

JICA Country Analysis Paper
for
the United Republic of Tanzania

Japan International Cooperation Agency
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The JICA Country Analysis Paper is a document in which JICA analyzes each country from the perspective of development, and is intended to be utilized when, as a development cooperation organization, JICA considers and implements effective cooperation projects for the country concerned. This document also provides information from the perspective of development when the Government of Japan formulates policies such as the Country Development Cooperation Policy for Respective Countries. The actual content of cooperation and projects to be implemented in the country concerned will be examined and decided according to the policy of the Japanese government, the budget scale of each fiscal year, and the circumstances surrounding the projects.

Summary

Tanzania is located along the access route to the Indian Ocean for neighboring landlocked countries. In addition, as a key member of the East African Community (EAC) and the Southern African Development Community (SADC), Tanzania is positioned as an important country that contributes to peace and stability in Eastern and Southern Africa and the Great Lakes region.

The Tanzanian government has a long-term plan "Tanzania Development Vision 2025 (TDV2025)" to become a semi-industrialized country and a middle-income country. In order to realize this, the government has set the "Five-Year Development Plan (FYDP)" as a concrete action plan and is currently implementing FYDPIII to realize industrialization for competitiveness and human development. Tanzania recorded an average real GDP growth of 6.5% over the past 20 years through 2019, and the projected real GDP growth rate is expected to be stably positive. In 2020, the World Bank announced that Tanzania had been upgraded from a low income country to a lower- middle income country.

Economic growth has been driven by the expansion of mineral resource exports, strong tourism, and a demographic dividend. However, social development indicators such as SDGs are at a lower level than the average for Sub-Saharan Africa (SSA). In the industrial sector, labor productivity is still low, and population growth is high, but there are delays in infrastructure development and shortages of medical services, safe water, food, and other social services. Against this backdrop, it is of great significance for Japan to take advantage of its comparative advantage and contribute to solving these problems.

The main objective of the new cooperation policy is to promote economic and social development for sustainable economic growth in Tanzania with the aim of consolidating and expanding the results of the past cooperation programs by utilizing their assets. The three priority areas are "1. Nurturing and expanding the base of sectors that drive economic growth" centering on primary and secondary industries, "2. Improving the environment to support economic and social development " to support the development of basic infrastructure for economic and social development such as transportation and Power and Energy, the improvement of urban environments, and sound Public Financial Management necessary for the efforts mentioned above, and "3. Realization of an inclusive and fair society " focusing on the delivery of services to local communities and inclusiveness and fairness for vulnerable groups such as youths and women. Based on situations such as the fast increase in the number of youths and the rapid progress of urbanization as well as the content of the Tanzania Development Vision 2050 (TDV2050) (draft), the basic policy specified below will be carried out.

Basic policy: Promoting economic and social development towards inclusive and sustainable economic growth		
Priority areas	Development issues	Cooperation programs
1. Nurturing and expanding the base of sectors that drive economic growth	Agriculture, fisheries, and livestock	<ul style="list-style-type: none"> ▪ Commercialization and industrialization promotion program ▪ Rice production promotion program ▪ Others (fisheries and livestock)
	Industrial development, industrial human resource development, and startup support	<ul style="list-style-type: none"> ▪ Industrial development program
2. Improving the environment to support economic and social development	Basic infrastructure development	<ul style="list-style-type: none"> ▪ Transport sector program ▪ Energy sector program
	Urban environmental improvement	<ul style="list-style-type: none"> ▪ Urban development program
	Financial management system	<ul style="list-style-type: none"> ▪ Public Financial Management support program
3. Realization of an inclusive and fair society	Youths, women, and local communities	<ul style="list-style-type: none"> ▪ Program for strengthening local governance to realize inclusive and fair development ▪ Program for strengthening health systems ▪ Others

Abbreviation list

Abbreviation	English
AfDB	African Development Bank
ASDP	Agricultural Sector Development Programme
AU	African Union
AUDA-NEPAD	The African Union Development Agency - New Partnership for Africa's Development
BDS	Business Development Service
BRT	Bus Rapid Transit
CARD	Coalition for African Rice Development
DPI	Digital Public Infrastructure
DSA	Debt Sustainability Analysis
DX	Digital Transformation
EAC	East African Community
ERDS	EAC Rice Development Strategy
FYDP	Five Year Development Plan
G7	Group of Seven
GDP	Gross Domestic Product
GGGI	Global Gender Gap Index
HIV	Human Immunodeficiency Virus
ICT	Information and Communication Technology
JGA	JICA Global Agenda
MoF	Ministry of Finance
MP	Master Plan
NCDs	Non-Communicable Diseases
NDC	Nationally Determined Contribution
NER	Net Enrollment Ratio
NINJA	Next Innovation with Japan
NRDS	National Rice Development Strategy
O&OD	Opportunities and Obstacles to Development

ODA	Official Development Assistance
OSBP	One Stop Border Post
PIDA	Programme for Infrastructure Development in Africa
PRSP	Poverty Reduction Strategy Paper
RRH	Regional Referral Hospital
SADC	Southern African Development Community
SDGs	Sustainable Development Goals
SGBV	Sexual and Gender-Based Violence
SSA	Sub-Saharan Africa
SU	Start Ups
TDV	Tanzania Development Vision
TOA	Tanzania Osaka Local Government Reform Alumni Association
TOD	Transit-Oriented Development
UHC	Universal Health Coverage
VAT	Value-Added Tax
VC	Value Chain
VETA	Vocational Education and Training Authority
ZAWA	Zanzibar Water Authority

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Chapter 1 Analysis of Tanzania's development policies and plans, major development issues, and sectors

1.1 Tanzania's development policies and plans

The Tanzanian government compiled the Poverty Reduction Strategy Paper (PRSP) in 2000 and formulated the National Strategy for Growth and Reduction of Poverty (MKUKUTA in Swahili) in 2005 and MKUKUTA2 in 2010. Then, in 2011, the government integrated the development strategies that had been set for each sector into a long-term plan called "Tanzania Development Vision 2025 (TDV2025)," with the aim of becoming a semi-industrialized country and a middle-income country and achieving a nominal GDP per capita of \$3,000. In order to realize this vision, it established the "National Five-Year Development Plan (FYDP)" as a concrete action plan and implemented the plan in phases: FYDPI (2011-2015), FYDPII (2016-2020), and FYDPIII (2021-2025). At present, the government is in the phase of FYDPIII, and the central issue is the realization of industrialization for competitiveness and human development, and the government is implementing policies centering on economic growth, social development, and good governance, including contributions to international goals such as the SDGs. In addition, in terms of nationally determined contributions (NDC, 2021), it increased the 2030 emission reduction target from 10-20% to 30-35%, focusing on addressing energy, transportation, forestry, and waste.

During the FYDPIII period, the annual GDP growth target is set at 7.3% to 8.7%, increasing GDP per capita from \$1,151 to \$1,427 and reducing the poverty rate from 26.4% to 22%. Other main targets are as follows:

Table 1. FYDPIII Targets

Item	Baseline	Target (2025/26)
Annual GDP growth rate	7.3% (2019/20)	8.7%
GDP per capita	US\$1,151 (2019/20)	US\$1,427
Poverty rate	26.4% (2018)	22%
Power generating capacity	1,602.3MW (2019/20)	4,915MW
Power connection rate	78.4% (2020)	85%
Annual growth rate of manufacturing	4.8% (2019/20)	6.8%
Share of manufacturing in exports	16.9% (2019)	24%
Under-5 mortality rate (per 1,000 live births)	50 persons (2019/20)	40 persons
Maternal mortality rate (per 100,000 live births)	220 persons (2019/20)	180 persons
Access to clean and safe water in rural areas	70% (2019/20)	85%
Human development index	0.57 (2019/20)	0.60

(Source: [MoFP](#))

In addition, based on the evaluation of Tanzania Development Vision 2025, the Tanzanian government is in the process of formulating Tanzania Development Vision 2050 as a new long-term plan. The keyword is "A Prosperous, Just, Inclusive and Self-Reliant Nation." In order to achieve this vision, the three pillars listed below have been established on the basis of governance, peace, security, and stability.

- (1) Strong, inclusive, and competitive economy
- (2) Human capabilities and social development
- (3) Environmental integrity and climate change resilience

1.2 Key development issues in Tanzania

Tanzania recorded an average real GDP growth of 6.5% over the past 20 years through 2019. Despite a temporary drop in real GDP growth due to the impact of COVID-19, the country enjoyed stable growth averaging around 5.1% from 2022 to 2024. Moreover, the World Bank changed the income classification of Tanzania from a low-income country to a lower-middle income country in 2020. The economic growth is attributed to the expansion of mineral exports, the strong performance of tourism, and the demographic dividend. On the other hand, Tanzania is still faced with many development issues, and the government has set the below-listed development policies to solve them.

- Need to transform the economic structure: Aim for sustainable growth by breaking away from dependence on agriculture and diversifying the economy through industrialization and expansion of the service sector.
- Acceleration of economic growth and reduction of poverty: The goal is to achieve economic growth with an annual real GDP growth rate of 8% or more. As about 90% of the population live on less than \$3 a day, poverty reduction is urgently needed. Employment in the agricultural sector is on the decline, but the expansion of manufacturing is limited.
- Strengthening of infrastructure and the investment environment: The development of power, transportation and ICT infrastructure is important for economic growth and industrialization. Private investment should be promoted and barriers to raising capital eased.
- Development of industry and enhancement of competitiveness: Evaluate public and privately-owned plants not in operation and promote the appropriate restart of their operation. The government aims to add greater value to natural resources and utilize the regional markets of EAC and SADC for industrial development.
- Improvement of governance and implementation capacity: It is necessary to formulate consistent policies for, and build stronger legal frameworks for, promotion of industrialization. The government should manage and evaluate development plans more effectively and prioritize the implementation of measures in line with the SDGs.

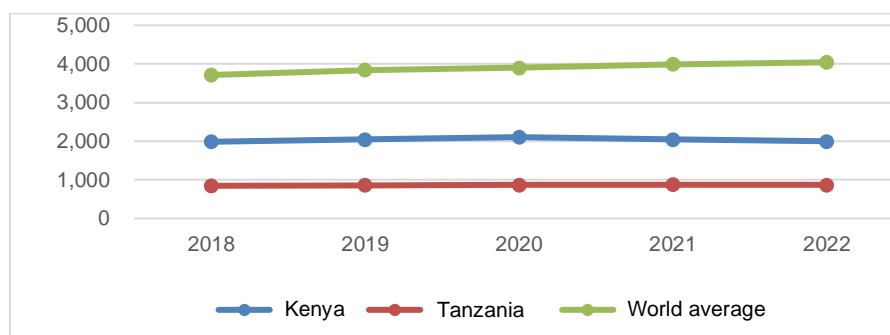
1.2.1 Agriculture

[Challenges] Although agriculture accounts for about 70% of the working population, the value added per farmer is lower than the world average and the low agricultural GDP growth (3.5% in 2021) and productivity are the challenges in Tanzania's agriculture sector.

Agriculture is an important sector, representing about 1/4 of GDP, but in 2021, the agricultural GDP growth rate was low, at 3.5%, and increasing productivity is an issue to be addressed, as the value added per farmer is lower than the SSA average. FYDP III aims to increase the

productivity of agricultural products and their share in total export revenue from 13% to 19%. Banks' loans to agriculture have high growth potential although they remain low, accounting for 8-10% of the total, while they consist mainly of short-term loans. In addition, agricultural mechanization is limited, and there is still high dependence on animal and human power.

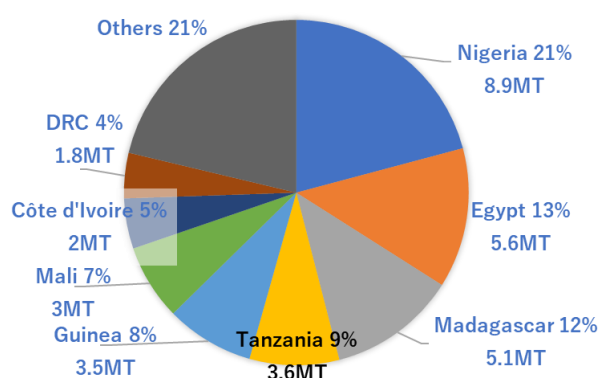
Figure 1. Value Added per Farmer (USD)



(Source: [World Development Indicators](#))

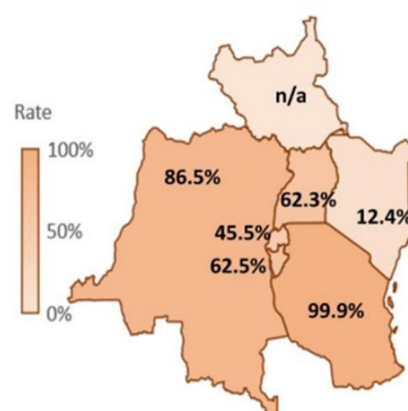
Tanzania is one of Africa's leading agricultural countries and plays an important role as a regional food basket. In particular, the production of rice has continuously improved, and self-sufficiency has been achieved, but the unit yield is still low at 3 t/ha. In addition, much of agriculture is rainfed and highly vulnerable to climate change.

Figure 2. Rice Production Share (2023)



(Source: [FAOSTAT](#))

Figure 3. Rice Self-Sufficiency Rate in EAC Countries



(Source: [EAC Rice Development Strategy](#))

The irrigated area increased from 460,000 ha in 2015 to 720,000 ha in 2024, but the potential irrigated area is about 29.4 million hectares, so there is much room for development. On the other hand, because of inadequate operation, maintenance, and management, about 50% of the existing irrigation facilities are not fully functioning due to aging and poor maintenance and management.

The fisheries sector accounts for 1.8% of GDP and employs four million people (including indirect workers). However, related infrastructure such as landing sites, storage facilities and processing facilities are not well developed. Value chain development and post-harvest losses (for example, half of the small fish called dagaa caught in Lake Victoria are lost) are issues to be addressed.

Other issues include low fishing technology, insufficient research on marine resources, and overfishing due to poaching.

Livestock production represents 7% of GDP (27% of agricultural GDP) and employs 33% of the population. Tanzania has the third largest livestock population in Africa, making it one of the most important and rapidly expanding industries in recent years. Challenges include climate change-related risks such as erratic rainfall patterns and rising temperatures, insufficient investments from the public and private sectors (with the current level of investment being about 1/5 of the required amount), livestock diseases, quality control of livestock products, low productivity, and greenhouse gas emissions (especially methane emissions, which contribute significantly to climate change).

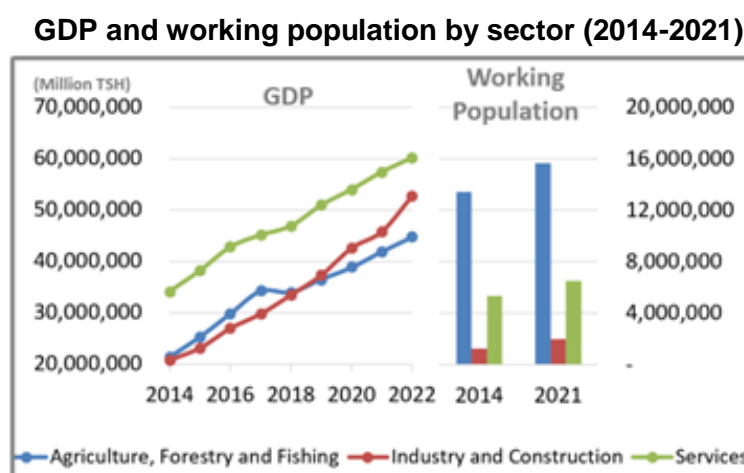
1.2.2 Industrial development

[Challenges] Tanzania's industries, which consist mainly of labor-intensive ones, require diversification and sophistication. High unemployment and an immature startup (SU) ecosystem are also issues to be addressed.

According to TDV2050, the share of the manufacturing and service industries in GDP is on the rise. More than 60% of the population is still engaged in labor-intensive industries such as agriculture, and sufficient employment opportunities are not created. The diversification and sophistication of industries is becoming an issue to be addressed. In addition, in order to promote domestic and foreign investments, it is essential to ensure transparency and improve the business environment. Moreover, although the potential labor force is plentiful with approximately 43% of the population under 15 years of age and approximately 65% under 25 years of age, the high unemployment rate, particularly among young people, and the mismatch with the human resource needs of the industry are issues to be addressed.

SMEs (Small and Medium Enterprises) play an important role in the economy, accounting for approximately 35% of GDP and 70% of the working population in 2022. However, challenges include weak financial inclusion, insufficient information on business laws and regulations, and access to capital.

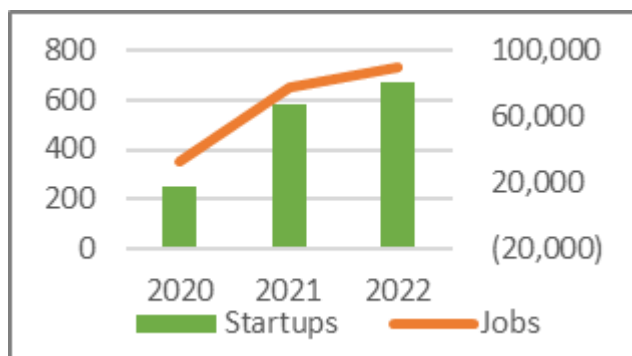
Figure 4. GDP and Working Population by Sector (2014-2021)



(Source: [Ministry of Finance](#) and the [National Bureau of Statistics](#))

In addition, although SUs are becoming increasingly important as they receive valuable employment in the country, there are capital shortages and regulatory and policy issues, which point to the immaturity of the ecosystem. Securing skilled human resources, supporting SUs, and bringing technological innovation are also necessary for the growth of the manufacturing and service industries. In particular, the utilization of ICT and the development of the digital industry are issues to be addressed in the future.

Figure 5. SUs and Employment by SUs



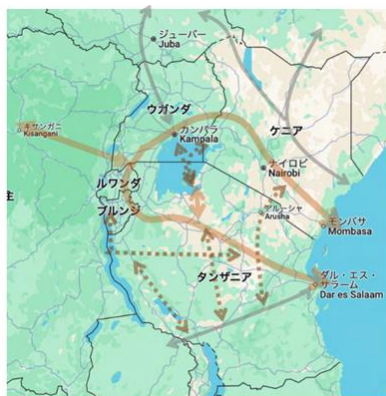
(Source: [Tanzania Startup Association](#))

1.2.3 Transportation

[Challenges] Logistics costs are high, and dependence on road transportation is high. It is necessary to strengthen logistics networks and their functions and improve safety by further developing infrastructure and establishing better intermodal linkages¹. In addition, the development of shipping and tourism in Zanzibar is also an issue to be addressed.

Logistics costs account for 35-45% of import costs in Tanzania. Strengthening the gateway function to landlocked countries and the logistics function necessary to utilize the development potential of agricultural products and mineral resources are required, along with connectivity between the Central Corridor and the Northern Corridor and the facilitation of trade with neighboring countries in East Africa.

Figure 6. Regional Connectivity with a Focus on the Central and Northern Corridors



(Source: JICA survey team)

¹ Efforts to shift means of freight transport from trucks and other motor vehicles to railroads and ships

More than 80% of passenger transport and more than 95% of freight transport in the country depend on roads, but the proportion of paved roads was low, at 8.9% (2021), at the start of FYDPIII, and the government aims to improve it to 12% by 2025. In addition, 11% of national roads are still in poor condition.

The goal is to increase the share of rail transport from 0.6% to 20% for passengers and from 5% to 40% for freight by 2030. Especially in Dar es Salaam, there is a need to eliminate serious traffic congestion and accidents as the population grows rapidly. In Zanzibar, economic development centering on marine transport and tourism is important.

Figure 7. Condition of National Roads

National Roads' Condition						
Year	Good		Fair		Poor	
	Km	%	Km	%	Km	%
2015	11,330	36	15,627	50	4,408	14
2016	12,388	41	13,642	45	4,235	14
2017	11,682	36	16,639	52	3,849	12
2018	11,043	35	15,864	51	4,216	14
2019	12,865	39	16,692	50	3,617	11
2020	12,722	40	15,500	48	3,853	12
2021	12,676	38	17,432	51	3,614	11

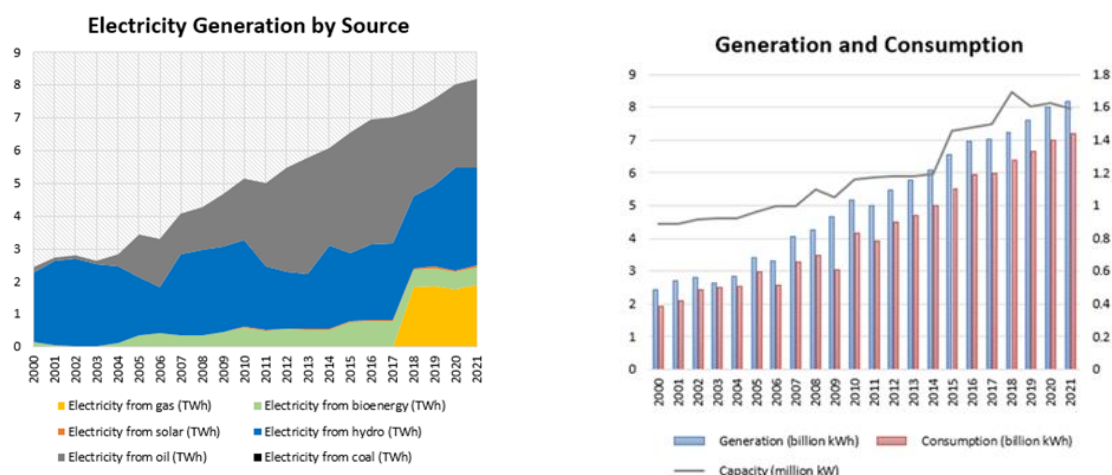
(Source: [TANROADS](#))

1.2.4 Power and Energy

[Challenges] Issues include insufficient access to electricity, and power transmission and distribution loss. Utilizing natural gas and renewable energy to meet future growth in demand for electricity due to population growth as well as developing power sources and improving connection rates through the establishment of power transmission and distribution networks are issues to be addressed.

With the completion of the Julius Nyerere Hydropower station, the installed capacity has increased significantly to 3,400 MW, and energy access, which indicates the capacity to supply electricity to households, has improved to 85%. However, the electrification rate, which shows the proportion of the population with access to electricity, is 42.7% nationwide, which is lower than the SSA average (50.6%). The power loss due to transmission and distribution is still high, at 13.5%, and the establishment of transmission and distribution networks and the development of power sources for future demand expansion are issues to be addressed. Further connections to the power pools (Eastern Africa Power Pool and Southern African Power Pool) are also required.

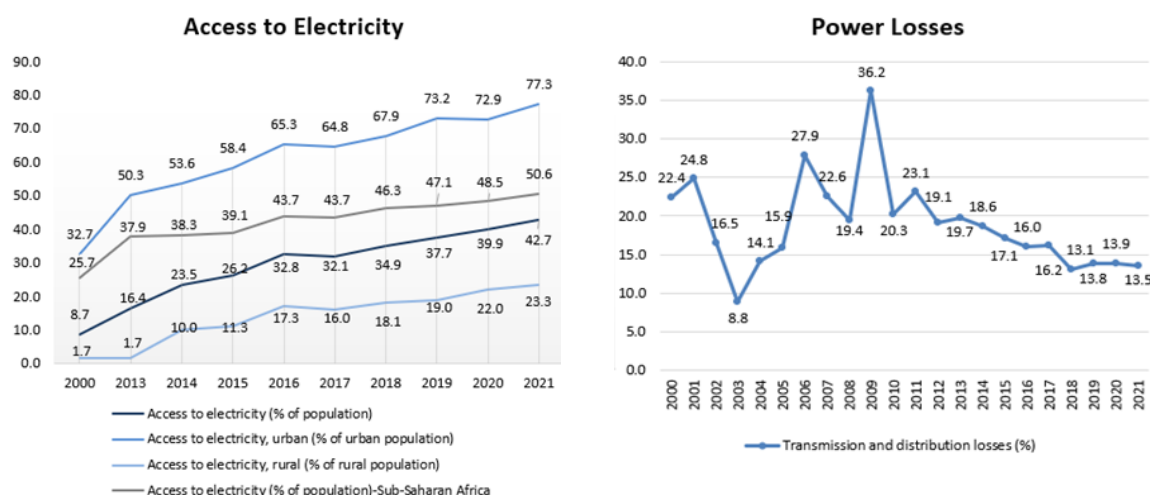
Figure 8. Power Generation by Source and Generation and Consumption



(Source: [Energy Information Administration](#))

Although energy access increased from 78.4% to 85% during the FYDPIII period, it is important to promote an energy mix utilizing natural gas and renewable energy to compensate for the instability of hydropower generation. With 8.3 TCF of natural gas (8.3/57 TCF of total potential), plans are under way to generate approximately 7,000 MW of power, and expectations are growing for the possibility of developing geothermal resources and the introduction of wind and photovoltaic power generation by independent power producers. In addition, the access rate for clean cooking, which uses environmentally conscious, clean, and safe fuel (such as electricity, liquefied petroleum gas, and biogas) instead of conventional fuel such as charcoal and firewood, remains at around 7%. Improvements are required to achieve the target of 75% by 2030.

Figure 9. Changes in the Electrification Rate and Power Losses



(Source: [World Bank Data](#))

1.2.5 Urban environment

[Challenges] As the urbanization is progressing rapidly, the deterioration of the urban environment is an issue to be addressed. Therefore, it is necessary to promote and manage appropriate development such as the improvement and strengthening of urban infrastructure and the prevention of sprawl². Other issues include traffic congestion in Dar es Salaam.

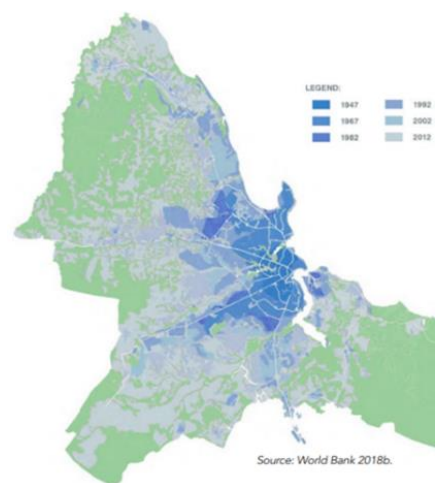
It is projected that the population will double to 140 million by 2050 and that rapid urbanization will progress. The acceleration of urbanization is particularly marked in the capital city of Dodoma, Dar es Salaam and Zanzibar. The largest city, Dar es Salaam, is expected to have a population of 10 million by 2030.

Figure 10. Population Trends in Rural and Urban Areas



(Source: [World Bank](#))

Figure 11. Urbanization in Dar es Salaam



(Source: [World Bank](#))

In cities such as Dar es Salaam, although urban development master plans (MPs) have been formulated, the lack of centralization of policies has caused serious problems, including traffic congestion, underdeveloped infrastructure, expansion of informal settlements and poor sanitation such as sewerage and waste disposal. In Zanzibar, high non-revenue water rate (63%) and low water meter coverage (12%) are identified as challenges. FYDPIII aims to increase access to safe water from 85% to 95% and improve the sanitary environment, but the implementation of sustainable urban planning, land use optimization, and urban infrastructure development are urgent issues to be addressed.

² A phenomenon in which urban development proceeds in an uncontrolled manner without awareness of planned linkages between cities and suburbs.

Figure 12. Key Indicators of Water Supply Services in Zanzibar

Item	2008	2013	2018
The amount of water yield (1,000 m ³ /year)	33,017	34,922	39,417
The amount of water consumption (1,000 m ³ /year)	3,058	14,549	14,584
Coverage rate (%)	65%	74%	83%
Number of boreholes	99	230	303
Non-revenue water ratio	91%	85.2%	63%
Number of new customers	N/A	3,000	5,604
The total number of customers	57,000	71,990	100,010
Water meter installation rate (%)	—	3%	12%

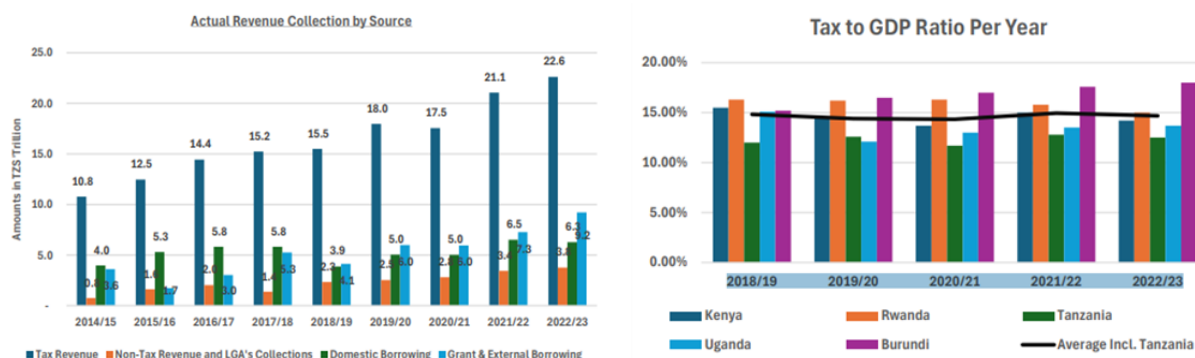
(Source: ZAWA Strategic Business Plan)

1.2.6 Public Financial Management

[Challenges] The low ratio of tax revenue to GDP is an issue to be addressed. In addition, it is necessary to improve budget planning capabilities and the budget execution rate in public spending.

The fiscal deficit hovers around 3% of GDP, of which about 2/3 is covered by external borrowing (half of which is concessional). Public debt is about 40% of GDP, and although the IMF's Debt Sustainability Assessment (DSA) was raised to Moderate in 2021, the current status is said to be manageable. Revenues have been increasing year by year, and although tax revenues account for about 80% of them, the ratio of tax revenues to GDP is about 13%, far below the SSA average of about 16%.

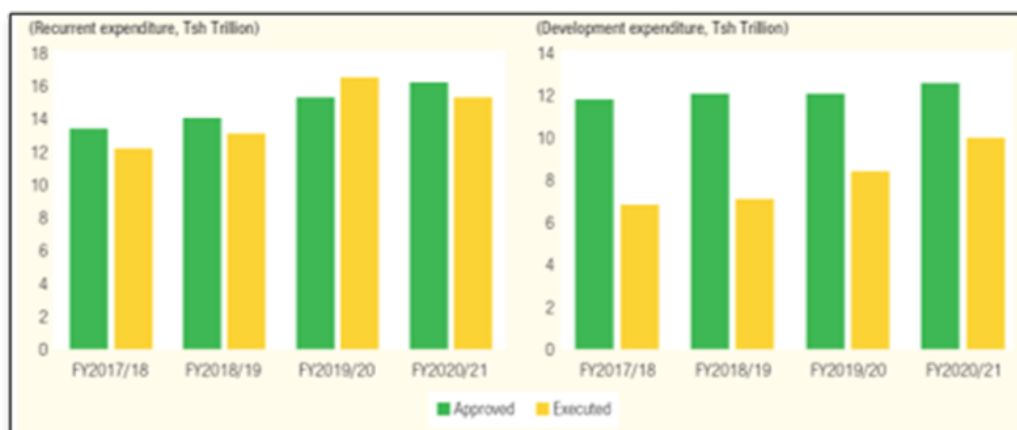
Figure 13. Tax Revenue as a Percentage of GDP



(Source: [General Audit Reports 2022-23](#))

The budget execution rate is low, and the improvement of financial management capabilities such as planning and execution is an issue to be addressed. Comprehensive fiscal reforms are needed for sustainable economic growth and improved public services.

Figure 14. Budget Execution Rate of Current Expenditure



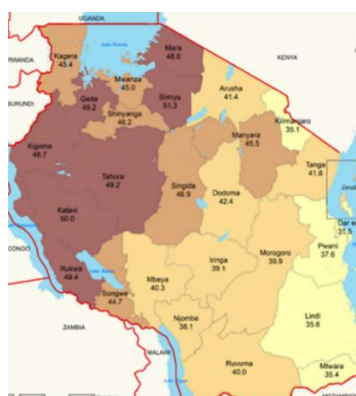
(Source: [World Bank and Tanzania Economic Update, September 2023](#))

1.2.7 Local Governance

[Challenges] The high poverty rate in rural areas and the disparity between rural and urban areas are issues to be addressed. In addition, it is essential to create jobs in rural areas as the population increases.

Since half of the population is under the age of 18 and 9.3% is disabled, building an inclusive society that includes youths, women, and persons with disabilities is an important issue to be addressed. The poverty rate is particularly high in rural areas compared to urban areas with 81% of the 14 million poor concentrated in these areas, and the prevalence of stunting³ is around 50% (national average 30%). FYDPIII has set a target of improving the proportion of the poor lacking basic needs in rural areas within five years, and it is essential to enhance the capabilities of local governments and communities to address regional disparities and create jobs in rural areas. Meanwhile, decentralization, which began in the latter half of the 1990s, has promoted the decentralization of administrative affairs and authority, while the decentralization of finance and personnel affairs for civil servants has not progressed substantially. There is an absolute shortage of staff, especially in local governments.

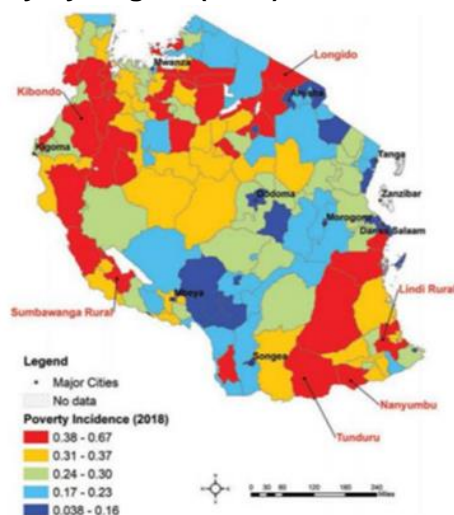
Figure 15. Proportion of Population Aged 15 or Younger by Region (2022)



(Source: AGE AND SEX DISTRIBUTION REPORT TANZANIA)

³ A condition caused by chronic malnutrition and resulting from acute or severe undernutrition.

Figure 16. Incidence of Poverty by Region (2018)



(Source: [Household Budget Survey](#))

The reform of the civil service system is about to be promoted. In particular, the points at issue in this process include human resources management, the relationship between the central and local governments (decentralization), community engagement, and the efficient provision of public services.

1.2.8 Health

[Challenges] Despite improvements in access to medical care, the young pregnancy rate and HIV prevalence are high, and non-communicable diseases (NCDs) are expanding. Challenges include improving the quality of maternal and child health and universal health coverage (UHC), eliminating gender inequality, and developing medical infrastructure and pushing institutional reforms.

The maternal mortality rate (238 of 100,000 live births, target 180) and the infant mortality rate (33 of 1,000 live births; target 30) have continued to improve, but the government targets have not been reached. In addition, the neonatal mortality rate remains unchanged, and it is necessary to provide high-quality maternal and child health services and secure high-quality medical personnel and equipment.

Figure 17. Infant and Neonatal Mortality Rate

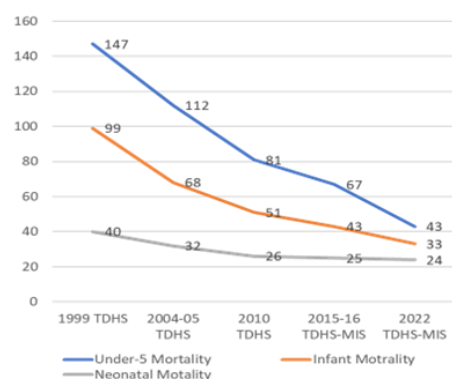
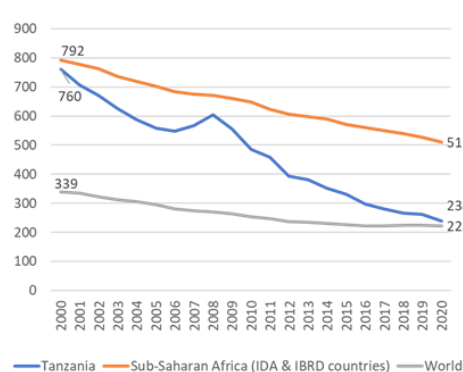


Figure 18. Maternal Mortality Rate



(Source: [Tanzania Demographic and Health Survey 2022](#))

UHC is one of the priorities of Tanzania's Health Sector Strategic Plan (2021-2026). However, the insurance coverage rate among the population was 15.3% in 2022, far from the government's target of 58% (2025/26). Further institutional reforms and the strengthening of infrastructure are required so that the entire population can receive high-quality health services. In Tanzania, life expectancy has steadily improved from 42.9 years in 1960 to 66.2 years in 2021. However, while the proportion of HIV/AIDS as the leading cause of death has shown a decreasing trend, approximately half of all deaths are caused by non-communicable diseases (NCDs).

1.2.9 Education

[Challenges] The final grade attainment rate in primary education varies by region and income, there are gender disparities in educational outcomes, and there is still room for improvement in the quality and quantity of teachers. Education tailored to industry needs such as vocational training is also required.

The net enrolment ratio (NER) for preschool education is low, at about 34% (2021), and there are significant regional differences. The final grade attainment rate in primary education is still unsatisfactory, at about 86% (2023), but it is even lower in rural areas and among the poor and children with disabilities, at about 60%. In addition, although there is no difference in the school attendance rate in primary education between boys and girls, there are some gender-related issues, including lower educational outcomes for girls than for boys such as basic achievement in mathematics and primary education completion tests as well as the occurrence of sexual gender-based violence (SGBV) in schools. In addition, the shortage of teachers and the lack of progress in improving their abilities have made the low quality of education a serious problem.

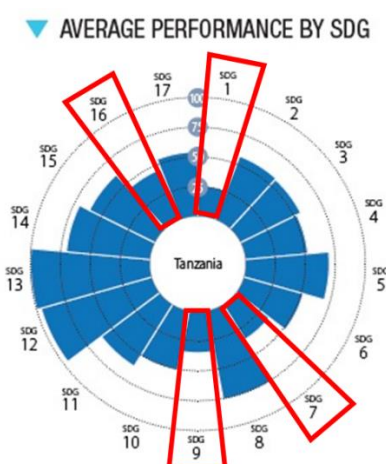
There are still differences in the quality of education among vocational schools, and a mismatch between the human resource needs of industry and the abilities and skills of students has been raised as an issue to be addressed. Despite graduation, the low technical level of industrial human resources and the shortage of soft skills have also become problems.

TDV2050 targets access to high-quality education at all levels of education, and in particular, the important development issues are to strengthen STEM and ICT education, develop human resources that meet industry needs, and reduce gender and regional disparities in educational opportunities.

1.3 Achievement of SDGs

Many of the 17 goals are considered important. In particular, the level of achievement is low for four goals: Goal 1 "No poverty," Goal 7 "Affordable and clean energy," Goal 9 "Industry, innovation, and infrastructure," and Goal 16 "Peace, justice, and strong institutions." On the other hand, Goal 12 "Responsible consumption and production" and Goal 13 "Climate action" have had high achievement rates and are expected to be completely attained by 2030. Tanzania has 42.8% of the population under the age of 15, which is higher than the SSA average. As a result, it is expected that there will be challenges in securing food as the population increases, developing social infrastructure, providing employment opportunities mainly through industrial advancement and diversification, and addressing the shortage of social services such as health and education.

Figure 19. Achievement of SDGs in Tanzania



(Source: [Sustainable Development Report 2024](#))

Chapter 2 Identification of key development issues and sectors to be addressed by JICA

2.1 Significance of cooperation in Tanzania

Tanzania gained independence from the United Kingdom in 1961, and Japan commenced economic cooperation through official development assistance (ODA) in the following year. Since then, Tanzania has maintained a moderate diplomatic policy and stable domestic politics and kept a good cooperative relationship with Japan in the international and in bilateral relations. Its main industries in the economy are agriculture, forestry, and fisheries; mining; manufacturing; construction; and services. With Dar es Salaam Port serving as the gateway from the Indo-Pacific region to landlocked countries in Africa, Tanzania is an important transport hub and a key member of the East African Community (EAC) and the Southern African Development Community (SADC), acting as an important balancer in the eastern and southern part of the continent. Its economy has been stable in recent years, and it became a lower-middle income country in 2020. At the same time, while the development challenges mentioned in Chapter 1 remain to be met, there is a strong need to continue supporting stable economic and social development based on the country's national strategy. In addition, given the characteristics and achievements of JICA's cooperation described below, cooperation in Tanzania is of great significance.

2.1.1 Realization of human security

JICA is promoting cross-sectoral initiatives that combine protection and capacity building to achieve human security. Although Tanzania has improved its economic and social indicators, its social development indicators such as the human development index are below the SSA average. In order to achieve the SDGs' central promise "Leave no one behind," continued improvements are required.

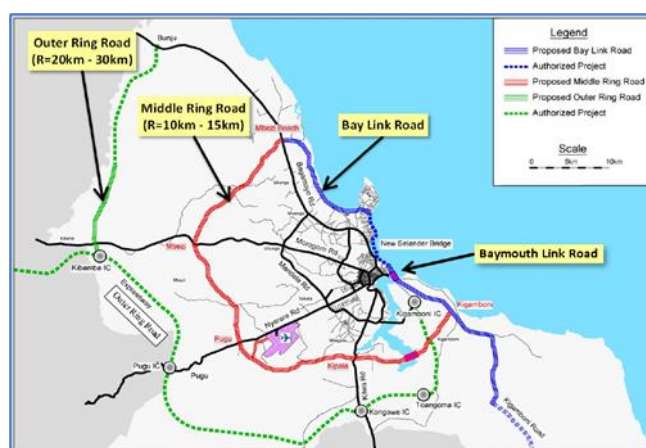
2.1.2 Utilization of yen loans to expand assets of long-term technical cooperations in rice production

JICA has provided technical cooperations for rice production sector, based in Kilimanjaro region for around 40 years, including 30 years of nationwide expansion. Utilizing three schemes, mainly through the Kilimanjaro Agricultural Training Center and the Ministry of Agriculture Training Institute, JICA has supported Tanzania to achieve rice self-sufficiency by promoting the spread of rice cultivation techniques in which Japan has extensive experience. As a result, Tanzania became the leading rice exporter in East Africa. In recent years, in addition to technical cooperation, JICA has carried out ODA loan projects such as support for agricultural inputs, agricultural finance and furthermore, Result Based Loan, which have supported the consolidation and expansion of assets in agricultural cooperation while encouraging ownership by Tanzania.

2.1.3 Leading the development of basic infrastructure

JICA supported the formulation of the Dar es Salaam Urban Transport Masterplan (MP) in 2008 and its revision in 2018 and implemented road improvement projects in line with the MP. Other donors, including the World Bank, the African Development Bank (AfDB), and the Export-Import Bank of Korea, have also promoted projects such as the Bus Rapid Transit (BRT) system and the Tanzanite Bridge based on the MP, and the implementation rate of the MP has reached 79.6%. In the energy sector, JICA is providing support for the development of power transmission and distribution networks in urban areas, the development of human resources for public utilities, and the preparation of MP, and at the same time is working with other donors to develop backbone transmission lines and internationally interconnected transmission lines. As described above, JICA is taking the lead in the development of basic infrastructure by making the most of Japan's strength in high-quality infrastructure systems.

Figure 20. Dar es Salaam Urban Transport Masterplan Road



(Source: [JICA](#))

2.1.4 Promoting private-sector partnership

The interest of Japanese businesses in Tanzania is increasing year by year, and the number of Japanese businesses advancing into Tanzania is also increasing. JICA's private-sector partnership projects have a track record of continuous project implementation, with 30 projects selected between FY2010 and FY2024, and are ranked first in Africa in the number of applications filed in FY2024. Six projects are under way, including those by Kikkoman and Fumakilla. JICA supports local activities of Japanese businesses through assistance for improving the business environment. In addition, the Agency makes effective use of overseas investments and loans to contribute to the development of the private sector by improving financial access for businesses, including small and medium enterprises, and mobilizing private funds.

2.1.5 Development of wide-area cooperation

JICA has been dispatching six generations of "Advisor of Regional Infrastructure Development for EAC" to the Directorate of Infrastructure based in Arusha to provide policy advice, coordination, and support. Since 2023, JICA has also provided technical assistance for trade facilitation and border control capacity enhancement and been dispatching "Advisor for Customs on Trade Facilitation in EAC", and from 2025, it plans to dispatch "Regional Rice Advisor to Support Implementation of EAC Rice Development Strategy (ERDS)". JICA contributes to the establishment of foundations for system development and human resource training that are essential for promoting regional integration. In the Kenya-Tanzania Power Interconnection Project, JICA provided assistance to contribute to the supply of electricity not only in Tanzania but also throughout Eastern Africa. In the context of the One Stop Border Post (OSBP) initiative, the case of EAC, including Rusumo (Tanzania/Rwanda border) and Namanga (Kenya/Tanzania border), is a good example for the whole of Africa.

2.1.6 Activities by Ex-participants of JICA's Trainings

The returned trainees of the "Osaka Training (country training 'Local government reform program')" developed the Tanzania Osaka Alumni (TOA) into an official organization of government officials and strengthened the capacity of and shared knowledge with more than 6,000 members. As a result, new decentralization policies and programs to strengthen state and local governments were proposed, and policies such as converting property taxes into local ones were introduced, bringing concrete results through ownership by the entities covered by these policies and programs.

2.2 Change in cooperation policy

2.2.1 Current cooperation policy for Tanzania

The current Country Development Cooperation Policy (September 2017) was formulated with reference to the JCAP formulated in FY2017 and in line with the pillars of FYDP II, the then five-year national development plan of Tanzania. The basic policy is to promote economic and social development for inclusive and sustainable economic growth and poverty reduction, and the three priority areas are "1. Nurturing the driving forces of economic growth," "2. Infrastructure development conducive to economic and social development," and "3. Improvement of Governance and the Public Service Delivery," and under these pillars, various programs are organized.

2.2.2 Future cooperation policy (three-tiered structure)

Tanzania is working on further industrialization as part of its national development plan, and the primary goal is to continue to promote economic and social development for sustainable economic growth in the country. The government will strive to consolidate and expand the results of various cooperation programs in the past by utilizing their assets continuously. The three priority areas are "1. Nurturing and expanding the base of sectors that drive economic growth" centering on primary and secondary industries, "2. Improving the environment to support economic and social development" in order to develop basic infrastructure for economic and social development such as transportation and electricity, improve urban environments, and support sound financial management necessary for the efforts mentioned above, and "3. Realization of an inclusive and fair society" focusing on the proper functioning of local communities and the inclusiveness and fairness of vulnerable groups such as youths and women. In light of the rapid increase in the number of young people and the fast progress of urbanization, etc., it is desirable that the current three-tiered structure be reorganized in line with the priority areas of the Tanzania Development Vision 2050.

Table 2. Three-tiered Structure (Current and Modified)

[Current]

Basic policy: Promoting economic and social development towards inclusive and sustainable economic growth and poverty reduction		
Priority areas	Development issues	Cooperation programs
1. Nurturing the driving forces of economic growth	Agricultural development	<ul style="list-style-type: none"> ASDP support program Rice production promotion program Others
	Industrial development	<ul style="list-style-type: none"> Industrial development program
2. Infrastructure development conducive to economic and social development	Transportation and urban development	<ul style="list-style-type: none"> Transport sector program
	Power and energy sector development	<ul style="list-style-type: none"> Energy sector program
3. Improvement of Governance and the Public Service Delivery	Strengthening administrative and fiscal management capabilities	<ul style="list-style-type: none"> Local governance reform support program Public financial management support program
	Improvement of administrative services	<ul style="list-style-type: none"> Program for strengthening health systems Water supply enhancement program Others

[Modified]

Basic policy: Promoting economic and social development towards inclusive and sustainable economic growth		
Priority areas	Development issues	Cooperation programs
1. Nurturing and expanding the base of sectors that drive economic growth	Agriculture, fisheries, and livestock	<ul style="list-style-type: none"> Commercialization and industrialization promotion program Rice production promotion program Others (fisheries and livestock)

	Industrial development, industrial human resource development, and startup support	<ul style="list-style-type: none"> ▪ Industrial development program
2. Improving the environment to support economic and social development	Basic infrastructure development	<ul style="list-style-type: none"> ▪ Transport sector program ▪ Energy sector program
	Urban environmental improvement	<ul style="list-style-type: none"> ▪ Urban development program
	Financial management system	<ul style="list-style-type: none"> ▪ Public Financial management support program
3. Realization of an inclusive and fair society	Youths, women, and local communities	<ul style="list-style-type: none"> ▪ Program for strengthening local governance to realize inclusive and fair development ▪ Program for strengthening health system ▪ Others

Specifically, from the perspective of supporting the achievement of the SDGs, the above-mentioned programs will utilize Japan's experience and expertise to promote commercial agriculture (Goals 1, 2, and 12), develop irrigation systems (Goal 13), and promote the Blue Economy Strategy (Goal 14). In addition, JICA will expand its cooperation to support the development of the corporate sector and SU ecosystem (Goals 8, 9, and 17), to develop infrastructure in the Dar es Salaam metropolitan area and Dodoma City (Goals 3, 6, 7, 11, 13, and 17), and to strengthen transmission and distribution lines associated with the development of electric power (Goals 7, 9, 11, 13, and 17). It will also cooperate in ensuring stable water supply and integrated water resource management (Goals 5, 6, 10, and 13), further improving public finance (Goal 17), upgrading the quality of local government services and bolstering the inclusiveness of communities (Goals 5, 10, 16, and 17), and providing better health services (Goals 3, 5, and 10).

2.3 JICA's cooperation policy

2.3.1 Agriculture: Commercialization and industrialization promotion program

In order to meet rapidly growing domestic demand and establish regional food security, JICA will strive to advance the development of agricultural value chains (VCs) and promote exports as well as commercialization and industrialization, thus improving farmers' incomes and agricultural exports. Specifically, JICA aims to promote market-oriented agriculture nationwide, support medium- and long-term asset financing through Tanzania Agricultural Development Bank and commercial banks, and contribute to strengthening the entire value chains of agriculture by furthering agricultural mechanization, including the introduction of Japan's advanced technologies. It will also work to increase the production of commercial crops as well as marine and livestock products and improve the quality of such products and their VCs. In order to achieve the Agricultural Sector Development Programme Phase II (ASDP II) and the Agricultural MP, JICA will provide effective sector development support while utilizing its experience and expertise and making the most of its past assets. This is consistent with the JICA Global Agenda (JGA) "Agricultural and rural development" and the Cluster Strategy "Smallholder Horticulture Empowerment & Promotion (SHEP)."

2.3.2 Agriculture: Rice production promotion program

JICA aims to build climate-resilient rice production systems, achieve goals of the Coalition for African Rice Development (CARD) and the National Rice Development Strategy (NRDS), and strengthen regional food baskets. In addition, in line with ASDPII and the Agricultural MP, JICA will promote the improvement of cultivation techniques, mechanization, and dissemination of quality seeds to increase productivity and contribute to strengthening irrigation development and management. JICA will utilize partnerships with other donors (including JICA's first Results Based Loan) to disseminate the results of its cooperation. Furthermore, through the implementation of the EAC Rice Development Strategy (ERDS), JICA will address challenges of production, distribution, and marketing and contribute to achieving rice self-sufficiency in the EAC region. This is in line with the JGA "Agricultural and rural development" and the Cluster Strategy "Coalition for African Rice Development (CARD)."

2.3.3 Industrial development, industrial human resource development, and startup hub support: industrial development program

In order to solve the issues listed in TDV2050, JICA will strive to create jobs by fostering industrial human resources, improving the business environment, and supporting the diversification and advancement of industries while contributing to the development of a resilient and inclusive economy. JICA will strive for the improvement of the business environment such as promoting private investments including attracting foreign direct investments, supporting quality and productivity improvements for SMEs through business development services (BDS) and *KAIZEN*, and providing better access to finance. In addition, JICA will support job creation for young people and improve labor productivity by supporting the development of highly skilled human resources who meet the needs of industry and can be immediately effective and will promote support for SUs and the tourism industry, which have a high capacity to absorb employment. This is consistent with the JGA "Private sector development," the Cluster Strategy "Africa *KAIZEN* Initiative," and "Support for entrepreneurs to create business innovation (Project NINJA (Next Innovation with Japan))," and the JGA "Digital for development."

2.3.4 Basic infrastructure development: Transport sector program

In particular, JICA considers the development of the Northern and Central Corridors as one integrated growth ring, and by securing and promoting the use of domestic road networks and public transportation, it will work to enhance regional connectivity. This will help reduce traffic congestion and reduce CO2 emissions. JICA will improve logistics in its tangible and intangible aspects to promote it and advance the enhancement of traffic safety and maintenance and management capabilities. Based on the "Dar es Salaam Urban Transport MP," it will cooperate in alleviating congestion in Dar es Salaam and promote infrastructure development to contribute to the future development of Dodoma, to which the capital functions are moving. Furthermore, using the EAC wide-area infrastructure advisors as a bridge, JICA will lead the organization of wide-area projects in the EAC area by engaging with the Programme for Infrastructure Development in Africa (PIDA) including OSBP, collaborating with JICA offices in neighboring countries, the African Union (AU), the African Union Development Agency-New Partnership for Africa's Development (AUDA-NEPAD), and other donors. This is consistent with the JGA "Transportation" and the Cluster Strategy "Building global networks."

2.3.5 Basic infrastructure development: Energy sector program

In order to achieve the National Energy Compact adopted in January 2025, JICA will promote measures against climate change, including securing a stable power supply and spreading clean energy. The top priorities to meet rapidly growing demand are development planning, power source development, infrastructure development, and human resource development. In cooperation with other donors, JICA will focus on (1) formulation of national-level development plans, (2) diversification of the power mix, including renewable energy, (3) development of power transmission and distribution networks, including internationally interconnected transmission lines, and (4) human resource development at the power utility and geothermal development corporation. Furthermore, it will work on (5) rural electrification/connectivity and (6) promotion of clean cooking using technology of Japanese businesses, and the utilization of natural gas will be promoted on the premise of environmental consideration. It is necessary, however, to take action in a manner that takes into account discussions by the international community such as the Leaders' Communiqué at the G7 Elmau Summit. Therefore, support for the development of thermal power generation using fossil fuel such as natural gas requires careful consideration, including confirmation of other donors' policies and dialogues with the Japanese government. This is in line with the JGA "Energy and mining" and the Cluster Strategies "Strengthening power transmission and distribution networks" and "Promoting the introduction of new and renewable energy."

2.3.6 Urban environmental improvement: Urban development program

For the sustainable improvement of urban functions, JICA will help enhance urban development management capabilities such as formulating medium- and long-term plans and promoting transit-oriented development (TOD) while promoting the enhancement of public transport functions to reduce traffic congestion, the development of infrastructure, and improvement of the living environment. With regard to urban infrastructure such as waste management and water supply and sewerage systems, based on the results of cooperation to date, JICA will continue to cooperate with Zanzibar in the improvement of urban water supply and the comprehensive management of water resources. The Agency will also work to improve urban infrastructure in Zanzibar, taking into account the assistance provided by other donors. JICA will also consider the development of urban water supply on the mainland. This is consistent with the JGA "Urban and regional development" and the Cluster Strategy "Cities for people," the JGA "Environmental management," the JGA "Sustainable water resources management and water supply," the Cluster Strategy "Practical integrated water resources management to resolve water-related issues in the field," the JGA "Transportation," and the Cluster Strategy "Promotion of urban public transport."

2.3.7 Financial management system: Public Financial Management support program

JICA will strive to stabilize the macroeconomy and improve debt sustainability by solidifying and diversifying the revenue base and enhancing budget management capabilities. In order to build a fair and efficient administrative infrastructure, it will promote the enhancement of fiscal management capabilities and the development of human resources. JICA will work to diversify the revenue base, including the enhancement of capabilities to increase tax revenues through the improvement of appropriate tax collection capabilities and the development of human resources and/or the enhancement of autonomous financing capabilities to meet the needs for increased

development spending. This is in line with the JGA "Public finance and financial systems" and the Cluster Strategy "Strengthening the national fiscal foundation."

2.3.8 Youths, women, and local communities: Program for strengthening local governance to realize inclusive and fair development

JICA will strive to promote inclusive and fair social development, ensure economic growth, and reduce regional and income disparities by strengthening local governments and communities. In particular, it will work to bolster administrative services from the perspective of youth, women, and persons with disabilities. JICA will promote regional revitalization and co-creation between Japan and Tanzania by further institutionalizing participatory planning and project implementation methods (improved O&OD) that have taken root nationwide and making effective use of JICA's assets such as human resources developed, and frameworks established, through years of cooperation. In addition, in cooperation with the World Bank's support for the reform of the civil service system, JICA will consider cooperation in the development of human resources in local administration, decentralization, and improvement of local administration services. This is consistent with the JGA "Governance" and "Social security/disability and development."

2.3.9 Youths, women, and local communities: Program for strengthening health system

In order to realize an inclusive and fair society, JICA will work to empower people in vulnerable positions, including women and youth, by strengthening health and medical services. It aims to promote maternal and child health services and reproductive health and reduce maternal, newborn, and infant mortality by strengthening the management of regional referral hospitals (RRH) and providing equipment to RRHs. By sharing the 5S-Kaizen-TQM approach over a wide area, JICA aims to improve the quality of health and medical services and provide support for achieving Universal Health Coverage (UHC). In accordance with the government policy of TICAD8 and G7, JICA will consider co-financing through Results Based Loan with other donors. This is consistent with the JGA "Health and medical care" and the Cluster Strategy "Strengthening diagnosis and treatment capacity of core hospitals."

Chapter 3 Points to note when providing cooperation

3.1 Cross-sectional matters

3.1.1 Climate change

In the African region, Tanzania is highly vulnerable to climate change as exemplified by increased floods and droughts due to rising temperatures and changing rainfall patterns. It has established the National Climate Change Response Strategy (2021-2026) and the National Disaster Management Strategy (2022-2027) and has set out and begun efforts to establish an institutional framework for intervention measures to strengthen resilience to climate change, disaster risk management, and loss reduction. Natural gas emits half the GHG emissions of charcoal, which is currently widely used, and by shifting from the use of charcoal, Tanzania aims for further utilization of natural gas and use of renewable energy, which are expected to reduce GHG emissions.

JICA will promote the utilization of green energy, smart agriculture, climate-resilient infrastructure development, and climate change finance taking into account the target of reducing greenhouse gas emissions, an NDC, and the need for adaptation to climate change. This is consistent with

the JGA “Climate change” and the Cluster Strategies “Promoting the implementation of the Paris Agreement” and “Co-benefits of climate change.”

3.1.2 Gender Equality and Women’s Empowerment

According to the ranking of the Global Gender Gap Index (GGGI) by the World Economic Forum, Tanzania ranks tenth in Africa and 54th in the world (out of 146 countries, 2024), which is relatively high. In the field of education, however, the country ranks only 114th in the world, making the gap in education and employment between men and women after higher education especially problematic. In the UNDP Gender Inequality Index (GII), Tanzania is low, at 131st (out of 166 countries, 2022). The rate of first marriage up to age 18 is 30.5% (2016), the early pregnancy rate is about 27% (2021), and the number of victims of sexual and gender-based violence (SGBV) is also growing, showing wide regional disparities. In light of the situation described above, JICA will carry out activities with gender equality in mind in all projects.

In addition, JICA will support the empowerment of women through sports and the promotion of sports through the women's athletic competition "Ladies First" and other events and work to promote gender equality in the areas of economic independence, education, health, and security. This is consistent with the JGA “Gender equality and women's empowerment” and the Cluster Strategy “Elimination of sexual and gender-based violence” as well as the JGA “Sport and development” and its pillar “Promoting social inclusion and peace through sport.”

3.1.3 Disabilities

According to the 2012 population and household survey, 9.3% of the total population of Tanzania had some form of disability or other. The Tanzanian government ratified the UN Convention on the Rights of Persons with Disabilities in November 2009 and established several legal frameworks, including the act on persons with disabilities, which aims to incorporate the rights enshrined in the Convention into domestic law. On the other hand, laws and policies are not effectively implemented due to the lack of knowledge and understanding among key actors working on disability issues, including experts and administrators. In light of this, the revised JCAP will consider promoting the mainstreaming of disabilities to ensure the participation of persons with disabilities as beneficiaries or implementers in all cooperation projects.

3.1.4 Digital Transformation

In each cooperation program, JICA will strive to consider utilizing data and digital technologies (including artificial intelligence). In the agriculture (including fisheries and livestock), transportation, and electric power sectors in particular, JICA will strive to consider developing data linkage platforms as a digital public infrastructure (DPI) that will contribute to increasing the momentum and development impact of Digital Transformation (DX) through the utilization of industry-wide data, and in the electric power, transportation, and other sectors, the Agency will strive to consider enhancing digital capabilities at the level of partner governments and public corporations. In the industrial development field, JICA will consider co-creation with private enterprises and SUs that are engaged in development support. This is in accord with the JGA "Digital for development."

3.1.5 Collective impact with private enterprises

The domestic political and economic situation is stable, and Japanese businesses are very interested in Tanzania. There are a certain number of influential local enterprises in the agricultural and industrial fields in the country. Japanese and local businesses will work together to contribute to solving development issues in Tanzania while utilizing SME support schemes, ,private-sector partnership projects and so forth.

3.2 New case of co-creation (case with Nagai City, Yamagata Prefecture)

JICA will implement a regional co-creation project between Tanzania and Nagai City in Yamagata Prefecture with the aim of solving problems for both sides. As an example, JICA will offer vocational training opportunities at the Nagai Technical High School to students of the Vocational Education and Training Authority (VETA) of Dar es Salaam as a pilot program and make proposals for solving the problems of both institutions: the shortage of instructors and equipment at VETA and the shortage of personnel at the Nagai Technical High School. JICA also aims to contribute to Nagai's manufacturing industry in the future by studying the possibility of employment in Japan for young Tanzanians.

3.3 Tax exemption issue

In light of the issue of exempting corporate tax, value-added tax (VAT), fuel tax, and other taxes in several grant-aid projects that have occurred in the past, it is necessary to continue discussions with the partner government to speed up the procedures for tax exemption.

End