. The main objective of the strategy is to provide a framework and strategic direction for TANAPA and stakeholders in the tourism industry to address issues, such as but not limited to, accessibility (transportation and infrastructure), planning and product development, investment and human resources development. The strategy developed should also aim to set policies and identify programs that will make tourism a catalyst and engine in protecting the environment, especially on climate change adaptation, preservation of culture and heritage, local economic development and poverty alleviation through local enterprise development.

The tourism strategy should incorporate marketing and tourism development plans. The strategy should incorporate the following outputs, outlined in summary here – however the contractor is expected to provide a detailed breakdown of how they expect to deliver these outputs as part of their technical proposal:
1. **Assessment of current Tourism in GKKL and GRL Landscapes:** Assess and review the recent government policies and implementation plans on tourism marketing. Review the work and projects undertaken by various organisations, in the areas of tourism planning, product development, marketing and promotions, regulation and licensing, standards, manpower development, and investments. Review tourism trends vis-à-vis competing destinations in the regions (Eastern and Southern Africa). Identify issues and sectoral priorities to achieve global tourism competitiveness and achieve the full potential of an integrated approach to tourism development in the GKKL and GRL landscapes. Identify the infrastructure needs/gaps in various tourism areas in the GKKL and GRL landscapes. Identify geographic areas within the GKKL and GRL landscapes with potential tourism value and provide recommendations and approaches to developing such areas, including the identification of relevant infrastructure and capacity needs.

2. **Tourism Strategy:** Based on the assessment of the current tourism situation in the GKKL and GRL landscapes, a Tourism and Marketing development strategy will be developed and will incorporate, but not limited to, the following aspects:
   - **Tourism Spatial Aspects, Product Development and Investment:** This would involve recommendations for the development of infrastructure in the identified tourist destinations and attractions. It would also include recommendations on tourism products and experiences to be developed to satisfy the identified demand for experiences and markets based on the analysis of gaps in the supply of tourism products and experiences. This includes cultural and historical attractions, activities such as adventure and accommodation, meetings and other facilities. This would also include strategies to encourage investment in the opportunities that exist specifically for local communities, emerging entrepreneurs and Small and Medium Enterprises. Providing recommendations on public sector support and facilitation of projects delivering empowerment to communities and equitable ownership of the tourism industry.
   - **Tourism Marketing and Promotion:** This would include identifying the core tourism products and experiences and matched these to target market segments; creating a tourism positioning and branding strategy for the area; providing recommendations for the development of product portfolios, packages and tourism routes; development of mechanisms to enhance the current tourism product mix to deliver a richer experience for both visitors and residents; develop a tourism promotion and communication strategy; and development of a tourism information system, with respect to the most appropriate distribution and promotional channels for the GKKL and GRL landscapes. Recommendations for marketing should include information proliferation media such as use of websites, brochures, tourism information centres amongst others.
o **Human Resources and Community Participation:** This would include recommendations for capacity building for personnel and local communities as well as recommendations for community integration into tourism development programmes in the southern circuit.

3. **Stakeholder Consultation:** The key stakeholders in tourism such as private sector and tour operators will participate in stakeholder meetings in which the findings of the tourism and marketing strategy will be discussed and validated. Concerns and recommendations by the stakeholders should be captured and incorporated into the final **Southern Circuit Tourism and Marketing Strategy (SCTMS)** to be submitted to TANAPA.

**Scope of Work**
TANAPA through UNDP is seeking to hire the services of a firm to develop the **Southern Circuit Tourism and Marketing Strategy (SCTMS)**, including undertaking the following tasks:

- Organise and conduct consultations, meetings, focus group discussions, and interviews with various stakeholders in the tourism industry as well as allied sectors, including indigenous groups, local communities and women, to elicit inputs, ideas, opinions and recommendations on the vision, goals and objectives, strategies, policies and programs for the SCTMS.
- Assess and review the recent government policies and implementation plans, including the various plans developed by the Ministry of Natural Resources and Tourism and relevant government agencies and institutions on tourism marketing, among others.
- Review the work and projects undertaken by various national and international organisations in the areas of tourism planning, product development, marketing and promotions, regulation and licensing, standards, manpower development, and investments.
- Review tourism trends vis-à-vis competing destinations in the regions (Eastern and Southern Africa), including analysis of market share in outbound traffic from source markets, new and emerging tourist source markets; and prepare forecast on visitor arrivals, receipts, room capacities, and domestic tourism, as well as overall contribution of tourism at the national and local levels.
- Identify issues, sectoral priorities as well as activities that TANAPA and other relevant agencies, including the local government units and private sector should be engaged in and implement to achieve global tourism competitiveness and achieve the full potential of an integrated approach to tourism development in the GKKL and GRL landscapes.
- Identify the infrastructure needs/gaps in various tourism areas in the GKKL and GRL landscapes, including roads, bridges, airports, sea ports, water supply, sanitation, and power, among others. It is emphasised that the consultants should not rely on the listing of the infrastructure agencies but see through the integrated development of tourism.
- Identify geographic areas within the GKKL and GRL landscapes with potential tourism value, based on set of criteria; provide recommendations and approaches to developing such areas, including the identification of relevant infrastructure and capacity needs.

- Develop the overall vision as well as define the strategies, policies and action plan for each area of concern, such as, but not limited to tourism planning and product development, marketing and promotions, standards and accreditation, manpower development, investments, infrastructure, transportation, environment, culture, gender, and poverty reduction. Prepare an action plan or roadmap on the various components of the SCTMS.

- Develop an integrated marketing plan that will provide for the identification of strategic market areas and niches, including products and services to develop the annual promotions plan.

- Recommend potential funding sources to implement the plan, including multi- and bilateral organisations, official development assistance, and public-private sector. Recommend a mechanism for the establishment and preparation of the annual Tourism Infrastructure Program as well as the implementation of mandatory accreditation and local development planning.

- Prepare and present the draft and final SCTMS to TANAPA and the Ministry of Natural Resources and Tourism including affiliated agencies as well as various stakeholders at the local and national levels. Prepare a communications strategy to inform, advocate and disseminate information on the SCTMS.

### BIDDING PROCESS

**Competencies Required by Bidder:**

The profile of the potential firm shall demonstrate long-term experience in the tourism and hospitality industry; training and human resources development as pre-requisite with proven international, regional and national skills. The firm should demonstrate involvement in similar assignment; particularly in the preparation of tourism plans, frameworks and strategies.

The competencies of the **team leader** shall include strong background in tourism work with extensive international and national experience. S(he) should have strong understanding of the current tourism trends (national and international) with at least 10 years of field experience. S(he) should be well versed with the existing national tourism policy. Educational background of the team leader should be at least PhD/MSc in the relevant field including tourism planning, marketing, infrastructure, transportation, product development, standards setting, local governance, environment, social, and cultural.

Senior expert shall have 7 years of proven field experience in tourism planning, infrastructure and product development. S(he) should have strong understanding of the current national tourism trends. S(he) should be well versed with the existing national tourism policy.
Educational background of the senior expert should be at least MSc in the relevant field including tourism planning, marketing, infrastructure, transportation, product development, standards setting, local governance, environment, social, and cultural.

Junior expert should be well versed in community engagement and marketing of tourism products. S(he) should at least have a first degree and 5 years of relevant field experience.

**Duration of the assignment**
The assignment shall be carried out within 90 days spread over the period from June to December, 2014, exact dates to be finalised at contracting stage

**Supervision and reporting**
The contractor will report to the Project Coordinator and the respective Chief Park wardens (Ruaha and Kitulo). In general, the strategy development process will be consultative in nature with a two-way communication maintained between the experts and the client.

**Submission of Proposals**
Technical and financial proposals to be submitted in separate sealed envelopes according to UNDP procurement procedures.