

Ed Lines

Challenges the next president of Tanzania will face are not insurmountable

Next November, Tanzanians will have a new president, new Members of Parliament and Local Government leaders. Without doubt, the majority of Tanzanians will elect a man who will consolidate achievements made by the outgoing President Benjamin William Mkapa, a man who is capable of solving problems that adversely affect efforts to develop the largest member of the East African Community.

Such a man is expected to pull Tanzania out of abject poverty the country has experienced almost since independence more than 40 years ago. As our cover story shows, the job for the next president of Tanzania will not be an easy one, considering the fact that the agricultural sector, the largest employer of Tanzanians, is still primitive in the sense that most wananchi in the rural areas are peasant farmers who still use the archaic hand hoe as their most important farming implement. If Tanzania is to become an important producer of wealth, the next president should insist on large-scale farming with modern farming tools. Subsistence farming has no place in modern Tanzania.

We believe this can be done considering that vast arable land in Tanzania is still idle and irrigation is not being extensively used to produce both staple and cash crops for domestic consumption and for export. Major lakes and rivers should be extensively used for irrigation.

The farming of non-traditional crops, such as flowers and fruits that flourish in the highlands, should also be encouraged. We expect that the next president will consolidate efforts being done in this sector.

We also believe that this can be done considering that the livestock sector is also under developed. If well planned and managed, this sector can make Tanzania rich. Industrialisation, light or heavy, is also important if we want to develop faster than we are doing now. We should add value to goods we export instead of exporting raw materials that are being used by other countries.

It is true that the mineral sector has expanded but the proceeds from this sector have not benefited much the majority of Tanzanians. Minerals, such as gold, diamonds and gemstones, should become major means to make the coming phase-four government richer than any preceding governments.

Another important economic activity in Tanzania is tourism. We expect that the coming government will make efforts to give the sector the publicity it deserves so that tourism, both domestic and international, becomes a major earner of government revenue.

Without doubt, a sound infrastructure is important in a country that intends to facilitate all levels of development. Our hope is that the next president will make sure that our trunk roads will be upgraded to all-weather highways for we believe that good road and railway systems facilitate rapid development.

Education is also important. A nation that is full of illiterate citizens can hardly develop. We, therefore, hope that the next president will give the education sector the priority it deserves for we think that good education is the most important human factor in development.

the
Investor

**The challenges
for Tanzania's
next president**



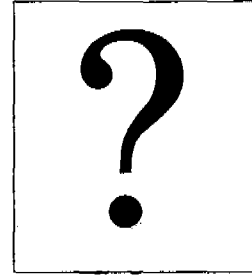
Mwalimu Julius Nyerere



Ali Hassan Mwinyi



Benjamin William Mkapa



Challenges for the next president in Tanzania

By Joseph Haki

Come next October, Tanzanians will elect a new president to succeed President Benjamin Mkapa whose term of office expires this year.

This will be the third president the country has had in its 44 years of independence.

The first was the Father of the Nation, the late Julius Kambage Nyerere who was succeeded by Ali Hassan Mwinyi in 1985, after leading the nation for 23 years.

After Nyerere's retirement, the constitution was changed to stipulate that, henceforth, the president could only serve for a maximum of two five-year terms. Thus, President Ali Hassan Mwinyi completed his maximum 10 year in 1995 to be succeeded by President Mkapa.

Ever since Tanzania gained independence under President Nyerere in 1961, its development ambition has been to rid the nation of three archenemies. These are poverty, ignorance, and disease. Yet, after more than four decades of independence, Tanzania remains one of the ten poorest countries in the world.

Experts say that measured in domestic prices, real income per head is only about 30 per cent higher than at independence. Tanzania's per capita gross national product of \$265 is low and far less than sub-Saharan Africa and East Asia's averages of \$500 and \$970, respectively.

The average gross domestic product (GDP) growth rate has been a low 3.7 per cent for most of the four

decades, while the number of Tanzanians has been increasing on average at 3 per cent over the same period.

The growth rate has been low, falling to -5.4 per cent during the economic crisis years (1976-83), but recovering to 3.7 per cent during 1984-94, and rising to 4.8 per cent for 1995-98.

By the late 1970s, Tanzania, unlike many other African countries, was a highly state-controlled economy engaged in the pursuit of socialist objectives characterized by monopolistic and heavily regulated production structures in all sectors of the economy.

What is perhaps more striking is that Tanzania has not been able to sustain relatively high and robust growth of an average of the 6 per cent it achieved in its first decade of independence, despite sustaining a reasonably high investment rate in the following three decades.

During this period the average growth decelerated persistently. This implied a significant waste of resources the country could hardly afford, and in the process the country engendered an unsustainable debt overhang, since a significant share of this investment was financed through debt.

Although growth has recovered somewhat in the last couple of years, at an average of 5-6 per cent, it remains too low to make a dent in the pervasive and deep poverty prevalent in the country.

Accounting for Tanzania's slow development

A recent study attributes Tanzania's slow progress in development primarily to inadequate capital accumulation and productivity growth, poor support for the transformation of agriculture, disrupted progress in building human capital, and

delayed demographic transition.

According to the study, the contribution of physical capital accumulation to growth fluctuated significantly during the past four decades. Gross domestic investment in Tanzania increased from about 13 per cent of GDP in 1964

to 30 per cent in 1991, and then declined sharply to 18 per cent in 1997 mainly due to a fall in public investment as a result of cutting down overall government spending and privatization.

The response of private investment to reform measures

has remained weaker than expected and has not compensated for the decline in public investment. The economy is only slowly recovering from that loss. Under-utilization of capacity and poor investment choices were the main culprits.

Actual capital accumulation was also much lower than implied by the investment rates because of the poor choices and incomplete projects affecting economy-wide returns to the investment.

With better and more efficient use of its investment, the study says, Tanzania's per capita income in 1998 would have been 30 per cent higher than what it actually was.

Poor support for the transformation of agriculture has limited

constrained access to inputs, credit, and timely advice based on sound research. In fact, recently, President Mkapa questioned the contribution of the Sokoine University of Agriculture, in promoting agriculture in Tanzania.

The private sector has been slow in filling the gaps resulting from the withdrawal of public sector involvement in the delivery of these.

The main constraints to commercialization relate to the poor availability of price information, poor infrastructure, undeveloped credit facilities, and weak competition in the markets.

Under-provision and the poor condition of the rural road network and inadequate connectivity of this network to the main road

arteries limit accessibility to markets and raise costs to producers, suppliers of inputs, and crop marketers.

The lack of clearly defined and coordinated strategies among the various government institutions for the development of agriculture, and of rural development more broadly, has constrained the

development of a coherent strategy for the transformation of agriculture.

Progress in building human capacity was not sustained in Tanzania. Despite the government's efforts to strengthen human capabilities through increased access to formal education, the contribution of human capital to growth declined from 0.3 per cent during the 1960s to 0.1 per cent during the 1980s.

It is generally now accepted that while Tanzania was successful in expanding access to primary

education, high dropout and failure rates at the Primary School Leaving Examination resulted in a high share of the population lacking the necessary skills and knowledge to be able to engage gainfully in a modern economy.

Tanzania's attainment rates in secondary and higher education are among the lowest in sub-Saharan Africa.

In fact, the share of Tanzania's population with at least some formal post-primary education had declined from 5 per cent at independence to 3.2 per cent by 1990. A major cause for low enrollment levels is the relatively high cost of secondary and tertiary education relative to income levels in Tanzania.

While 80 per cent of poor children and 100 per cent of the rich complete grade one, only 40 per cent of the poor complete grade seven, compared with 75 per cent of the rich.

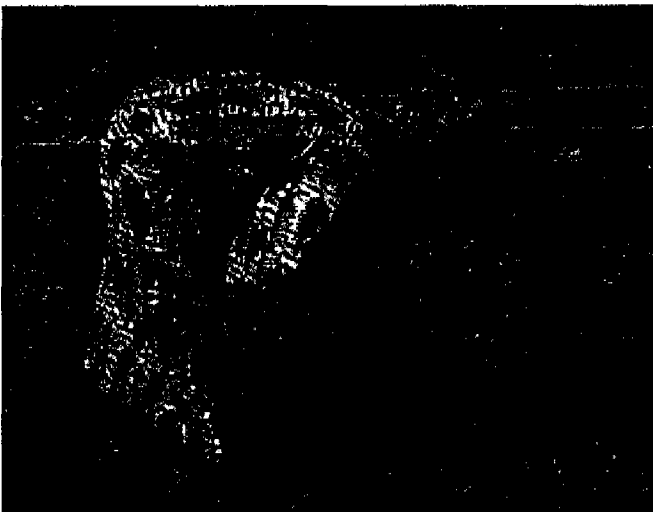
The HIV/AIDS pandemic poses a major threat for eroding gains made in human development for the past four decades. The rate of HIV infection is estimated to have reached 8.1 per cent in Tanzania. HIV/AIDS is not merely a health problem, but also an economic development problem.

It has begun eroding the expected longevity of productive life from the peak of 52 years in 1988 to 48 years currently.

Delayed demographic transition has resulted in an excessive burden on the labour force.

At 50 per cent, the dependency ratio in Tanzania is too high to support adequate saving levels. In combination with a population growth rate averaging 3 per cent over the past four decades, it puts immense pressure on the existing labor force to provide for dependents and undermines progress in living standards.

Higher growth of the economy and education are therefore important elements in the effort to stem rapid growth of the population.



Agriculture is the backbone of the economy

the sector's dominant contribution to growth and poverty reduction. It has also limited progress in agricultural intensification and commercialization.

Despite being the backbone of the economy and a source of livelihood for the majority of Tanzanians, agriculture was overtaxed during the control regime, and its revival is still constrained by inadequate public support for productivity growth in the sector and stagnant growth in agribusiness.

One of the reasons for slow intensification of agriculture is

Change in economic policies a must



Benjamin William Mkapa

Tanzania's rigid economic system of state-interventionist policies, the Kagera war with Uganda, and external shocks during the late 1970s resulted in major macroeconomic imbalances, economic stagnation, and a decline in per capita income that lasted over 15 years.

As GDP shrank, shortages of basic consumer goods appeared, and farm exports collapsed.

With the coming to power of Mwinyi in the early 1990s, Tanzania gradually liberalized its economy and began pursuing market oriented reforms.

These reforms were intensified in 1996, when Mkapa took over, resulting in major progress in macroeconomic stabilization and an acceleration of growth.

Since 1996 economic growth has averaged about 5 per

cent (compared with less than 3 per cent during 1990-95), while inflation declined to single digits in 1999 and to below 5 per cent in 2002.

Tanzania has achieved macroeconomic stability, and is making steady progress in reorienting its economy to a market-based operation, and creating space for exploiting the large potential of private sector initiative.

Much as the payoff from these efforts has still to be fully realized, Tanzania Vision 2025 expresses both hope and determination in ridding the country of poverty, disease, and ignorance.

It seeks to do so by achieving high and sustained growth, at an average of 8 per cent, and halving abject poverty by 2010 and eliminating it by 2025. Furthermore, Tanzania aims to develop a modern, export-led economy and leap into the category of middle-income country.

Mkapa's macroeconomic stabilization and market-oriented structural reforms triggered large inflows of official donor assistance that, in a virtuous cycle, further supported growth and the continuation of reform efforts.

Macro-economic stabilisation spurs economic growth

Over the past 10 years of Mkapa's administration, Tanzania has made major strides in improving its economic performance. Pursuing an ambitious program of economic reform and supported by substantial donor aid, Tanzania's growth has increased noticeably, and macro-economic stabilization and debt sustainability were reached.

While more than one-third of growth since 1996 has resulted from agricultural performance, another one-third has reflected growth in services, notably trade, and tourism-related services, followed by construction and manufacturing.

The mining sector, while exhibiting high sectoral growth rates, did not contribute very significantly to higher growth.

Higher growth in the non-agricultural sectors was in large part due to foreign direct investment (FDI).



Tourism sector is becoming an important activity

FDI flows to Tanzania gained momentum in the second half of the 1990s, increasing six fold to an annual average of over \$300 million compared with the first half of the 1990s. About 40 per cent of the higher FDI was directed to the mining sector.

The remainder went primarily into the manufacturing, tourism, and financial sectors.

Growth in the manufacturing and tourism sectors had, moreover, important spillover effects on activity in the construction and transportation sectors.

Tanzania's relative success in attracting FDI reflected the implementation of a critical mass of macroeconomic and structural reforms, as well as the presence of political stability in the context of multiparty democracy.

In short, the pillars of Tanzania's reform-oriented policies since have included large-scale privatization. Since 1992, virtually all state-owned enterprises have been privatized.

Another pillar has been liberalization whereby since 1990, current account transactions, the exchange market, agricultural prices, and marketing boards have been gradually liberalized, as the state increasingly retreated from dominating economic activities.

Tight fiscal and monetary policies have stabilized the economy which resulted in a rapid decline of inflation from over 30 per cent in the 1980's to less than 5 per cent today. The manufacturing sector has risen six-fold compared with the first half of the decade and has been driven by a broad-based increase in the output of a number of commodities, including sugar, beer, soft drinks, cement, and steel, following privatization.



Cement production boosts the building industry

The strong growth in the tourism sector, which has more than doubled relative to the first half of the 1990s, was reflected in an increase in arrivals from 153,000 in 1990 to 576,000 in 2003, and resulted in a surge of tourism receipts from \$65 million to \$446 million.

This strong performance reflected, to a large extent, the increasing attractiveness of Tanzania as an international tourism destination, as a result of a substantial surge in private investment in tourism facilities toward international standards following privatization.

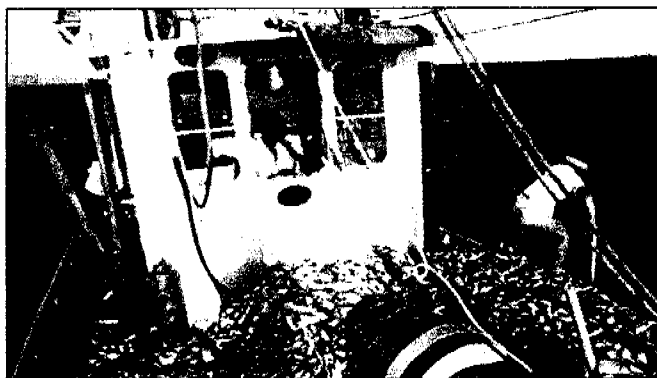
While exports of manufactured goods have tripled since 1996, the manufacturing sector continues to be oriented mostly to the domestic market, and a further strengthening of its export competitiveness will be essential to enhance its contribution to growth. This should be one of the priorities of the next President and his Government. The liberalization of banking services in 1995, has led to rapid foreign direct investment in this area. During 1996-2003, the financial services sector grew by almost 5 percent annually in real terms, up from 2 percent during 1990-95. These developments reflect partly the liberalization of interest rates and the approval of the Banking and Financial Institutions Act, which laid the ground for the establishment of private financial institutions.

The effectiveness of financial sector reform is reflected in the substantial increase in credit to the private sector especially manufacturing and mining, building and construction

Liberalization has boosted export sector

The liberalization of the economy in Tanzania also helped the promotion of other exports, notably processed food, fish, and horticulture. Over the decade ending 2003, nontraditional non-mineral exports increased three fold.

Exports of goods and services have played an important role in contributing to the overall growth of the economy since 1990. Exports contributed 2.2 per



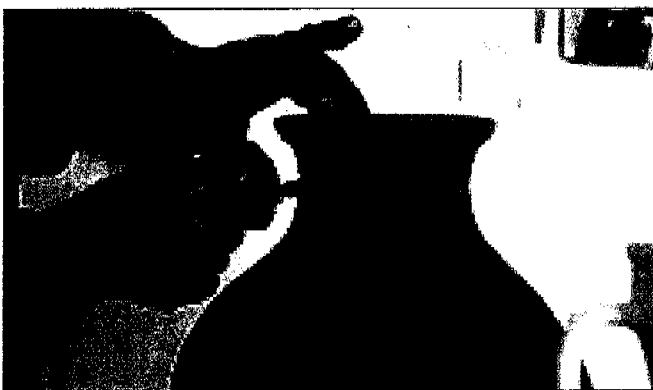
Non-mineral exports, such as fish, have increased.

cent of the 3.8 per cent annual average growth during 1990-2003. In other words nearly 60 percent of GDP growth during the period came from exports.

The Third Phase Government is also credited with bringing inflation down to single digits in 1999 and which declined further to below 5 per cent in 2002.

However, SMEs and the agricultural sector have not been so lucky. As a recent study observes, "The ambitious financial sector implementation plan currently being finalized is an important framework for further improvements, particularly with regard to the provision of credit to larger portions of the economy, notably agriculture."

The next Government should ensure that they too get a fair share of the cake. Economic reforms introduced from 1986 to allow market forces to play a greater role in the economy also had a substantial effect on the structure of agricultural performance. Domestic food crop marketing was liberalized, with private traders gradually taking over the role of the cooperatives and crop authorities; the marketing and export of traditional export crops was decontrolled, and the commercial role of parastatal crop authorities was scaled back.



Small and Medium Enterprises boost the economy

However, the marketing of crops in many places calls for more attention from the Government to streamline it. This should also be the task of the coming president and his team.

Agricultural performance did not, however, improve significantly during the second half of the 1990s compared with the first half of the 1990s, partly as a result of the decline in the terms of trade for most traditional exports and the appreciation of the real exchange rate through 2001.

Improved monetary management by the Bank of Tanzania was also supported by the adoption of a cash-management system, which limited expenditure to available revenue, as well as by the steady inflow of donor support. This virtually eliminated the budget's domestic financ-

ing requirements—a major source of inflationary pressures in the past.

Recently, the International Monetary Fund (IMF) commended Tanzania's macroeconomic achievements.

The Tanzanian authorities deserve much credit for maintaining a strong

macroeconomic performance under their PRGF-supported program. The country has made further strides in enhancing macroeconomic stability and addressing key impediments to growth through the accelerated pursuit of structural reforms.

The challenge of the next president: Ensuring sustained growth

However, a recent Household Budget Survey shows only a modest decline in aggregate poverty over the past decade, raising the question of whether positive macroeconomic performance has had any significant effect on reducing poverty.

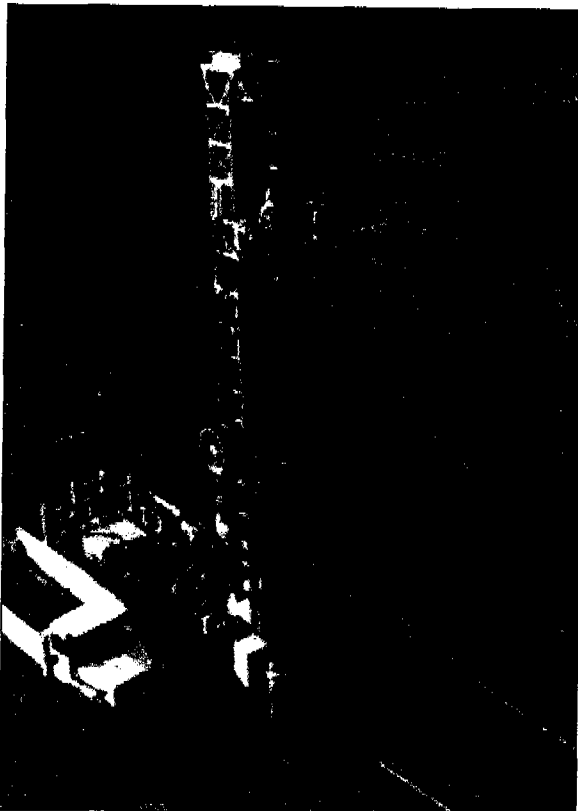
This sentiment was also recently expressed by the IMF in its recent review of Tanzania's macroeconomic performance. It expressed this in the following terms, "Despite these successes, Tanzania will need to sustain its reform efforts in the areas of energy, infrastructure, trade facilitation, governance, fiscal management, and

financial sector reform to make deeper inroads against poverty."

This implies that the national strategy for poverty reduction should focus much more on policies to improve the business and investment environment.

The IMF says: "While impressive progress has been made in revenue mobilization, continued efforts to generate domestic resources will provide critical support to growth and poverty reduction, and will help lower Tanzania's high level of aid dependence over the medium term."

Exploiting natural resource base



Exploration of minerals has increased

High growth recorded in the 1960s indicate that Tanzania can sustain a 6-7 per cent rate of growth by exploiting its natural resource potential, sustaining peace, and staying the course of reforms.

To increase Tanzania's growth performance, it is necessary to raise the private investment response and enable efficient business operations.

Sustained macroeconomic stability, reduced cost of doing business, fair competition, and privatization constitute the main criteria for achieving these results.

Given the small size of the Tanzanian economy, growth will only be sustainable if it is firmly rooted in exploiting the

domestic resource base, international competitiveness, and the aggressive pursuit of new export opportunities.

Increases in productivity will only be possible if close attention is paid to the acquisition, adoption, and use of various forms of knowledge, including technical know-how. Foreign direct investment, an appropriate communication and information infrastructure, and an improved level of educational attainment are key elements in facilitating productivity gains through knowledge.

It is encouraging that the Government has started putting stress on the education sector. The incoming Government will, therefore, have to take up from where Mkapa's has left off.

But, considering Tanzania's low post-primary education attainment, it is imperative that measures will have to be put in place to increase the incentives and returns for undertaking such investments.

It is wise for it to focus on

increased public support in areas where externalities are large, such as primary education and preventive health care.

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The dominance of agriculture



Needed: modern farming.

Agriculture will, for the foreseeable future, remain the back bone of the economy, and only a prospering agriculture sector can provide the basis for sustainable poverty reduction and accelerated growth in the other sectors.

To achieve the 6-7 percent overall growth, agriculture should grow at 5 per cent annually, a considerable increase from the current 3-4 percent growth rate. The prominence of this sector in overall growth and poverty reduction in Tanzania is underscored by the fact that it dominates income generation and has the highest

forward linkages and consumption spin-off effects to the rest of the economy, compared with other sectors.

In contrast with the past initiatives, support for the transformation of agriculture should hinge on a cohesive, long-term strategy that targets intensification and commercialization.

Apart from more effective research and extension, there will be a need for better rural roads to lower costs of access to markets and inputs, better education to facilitate adoption of improved husbandry, increased private credit to fill gaps left by the collapse of public credit institutions, lower and more transparent taxation, and greater contestability of markets.

The industrial sector similarly remains the backbone of modernization. Despite the massive closure of failed public enterprises, industry has managed to continue posting a growth rate, on average, of 5 per cent or more in the past decade, implying that new and surviving firms are growing much faster to more than compensate for failing

firms. But again, what is needed is to enhance the skill profile for a modern labour force in order to support the buildup of export competence to break into new markets and withstand global competition in a world increasingly becoming dependent on information technology for productivity growth.

Tanzania's rich-resource endowment offers the opportunity to garner additional growth from more intensive exploitation of its resource base. As earlier seen, exports of nontraditional agricultural commodities, increased

activity in the mining sector, and expansion of tourism are three areas that already have registered relatively high growth rates in recent years, but these areas still have substantial potential for additional growth in the near future. It is, however, imperative to take measures that increase the linkages with the rest of the economy.

Low density and poor quality of infrastructure is a critical constraint to market integration and efficiency, given the sparse distribution of economic activity in Tanzania.

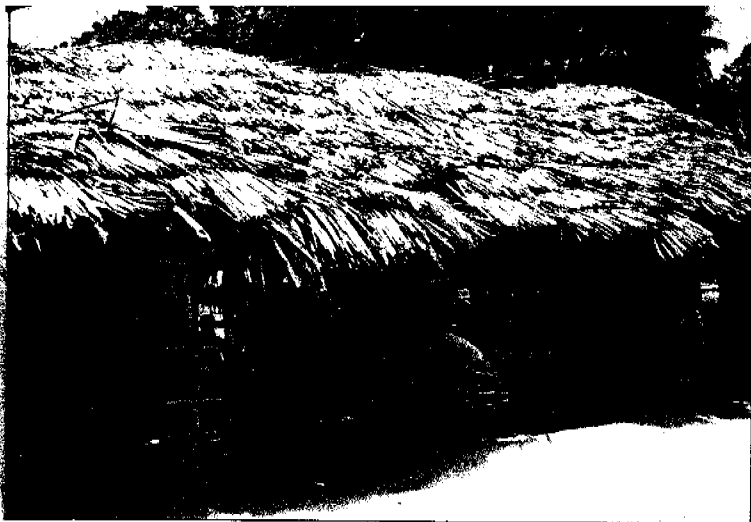
The road to poverty reduction

The key to significant poverty reduction in Tanzania is accelerated growth. According to a recent World Bank study, recent improvements in the policy and institutional framework indicate that per capita GDP could grow between 1.4 and 1.9 per cent annually.

Further improvements in this framework would raise the predicted annual rate of growth of per capita GDP to an estimated range of 2.4-4.3 per cent.

Estimates of poverty elasticities indicate that such accelerated growth could lead to a reduction in the share of the population living below the poverty line, from around 50 per cent currently to 30 per cent by year 2015.

Sustaining peace and tranquility, stability, and national cohesiveness is critical for development. Tanzania has managed to forge national cohesiveness and enjoyed peace and stability throughout the post-



Poverty means schools like this

independence period.

As the country prepares for this year's presidential and general elections, it is important to bear in mind that for Tanzania to realize its growth potential, it must nurture and sustain the current peaceful atmosphere, both within the country and also with its neighbors.

Good governance matters for long-term growth not only because of its effects on policy distortions and uncertainty, but also because of its capacity to handle external shocks. Corruption and all forms of mal-admin-

istration will have to be strongly dealt with.

Another debilitating problem that the next Government will have to contend with will be that of HIV/AIDS as it seriously threatens Tanzania's socioeconomic development. The epidemic has already had a huge effect on overall human development.

The relative high incidence of HIV/AIDS has led to a drastic decline in some indicators related to human development and eliminated gains in life expectancy that had been painstakingly achieved during the past four decades.

Recent studies of the impact of HIV/AIDS on economic growth indicate that at present incidence levels, economic growth will be 1 per cent lower than without HIV/AIDS. Taking measures to halt the spread of HIV/AIDS will thus have to be central to the next 's development efforts.

Achieving the target of accelerated growth will require significant efforts to enhance productivity and increase investment in both human and physical capital. The removal of institutional and policy constraints under the ongoing reforms is an important element in closing the productivity gap that has opened up over the past 20 years.

The way to the promised land

Improved productivity should also be another priority for the next president. Further increases in productivity will only be possible if close attention is paid to the acquisition, adoption, and use of various forms of knowledge, including technical know-how.

Increasing the investment in human capital requires implementing measures that will not only increase the incentives for and returns to carry out such investments, but also requires increased public support in areas where externalities are large, such as primary education and preventive health care.

Increased public resource allocations to these areas have to be accompanied by increases in the efficiency of service delivery if the desired increase in the stock of human capital is to be achieved.

However, if this education is to be meaningful, particular attention needs to be paid to the quality of education and its relevance to the demands of the labor market. Given

the rapidly changing demands of the labor market, emphasis will have to be placed on the acquisition of strong technical skills.

Investment in physical capital is the final element necessary for sustaining high growth rates. The principal source of investment has to be the private sector. However, public investment has an important role to play in providing selected infrastructure services that are complementary to private investments and that are unlikely to be provided by the private sector in sufficient quantities.

The role for government in this area will have to remain that of providing an appropriate legal and-regulatory framework for private sector investment and ensuring property rights and legal contracts.

Thus, one of the imperatives for the present and future is to continue reforms to improve the environment for private sector investment. An area of equal importance is the development of financial markets.

At present, financial intermedia-

tion is barely working. This constrains both the savings rate and the flow of savings to the most productive uses. In addition to domestic savings from both the private and public sector, foreign savings can also be an important source of finance for domestic investment.

While significant resource transfers currently take place in the form of ODA, in future these will need to be supplemented by increased inflows of private capital to finance increased investment levels in the private sector.

The realization of a higher investment level will require bold and pragmatic policy actions to increase the savings effort.

First is curtailing unproductive expenditure, fraud, and waste, which would provide a significant potential for increasing public sector savings. These increased savings could then finance public investments and keep the government from having to access Tanzania's domestic credit market.

Second-is encouraging private

savings through contractual savings institutions that has been started by liberalization of the insurance market.

The high cost of doing business in the country will have to be addressed. This is primarily a result of high power and utility costs, as well as high tax rates.

In addition, the next government will have to accelerate and sustain the reform of its financial sector and institutions, consolidate the stability of macroeconomic fundamentals, and encourage remittances from abroad by judiciously removing the

remaining capital controls.

The next government will also have to increase the share of value added by industry and services, with a matching relative decline in the importance of agriculture-can be expected to occur alongside accelerated growth.

Although agriculture will, for the foreseeable future, remain the backbone of the economy, only a prospering agriculture sector can provide the basis for sustainable poverty reduction and accelerated growth in the other sectors.

Tanzania's rich resource endowment offers the opportunity to garner additional growth from more intensive exploitation of its resource base.

Exports of farm commodities, increased activity in the mining sector, and expansion of tourism are three areas that already have registered relatively high growth rates in recent years,

but which still have substantial potential for additional growth in the near future. This will have to be developed.

However, because some of these activities are enclaves within the economy, they have only weak linkages to the rest of the economy, limiting their potential to contribute in a significant way to poverty reduction.

It is thus imperative to take measures that increase the linkages with the rest of the economy, such as creating incentives for the reinvestment of proceeds from these sectors in other parts of the Tanzanian economy.

Given the small size of the Tanzanian economy, growth will only be sustainable if it is firmly rooted in international competitiveness and the aggressive pursuit of export opportunities.

In summary, of particular importance are further reforms of the business environment with a view to attracting investment, and additional efforts to reform the agricultural economy as an essential ingredient for poverty reduction



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