

Business Environment Strengthening for
Tanzania - Advocacy Component

Third BEST-AC Baseline Study

Final Report

March 2007

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List of Abbreviations

ACT	Agriculture Council of Tanzania (formerly known as Tanzania Chamber of Agriculture and Livestock)
AMSDP	Agricultural Marketing Systems Development Programme
BDSP	Business Development Service Provider
BEST-AC	Business Environment Strengthening in Tanzania - Advocacy Component
CEO	Chief Executive Officer
CIPE	Center for International Private Enterprise
CTI	Confederation of Tanzania Industries
DANIDA	Danish Agency for International Development Assistance
DFID	Department for International Development (UK)
GoT	Government of Tanzania
GTZ	Deutsche Gesellschaft für Technische Zusammenarbeit
HAT	Hotel Association of Tanzania
IFAD	International Fund for Agricultural Development
KILICAFE	Association of Kilimanjaro Specialty Coffee Growers
LGA	Local Government Authorities
LHRC	Legal and Human Rights Centre
MLEYD	Ministry of Labour, Employment and Youth Development
MNRT	Ministry of Natural Resources and Tourism
MDA	Ministries, Departments, Agencies
PPP	Public Private Partnership
PSA	Private Sector Advocacy
PSO	Private Sector Organisations
RNE	Royal Netherlands Embassy
RULU	RULU Arts Promoters
SCC	Same Chamber of Commerce
SIDA	Swedish International Development Agency
TACECA	Tanzania Civil Engineering Contractors' Association
TAFFA	Tanzania Freight Forwarders' Association
TAHA	Tanzania Horticulture Association
TCCIA	Tanzania Chamber of Commerce, Industry and Agriculture

TCT	Tanzania Confederation of Tourism
TLA	Tanzania Institute of Arbitrators
TLS	Tanganyika Law Society
TNBC	Tanzania National Business Council
TPSF	Tanzania Private Sector Foundation
TRA	Tanzania Revenue Authority
Tsh.	Tanzania Shilling (Tsh. 1168 to USD 1, 30 January 2006)
USD	United States Dollar
VAT	Value Added Tax
ZACPO	Zanzibar Clove Producers Organisation
ZNCCIA	Zanzibar National Chamber of Commerce, Industry and Agriculture

Executive Summary

Since December 2005, BEST-AC has been assisting Private Sector Organisations (PSOs) to develop their advocacy capacity, and supporting them to develop and implement concrete advocacy initiatives.

The **purpose** of this third baseline survey is to provide data to enable the BEST-AC team to assess advocacy capacity and competence among a selection of private sector organisations in Tanzania. The survey covers private sector organisations that have worked with BEST-AC (grantee PSOs) and a selection of PSOs likely to do so in the future (new PSOs). The **methodology** is based on the approach taken in the first two baselines but also informed by ideas introduced by a recent review team and the development of a new logframe for the projects. Key findings of the survey are:

Secretariats are becoming better staffed. The average number of fulltime staff in grantee PSOs now lies at 4.6 as compared to 2.8 previously. For all PSOs covered in the baseline, the average number of staff is four people. For the grantee PSOs there also seems to be a clearer focus on advocacy as compared to the second baseline, and many PSOs now say that they exist primarily to do advocacy.

The average budget of PSOs has gone up considerably compared to the second baseline. Overall the 2006 budget was for the 20 interviewed PSOs Tsh 135m compared to Tsh 37.7m Tsh in the second baseline. The budgets for the ten grantee PSOs have increased by almost four times. The increase in funding is to a large extent a result of increased funding from external donors. For the grantee PSOs this includes support from BEST-AC.

Interaction with the authorities is increasingly assessed as successful.

Among the grantee PSOs interviewed this time, more than half characterised the outcome of their interaction with the authorities as a successful. The PSOs increasingly point to the importance of participating in public-private fora such as the national and regional business councils. Still, the question remains whether the notion that the outcome is becoming more successful can be backed up by examples of tangible achievements?

Several of the interviewed PSOs have frequent interaction with other PSOs since they are by nature apex organisations. However, when asked about the outcome of this interaction, not many are able to point out tangible benefits.

The definition of private sector advocacy advanced by the 20 PSOs interviewed suggested that all have a good basic understanding of the concept, including the process, the objective and the target groups. Business plans and similar documents appear to become more and more popular with the PSOs. During the last baseline only four in ten claimed to have such a document. This has now increased to six in ten for the grantee PSOs. More interesting the PSOs were also pointing out that advocacy was a key part of the business plan.

Of the twenty interviewed PSOs only three PSOs had staff in particular advocacy posts. Two of the three have implemented BEST-AC financed projects in the past year and have recruited their advocacy staff in this period. For other PSOs having dedicated advocacy staff (let alone directorates) is seen a 'luxury' they still cannot afford.

Most PSOs interviewed have carried out advocacy campaigns on more than two issues. Hence there is a lot of experience to draw on for both the ten grantee PSOs as well as the ten new ones. At the same time it should be mentioned that the level of activity is not higher than the second baseline.

In terms of approach, issues are typically identified through the members, but only in a few cases through a strategic approach where members are consulted. The notion that advocacy must be evidence based is increasingly accepted by private sector organisations. Hence 14 out of 20 PSOs reported to have carried out some form of research associated with advocacy issues under discussion. 15 out of 20 PSOs pursue issues based on written responses and position papers. Public-private fora are becoming increasingly popular for reaching relevant decision makers. PSOs see time invested in getting involved in PPP fora as an important investment in building up networks for effective advocacy work. Finally, follow-up/ monitoring of advocacy issues is becoming more and more institutionalised through committees and task forces, especially so for the grantee PSOs.

16 out of the 20 PSOs claimed to have instigated (some measure of) regulatory or commercial changes. Despite these achievements, a considerable number of PSOs claimed that they were yet to see the fruit of their advocacy work. These PSOs were however hopeful that they had been creating a strong basis for getting results by positioning their PSOs, making strategic alliances, and (in some cases) building up the capacity of their secretariat.

13 of the 20 PSOs see leadership as the main strength. This is closely followed by 11 PSOs who see the secretariat as a strength for the PSO. Unlike the second baseline, it is also interesting to note that transparency has been mentioned by three PSOs as a strength. When asked about weaknesses there is wide consensus (between half and up to two thirds) that the PSOs lack funding and that their secretariats are not in a position to effectively defend the interests of their members.

In terms of opportunities, nine of the 20 PSOs identify the strategic importance of their sector. Moreover, especially the grantee PSOs take the view that

there the government mind-set has changed to the better and that this is an opportunity for their organisation. Nevertheless, the mindset of the government is still seen as a major challenge by a third of the PSOs. Five of the 20 PSOs also identify lack of awareness/ interest among its own members as a threat to the organisation.

1 Introduction

1.1 Background

The purpose of the Business Environment Strengthening for Tanzania - Advocacy Component (BEST-AC), the fifth component of the BEST programme, is *to sustainably enhance the quality and effectiveness of Tanzanian private sector advocacy for an improved investment climate*. Since December 2005, BEST-AC has been assisting Private Sector Organisations (PSOs) to develop their advocacy capacity, and supporting them to develop and implement concrete advocacy initiatives. To date BEST-AC has supported 10 PSOs with grants, training and technical assistance.

During the inception phase of BEST-AC, the need for a baseline survey of the capacity and competency in business advocacy was identified. Two baseline studies were completed by COWI (hereinafter referred to as the Consultant) during the inception phase of the project (i.e. before any grants were disbursed). The first, in September 2005, covered 28 randomly selected national PSOs and 19 regional PSOs. The second, in February 2006, focused on the 10 PSOs that were awarded grants by the (then) Grants Allocation Committee.

The purpose of the surveys was to establish a baseline on the current situation with regard to advocacy planning and initiatives among the PSOs and thus articulate the point of departure for BEST-AC.

In October 2006 a mid term review (MTR) of BEST-AC concluded that the project was making sound progress and should be extended. However, the review team also recommended introducing a number of changes to the programme, including a revision of the strategic framework, or logframe. As a result the Work Plan was revised and now incorporates a new logframe which covers the period to June 2008. The new logframe focuses on the outputs for the project, i.e. what it is intended to achieve, as opposed to focusing on the activities. It includes a number of new indicators that will measure the programme's progress in achieving these Outputs.

The MTR also argued for the introduction of a five-step approach to advocacy encompassing the steps of (i) identification, (ii) research, (iii) development of responses, (iv) influencing and finally (v) follow-up/ monitoring. This approach has been followed by the BEST-AC Team in the development of the above-mentioned revised work plan.

The MTR Team furthermore developed a tool to measure business organisations' current competence, utilising six areas of competence and attempting to establish a numerical rating for each area. This tool, the diagnostic competence assessment tool, is currently being elaborated under a separate contract with BEST-AC and other advocacy fund managers in Africa.

Following these changes, BEST-AC has arranged for a third baseline survey to ensure that the BEST-AC team is able to measure performance against the indicators outlined in the new logframe, as well as to provide information to help with the implementation of the programme.

Following the introduction of these changes, the BEST-AC management commissioned COWI to undertake a third baseline survey in early 2007. This survey is foreseen in the general monitoring and evaluation set-up of BEST-AC and a fourth baseline is also expected to be carried out in the first half of 2008.

The Inception Report for the third baseline was submitted to BEST-AC on 31 January 2007. The data collection phase of the assignment was completed on 08 February 2007 and a debriefing with the BEST-AC Team was held in Dar es Salaam on the same day. This report, the final under the assignment, summarises the methodology for the assignment (as described in the Inception Report), presents the findings and presents lessons learned for BEST-AC consideration.

1.2 Purpose of Assignment

The purpose of the third baseline survey is to provide data to enable the BEST-AC team to assess advocacy capacity and competence among a selection of private sector organisations in Tanzania. It also provides inputs to understanding reasons for success and failure of advocacy initiatives, and inputs on advocacy training and capacity building needs of the PSOs.

Terms of Reference are annexed to the inception report submitted to BEST-AC.

The survey covers private sector organisations that have worked with BEST-AC and an equal number of PSOs likely to do so in the future. Accordingly, unlike the first baseline study, but as with the second baseline study, the PSOs interviewed have not been selected randomly, but have been pre-selected by the BEST-AC Team.

The baseline is not a project review per se, but focuses on advocacy activities of the organisations in general.

This report is organised as follows:

Chapter 2 presents the methodology for the assignment, i.e. definitions and indicators for private sector advocacy and details on data collection and processing.

Chapter 3 presents the findings of the survey by topical areas. In the initial sections the focus is on the general organisation of the PSOs, but the subsequent sections are increasingly focused on the advocacy experience of the PSOs.

Chapter 4 describes some observations related to the BEST-AC project and any subsequent baselines to be undertaken under the project.

Annex 1 has the interview Guide used for data collection purposes. Annex 2 includes a list of references including useful Internet sites.

2 Methodology

The baseline methodology is based on the approach taken in the first two baselines but inspired by the ideas introduced by the MTR Team (the five steps of advocacy) and the diagnostic capacity assessment tool developed by the same team. Finally, the development of a new logframe has made it necessary to undertake minor revision. The methodology is explained in more detail in the following sections:

2.1 Conceptual Framework

For the purpose of the survey, **private sector advocacy** is defined as: Actions to influence the authorities (Ministries, Departments, Agencies and other public bodies at both central and local level) with a view to create and maintain a favourable environment for private sector business.

More specifically, the survey focuses on advocacy capacity and competency as defined in the subsections below.

2.1.1 Advocacy Capacity

Advocacy capacity is defined as the general ability of PSOs to influence target groups. This mainly concerns the strength of the organisations (staff, budget, members etc.), their networks and access to decision makers.

The advocacy capacity indicators outlined below relate mainly to the organisational set-up of the PSOs, their leverage in terms of members, funding and relations to public and private entities:

- **general organisation:** budget, funding source and any specific allocations for advocacy; number of paid-up members, funding sources; representation of the organisations in the sector; and staff (including any dedicated to advocacy);
- **access to decision makers/ capacity to influence dialogue with government:** frequency of meetings with decision makers; being member of government/ regional committees; being invited for policy dialogue; general effectiveness of policy dialogue;

- **networks:** meeting regularly with other business organisations to discuss policy issues and mutual interests;

2.1.2 Advocacy Competency

Advocacy competency, in turn, is defined as the ability of PSOs to define advocacy, develop advocacy systems, and their general approach to advocacy (as defined by the five steps) and track record in achieving desired results.

The indicators for advocacy competency are outlined below:

- **understanding of business advocacy:** basic understanding of advocacy and advocacy tools,
- **advocacy systems and planning:** availability of planning documents; definitions of responsibility within the organisation/ coalition;
- **experience:** previous experience with specific advocacy activities;
- **approach to advocacy/ advocacy method:** comprising the five steps as outlined in the MTR report:
 - **identification of issues;**
 - **understanding the issues** through research;
 - **development of responses and proposals** including the development of compelling recommendations;
 - **influencing policy makers** at the appropriate level; and
 - **follow-up** and monitoring of progress to ensure that agreements are put into practice.
- **output/ impact/ effectiveness:** having carried out advocacy activities that were successful and the ability to explain success and/ or failure.

2.1.3 Changes Compared to Second Baseline

Changes have been made to the indicators (and consequently the Interview Guide) to accommodate BEST-AC's request to capture data against the revised logframe, to have consistency with the five steps of advocacy and with the diagnostic capacity assessment tool. The following indicators have been added or modified:

- 'understanding of private sector advocacy' was in earlier baselines included as indicator under advocacy capacity, but has now been moved to competency section as an introduction to the indicators related to advocacy experience;

- years of existence for PSOs (added);
- governance issues such as constitution and election to governing body (added);
- existence of branch offices (added);
- methods for communicating with members (added);
- any initiatives for expanding membership base (added);
- more detailed indicators on staff of the PSOs, including breakdown by paid secretariat staff and volunteers (added);
- who in the PSO is responsible and their advocacy skills (added);
- tools for advocacy has been adapted to the diagnostic capacity assessment tool;
- indicators on planning documents for advocacy have been adapted to the diagnostic capacity assessment tool and the revised logframe;
- indicators on advocacy approach have been adapted to the five steps of advocacy and the logframe;
- impact indicators have been elaborated to meet the requirements of the logframe; and
- a short section on capacity building has been removed as this is now addressed through a separate consultancy on this issue.

2.2 Data Collection

Data was collected through face-to-face interviews. The interviews were based on an interview guide (refer to Annex 1). The design was based on the guide developed for the two first baseline studies, but with inspiration from guides developed in Ghana and Nigeria (received through the BEST-AC office). Some of the answer options outlined in the most recent version of the diagnostic capacity assessment tool (28 January 2007) have also informed the design of the interview guide.

Questions in the guide were in most cases open and interviewees were where relevant invited to substantiate and elaborate answers.

The respondents received an introduction letter in advance of the interviews explaining the general topics to be discussed and the background for the assignment. At the beginning of the interviews, they further received a one-page outline of the questionnaire.

The interviews were carried out by two consultants in the period 31 January - 08 February 2007. The initial interviews were carried out jointly by the consultants to harmonise procedures and approach. Hereafter the team split, covering Zanzibar and different regions outside Dar es Salaam (Arusha, Iringa, and Kilimanjaro).

The interviews lasted between 60 and 75 minutes and were not recorded on audio/video. They were conducted in English and no language barriers were detected. Enthusiasm to participate was evident all across the board. Moreover a significant number of the participants were well prepared for the interview. Executives and/ or Chairmen were interviewed in most cases, often with other secretariat staff or members around. A matrix with the identity and contact details of the interviewees has been made available to BEST-AC management.

No requests were made for confidentiality.

2.3 The Sample

The Consultant received a list from BEST-AC, with names and details for 20 PSOs to be covered under this survey. Of the original twenty all except Tanzania Private Sector Foundation were interviewed¹. Later on, the Consultant was asked to also include the CEO Roundtable, which was then successfully interviewed. Hence a total of 20 PSOs were interviewed.

Ten of the twenty have received grants from BEST-AC and were the subject of the second BEST-AC baseline. Most of these have by now finalised the projects financed by BEST-AC except a few that still have to complete final reporting and auditing procedures. These are hereafter referred to as Grantee PSOs (consistent with wording used in the second baseline). It should be mentioned that (currently) two of the Grantee PSOs are in dialogue with BEST-AC on new advocacy activities to be financed by BEST-AC.

In addition the sample includes ten new PSOs, of which only one (TCCIA Arusha) has been interviewed during the first baseline. These PSOs are all currently in dialogue with the BEST-AC management to discuss possible cooperation opportunities. Some of them are in the process of preparing applications to BEST-AC, but none had received a firm BEST-AC funding commitment at the time of the interview. The Zanzibar National Chamber of Commerce, Industry and Agriculture already works with BEST-AC under a separate grant awarded directly. These PSOs are hereafter referred to as 'the ten new PSOs'.

The PSOs and their status vis-à-vis BEST-AC are listed in the table below:

¹ TPSF representatives were not available to meet with the Consultant during the data collection phase of the assignment

Table 1 Organisations interviewed

Name of PSO	Status
Agriculture Council of Tanzania (ACT)	Grantee
Association of Kilimanjaro Specialty Coffee Growers (Kilicafe)	Grantee
Hotel Association of Tanzania (HAT)	Grantee
RULU Arts Promoters	Grantee☼
Same Chamber of Commerce (SCC)	Grantee
Tanzania Civil Engineering Contractors Association (TACECA)	Grantee
Tanzania Freight Forwarders (TAFFA)	Grantee
TCCIA Iringa	Grantee
TCCIA Kilimanjaro	Grantee
Tourism Confederation of Tanzania (TCT)	Grantee☼
CEO Roundtable	New
Confederation of Tanzanian Industries (CTI)	New
Jumuiya ya Vikundi vya Wenye Viwanda na Biashara Ndogodogo (VIBINDO Society)	New
Tanganyika Law Society (TLS)	New
Tanzania Association of Tour Operators (TATO)	New
Tanzania Horticulture Association (TAHA)	New
Tanzania Institute of Arbitrators (TIA)	New
TCCIA Arusha	New*
Zanzibar Chamber of Commerce Industry and Agriculture (ZNCCIA)	New†
Zanzibar Clove Producers Organisation (ZAPCO)	New

☼ In dialogue with BEST-AC on new BEST-AC financed project

* Interviewed during first baseline

† Will receive funding from BEST-AC under separate arrangement

The sample is not representative of PSOs in Tanzania in general. The general capacity and competency of the Grantee PSOs in the area of advocacy is assessed to be above average since they have worked intensively with BEST-AC on advocacy issues for the past year. The capacity of the new PSOs may be more representative of the national average with the caveat that they have all been in close dialogue with BEST-AC for the past two-three months on advocacy issues, including definitions and methodologies. This dialogue has most likely increased their general understanding of advocacy issues.

The sample involves a mix of Dar es Salaam based, Zanzibari and up-country PSOs. Dar es Salaam and the Northern regions of Arusha and Kilimanjaro may be somewhat overrepresented.

Except the CEO Roundtable, all of the PSOs are registered organisations with constitutions, boards and annual general meetings. The Roundtable does not work as a “normal” PSO and does not have constitution etc.

In conclusion, although the sample is biased in terms of advocacy capacity, competency and geography, it is representative in other aspects.

2.4 Data Processing

A number of pre-fixed answer categories, not revealed to the interviewees, were identified in the Interview Guide to facilitate categorisation of data. These categories had been identified on the basis of the responses obtained during the two first baselines. The data has been entered into an Excel sheet for analysis.

To ensure transparency of the interpretation of such data, the questionnaires containing all the original responses, documentation received from the interviewees (business cards, business plans, advocacy proposals, brochures etc.), and a data matrix where the data has been categorised by the Consultant will be handed over to BEST-AC together with this report.

The responses obtained reflect interviewees' own assessments, and have not been systematically verified by information from third parties. Accordingly, some of the data on capacity, competency and particularly output/ outcome may be biased under the assumption that interviewees prefer to talk about success rather than failure.

Moreover, there is also a risk that the PSOs - especially those planning to apply for funding from BEST-AC - have seen the Consultant as a representative of BEST-AC (despite assurances of the opposite) and thus seen the meeting as a chance to promote themselves as able private sector advocacy agents.

Most of the data is narrative, and it has therefore not been possible to compare the level of advocacy capacity and competency in any quantitative sense.

Still comparisons have been made on qualitative basis between the sample and the second baseline that focused exclusively on the ten grantee PSOs. Comparisons between these two baselines are valid inasmuch as they are both biased towards PSOs with above average capacity and competency.

The second baseline was carried out before disbursement of BEST-AC funds, while this third survey is carried out after most project-related activities have been implemented.

To properly assess any changes with respect to the ten grantee PSOs, distinction has for the new baseline been made between the ten grantee PSOs and the ten new ones. All data is also disaggregated in this way in the Excel matrix.

Finally, it should be noted that no comparisons have been made to the first baseline, which involved a randomly selected sample of national and regionally based PSOs. While it is assumed that the third baseline covers PSOs with above-average capacity and competency in the area of advocacy, the PSOs covered through the first baseline are believed to be close to the national average.

Hence no solid conclusions about changes over time can be made about any differences observed between observations from the first and this third baseline.

3 Findings

The findings of the survey are presented by themes: The first section (3.1) deals with the general set-up of the organisations, while sections 3.2 - 3.9 are more focused on advocacy: Section 3.2 describes the PSOs interaction with the authorities, while section 3.3 focuses on relations with other private sector bodies. Section 3.4 outlines the interviewees' perceptions of advocacy and section 3.5 looks into how the PSOs organise their advocacy work. Section 3.6 describes their advocacy 'track-record' in terms of issues identified and advocacy campaigns carried out. Section 3.7 looks in more detail at how the PSOs carry out specific advocacy campaigns and 3.8 provides information of their achievements so far. Finally, section 3.9 presents the PSOs' own analysis of their strengths, weaknesses, opportunities and threats (challenges).

3.1 General Organisation

The information related to the general organisation of the PSOs relate to their governance structures, number of paid-up members, activities to expand membership, communication, staffing, budget, and source of funding.

16 of the Private Sector Organisations interviewed were established after 1990 with five of them formed only after 2000. The youngest PSO interviewed was the Zanzibar Clove Producers Organisation (ZACPO), established in 2004. Hence, the majority of the PSOs are still relatively young, and some of them are modernised version or break-aways from older organisations. The Hotels Association of Tanzania, for example, was formed on the basis of the Hotel Keepers Association, and the Agricultural Council of Tanzania (ACT) replaced the Tanzania Chamber of Agriculture and Livestock.

All of the PSOs (except CEO Roundtable) are governed by a similar set-up: A board that meets four times or more per year and is elected through general meetings. The typical PSO also has a constitution that lays down rules for election and other fundamental governance procedures. All PSOs informed that their boards (sometimes referred to as management committee or governing council) meets at least three times per year, with some even meeting on a monthly basis or even more frequently. TAFFA, whose Council meets twice a month is a case in point.

The PSOs differ significantly in terms of their membership coverage. Some of the PSOs, such as the regional TCCIA offices, have a high number of mem-

bers in absolute members (between 300 and 741), but when compared to the total number of potential members in their respective areas, they cover less than five percent. Such a low representation may have implications for the leverage, influence and negotiation position that these organisations enjoy.

Other PSOs have a much higher coverage of the sectors they represent. These include TAHA (horticulture exporters), TATO (tour operators) and TAFFA (freight forwarders). These PSOs benefit from the fact that they operate in well-defined sectors where it is relatively easy to identify and approach potential members. TAFFA for example claims to organise more than 90 percent of total operators and TAHA's membership represents more than half of Tanzania's annual exports of horticulture products.

Unlike all other PSOs interviewed, Tanganyika Law Society has 100 percent coverage due to its position as the authoritative vetting body for lawyers in mainland Tanzania. TATO is similarly arguing for the government to formalise that tour operators should be vetted by TATO before given a government license to operate.

The PSOs interviewed differ significantly by the type of members that they organise. The Tourism Confederation of Tanzania (TCT), the Confederation of Tanzania Industries (CTI), and the Agricultural Council of Tanzania (ACT) are all apex organisations that represent sub-sector associations vis-à-vis the authorities. The regional TCCIA offices do also to some extent play this role, although on a regional level and covering a number of sectors. The CEO Roundtable is an entirely different body, which cuts across all sectors and mainly works as an informal gathering of the most senior business people in the country.

The remaining PSOs are more typical private sector organisations representing commercial entities within a given sub-sector. They represent sectors as diverse as tourism, transportation, and construction. Key sectors such as fishing and mining are not represented.

Most PSOs see communication with members as a two-way process. The PSOs communicate with their members through traditional media such as letters, fax and telephone in addition to meetings.

A small proportion of the PSOs also communicate to their members through a website. Seven of the 20 have their own designated website, while the three TCCIA offices are represented through the central TCCIA website (addresses available in Annex 2). Two PSOs claimed to be in the process of establishing websites. This is a change from the second baseline: Of the ten, HAT and RULU have since last year launched websites and TACECA and TCT are in the process of doing so. One year ago none of these had a website and did not express intent of launching one.

Currently, all except two PSOs have an email address but only very few can rely on email for communication and consultation with their members. This is

the case for TAHA, CTI and also to some extent TATO, who all described email communication as very reliable and effective.

Finally, to encourage bottom-up communication, CTI operates a so-called hot-line enabling its members to bring issues to the attention of CTI management. However it is not clear to what extent it is used (and staffed).

Secretariats are becoming better staffed. The average number of fulltime staff now lies at 4.0. The number is even higher for the ten grantee PSOs which now has 4.6 full time equivalent as compared to 2.8 previously. Of the 4.6, 2.6 staff in the grantee PSOs are classified as professional staff, i.e. staff with university level degree. Remaining staff are either administrative or support staff. The average number of staff in the secretariats of the ten new PSOs is 3.5, i.e. lower than the current levels of the grantee PSOs.

One would expect that as PSOs in Tanzania get more experience, they would tend to rely more on a staffed secretariat. One example of this trend is ACT, which one year ago was driven primarily by volunteerism but now - thanks to external donors - has established itself in permanent offices with a secretariat and salaried staff.

Still many PSOs rely to a significant degree on members volunteering. This is especially the case for RULU, TACECA, VIBINDO, TAFFA (as mentioned above its Council meets at least twice monthly), TAHA, Same Chamber of Commerce (SCC), Zanzibar Clove Producers Organisation (ZACPO) and the Zanzibar Chamber of Commerce, Industry and Agriculture (ZNCCIA). By contrast, PSOs such as CTI, TATO, the TCCIA Regional Offices and KILICAFE are run mainly by secretariat staff - with members called in for major important events.

Roughly half of the PSOs interviewed have some kind of branch structure. CTI is in the process of increasing its branch offices. Outreach offices in Tanga and Mwanza have since the last baseline survey been added to their first branch office in Arusha (covering both Arusha and Moshi). HAT, the Tanzania Civil Engineering Contractors Association (TACECA), and TAFFA have all managed to establish representations in the relevant regions or zones. TATO and the Tanzania Horticultural Association (TAHA) are considering whether to go in the same direction.

Still, in most cases the existence of branches does not involve the presence of salaried staff at branch level: The three TCCIA offices interviewed, Arusha, Iringa, and Kilimanjaro, are themselves branches of the national TCCIA offices, but they also have responsibility for a number of district level offices in their regions. The Consultant was informed that the district offices are under resourced with no paid secretariat staff.

Branch offices are seen as instrument for boosting membership. Face-to-face interaction is mentioned by the most PSOs when asked about strategies for increasing the number of members and the presence of branch offices is seen as an asset in this context.

Moreover, most PSOs point out that advocacy in itself is seen to be promoting the organisations - as long as the advocacy work is registered and reported in the media. Hence, the more coverage the PSOs are able to get in the media, the more likely it is that potential members will consider joining the organisation.

There seems to be a trend for PSOs with well-defined sectors and a limited number of total operators to be relatively more effective in recruiting members than PSOs with a more diverse membership composition/ or and a high number of total members.

Finally, it should be mentioned that the CEO Roundtable differs from the rest: Membership is not open to anyone who can support their main activity or is part of the sector (as it is not an apex organisation or a particular sector organisation). Membership is by invitation only and currently the Roundtable is not looking for new members except to attract female business executives, as all current members are men.

Most PSOs define advocacy as a main activity. There seems to be a clearer focus on advocacy as compared to the second baseline, and many PSOs say that they exist primarily to do advocacy. Last year many PSOs would also mention advocacy as a main activity, but not always as the first and main activity. TCT for example is explicit that the organisation has changed from being a service provider to an advocate. The only exception is KILICAFE, which continues to see itself as more of a marketing organisation. Moreover, it is worth mentioning that the regional branch offices of TCCIA have a prerogative from the Government to issue certificates of origin. The TCCIA offices see this as a key service for their members.

It is important to keep in mind that the sample is biased. Not only have ten of the PSOs worked with advocacy through BEST-AC projects, but the ten new ones are currently in dialogue with BEST-AC. Some of them may have an interest in describing themselves as advocacy organisations, since the information provided to the Consultant ultimately goes to the BEST-AC management. Moreover it is also expected that the extensive interaction that the new PSOs have had with BEST-AC has helped them to get a better understanding of private sector advocacy issues.

In addition to advocacy, 15 of the 20 PSOs mention the provision of information and training to their members as a main activity. One interesting change is TAFFA, which since the last baseline has established a training centre in collaboration with the Tanzania Revenue Authority. Nine of the 20 PSOs are also involved in marketing the products of their members. Only four of them develop standards and codes of conduct for their members (TACECA, TLS, HAT and TATO).

The average budget of PSOs has gone up considerably compared to the second baseline. Overall the 2006 budget was for the 20 interviewed PSOs Tsh 135m. For the ten grantee PSOs alone, the figure is slightly higher at Tsh 140m, which compares to Tsh 37.7m Tsh in the second baseline. Hence, the budgets for the ten grantee PSOs have increased by almost four times.

The increase in funding is to a large extent a result of increased funding from external donors. All of the 20 PSOs receive contributions from their members but this is on average less than 40 percent of total income. Of the 15 PSOs that receive funding from external donors, this accounts on average for 59 percent of their income.

The fact that half of the sample has received funds from BEST-AC in 2006 is obviously part of the reason, but the PSOs have also worked with other donors, organisations, and programmes, including:

- German Agency for Technical Cooperation (GTZ) (to TLS),
- The Government of the Netherlands (to TAHA),
- SIDA (to the TCCIA Regional Offices),
- Danish Association for International Cooperation (to ACT); and
- The Agricultural Marketing Systems Development Programme (AMSDP) co-financed by the Government of Tanzania, IFAD, the African Development Bank and the Government of Ireland (TCCIA Kilimanjaro and SCC).

It should be mentioned in this context that the level of donor funding fluctuates significantly from year to year, but an increasing number of donors and programmes seem to be targeting development of private sector organisations and business sector development more generally. The abovementioned AMSDP is one example just as the World Bank has launched its Private Sector Competitiveness Programme (PSCP) in Tanzania.

Finally, it should be mentioned that some of the PSOs rely on significant funding from the Government: ACT, TCT, and ZACPO. Moreover, the TCCIA offices are depending on income derived from a service that they provide courtesy of the Government: the issuing of certificates of origin.

This in turn may jeopardise their independence from the authorities and hence their ability to act as an unbiased advocate of private sector interests vis-à-vis the Government. The risk is that these PSOs may become servants of the government more than advocates for their members.

3.2 Interaction with Authorities

This section focuses on the quantity and quality of the interaction between the PSOs and authorities. It focuses on meetings with decision makers, whether the PSOs are consulted by the authorities, and whether any of the PSOs are members of any committees chaired by the authorities. The section also describes the PSOs' general assessment of the effectiveness of their interaction with the authorities.

Ministries dealing with private sector development and crosscutting administrative issues are frequently targeted by the PSOs. For example a significant amount of PSOs report to have interaction with:

- Ministry of Finance,
- Ministry of Industry, Trade and Marketing,
- Tanzania Revenue Authority (TRA),
- Ministry of Infrastructure Development, and
- Ministry of Labour, Employment and Youth Development (MoLEYD)

Besides, all of the PSOs have some kind of interaction with their respective resort ministries and authorities, such as SUMATRA (for TAFFA), Ministry of Natural Resources and Tourism (for TATO, HAT and TCT), Tanzania National Roads Agency (for TACECA), Ministry of Agriculture (for ACT, KILICAFE, and TAHA) and Ministry of Home Affairs (for TATO).

Most PSOs are consulted by the authorities. CTI, TACECA and VIBINDO have for example all indicated that they have been approached by the MoLEYD for their inputs to a policy on youth employment creation. Another example is KILICAFE which was asked by the Tanzania Coffee Board to give their opinion on the on the Coffee Industry Act no. 23 of 2001. Finally, TAFFA mentioned having been invited to annual stakeholders' forum organised by TRA.

Likewise PSOs are typically represented in government councils and committees. Examples are TAFFA which sits in the SUMATRA Consumers Consultative Committee and the East African Customs Union Harmonisation Committee and KILICAFE which is represented in the board of the Tanzania Coffee Board and in the Tanzania Coffee Research Institute (TACRI).

To develop the dialogue with authorities, the PSOs stress the importance of Public Private Partnerships (PPP). It should be noted that PPP in this context is understood to include any kind of initiative or institutional framework that brings the public and private sector together, whether it is for general discussion and debate, or more narrowly as 'a system in which a government service or private business venture is funded and operated through a partnership of government and one or more private sector companies'.²

The PSOs point to the importance of participating in public-private fora such as the national and regional business councils. One reason cited why business councils are popular is that the decisions are seen as binding and authoritative since they have government representatives in the chair.

Since the second baseline in February 2006, a committee has been formed under the National Business Council tasked with establishing Regional Business

² Definition from Wikipedia.com

Councils to oversee dialogue at district and local levels. 12 regional business councils are expected to materialise at the regional level. Other examples are the PPP-forum in the tourism sector, championed by TCT with BEST-AC funding, and, more locally, the recent establishment of the Moshi Business Forum and the Moshi Roundtable which bring together private sector operators with senior local government officials.

Most claim to have informal dialogue with the authorities. Some PSOs for example benefit from having recruited key staff to their secretariats that have a history with the government administration. A case in point is ACT, whose newly recruited executive officer (in place since summer 2006) has a career in the Ministry of Agriculture behind her. Likewise, the CTI officer responsible for policy and research was employed by the Government prior to joining CTI.

A modality for informal dialogue is participation in social gatherings and functions hosted by the authorities (mentioned for example by TAFFA and TCCIA Iringa). Moreover as mentioned by SCC, informal dialogue is also a popular way of interaction in smaller places (such as the town of Same) where the SCC representatives frequently meet government officials in various contexts.

Interaction with the authorities is increasingly assessed as successful.

Among the grantee PSOs interviewed this time, more than half characterised the outcome of their interaction with the authorities as a successful. This is a slightly higher proportion than last survey where four in ten did so. There is also a tendency that the grantee PSOs are slightly more positive than the ten new PSOs in their assessment of their interaction with the authorities. Only three of the ten new PSOs characterised the outcome as successful. This may suggest that the grantee PSOs have become more skilled at building relations with the authorities.

Still, the question remains whether the notion that the outcome is becoming more successful can be backed up by examples of tangible achievements? As section 3.8 will demonstrate, there are examples of such achievements, but there are also numerous examples of PSOs who are yet to see results of their advocacy work. It appears that for many PSOs it is a success simply being invited and consulted by the Government, although the impact that the PSO may have is (yet) limited.

3.3 Private-Private Networks

This section focuses on regular meetings with other business organisations to discuss policy issues and mutual interests, and whether the PSOs are members of any private sector bodies such as umbrella organisations and international associations.

Several of the interviewed PSOs have frequent interaction with other PSOs since they are by nature apex organisations. These include TCT, ACT, CTI and the TCCIA Regional Offices. In addition to this more than half of the 20 interviewed PSOs interact with the Tanzania Private Sector Foundation and

participate in the annual TPSF meetings and sometimes in other arrangements such as breakfast meetings. In addition to TPSF a number of the PSOs are involved in social fora and umbrella organisations such as the Tanzania network for NGOs (TANGO), the Legal and Human Rights Centre (LHRC) and the NGO Policy Forum.

However, when asked about the outcome of this interaction, not many are able to point out tangible benefits. The PSOs (with few notable exceptions) are nevertheless confident that investment will pay off in the long term. There is probably an argument that the lower the capacity of a PSO, the more it is likely to rely on for example TPSF to bring major issues to the attention of the Government. One PSO remarked in this context that TPSF may need to increase its operational and analytical capacity to effectively fill its role as representative for the Tanzania private sector. Collecting, synthesising and presenting private sector views is a challenging task and PSOs can only be relied on to work through TPSF if they believe that TPSF can meet this challenge.

Tanzania PSOs are not taking advantage of the international networking opportunities. At present, only five of the twenty interviewed PSOs are also interacting with international PSOs:

- TAFFA through the East African and Global Chapters of Freight forwarders;
- HAT through the international association for hotels and restaurants and through cooperation with their Kenyan equivalent;
- KILICAFE through the Eastern African Fine Coffees Association (EAFCA); and
- The Tanzania Institute of Arbitrators through the Institute of Chartered Arbitrators in the United Kingdom.

The level of international exposure of the PSOs has remained stable, but it is worth noticing that those who do make use of international networks are enthusiastic about the advantages of doing so. It can serve as both leverage and inspiration for the individual PSOs. A case in point is TIA, which sees its UK equivalent as a benchmark and inspiration for its own future development.

3.4 Definitions of Advocacy

This section presents the interviewees' own definition and understanding of private sector advocacy including examples of what they see as effective ways to do advocacy in Tanzania. A good conceptual understanding of private sector advocacy is believed to be a solid basis for strong and effective advocacy work.

The definition advanced by the 20 PSOs interviewed suggested that all have a good basic understanding of the concept, including the process, the objective and the target groups. The definition outlined by most can be syn-

thesised as follows: “you influence and work with the authorities to remove stumbling blocks and to create a more conducive business environment”. This consensus is not surprising: The ten grantee PSOs have all worked with advocacy projects from BEST-AC and have participated in the training arranged by the University of Dar es Salaam Entrepreneurship Centre (UDEC).

The non-grantee PSOs have a perception of advocacy that is similar to the grantee PSOs. This is arguably a result of frequent interaction with BEST-AC staff over the last few months, where the new advocacy methodology has been outlined and discussed in detail,

The consensus also applies to tools, except that the grantee PSOs are more likely to mention media as a potential effective tool (four out of ten as compared to two out of ten of the new PSOs). It is also interesting to note that networking and building of coalitions is becoming more popular - compared to the second baseline where only one in ten mentioned this as a tool, it is now mentioned by four of the ten grantee PSOs. This may reflect an increasing sophistication among the grantee PSOs with respect to how they see advocacy - more of a long term process where the short and medium term development of alliances and coalitions can become a strong basis for creating long term results.

3.5 Advocacy Systems and Planning

This section explores the kind of document and structures that the PSOs have in place for dealing with advocacy work. It focuses on the availability of business plans and whether the PSOs have relevant skills to plan and implement advocacy campaigns.

Business plans and similar documents appear to become more and more popular with the PSOs. During the last baseline only four in ten claimed to have such a document. This has now increased to six in ten for the grantee PSOs while it is five in ten for the new ones. In addition to this, most of the PSOs who do not have a plan claim to be in the process of finalising it. Hence, the need for and rationale behind business plans seems to be more and more accepted. This can be seen as a testimony to the increasing professionalism of the PSOs. In this context it is interesting to note that TAHA had the development of their Business Plan commissioned to an external consultant, while ACT is raising funds for the same.

More interesting the PSOs were also pointing out that advocacy was a key part of the business plan. This corresponds with the observation that more and more PSOs see themselves as advocacy organisations when asked about the activities of their organisation. It also represents a change from the second baseline where advocacy would be addressed in business plans, but generally not as the main topic. This observation should be qualified by the fact that some PSOs may have a very broad perception of the work 'advocacy' and thus label all their activities as such - especially if they are in the process of applying for financing from BEST-AC and consequently want to be seen as an advocacy organisation. At the same time it should be noted, as demonstrated above, that

most of the PSOs have an understanding of advocacy that is coherent with the one adopted in this report.

Again it should be highlighted that the CEO Roundtable differs because of its informal structure. Thus having a business plan or a strategic plan is not relevant for them.

Two-thirds of those who have a business plan also report to have specific procedures in place for monitoring its implementation. In some cases, the responsibility for monitoring the implementation of the advocacy content of the plan is delegated to a subcommittee for advocacy activities. This subcommittee is then responsible for reporting back to the board/ governing council.

Of the twenty interviewed PSOs only TCT, CTI, and TACECA had staff in particular advocacy posts. This compares to last year where only CTI had dedicated advocacy staff (CTI even features as the only PSO with a directorate for policy and research that is responsible for advocacy activities). In the case of TACECA, the advocacy officer was recruited as part of (and financed by) the BEST-AC project, while TCT has recently recruited a policy advocacy officer to do advocacy and research.

For other PSOs having dedicated advocacy staff (let alone directorates) is seen a 'luxury' they still cannot afford. However, several of them claim to have plans to recruit research and advocacy staff. TATO is a case in point, where the executive director is keen to strengthen the secretariats' ability to collect data and present analytical work in support of its cases.

So advocacy is still carried out in an ad-hoc way by non-professionals, i.e. staff or volunteers with no particular training in this area - but often - as many of the interviewees themselves point out - with a very significant practical experience. Moreover all of the Grantee PSOs have benefited from the UDEC training on public policy advocacy just as SCC reports that advocacy training is being offered through AMSDP. As mentioned above, the new PSOs have also benefited from a great deal of interaction with the BEST-AC team.

3.6 Advocacy Experience

This section outlines the key problems affecting the members of the interviewed PSOs and the procedures that the PSOs follow to determine which of these problems to address. It also maps the number and type of advocacy activities carried out by the PSOs in the past year.

There is no shortage of problems for the PSOs in Tanzania to deal with. The most commonly cited problems can be summarised as follows:

- 12 PSOs reported that the business of their members were blocked by constraints in the **regulatory framework** such as the existence of 'outdated legislation that did not correspond to the market-based economy that Tan-

zania has shifted to'. The Institute of Arbitrators argued that the provisions of the arbitration act (revised last time in 1931) do not support the current needs for arbitration. HAT reported that the new labour act gave priority to the employees at the cost of the employers.

- 10 PSOs identified **taxes, fees and levy-related issues** as some of the main problems affecting their members. For example the Government's decision to raise the park fees has been met with resistance from the PSOs in the tourism sector. At the district level, the TCCIA Regional Offices report that their members complain that the recent abolishment of nuisance taxes has been replaced with other taxes through the backdoor. KILICAFE members complain that taxation should be on farm gate prices of their produce while it is actually being levied after value has been added.
- Poor **infrastructure and utilities** were also cited by 10 PSOs. This is no surprise especially since 2006 was a particularly bad year in Tanzania where power supplies were short and unpredictable. Many companies were forced to rely on diesel-driven generators for power supply. TAHA sees the lack of airfreight opportunities as one of the main constraints for their members. TCCIA Iringa complains about lack of storage facilities for their members and SCC, TAHA and TCCIA Kilimanjaro stress that the poor road network is a major stumbling block for smallholders seeking to access markets for their produce.
- Problems related to **market entry, licenses and standards** were singled out by nine PSOs. TAFFA for example complains that licenses for its members to operate have been excessively high. More generally, VIBINDO and TCCIA Iringa complain that the rules for formalising and registering business were too cumbersome and entrepreneurs were accordingly not in a position to meet them;
- On a very different note, eight PSOs saw the **government mindset** as one of the main problems hampering the business of their members. The CEO Roundtable for example has been established primarily to address issues related to government culture and mindset. ZNCCIA sees itself as being underrepresented in government bodies and points to government mindset as part of the explanation (although this may also be due to their own approach to the authorities); and
- Finally, lack of awareness and low capacity among members (and potential members) were identified as a problem by seven out of the 20 PSOs. This is one of the few areas where there is a notable difference between the grantee PSOs and the new ones: Half of the grantee PSOs saw awareness/capacity issues as a problem for the organisations, while this was only the case for two out of the ten new PSOs.

Given the high number of problems identified by the PSOs, there is a compelling need for them to prioritise which issues to pursue and which ones to leave aside. CTI typically goes about this by organising a survey of its members where they are asked to identify priority issues. Still, the standard proce-

ture is for those dealing with advocacy on a daily basis (either the secretariat or the advocacy committee) to make recommendations to the board/ governing council. This is not a very flexible procedure and often PSOs therefore decide to act on a certain issue if for example a significant number of complaints are received. For those few PSOs that can rely on quick and efficient email communication it is an option to consult all members before taking action.

Moreover given that resources are often required to address issues, the prioritisation may also be determined by the availability of funds from donors. TAHA has identified a number of issues in their business plan, which they use as a basis for soliciting funding. Hence, the prioritisation is to some extent determined by the willingness of external donors to support certain issues.

Most PSOs interviewed have carried out advocacy campaigns on more than two issues. Hence there is a lot of experience to draw on for both the ten grantee PSOs as well as the ten new ones. At the same time it should be mentioned that the level of activity is not higher than the second baseline, where eight out of then PSOs were carrying out advocacy campaigns on more than two issues. The key issues pursued in the past year by the 20 interviewed PSOs are summarised below, by frequency. There are no major differences between the issues pursued by grantee PSOs and the new PSOs.

- Twelve of the PSOs have been pursuing issues related to the regulatory framework in a broad sense. For SCC this involves the right of their members to operate in a local market or for TAFFA the request that the authorities decentralise the process for obtaining licenses.
- Ten PSOs also address marketing and value-chain related issues in their advocacy work. This type of work is not necessarily advocacy work in the definition adopted in this report, and is primarily an issue between private sector entities. ACT for example is working to promote the use of pesticides among its members.
- Seven of the PSOs have also been addressing issues related to the sector-wide policies covering their particular area. This is the case for VIBINDO which is arguing for a more coherent policy on the informal sector and TATO and TCT which are seeking to influence the development of a new tourism policy.
- Unlike the second baseline, some of the PSOs cited 'creating partnerships' as one of their advocacy campaigns (KILICAFE, TAHA, TCCIA Arusha and Kilimanjaro). This reflects in the Consultants' opinion a more sophisticated approach to advocacy - instead of focusing on certain issues they are taking more of a strategic approach by building networks that will facilitate the achievement of specific issues in the future.
- Finally, a new issue cropping up is the need for improved security in the tourist destinations. This has been pursued (successfully) by both TATO and TCT.

Finally, not all of the PSOs devote the same amount of time to advocacy work. The amount of advocacy work may be determined by the number of problems identified, procedures for identifying and prioritising issues, availability of funding, and finally the necessity of the PSO to market and legitimise itself through continued advocacy activities.

Some PSOs are more consolidated than others and not all may feel the need to do advocacy for marketing purposes. A case in point is TLS, which has been focusing on building up its secretariat in the past year. TLS describes itself as a very 'well protected' PSO which benefits from the fact that lawyers operating in mainland Tanzania must register with society to be allowed to practise.

3.7 Approach to Advocacy

This section presents more detailed information on interviewees' approach to one of their most recent advocacy campaigns. The purpose is to benchmark their process against the new advocacy methodology adopted by the BEST-AC offices as described section 2.1.2. (i.e. the five steps of advocacy)

This methodology has been used as a framework for assessing the advocacy approach of the twenty interviewed PSOs. Hence, each of the PSOs were asked to describe the approach taken in one of their most recent advocacy campaigns:

Step 1 - Identification. Identification of issues is often done by the PSO representatives themselves, either through secretariat staff or members who as commercial operators are likely to meet problems in their daily life.

Still, most organisations seem to be reactive rather than proactive on advocacy issues. However, some of the more advanced PSOs, notably CTI, have carried out needs assessments. TCT has also implemented a larger survey of its members through which more than 70 issues were identified. Similarly HAT has consulted its members through visits to most of its members.

Hence issues are typically identified through the members, but only in a few cases through a strategic approach where members are consulted. The typical scenario is that members bring issues to the attention of the PSO at their own initiative. The more that do so, the more likely it is that the PSO will act.

Step 2 - Research. The notion that advocacy must be evidence based is increasingly accepted by private sector organisations, and is a core principle for CTI for example. Hence 14 out of 20 PSOs reported to have carried out some form of research associated with the advocacy issue under discussion.

The typical scenario is for the PSO members or secretariat staff to undertake the research. The TCCIA Arusha Regional Executive Officer reports for example that when he receives complaints he will try to make time to go out and verify the nature of such complaints before taking them any further. The CEO Roundtable has been able to draw on experts volunteered by its members.

In a few cases, PSOs have contracted research to external consultants. TAFFA for example commissioned a consultant to do a fact-finding mission. Only few PSOs are able to pay qualified consultants from their own resources. The regional TCCIA offices in Iringa and Kilimanjaro and KILICAFE used BEST-AC funds to commission studies/ fact-finding exercises.

In summary, more PSOs are interested in professionalising their research, but face obvious resource constraints in doing so.

Step 3 - Responses. 15 out of 20 PSOs pursue issues based on written responses and position papers. Such responses are developed on the basis of the research and point out suggested policy options. The response is typically outlined in a letter or a concept paper outlining ideas for the authorities to consider.

The need to present compelling argumentation is recognised by PSOs such as TAFFA and TAHA, who both try to link the interest of the sector to 'the national interest'. TAFFA for examples has used the fact that its members provide more than half of the revenue that Tanzania Revenue Authority (TRA) collects, just as TAHA has been keen to underline the significant contribution that its members make to the combined horticultural exports of Tanzania (more than half measured in value).

Another option for influencing is to build alliances with other stakeholders. TACECA mentions the strategic importance of having the World Bank support its drive to reform procurement procedures.

Still aside from the abovementioned examples, there were few examples mentioned of strategic approaches and compelling cases advanced by the PSOs in support of their cases. PSOs may not be keen to discuss such matters openly, but judged on the evidence made available to the Consultant the competency in this area is still relatively low.

Step 4 - Influencing. Public-private fora are becoming increasingly popular for reaching relevant decision makers. PSOs see time invested in getting involved in PPP fora as an important investment in building up networks for effective advocacy work. Hence, their expectation appears to be that PPPs (as defined above) will be the main framework for ironing out public-private differences in the future. Since the various PPP bodies are new, it is yet too early to assess their impact and effectiveness for bringing public and private parties together, but the Consultant was informed for example that one of the recently established regional business councils was yet to meet because the convener (representative of the government) still had not called a meeting. This was assessed as a lack of interest on part of the government.

Moreover, PPPs may not always be appropriate for more narrow interests of particular sub-sector PSOs. There will therefore continue to be significant amount of direct interaction between PSO representatives and government officials. In such cases the PSOs often make use of their advocacy committees

(where available) to prepare the ground for any subsequent more formalised responses.

Another option is to convene workshops and stakeholders with government officials present where any written responses can be discussed with a view to achieve consensus. This was for example the approach taken by RULU who managed to involve relevant MPs in a workshop in Dodoma.

Other examples are the establishment of ad-hoc fora to advance certain issues such as the power forum established at initiative of CTI to press the government to address the power shortage/ excessive reliance on hydropower. Likewise, TCCIA Kilimanjaro convened a committee including local councillors to determine the allocation of market places for hawkers.

Obviously having access is a key condition for effective advocacy work. The ACT Executive Officer reported for example how she managed to make direct contacts with ministry officials at director level without any formal introductions and letters. She is a former employee of the ministry.

In most cases PSOs report to succeed in getting access to ministry officials at the level of permanent secretary and ministers. However this is predominantly the case for the more established (e.g. TATO, TACEC and CEO Roundtable, the latter even operates at the presidential level).

Step 5 - follow-up/ monitoring of advocacy is becoming more and more institutionalised. TACECA for example created a committee with people from major institutions to oversee monitoring of one of its advocacy campaigns. HAT sees the PPP forum in the tourism sector - championed by TCT- as the ideal forum for following up and monitoring government implementation of any decisions reached. Likewise TAFFA has a stakeholder forum in place to monitor Government follow-up of any issues agreed.

A different approach was taken by the Tanzania Institute of Arbitrators, which has a consultant working for them to assist the Government in implementing their commitment to revising the arbitration act.

An example of a less institutionalised approach is TCCIA Arusha, which used the number of incoming complains as an indication whether the issue had been resolved successfully. It was assumed that when complaints stopped coming, the issue was resolved successfully.

In general the grantee PSOs are much more likely to do systematic follow-up: Eight out of ten grantee PSOs reported to have done systematic follow-up while this was only the case for two out of the ten new PSOs.

3.8 Achievements

This section focuses on achievements. A distinction is made between regulatory/ commercial achievements (sub section 3.8.1) and achievements in terms

of any changes made to the organisation and development (O&D) of the PSO (sub section 3.8.2).

3.8.1 Regulatory or Commercial Results

16 out of the 20 PSOs claimed to have instigated regulatory or commercial changes. These PSOs are equally distributed between the grantee PSOs and the new ones.

It is however difficult to determine the question of attribution: An achievement may be claimed by more than one PSO. This is probably closer to the truth anyway in the sense that combined pressure from a number of PSOs will often be determining whether the authorities feel compelled to act.

Moreover, the achievements should ideally be qualified: Some campaigns are more ambitious than others. TACECA is for example working to modify the public procurement act which may not be achieved in the short to medium term. The association is hopeful that it has created momentum for such changes by building the necessary relations.

Examples of tangible commercial achievements include the following:

- Improved enforcement of the requirement to respect and disburse of copy-right royalties to artists (claimed by RULU);
- Abolishment of blind auctioning by the Tanzania Coffee Board allowing buyers to distinguish between coffee from different operators (claimed by KILICAFE);
- Reduction of power tariffs (claimed by CTI);
- Levies for market vendors reduced and establishment of 3 trading centres in Kilolo (claimed by TCCIA Iringa); and
- Improved security conditions, such as an alleged decision by the authorities to accompany late charter tourist arrivals from Kilimanjaro airport to their final destination (claimed by TATO).

Impacts have also been registered at the local government level, although there seems to be a tendency for cases to stall due to conflicts between PSOs and the local authorities. SCC reports for example that one of its advocacy issue was stalled due to sharp differences of opinion between the Chamber and top officials in the District. The delay in calling meetings in one of the regional business councils also comes to mind.

Despite these achievements, a considerable number of PSOs claimed that they were yet to see the fruit of their advocacy work: These included:

- TACECA's drive to have the public procurement act amended;

- HAT's campaign to have grading systems underwritten by the government and applied by all operators;
- TCCIA Arusha was generally of the opinion that some of its outstanding issues would be solved effectively through its participation in the recently established regional business council. Likewise, TCCIA Kilimanjaro has high hopes for the newly established Moshi Business Forum and Moshi Roundtable, where the Chamber is expected to have, regular access to key decision makers;
- Similarly, TAHA is hopeful that the establishment of Horticulture Development Association would facilitate the PSOs advocacy work, which in itself was yet to create tangible commercial achievements; and
- Finally, also ZNCCIA points to the recent establishment of Zanzibar National Business Council and is hopeful that this will help bring about a change of mindset among government officials on Zanzibar. ZNCCIA will be uniquely placed to influence the agenda as it will allegedly be the secretariat for the Council.

In summary, most of the above-mentioned PSOs were hopeful that they had been creating a strong basis for getting results by positioning their PSOs, making strategic alliances, and (in some cases) building up the capacity of their secretariat.

3.8.2 Organisation and Development

All except two PSOs could identify specific institutional improvements that had been made to their organisation within the past year. Again these 18 were divided equally between the grantee PSOs and the new ones.

- Increased membership (TACECA, HAT, VIBINDO, TATO and KILICAFE); this in itself is an indication that the PSOs are becoming more recognised - hence there is clearly a market for private sector organisations;
- Increase in secretariat staff and establishment of more professional secretariat. In the case of TAFFA this includes the establishment of a training centre for its members located in the building where the TAFFA secretariat is placed. The O&D achievement may to a great extent be a result of the external funding that has been made available to the PSOs. For example TAHA, ACT, LTS have all used funds from donors to scale up their secretariats. Likewise, business information centres in the regional TCCIA offices were rolled out during the period of the interviews thanks to SIDA funding.

In contrast to the PSOs that are keen to build up their capacity and become better positioned, the CEO Roundtable pursues a different strategy: The idea is for the Roundtable to work behind the lines, but at the highest level. There are no

intentions to make its work public, and the secretariat function has been sub-contracted to an external agent.

3.9 Analysis

All of the 20 PSOs were asked to do a self assessment of their organisations. The analysis was structured as a SWOT-analysis in the context of their advocacy work, asking the interviewees to list their main strengths, weaknesses, opportunities and challenges (threats). Each of these is described in the sections below. The purpose is to assess the ability of the PSOs to identify what is important for effective advocacy work.

3.9.1 Strengths

13 of the 20 PSOs see leadership as the main strength. This is closely followed by 11 PSOs who see the secretariat as a strength for the PSO. Hence, the majority of the interviewed PSOs see the people behind the organisations as the main asset; this applies to both its leadership (members as represented in board and subcommittees) and secretariat staff. This perception is a significant change from the second baseline where slightly less than half saw its leadership as a strength and only 20 percent saw the secretariat as a strength. Hence there is some evidence to suggest that the grantee PSOs are gaining in terms of secretariat and leadership, at least in terms of their own perception. This observation corresponds to the fact that there is a de facto increase in the size of the secretariat and the number of people interviewed who say that their PSOs have become better positioned.

Compared to the second baseline study, it is interesting to note that transparency has been mentioned by three PSOs as a strength (RULU, KILICAFE, and TAFFA). This suggests that PSOs are increasingly aware of the role of governance, and that it is valued by the members (and potential members). The need for good governance was also recognised by TCCIA Iringa which saw its 'clear financial regulations' a major strength for the organisation.

Another addition to the list of strengths is the fact that two organisations reported that their small size was an asset. For TCCIA Arusha, it was the small size of the secretariat which 'allows for flexibility' while for TAHA it was the small number of members (currently at 21), which allows all of the members to have focused discussions of relevance to all around the table.

Since PSOs derive their mandate from their members, PSOs are also likely to become stronger if their members can agree the means and ends to be achieved through the organisation. Unity among members is mentioned by TAFFA as a strength.

3.9.2 Weaknesses

When asked about weaknesses there is wide consensus (between half and up to two thirds) that the PSOs lack funding and that their secretariats are

not in a position to effectively defend the interests of their members. Hence despite recent improvements as documented by this report, the PSOs are eager to further build up the capacity of their secretariats. For example, as mentioned by TCT, the secretariats are still operating in a mainly reactive mode, with no time for proactive, strategic work such as surveys of members and development of strategic plans and documents. At present the work of the PSOs are to a large extent determined by developments in the external environment. This point of view is shared by HAT.

Another activity that for example TATO would like to see is the secretariat carrying out systematic collection of data/ statistics. As mentioned already, hard evidence is more and more seen as the foundation for effective advocacy work. If the PSOs had a better idea of the contribution of their sector to the economy they would have a stronger basis for influencing the authorities.

Finally, in terms of facilities, KILICAFE informed that having only one vehicle to the entire association made it very difficult to carry out its work. ACT likewise mentioned that the effectiveness of its operations was suffering from lack of internet and email connection in the office. This was however expected to be rectified imminently.

Just as TAFFA saw the unity of its members as a strength, TATO mentioned that emerging fractions within its body of members was preventing the organisation from acting effectively. Similarly TACECA expressed a wish that its members (not counting those in the boards and committees) could become more interested and committed to the work of the association. Another concern voiced by TCCIA Iringa is the absence of prominent business people among its membership. ACT is another organisation that would benefit from having more high-capacity members.

Only TCCIA Iringa and ZACPO identified lack of advocacy skills as a weakness. TAFFA also recognised that the secretariat needed to be boosted by more senior officers with access to decision makers.

Finally, TCCIA Kilimanjaro acknowledged that a proper strategy for membership recruitment was lacking. More generally, ACT saw the lack of a strategic plan for the association in general as a major weakness. The association was taking steps to develop such a document.

3.9.3 Opportunities

In terms of opportunities, nine of the 20 PSOs identify the strategic importance of their sector. A similar proportion identified this as a strength during the second baseline. For example, TAFFA has emphasised vis-à-vis the authorities that tax payments by their members account for roughly half of the revenue of the Tanzania Revenue Authority.

Other examples include TACECA which anticipates a significant increase in the number of job opportunities for its members which in turn is expected to

lead to a strengthened organisation. Similarly TAHA informs that the Government has now, facilitated by World Bank analyses, identified the horticultural sector as strategically important for the national economy.

The ten grantee PSOs are far more likely than the new ones to see changes in government mindset as an opportunity. While only one of the new PSOs identified this as a opportunity, it was mentioned by four out of the ten grantee PSOs. This in turn represents a doubling of the two grantee PSOs who mentioned this during the second baseline.

Other opportunities mentioned include the availability of international cooperation partnerships, but this is an opportunity only recognised by relatively few organisations. In this context TCT was one of the few PSOs to mention the liberalisation of the East African market as an opportunity for its members, which would strengthen the foundation for the organisation.

Some of the PSOs also mentioned the existence of new and promising funding opportunities. It is clear that as the role of private sector is increasingly recognised by government and development partners in Tanzania, more and more funding opportunities are becoming available, even in the form of grants such as those offered by BEST-AC. VIBINDO is a case in point which was enthusiastic about opportunities from the Financial Sector Deepening Trust (FSDT) funded by CIDA, DANIDA, DFID, SIDA, and the Royal Netherlands Embassy. TCCIA Kilimanjaro is similarly seeking to take advantage of its new partnership with the AMSDP and TAFFA is looking to benefit from a partnership with USAID and the World Bank among others. However, as SCC points out, it is not always easy to get an overview of the opportunities available, at least not from Same, where access to ICT is very limited.

In more commercial terms, KILICAFE sees enormous potential in its cooperation with American corporate partners such as Starbucks, which has already placed large orders with the association.

3.9.4 Challenges

The mindset of the government is still seen as a major challenge by a third of the PSOs. But this is a decrease from last year where six out of ten PSOs identified it as a challenge/ threat. One example mentioned by one of the interviewees is the tendency of the authorities to blame the failure of a road construction projects on the contractors, without assessing further whether the procurement procedure followed by the authorities was appropriate for the job in question. Moreover, TCCIA Iringa points out that the politicians have a tendency of hijacking issues. On Zanzibar, the ZNCCIA likewise observes that the private sector is still very weak and has long way to go in becoming recognised by the authorities as a key player for economic development.

Other challenges include competition from other business and neighbouring markets in the sector they represent. This is mentioned by six out of ten PSOs. HAT and TAFFA for example sees the competition becoming much stronger as

the East African market is liberalising. If the Tanzania companies were to loose business as a result, it would also have negative implications for the PSOs that represent them.

Five of the 20 PSOs also identified lack of awareness/ interest among its own members as a threat to the organisation. This also includes the existence of free riders who benefit from the work of the PSOs without registering and paying with the PSO.

Finally, just as some PSOs see the strategic importance of the sector that they represent as a major opportunity, a number of PSOs are recognising in the same way that if the markets for its members decrease, it will have direct bearing on the sustainability of the PSO. This was voiced as a concern by for example TAHA.

4 Lessons Learned

This final Chapter describes some observations related to the BEST-AC project (section 4.1) and recommendations from the Consultant for any subsequent baselines to be undertaken under the project (section 4.2).

4.1 Lessons for BEST-AC

In the course of the interviews, some of the (grantee) PSOs brought up issues related to the way BEST-AC operates and interacts with its partners. These are summarised in this section for BEST-AC management to consider:

- One PSO queried about the future set-up for Business Development Service providers. The interviewee had the understanding that PSOs may no longer work with these but that a new policy is forthcoming from BEST-AC on how PSOs can benefit from working with them;
- A large PSO interviewed remarked that BEST-AC appeared to marginalise large organisations. The interviewee speculated that BEST-AC was of the opinion that large PSOs had plenty of resources to themselves, but, as the interviewee pointed out, BEST-AC would in that case be mistaken;
- PSOs were asked to assess the usefulness of the training organised by UDEC and there was general recognition that the training was a useful way for PSOs to develop and fine-tune their advocacy armoury. No PSOs identified any specific organisational changes implemented as a result of the UDEC training; and
- A former grantee remarked that while it had been audited and sent the report to BEST-AC, it was yet to receive a new format for application which had otherwise been promised by BEST-AC. The same PSO regretted that 'funds for research is not in the BEST programme'.

In addition the Consultant detected through the interviews a strong interest among PSOs to professionalise their research. The Consultant understands in this context that several PSOs have applied for BEST-AC funding for this 'second step' of the advocacy approach.

Likewise, BEST-AC may want to encourage the trend towards better and more transparent PSO governance. If PSOs are seen to be among the avant-garde in

promoting transparency, accountability and corporate social responsibility, they may also be attracting a lot of interest from private sector entrepreneurs who believe in these ideas.

4.2 Lessons for the next baseline

It is assumed that another baseline will be carried out in 2008 and possibly others after that. The Consultant would like to make the following suggestions in terms of substance and process that BEST-AC and future consultants may want to take note of:

- The most important observation is that PSOs will want to see the results from these baseline studies. During the second baseline study several PSO expressed an interest in seeing the report, but as far as the Consultant can determine none received it. During this third baseline survey, a similar request was made. Hence it is strongly recommended that the final report for this baseline is distributed to the interviewees.
- While it is understood that the next baseline may cover the same sample, BEST-AC may in a few years time consider repeating the first baseline that include a more representative sample of Tanzania PSOs. The purpose would be to follow the state of private sector advocacy in Tanzania and hence detect any trends and issues that the project may be overlooking by working with PSOs in the 'high-capacity' segment.
- The interview guide should be revised so that the question related to prioritisation of advocacy work is included under Section E: Advocacy Systems and Planning.

Finally, future baselines may want to look at the following issues in more detail:

- The value of the membership contributions and whether there are any models that work better than others (flat rate vs. progressive),
- Advocacy proposals/ written responses and business plans with advocacy content developed by the PSOs (separate assessment tool may need to be developed to focus and standardise the assessments);
- A few interviews of members of PSOs with a view to triangulate some of the information obtained from the PSOs and solicit the members' views on the quality of the work carried out by the PSOs; and
- Budgets and sources of funding to be tracked for a period of several years to assess the predictability of the income.

Appendix 1 Interview Guide

Section A: General Organisation

Q 1: Name and position of interviewee(s)?

Q 2: Email and website?

Q 3: Telephone and fax?

Q 4: Name and acronym of organisation?

Q 5: Years of existence?

Q 6: Do you have a Constitution

Q 7: Name of governing body (-ies)?

Q 8: How do you elect members to the governing body (-ies) - and how many?

Q 9: Does your organisation have any branch offices?

- ☐ No
- ☐ Yes, specify:

Q 10: Frequency of meetings of governing bodies?

Q 11: What kind of members do you have?

- ☐ Individual companies
- ☐ Associations

Q 12: How many paid-up members do you have?

Q 13: Main Sector(s) in which your members operate?

- ☐ Agriculture
- ☐ Mining and quarrying
- ☐ Manufacturing
- ☐ Wholesale and retail trade
- ☐ Construction
- ☐ Communication
- ☐ Transport
- ☐ Banking and Finance
- ☐ Real Estate
- ☐ Hotel, restaurant and tourism

☐ Education, Health and social work

☐ Other, please specify:

Q 14: How many percent of the potential membership base would you say you represent?

☐ 0-25%

☐ 26-50%

☐ 51-75%

☐ 76-100%

☐ Impossible to say

Q 15: How do you communicate with your members (newsletters, meetings, Internet etc.)?

☐ No communication

Q 16: How would you characterise the quality of interaction with your members (one-way, two-way etc.)?

Q 17: What do you do to expand your membership base

Q 18: Primary activities or services provided by your organisation?

- ☐ Advocacy and representation
- ☐ Marketing/ Introductions to potential customers
- ☐ Training or information to members
- ☐ Setting standards/ Promoting code of conduct
- ☐ Other, specify:

Q 19: Number of paid full-time staff in secretariat (and their responsibilities)?

- ☐ None

Q 20: Other people supporting/ working for the organisation on a voluntary basis?

- ☐ None

Q 21: Yearly budget in million Tsh and average member contribution?

Q 22: Funding source(s) of the organisation?

- ☐ Member contributions, if yes, estimate share of total: _____%
- ☐ GoT funding, if yes, estimate share of total: _____%
- ☐ Donor funding, if yes, estimate share of total: _____%
- ☐ Service fee, if yes, estimate share of total: _____%
- ☐ No source, if yes, estimate share of total: _____%

Section B: Interaction with Government/ Public Bodies**Q 23: Your interaction with the public authorities in the last 12 months?**☐ meetings with gvt/ public bodies authorities, specify:

☐ been invited by gvt/ public bodies to take part in business policy dialogue, specify:

☐ been a representative in gvt/ public bodies committees

☐ had informal dialogue with public authorities

Q 24: Do you generally feel that your interaction with the authorities has a successful outcome?☐ no☐ partially☐ yes

Section C: Networks with Other PSOs

Q 25: Is your organisation affiliated with any umbrella organisation(s) (including regional and international associations and chambers)?

Q 26: Within the last 12 months, how often have you meet with other organisations t that have similar interests to your members?

- ☐ no meeting
- ☐ yes, specify:

Q 27: How would you characterise the outcome of these meetings?

- ☐ Not applicable

Section D: Definitions of Advocacy**Q 28: How would you define business advocacy**☐ Process, specify

☐ Target group

☐ Objective

Q 29: Can you give us examples of effective ways to advocate?

- ☐ Written policy proposals and publications
- ☐ Meetings with public policy makers
- ☐ lobbying
- ☐ Mobilised grass roots support
- ☐ networking and coalitions with other PSOs
- ☐ use of media
- ☐ written petition
- ☐ Other, please specify:

Section E: Advocacy Systems and Planning

Q 30: Which planning documents does the association have?

☐ Business Plan or Strategy with specific advocacy contents, if yes specify:

☐ Procedures for monitoring progress on advocacy activities in the business plan, if yes specify:

☐ Other, specify:

☐ No documents

Q 31: Who in your organisation is responsible for advocacy work?

☐ No one is responsible

Q 32: What skills do these person(s) have?

☐ Not applicable

Section F: Advocacy Experience

Q 33: Identify the most important problems affecting the business of your members

☐ No problems

Q 34: How do you prioritise and organise your advocacy work?

☐ Not applicable

Q 35: Within the last 12 months, on how many issues have you carried out advocacy activities to improve the business conditions for your members?

- ☐ no issues
- ☐ 1-2 issues
- ☐ over 2 issues

specify (including any justification for prioritising certain issues over others):

Q 36: If you have not carried out any activities, why is that?

- ☐ no problems related to gvt policies/regulations?
- ☐ uncertain how to go about it?
- ☐ no access
- ☐ no documentation
- ☐ don't believe in advocacy
- ☐ time

- ☐ Not applicable

Section G: Advocacy Approach/ Method

Q 37: If you have carried out advocacy activities, please tell us about your most recent advocacy initiative and what you did? The issue: _____

If negative, please tell us how you would go about advocating?

☐ Identification of issues, specify:

☐ Understanding the issues (research), specify:

☐ Development of responses and proposals, specify:

☐ Influencing, specify

☐ Follow-up/ monitoring, specify:

☐ Other, please specify:

Section H: Impact/ Effectiveness**Q 38: What have you achieved through your advocacy activities?**

- ☐ Regulatory or commercial impact (changes in policies and by-laws, duties, taxes, levies, market access, supply chain, administrative requirements,), specify

- ☐ Organisation development impact (improved member services, increase in no. of staff, members, improved governance, communication, advocacy systems), specify (end highlight any changes introduced as a consequence of any participation in UDEC training financed through BEST-AC):

- ☐ Other impact (strategic alliances etc.), specify:

- ☐ No impact
- ☐ No advocacy activities

Q 39: How do you explain this outcome? (positive/negative)

- ☐ strengths)

- ☐ Opportunities

- ☐ Weaknesses

- ☐ Challenges

Appendix 2 Resources

Documentation

BEST-AC Quarterly progress report October - December 2006.

BEST-AC Work Plan October 2006 - June 2007 (revised)

BEST-AC Brief Background, Power Point Briefing for BEST-AC Project

Mid-term Review of the BEST-AC, Irwin Grayson Associates in association with Enterplan, October 2006

BEST-AC Baseline Survey: Advocacy Capacity and Competency of Private Sector Organisations and Business Development Service Providers, COWI, September 2005

BEST-AC Baseline Survey: Advocacy Capacity and Competency of Grantee Private Sector Organisations, COWI, February 2006

National Survey of Business & Trade Associations in Ghana, questionnaire developed by the Private Enterprise Foundation

Private Sector Organisations in the Policy Formulation Process in Nigeria, questionnaire developed by the Nigerian Economic Summit Group.

Websites of Interviewed Organisations

Association of Kilimanjaro Specialty Coffee Growers (KILICAFE)
kiliface.com

Zanzibar National Chamber of Commerce Industry and Agriculture
znccia.com

Tanzania Association of Tour Operators
tatotz.org

Hotels Association of Tanzania
hoteltanzania.com

Tanganyika Law Society
tanganyikalawsociety.or.tz

Confederation of Tanzania Industries
cti.co.tz

RULU Arts Promoters
ruluarts.itgo.com

Other websites of Interest

BEST-AC
best-ac.org

Tanzania National Business Council
tnbctz.com

The Agricultural Marketing Systems Development Programme
amsdp.org

The Financial Sector Deepening Trust
bot-tz.org/MFI/Library/FSDT.htm