

THE NATURE AND ROLE OF LOCAL BENEFITS IN GEF PROGRAMME AREAS

**CASE STUDY
TANZANIA – ZANZIBAR**

**JOZANI-CHWAKA BAY
CONSERVATION
PROJECT**



GEF

**GLOBAL ENVIRONMENT FACILITY
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Red Colobus Monkey: Jozani Forest, Zanzibar¹

Pictures removed

¹ All pictures courtesy of Ms. Priya Kalsi (August 2004)

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This report has been prepared for the Office of Monitoring and Evaluation of the Global Environment Facility (GEFME). The findings, interpretations, and conclusions expressed in this paper do not necessarily reflect the views of the GEF Secretariat, UNDP or the Governments of Tanzania and Zanzibar

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Acknowledgement

The study team would like to express gratitude to the communities living around Jozani-Chwaka Bay National Park and other stakeholders for their willingness to give their time to participate in this study and patience in answering our many questions.

Many thanks to the staff of CARE Tanzania Jozani Chwaka Bay Conservation Project, Director and staff of the Department of Commercial Crops, Fruits and Forestry, and UNDP Tanzania for imparting their knowledge, enthusiasm, provision of logistical support and most of all their patience – this report has been long overdue.

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November 2004.

Executive Summary

This report describes the outcomes of a case study designed to understand types and scale of local livelihood benefits and the relationship between local livelihoods benefits and global environmental benefits accruing from the Global Environment Facility's (GEF) support to the Jozani-Chwaka Bay Conservation Project (JCBCP). The study is part of a broader series of case studies supported by the GEF Office of Monitoring and Evaluation to assess the linkages between local and global benefits in GEF programme areas.

JCBCP was selected as a case study because of its potential for demonstrating strong linkages between improvements in local livelihoods and the attainment and sustainability of global environmental benefits. Therefore, implementation experience has the potential to yield important findings, and lessons³.

The study team for implementing the case study was lead by GEFME specialist and supported UNDP/GEF M&E specialist. Fieldwork and analysis was undertaken by a locally based natural resources specialist.

The overall conclusion of the study team are that JCBCP generated significant local livelihood benefits:

Natural capital in the JCBCA has improved as evidenced by the reversal in JCBCA ecosystems deterioration. The main indicative achievements here are the marked increase in the number of Red Colobus monkeys and recovery of the Ader's Duiker populations coupled with halt in encroachments into the JCBCA. The conservation area was also successfully gazetted as a National Park in 2004 with the agreement of national and local stakeholders. Other improvements (or potential for improvements) were observed in the operationalization of VCCs by the communities and DCCFF to establish co-management of forest resources to regulate access and use. Immediate improvements in community access to natural capital were evidenced by increased access to ground water, woodfuel and building materials through agro-forestry.

Financial capital improvements have been the most visible impact of the project. The project has enabled individuals / households to increase to the productivity of existing sources of livelihoods. More importantly, the project enabled opportunities for alternative livelihood activities in areas such as improved farming (mushroom growing), mariculture, agroforestry and ecotourism. This has lead to increases in cash incomes and improvements to the ability to save and access capital. The establishment of savings and credit groups, local capacity building and marketing have significantly influenced the development and success of income generating opportunities made by households.

Social and institutional capital improvements were evidenced in development of community-level institutional most notably the savings and credit and IGA groups and the VCCs. The ability of community members has improved in terms of the effectiveness to interact with GoZ departments (particularly the DCCFF) and the private sector to market / sell their goods. There have been considerable improvements to social equity at the local level, especially through the empowerment of women in financial decision-making, but also in allowing women to finance issues that are critical to them (e.g. health and education).

Physical capital improvements were evidenced by investments in water supply, social infrastructure such as health and school buildings and tourist visitor facilities that include a souvenir shop and visitor centre and a mangrove boardwalk. These developments have greatly improved access to clean water in the villages, health and education services where previously these services were limited or non-existent.

³ This report contains no direct recommendations to the Government of Zanzibar or CARE

Human capital improvements were evidenced by the development of skills and knowledge for income opportunities, household and group financial management and importantly co-management of resources through VCCs. Notably the project paid particular and explicit attention to the role of women that emphasized issues such as functional literacy, confidence building, management and leadership skills of women within and outside their respective savings and credit and IGA groups.

All of the improvements in the livelihood capitals have contributed to reduced **vulnerability and improved community resilience** to natural disasters, environmental degradation and variability, food shortages, socio-political and market disruptions. Community respondents particularly emphasized improved capabilities to deal with illnesses; bereavements; weddings, putting children into school and accessing paid medical services; improved quantity and quality of food.

The **policy and political environment**: the JCBCP experience has demonstrated that the development of an effective policy and institutional environment is essential for effective conservation efforts at the local level. This has not been a straightforward issue and is a factor that has evolved with continuous dialogue among the project, communities and the GoZ. The existence of a national policy and institutional structure now has the potential for wider application in the co-management of many other community related protected areas within Zanzibar and Pemba.

Linkages between local and global benefits: the project was based on two related linkage assumptions contained within the a hypothesis:

“Increased household savings and income will increase household livelihood security and reduce pressure on natural resources and lead to the sustainable conservation of biodiversity, in the context of strong and environmentally aware community and government institutions, strong community based natural resources management, and environmentally sound criteria for the provision of financial and non-financial business services.”

1. Improvements in income and employment opportunities **lead to** reduced pressure on natural resources and sustainable biodiversity conservation;
2. Improvements awareness and knowledge, and community management of natural resource and other non-financial benefits **lead to** reduced pressure on natural resources and sustainable biodiversity conservation.

With regard to the first assumption the results indicate that household savings and income earning opportunities and to lesser extent employment has increased in many of the villages around JCBCA. Also communities are well aware that JCBCA is a source of income through tourism revenue sharing scheme, CDF projects and farmer compensation scheme. But, it is clear that the links between IGAs and savings and credit groups activities and conservation are not sufficient to reduce dependence on natural resources⁴. The results show 58% of households depend on multiple livelihood activities hence a substitution is likely to be imperfect and may act as an addition to ongoing use of natural resources for livelihood security. Moreover, 70% of households still depend on the forest for woodfuel. Therefore, the study team conclude that there is no clear substitution or trade off between improved income and employment opportunities and reduced pressure on natural resources. Hence, primary assumption of the hypothesis is unproven.

The second assumption encompasses the broad institutional and non-financial interventions of JCBCP and they have contributed to improved community attitudes towards the JCBCA (CARE, 2003) and acceptance of the National Park gazettement. What is beginning to emerge now are the first signs of the sustainable conservation of biodiversity, in the context of strong and environmentally aware community and government and local institutions engaging in co-management of Jozani-Chwaka National Park. The caveat here must be that institutions such as the VCC and the

⁴ This results is supported by Hartley et al (2003)

CFMA / RUMA agreements are yet to be fully operationalized, but there is strong potential for the development of sustainable biodiversity conservation management based on partnership between communities and GoZ⁵. The study team concludes the non-monetary benefits of co-management for provision of regulated access and use of forest resources is likely to have greater influence on links between local livelihoods and global environmental benefits than financial benefits.

It is important to view the JCBCP interventions holistically and the evidence shows that in a situation where the global goal is to conserve the biodiversity of resources that have high local demand and potential values, and are under a range of development pressures then ensuring a wide range financial and non-financial local livelihood benefits is a prerequisite for moving towards global environmental benefit. Hence, when the both assumptions are working together the hypothesis is proven.

Key Lessons for GEF:

- ▶ The global goals will only be realized on a scale needed to preserve the integrity of the ecosystems where local communities have become active agents of conservation management;
 - Local communities are far more willing to be active agents of conservation where they see direct and indirect benefits accruing to them from their participation. Participation alone is not enough to guarantee changes in behaviour necessary to sustain biodiversity;
 - Non-monetary benefits are just as important as monetary (i.e., income and employment benefits) in forging links mutually supportive links between local benefits and global environmental benefits;
 - Market analysis and appropriate local capacity building and key for the design and success of alternative livelihoods / new IGAs;
- ▶ National enabling conservation policies and legislation are critical to secure local benefits streams, particularly in relation to tourism revenue sharing, co-management and access, and sustainable use of resources;
- ▶ Protected area institutions are difficult to establish and maintain and have initial and longer term transaction costs given that benefits from conservation are not always apparent and stable. Community ownership has been critical in design and implementation of local conservation institutions charged with co-management;
- ▶ Understanding the balance of rights, responsibilities and returns to each participating party is an important tool in resolving resource conflicts;
- ▶ Social assessment / baselines can provide critical inputs into design and targeting livelihood / conservation interventions to enable local – global linkages;
- ▶ Partnership with NGOs with strong rural development / natural resource management and community focused approach may improve the design and implementation of GEF biodiversity projects (particularly MSPs) to enable local – global linkages
- ▶ Sustainable local – global linkages take time and are unlikely to be observed over short project timeframes (i.e., 3 – 5 years). This indicates the advantage of multi-phased approach taken in the case of JCBCA.

⁵ Therefore allowing for the management of the majority of woodfuel supply which comes from the forest.

Acronyms

CBO	Community Based Organization
CBNRM	Community Based Natural Resource Management
CCF	Country Cooperation Framework
CDF	Community Development Fund
CFMA	Community Forest Management Agreement
CNR	Commission for Natural Resources
DCCFF	Department of Commercial Crops, Fruits and Forestry
FINNIDA	Finnish International Aid and Development Agency
GEF	Global Environment Facility
GoT	Government of Tanzania
GoZ	Government of Zanzibar
IGAs	Income Generating Activities
ICDP	Integrated Conservation and Development
JCBCA	Jozani-Chwaka Bay Conservation Area
JCBCP	Jozani-Chwaka Bay Conservation Project
JECA	Jozani Environmental Conservation Association
JODCO	Jozani Conservation and Development Organizations
JOSACA	Jozani Savings and Credit Association
MMD	Matu Masu Dubara (“women on the move”)
MSP	Medium Sized Project
PIR	Project Implementation Report
Prodoc	Project Document
PRSP	Poverty Reduction Strategy Paper
PSD	Program Support Document
RRA	Rapid Rural Appraisal
RUMA	Resource Use Management Agreement
SONARECO	Society of Natural Resources Conservation and Development
M&E	Monitoring and Evaluation
NGO	Non Government Organization
S & C	Saving and Credit
TE	Terminal Evaluation
TORs	Terms of Reference
UNDP	United Nations Development Program
VDC	Village Development Committee
VCC	Village Conservation Committee

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A. BACKGROUND

A.1 The GEF Local Benefits Study

The GEF is presently conducting a portfolio wide study designed to explore and understand better the interrelationship between local livelihoods benefits of GEF-supported interventions and the attainment of global environmental benefits. The GEF mandate incorporates the role of local benefits through its emphasis on sustainable development: *“The GEF shall fund programmes and projects which are country-driven and based on national priorities designed to support sustainable development”*. Furthermore, both the UNDP and the World Bank, as GEF Implementing Agencies, have policies that formally link their environmental activities to poverty reduction. In this study, local benefits are defined as:

“Project outcomes, which directly or indirectly have positive impacts upon people and ecosystems within or adjacent to project areas, and which provide tangible gains in the livelihoods of communities and the integrity of ecosystems.”

The study is designed to explore the following dimensions of selected projects in the GEF portfolio:

- ❖ The nature of links between attaining **global environmental benefits and generating local benefits**. This is based on an analysis of how global environmental benefits can affect benefit streams at the level of project area communities and how the generation of local benefits can affect the attainment and sustainability of global environmental goals. **Global environmental benefits** of the projects are assessed in relation to specific project design objectives.
- ❖ The types and scale of **local (livelihoods) benefits and of any negative impacts**, intended or unintended, which have resulted from GEF projects, including local perceptions of these impacts.
- ❖ The extent to which project design and the environmental management options selected in the project **can maximize opportunities** to generate greater levels of local benefits, or can **miss** or not sufficiently exploit such opportunities.

The justification for examining these issues is to assist in increasing the long-term sustainability of global benefits in sensitive areas by enhancing the level of direct and tangible gains accruing to local communities and actors in future GEF policy, strategies and programmes, within the requirements of the GEF mandate. Specifically, the overall **purpose** of the study is to contribute towards:

- ❖ Enhancing GEF **policies, strategies and project design and implementation**, in order to fully realize the potential for local gains in global environmental programmes, to mobilize local actors for long term support to sound environmental management, to reduce local costs incurred by local communities for supplying global environmental goods, and to ameliorate possible negative impacts.
- ❖ Strengthening GEF **M&E policies and processes** to identify indicators for and strengthen the tracking of local benefits and negative impacts.
- ❖ Expanding the body of existing **operational knowledge** about **good practices** and experiences germane to pursuing global environmental issues, and of constraints or fallacies to be avoided in operations.

The study has a multi-phased **methodology**. In its preparatory phase, a detailed desk review of 127 GEF projects was completed, as well as a review of international donor and NGO experiences of local livelihood benefits in sectors covered by the GEF portfolio. In the second phase, field-based case studies of 18 GEF projects are being undertaken in ten countries and a further 27 projects are being examined through existing project documents, evaluations and external studies.

The specific objective of this field case study is to:

- ▶ Understand the relationship/linkage between local benefits (and/or negative impacts/miss opportunities) and the attainment of global environmental benefits of the GEF Jozani Chwaka Bay Conservation Project.

The Jozani-Chwaka Bay Conservation Project (JCBCP) in Zanzibar (Tanzania) was selected as a pilot case study because of the anticipated strong potential for demonstrating linkages between improvements in local livelihoods and the attainment and sustainability of global environmental benefits, and therefore for providing important findings, lessons and recommendations both for GEF and JCBCP (see Annex 1 and 2).

The case study was conducted by a study team consisting of GEF M&E Specialist (Team Leader), UNDP /GEF M&E Specialist and an independent consultant with a background in social sciences. The independent consultant led the main fieldwork phase data collection and analysis.

A.2 Overview of GEF support to JCBCP

Project Name:	Jozani-Chwaka Bay Conservation Project
Project Type:	Medium Sized Project (MSP)
GEF Implementing Agency (IA):	UNDP
Project Proposer (Executing Organisation):	Department of Commercial Crops, Fruits and Forestry; CARE International and; Jozani Environmental Conservation Association
GEF Focal Area:	Biodiversity
Total Cost:	\$1.5925M (US)
GEF Financing:	\$0.7475M
Co-Financing (from Ford Foundation; McKnight Foundation; Government of Austria; Government of Zanzibar):	\$0.830M
GEF Operational Programme:	OP2 – Coastal & Marine and Wetland Ecosystems OP3 – Forest Ecosystems

The **global environmental goal of JCBCP MSP** is to conserve the biodiversity of Jozani Forest and Chwaka Bay (see Figure 1) that contains areas of coastal swamp and coral rag forest that are unique as well as important areas of mangrove forest. The forest area also contains three globally important endemic species the Red Colobus Monkey, Ader’s Duiker and the Zanzibar Leopard.

Several development partners supported the project. The GEF-UNDP component focused on biodiversity conservation through Community Based Natural Resources Management (CBNRM), strengthening the communities’ natural resources and community organizations, training and infrastructure development. The Government of Austria, CARE, the Ford Foundation and McKnight Foundation focused on income generating activities (IGAs).

The main project partners were CARE – Tanzania, the Government of Zanzibar through the Department of Commercial Crops, Fruits and Forestry (DCCFF) and the communities adjacent to the project area organized under Jozani Environmental Conservation Association (JECA). The project began implementation in 2000 and was completed in mid –2003.

Figure 1: Zanzibar and the Project Area

Map removed

The goal for the project was:

- ❖ To ensure that the core conservation area (The proposed National Park) within the Jozani Chwaka Bay Conservation Area (JCBCA) (containing both biodiversity conservation and community development) is effective, productive, harmonized and sustainable in the longer term (see Annex 3).
- ❖ The immediate goals were:
 - ▶ The biodiversity of the Jozani Chwaka Bay is protected managed and utilized sustainably; and
 - ▶ The livelihood security of communities adjacent to Jozani Chwaka Bay is enhanced.
- ❖ Sub-level outcomes:
 - ▶ Jozani Chwaka Bay⁶ is gazetted and managed as a National Park under relevant legislation;

⁶ Jozani Chwaka Bay will be referred to as 'Jozani' and JCBCA hereafter.

- ▶ Institutions involved in natural resource management of Jozani are strengthened and enhanced;
- ▶ Financially, socially and ecologically sustainable protected area management systems are in place at the JCBCA;
- ▶ The decline in rare and endangered fauna and flora is halted and recovery promoted while knowledge of Jozani biodiversity is increased;
- ▶ Jozani adjacent communities are committed to and empowered to manage and benefit from their own resources;
- ▶ Implementation of legislation and policies appropriate to conservation and development of Jozani area advocated; and
- ▶ Jozani adjacent communities develop appropriate alternative income generating activities which reduce community dependence on natural resources and assist in community development.

The project intended to carry out the following activities:

- ▶ Establishing the Jozani Chwaka Bay National Park (GEF Funded);
- ▶ Building capacity of institutions involved in the management of Jozani (Ford Foundation; Government of Austria and GEF Funded);
- ▶ Developing and implementing a Protected Area management system that is socially, ecologically and financially sustainable (GEF and GoZ Funded);
- ▶ Developing and implementing biodiversity recovery plans for key species (e.g. Red Colobus and Ader's Duiker) (GEF Funded);
- ▶ Developing CBNRM to empower local communities to manage and benefit from their resources (Government of Austria and GEF Funded); and
- ▶ Assisting the GoZ to implement the policy and legislation for the appropriate management and development of Jozani (GEF Funded).

A.3 Jozani Chwaka Bay Conservation Area (JCBCA)

This section will provide background on the globally important biodiversity of the JCBCA and key threats.

The Jozani Forest Reserve has existed since the 1940s when the forest was logged and part replanted to form a plantation. Only in the early 1990s did the GoZ recognize it as 'biodiversity hotspot'.

The JCBCA consists of a protected core area of 56sq km and buffer in excess of 80 sq km. The biodiversity of Jozani includes a unique swamp forest. This is a coastal forest on coral rock with shallow humic soils, and a high water table. It floods seasonally, creating a forested wetland for bird species, aquatic invertebrates, amphibians and freshwater crab. The area is home to three endemic and globally threatened mammal species, the Zanzibar Red Colobus, and the Ader's Duiker, possibly found only in one other location (Arabuko Sokoke Forest, Kenya). Both species are dependent on Jozani Forest. The Zanzibar Leopard, a distinct race of leopard, which is smaller when compared to mainland species, has not been reliably recorded for a number of years and may be extinct. The area also contains coastal endemic birds, reptiles, invertebrates and plants.

The Jozani area is also important as it contains a range of coastal habitats in close proximity. The area shows an ecological transition from dry evergreen thicket on coral rag through closed evergreen forest, to wet swamp forest and wetland and eventually the mangroves fringing Chwaka Bay. It includes additional coastal habitats including sea grass beds and mudflats. Chwaka Bay is a shallow open bay, and is itself a unique geophysical feature. The bay supports the largest block of mangrove forest on Zanzibar and an internationally important wintering population of the Crab Plover. Bird-Life International recognizes it as an Important Bird Area (IBA), and the area meets

the criteria for an internationally important wetland area under the RAMSAR convention. The buffer zone of the protected area includes an area of coral reef.

The threats to the ecosystem are:

- ▶ Loss of habitat and degradation of the forest resource due to encroachment and over harvesting both for subsistence and commercial uses by surrounding communities;
- ▶ Increasing human population numbers and declining livelihood security causing communities to escalate exploitation of the Jozani swamp and mangrove forests;
- ▶ Loss of soil fertility and;
- ▶ Dwindling wildlife populations⁷ caused by uncontrolled hunting.

Presently, the main threat to Jozani is the demand for fuel wood used for making charcoal which is used commercially and domestically in Zanzibar town: Green mangrove wood from Jozani forest is specially preferred by bakeries in Zanzibar town because it is slow burning and is ideal for bread baking. The forest is also illegally logged for building poles for house construction and more recently, for constructing hotels⁸. A recent study on fuel wood and energy use in Zanzibar concluded that 70% of fuel wood supplied to Zanzibar town comes from the south of the island, an area that includes JCBCP (Owen, 2002: i)⁹. Inevitably there is some illegal poaching of fuel wood within Jozani that if not managed or monitored effectively could threaten the forest in the future¹⁰. The study on fuel wood/energy use concluded that:

“In spite of the large volumes of charcoal imports, rates of woodfuel harvesting within Unguja are thought to exceed sustainable yield by a factor of about three. The high rate of commercial woodfuel extraction with Zanzibar, especially of charcoal, means that local woodfuel sources are rapidly disappearing. The most distant high forests and the more inaccessible mangrove areas on Unguja are now heavily targeted by charcoal makers.”

The report further concluded that fuel wood trade was uncontrolled:

“The laws controlling woodfuel harvesting and transport are comprehensive. But abuse is rife and the government has effectively lost control over the commercial wood trade. Current policy is failing to manage wood resources sustainably or generate any significant revenue for either the state or for local communities in wood fuel source areas.”

Obviously, the wider issue of fuelwood / energy supply in Zanzibar is one that the study team believes has long term implications for JCBCP and is further discussed in subsequent sections of this report (See Section C).

JCBCA was officially gazetted as Jozani Chwaka Bay National Park on the 27th February 2004 (see Section A.6).

A.4 Local Communities

This section provides a profile of the local communities that live adjacent to JCBCA (see Figure 2) and their livelihoods (see also Section C.2).

⁷ For example the Zanzibar Leopard was on verge (if not already) extinct, and Aders duiker critically endangered due to hunting.

⁸ DCCFF/CARE discussions

⁹ Owen’s observations are broadly similar to an earlier study conducted by R. Masoud (1991).

¹⁰ Society of Natural Resources Conservation and Development - SONARECO

Figure 2: JCBCA and Adjacent Communities¹¹

Map removed

There are 9 villages surrounding the Jozani Forest area, 8 of which were under the GEF /UNDP project. The villages are Bwejuu, Charawe, Cheju, Chwaka, Ukongoroni, Unguja Ukuu, Pete, Michamvi, and Kitogani (see Figure 1). Community livelihoods are mainly based on subsistence agriculture (rice cultivation, maize, cassava, bananas, and coconuts) and rearing small livestock, such as goats and sheep and chicken. In the coastal villages, fishing and seaweed farming supplement subsistence activities mentioned above. Other activities include making charcoal and collecting fuel wood, and building poles, for domestic consumption and trading.

Until the commencement of the JCBCP, the Red Colobus monkeys were considered a threat, raiding people's small farms (shambas) and destroying banana, coconut and maize and other crops. The

¹¹ UNDP (2000: 25)

impact of the crop damage was considerable and the monkeys were very unpopular. The reaction of the farmers was to kill the monkeys to protect their crops and as result their population was under threat of extinction. Legal instruments were initiated to declare them a protected species, but these were largely ineffective. It became important to make the community understand the importance of the Red Colobus, both for biological diversity as well as tourism potential.

Therefore, the main motives for working with local communities were twofold. First, to reduce pressure on forest resources through farming and timber and fuel wood extraction thus preserving the habitat for Red Colobus and other fauna; and second, to conserve the Red Colobus by reducing and even removing the threat to their extermination (see Section A.5).

A.5 Project Context

This section provides an overview of the project's historical, institutional and policy background, and outlines donor priorities.

A.5.1 Project Historical Context

Conservation efforts at Jozani began modestly in 1990 with the decision by the Government of Zanzibar (GoZ) to stop commercial timber harvesting. In 1995 the Jozani Chwaka Bay Conservation Project (JCBCP) (Phase I) was established between the DCCFF (formerly the Commission for Natural Resources) with the aim of preserving the forest and key species such as Red Colobus Monkey.

Box 1: Phase I Implementation (1995 – 1997)

Long term Objective: The sustainable long-term conservation of the biodiversity of Zanzibar Islands, in particular the last remaining groundwater forest zones and connected fauna, to improve the long-term living conditions of the population of Unguja Island.

Project Goals:

- 1) Assist the Zanzibari Government in creation, development and management of Jozani Forest and Chwaka Bay Mangroves NCA;
- 2) Improve the local economy and living conditions through eco-tourism activities and through advice in sensible use of those zones of the NCA which are dedicated for sustainable use by local communities; and
- 3) Create awareness of the importance of protecting natural resource through extension, training and conservation education "on-site".

Achievements:

- ▶ Established project partnership between CARE Tanzania and Commission Natural Resources, Zanzibar (now DCCFF);
- ▶ Increased capacity of Commission staff;
- ▶ Secured retention of 30% Jozani revenue for running the PA;
- ▶ Approved proposal and management plan for upgrading of Jozani Forest Reserve to a national park;
- ▶ Modest improvement to local economy through developing ecotourism (20% tourists to Zanzibar were visiting the Jozani by end of Phase I. When the boardwalk opened in 1997, it helped raise US\$10,000 for Pete);
- ▶ Secured agreement of Cabinet of GoZ over retaining a further 50% revenue for community development fund;
- ▶ Reduced conflict and built trust in 8 Core Villages - established active conservation committees and hunters' associations;
- ▶ Established representative community structure for Jozani that developed a constitution eventually becoming a local NGO, the JECA;
- ▶ Improved basic tourist infrastructure and development of a visitor centre.

Source: Hartley et al (2003: 8)

During Phase I initial efforts (see Box 1) were made to work with surrounding communities and help each village set up conservation committees; develop a tourism revenue retention scheme to partially fund the management of the Jozani and also contribute to a 'community development fund' (CDF); and in 1996 a formal proposal was put forward to GoZ to proclaim Jozani-Chwaka Bay a National Park. Phase I finished in May 1997, having set up and consolidated the institutional capacity within the DCCFF to implement the new Forestry Resources Management and Conservation and Policy (see Section A.5.2) (UNDP, 2000; Hartley et al, 2003).

Phase II of JCBCP (1998 – 2000) shifted the emphasis of the project towards improving the livelihoods of communities living around Jozani and consolidating Phase I. Although Phase II was relatively short, CARE assisted in establishing a local NGO - the Jozani Environmental Conservation Association (JECA) to represent the communities living around Jozani¹² and carry out conservation education and forest protection. Furthermore, the various savings and credit scheme models were tested among the communities (see Box 2).

Box 2: Phase II Implementation (1998 – 2000)

Long term Objective: The livelihood security of communities adjacent to Zanzibar's protected areas is enhanced.

Project Goals:

- 1) The livelihood security of communities adjacent to Jozani-Chwaka Bay Conservation Project is enhanced;
- 2) Degradation of natural resources and biodiversity on the Jozani-Chwaka Bay area is reduced.

Achievements:

- ▶ Phase II built on the progress made in Phase I;
- ▶ Notably, increasing numbers of visitors to the area were recorded and tourism revenues increased indicating the long term potential for sustainable tourism;
- ▶ The Jozani Environmental Conservation Association (JECA) developed out of the Jozani-Chwaka Bay Advisory Committee and was registered as an NGO in June 1999;
- ▶ A savings and credit scheme was tested.

Source: Hartley et al (2003: 9)

GEF funding specifically for Jozani was requested for Phase III of the JCBCP. Past GEF¹³ support assisted in enhancing Zanzibar wide conservation efforts. The GEF funding alongside support from FINIDA provided an enabling policy and legislative environment for conservation work (see Section A.5.2) and also provided infrastructure support and training for field conservation.

Phase III built on livelihood approaches tested in Phase II. Despite the previous two phases there was still a considerable amount of resource conflict and resistance to conservation (including the gazettment of Jozani-Chwaka National Park) within the communities as evidenced by statements in the Prodoc (UNDP, 2000):

“Recently [1998] a sub-population of the Zanzibar Red Colobus were reduced from 200 individuals to 30 by farmers, who killed or chased them away because of crop damage. There is thus an immediate requirement to establish a core conservation component to secure the global biodiversity benefit and build upon the foundation laid by the earlier project. Hence the need, therefore, for this MSP for the development of the proposed National Park. Conservation efforts required a further development, particularly in terms of implementing policy and legislation that supported CBNRM and improving community livelihood security links to conservation.”

¹² JECA is an umbrella organization that represents villagers from eight key communities around Jozani and during Phase II and III the organization has become more involved with alternative IGAs and community mobilization, as well as acting as representative of community interests to the GoZ.

¹³ GEF project 'Institutional Support for the Protection of Biodiversity in East Africa' - from 1992 to 1996.

The relations with communities needed to be further improved so that they would come to view the conservation of Jozani Forest as congruent and vital for maintaining and improving livelihood security. The aim was to achieve this through the further development of co-management through Village Conservation Committees (VCCs) and the establishment of alternative IGAs – in essence, to substitute for loss of access to resources inside the planned Jozani Chwaka Bay National Park and thus orienting people away from the forest. This was reflected in the community assessment of Phase I and II and their priority issues for the design and implementation of Phase III (see Box 3).

CARE and the GoZ also wanted to use Phase III of JCBCP to test links between improving livelihood security and improved biodiversity conservation¹⁴. UNDP (2000) asserted:

Box 3: The Communities' View of the Phase I (1995-1997) and Priorities for Phase II & III of JCBCP

The following are some of the **Phase I achievements as perceived by the community**:

- ▶ People's awareness of conservation issues has improved significantly.
- ▶ Conservation committees have been established in each of the seven villages around JCBCA.
- ▶ Community has become involved in patrolling, protecting and managing their resources through the conservation committees in each of the seven villages.
- ▶ Implementation of community development projects is in progress.
- ▶ A community development fund has been established recently. Funds from the donation box at Jozani are expected to make a much needed contribution.
- ▶ Construction of the mangrove boardwalk at Pete has been completed and its pilot management by the Jozani-Pete community is about to begin. The boardwalk will benefit Pete/Jozani villagers as well as other communities around JCBCA.
- ▶ Protective forest clothing and bicycles have been issued to all conservation committees
- ▶ Development of Shehia management plans and bylaws is in progress.
- ▶ Conservation education programme established. Village seminars and cross-visits, within and outside Zanzibar, improved conservation awareness, understanding and commitment.
- ▶ Good relationships have been built and closer co-operation between community and project staff created through village discussions, collaborative training and Advisory Committee meetings.

Priority issues to be tackled in Phase II

- ▶ Put proper attention to communication problems for the conservation and advisory committees.
- ▶ Provide more conservation education to community.
- ▶ Promote conservation and environmental education amongst school children.
- ▶ Assist communities to develop feasible alternative sources of income to tree cutting.
- ▶ Resolve boundary conflicts between villages.
- ▶ Promote people's awareness in the conservation of rare and endangered species of Zanzibar, emphasising their importance to the environment.
- ▶ Convince government to allow revenue sharing between Jozani management and community in all areas where Red Colobus monkeys destroy farmers' crops. (Jozani earns revenue at the expense of destruction of farmers' crops by Red Colobus monkeys)
- ▶ Change the status of the Advisory Committee to an NGO (Done)
- ▶ Develop stronger collaboration between the stakeholders of JCBCA.

Source: UNDP (2000)

"It is not assumed that alternative income generation will automatically lead to reduced and sustainable resources use. Conversely it not assumed that communities would automatically reinvest increased income into destructive activities. It is felt that the uses made of increased income will depend on a number of factors that the project will endeavour to understand and influence. Once identified, the project will promote the conservation supporting factors. Currently the hypothesis regarding alternative income generation that will be tested by the project is as follows:

¹⁴ Phil Franks pers comm.

“Increased household savings and income will increase household livelihood security and reduce pressure on natural resources and lead to the sustainable conservation of biodiversity, in the context of strong and environmentally aware community and government institutions, strong community based natural resources management, and environmentally sound criteria for the provision of financial and non-financial business services.”

In 2000, this was the only GEF funded biodiversity project that included an explicit aim to test local livelihood – global environmental benefit linkages (see Risby, 2003c).

A.5.2 Institutions and Policy

Before 1990, Zanzibar’s forest resources were recognized as ‘government’ lands and excluded communities from their management. Communities had no rights of ownership, but concessions were granted for commercial extraction to local people for serving the domestic fuel wood markets and for construction. The Forest Reserve Decree of 1965 allowed for:

- ▶ Alternate closing and opening of areas on a 10 year rotation basis.
- ▶ Harvesting poles up to a maximum height of 10cm.
- ▶ Prohibition of use of mangrove for fuelwood and bark removal
- ▶ Issuing of cutting and transportation permits for mangrove extraction
- ▶ Law enforcement to prevent illegal cutting

However, by the 1990s several things were obvious; firstly, the Decree was out of date and did not take into account moves towards CBNRM and co-management; secondly, that there had been significant illegal cutting of wood for fuel over the previous 50 years, which reduced the availability of mangrove poles for building to almost zero (Masoud & Wild, 2000). In essence, the Decree had become to some extent irrelevant and was failing to protect forest resources.

Support from GEF and FINNIDA allowed the GoZ a new enabling environment for conservation and in 1996, the Zanzibar Forestry Resources Management and Conservation Act¹⁵ replaced the outdated Forestry Decree. The new policy emphasized environmental protection, social equity and economic development, and strongly advocated active involvement and participation of communities in the planning, management of forest resources through various programs (of which JCBCP is one) and research studies. Basha et al (1999) state:

“Sharing of experience and knowledge between resource users and professional forestry researchers are focal concerns in the implementation of the new forestry policy. Directives from the new policy indicate that learning can be accomplished through pilot projects, development of micro-plans and through organizational development.”

Most importantly, it also provides for ‘community managed areas’ (formed as VCCs) and the creation of Protected Areas under the National Park Legislation, which was passed by the GoZ in 1996.

Another important policy development that has taken place since 1996 is the ‘tourism revenue retention and sharing scheme’. The scheme splits tourism revenue between DCCFF (core operations and Jozani management), the local communities (through the CDF and farmers crop compensation scheme) and the GoZ Ministry of Finance. However, this policy was only fully operationalized in 2001 (see Section A.6 & C.3.6).

The main institution responsible for implementation of the Forestry Policy and conservation of forest resources in Zanzibar is the DCCFF, which replaced the Commission for Natural Resources

¹⁵ The new legislation was a product of the joint GoZ – Finnida/GEF initiatives.

(CNR). The DCCFF has the status of a parastatal under the Ministry of Agriculture, Livestock and Natural Resources.

A.5.3 National and Donor Strategy

The objectives of JCBCP were congruent with GoZ, the Government of Tanzania (GoT), UNDP and CARE International environment and development priorities and strategies:

The GoZ Biodiversity Strategy focuses on:

- ▶ The management of forest resources both for conservation and sustainable use
- ▶ Conservation and sustainable use of coastal resources including mangrove forests, which are integral part of the Jozani-Chwaka Bay ecosystem.

The GoZ Poverty Reduction Plan (2002) focuses outlines several priorities that are relevant to JCBCP IGA, savings and credit, and VCC//CFMA activities:

- ▶ Investment: stimulating investment through local entrepreneurship in the areas of agriculture and tourism;
- ▶ Agriculture: increasing the production of cash crops like cloves, seaweed and other non-traditional crops; expanding the production of alternative crops to supplement traditional crops;
- ▶ Forestry: development through agro-forestry and small scale fuelwood development and to ensure adherence to environmental protection through community involvement; and
- ▶ Governance: community participation and democratic governance, particularly empowering the poor and women.

The GoT formulated a National Environmental Action Plan (NEAP) in 1994 and in 1997 the National Environmental Policy (NEP) was passed. Both the plan and the policy identify three major problems relevant to JCBCP that require urgent national intervention

- ▶ Loss of wildlife habitats and biodiversity,
- ▶ Deterioration of aquatic systems, and
- ▶ Deforestation.

The GoT 2000 Poverty Reduction Strategy Paper (PRSP) emphasized the need for increased integration of environmental concerns into poverty reduction strategies in order to define more effective management. The strategies laid out in the PRSP did not directly address environment and development linkages. Indirectly, the strategies aimed at: catalyzing communities and local stakeholder to play a role in poverty reduction through self-help schemes across all sectors; and employment creation aimed at the most vulnerable. These are relevant to JCBCP's emphasis on CBNRM, alternative IGAs and co-management.

Since 2000 the GoT has made commitments to fully integrate poverty and environment issues. The GoT requested UNDP's assistance to develop a strategy. In 2003, the UNDP and GoT Program Support Document (PSD), which was based on the UNDP Country Cooperation Framework (CCF) 2002 – 2006 and PRSP, outlined the following environment – development outcomes:

- ▶ Integration of environment and livelihoods issues into PRSP processes to achieve sustainable development and poverty reduction;
- ▶ Improved access and utilization of environment/livelihoods data for use in local level planning;
- ▶ Institutional capacity building to integrate environment into multi-sectoral plans and strategies and national and district levels

These outcomes are to be achieved over 3.5 years through improving the knowledge base, data collection, monitoring and dissemination of lessons on poverty – environment links. Moreover,

strengthening the capacity of the GoT Poverty Eradication Division and the Ministry of Environment to integrate poverty/livelihoods and environmental issues in policies and programs. The PSD also highlighted the JCBCP¹⁶ as an example of how projects are linking improvements in livelihoods and the natural resource base and present potential opportunities for lesson learning to feed into policy and further program development.

The development and implementation of JCBCP was also influenced by CARE's emphasis on linking livelihood security/poverty reduction and natural resource management. Since the early 1988 CARE had developed a number integrated conservation and development projects (ICDP) in Uganda, Tanzania, Ethiopia and Madagascar. In 1998 CARE Tanzania made ICDP, and health and education its core program areas until 2003. Therefore, the JCBCP provided an opportunity for CARE to internally deepen and expand its' experiences, and lesson learning and also demonstrate the approach among external partners such as the GoZ and DCCFF.

A.6 Implementation Status of JCBCP

The JCBCP was completed in September 2003 and was granted a 'no cost extension' until March 2004¹⁷. The following section reports on the implementation outcomes of the project as reported in the Project Implementation Reports (PIRs) and the Terminal Evaluation (TE). The study team noted that there is a significant difference in reporting between the PIRs and TE – the PIRs report against the original prodoc goal and sub-outcomes (see Section A.2). However, the TE reports against a 'redefined' goal and immediate outcomes (see Annex 4). These changes in goals and outcomes do not appear to have been officially reported to the GEF Secretariat or the GEFM&E Unit. Therefore, overview of achievements and weaknesses of the JCBCP will be against the original goal and sub-level outcomes¹⁸.

Immediate Outcome 1:

Jozani Chwaka Bay is gazetted and managed as a National Park under relevant legislation.

Achievements:

- ▶ Boundaries of the proposed Jozani Chwaka Bay National Park were agreed following an extensive participatory process involving the communities, DCCFF, JECA and CARE;
- ▶ Jozani Chwaka Bay National Park was gazetted in February 2004 in accordance with the National Park Legislation.
 - Overseen by The National Park Management Board (set up by DCCFF). Day-to-day management remains with the DCCFF;
 - National Park Regulations have been finalized and approved following a public consultation process;
 - National Park Management Plan was prepared in collaboration with communities and other stakeholders (PIR, 2003)

Weaknesses:

- ▶ No reported weaknesses

Immediate Outcome 2:

Institutions involved in natural resource management of Jozani strengthened and enhanced.

¹⁶ Which was close to completion in early 2003.

¹⁷ Allowing time for CARE to develop an exit strategy.

¹⁸ The TE will inform reporting against original sub-level outcomes where appropriate.

Achievements:

- ▶ DCCFF capacity has been considerably developed by the JCBCP through training. The institution has been ‘transformed’ (Hartley et al, 2003:2) into a modern people orientated approach to natural resource management and conservation;
 - DCCFF has developed and implemented the revenue retention scheme (since 2001) to fund operations (30%) and the National Park management (33.6%) thereby allowing it to sustain capacity (PIR, 2003);
- ▶ JCBCP has strengthened civil society through the creation of JECA to represent community interests to the GoZ and DCCFF;
 - JECA effectively gained the trust of the local communities;
 - JECA succeeded in supporting the communities efforts to manage natural resources (through the Village Conservation Committees (VCCs) and IGAs;
- ▶ VCCs were established¹⁹ in all 8 villages adjacent to Jozani and communities are aware of their roles and responsibilities;
 - VCCs are actively involved in planning Community Forestry Management Agreements (CFMAs) and Resource Use Management Agreements (RUMAs);
- ▶ Jozani Savings and Credit Association (JOSACA) established savings and credit groups and is now ‘self-sustaining’ (Hartley, et al 2003: 25) and play a significant role in improving livelihoods (TE).

Weaknesses:

- ▶ JECA has played the role of ‘service provider’ for CARE Tanzania within the context of the JCBCP. It is dependent on donor support for its operations and this jeopardizes the long-term financial and institutional sustainability of JECA;
 - Until recently JECA was highly dependent on one key individual (the former Director). “The critical issues here is balance between staff retention and the skills available” (Hartley et al, 2003: 25);
- ▶ JECA’s organizational identity and role as either an NGO or a CBO has not been clarified (TE).

Immediate Outcome 3:

Financially, socially and ecologically sustainable protected area management systems in place at the Jozani Chwaka Bay Conservation Area.

Achievements:

- ▶ DCCFF has developed and implemented the revenue retention scheme to fund core operations (30%) and the National Park management (33.6%) thereby allowing it to sustain capacity. The GoZ Ministry of Finance receives 14% of revenue. This money has contributed “substantially” (PIR, 2003) to fund DCCFF management operations;
- ▶ Local communities are working with DCCFF in joint patrols of the JCBCA and the number of illegal activities (notably harvesting of poles and fuel wood) has decreased;
 - There have been no incidences of killing of Red Colobus during the final two years of the JCBCP implementation. This indicates that the crop raiding compensation scheme, tourism revenue sharing and IGAs are demonstrating the value of conservation to communities;
- ▶ 22.4% of Jozani tourism revenues are retained for the CDF. Total entry fee revenue for 2003 was US\$88,847 of which revenue from the mangrove forest board walk was US\$17,687. In 2003 contribution to the CDF was US\$18,491 (PIR, 2003).

¹⁹ This is in accordance with the Forestry Management Act 1996, which approved the formation of ‘community management groups’.

Weaknesses:

- ▶ Core DCCFF management/operations for Jozani and community conservation and development activities are significantly dependent on tourism revenue creating a financial, social and ecological sustainability risk (TE).
 - The ‘fickle’ nature of tourism industry, particularly given the world terrorist alerts has the potential to impact visitation to Zanzibar. For example, in May 2003 UK, Australia and USA warned tourists against travel to Zanzibar because of terrorism fears²⁰.

Immediate Outcome 4:

The decline in rare and endangered fauna and flora is halted and recovery promoted while knowledge of Jozani biodiversity is increased.

Achievements:

- ▶ Recovery plans for the Ader’s duiker has been developed and implemented in 6 local communities (shehias) through JECA;
 - Recovery plan for Red Colobus was under development in 2003;
- ▶ Communities from the 8 villages surrounding JCBCA have been trained in techniques for specimen collection and usefulness of ethnobotanicals;
- ▶ Regular monitoring of Red Colobus groups have been carried out;
 - Population of Red Colobus have increased from 275 to 290 in 2003;
- ▶ Report on fuel wood use and consumption in and around Jozani has been completed (PIR, 2003).

Weaknesses:

- ▶ None reported

Immediate Outcome 5:

Jozani adjacent communities are committed to and empowered to manage and benefit from their own resources.

Achievements:

- ▶ VCCs have been established in every village and are actively involved in conservation education, forest patrolling and formulation of CFMA and RUMAs (TE).
 - Membership of the VCCs includes both men and women from both rich and poor households (TE);
 - VCCs have developed CFMA and RUMAs including bylaws and zoning maps. The agreements have been signed by the DCCFF and Zanzibar Attorney General (PIR, 2003);
- ▶ The JOSACA – savings and credit groups have allowed women access to their own financial resources and provided them with the freedom to spend it on the items and services they need (TE);
 - Savings and credit has assisted in building intra-community relations and trust among individuals to work together;
 - The TE states: “the successful JOSACA experience merits replication and dissemination” (Hartley, et al (2003: 32).
- ▶ A combination of tourism benefits, and IGA activities have resulted in a significant improvement in community attitudes toward conservation. For example, the PIR (2003) reported 95% of communities interviewed viewed VCCs as beneficial and 79% confirmed they were aware and participating in conservation activities.

²⁰ <http://news.bbc.co.uk/1/hi/business/2995965.stm>

Weaknesses:

- ▶ The JOSACA scheme does not permit large loans and operates on a short loan cycle making it suitable for financing petty business only (Hartley, et al 2003: 25) (TE). This restricts the types of IGAs;
- ▶ Many of the IGAs are to some extent dependent either directly or indirectly on the tourism industry, and this could make them vulnerable to downturns in the overall foreign visitation to Zanzibar.

Immediate Outcome 6:

Implementation of legislation and policies appropriate to conservation and development of Jozani area advocated.

Achievements:

- ▶ JCBCP has assisted the DCCFF in implementing the Forestry Resources Management and Conservation Act in terms of establishing ‘community management groups’ in the form of the VCCs;
 - The Act and Forestry Policy have been translated into Kiswahili to assist community comprehension (PIR, 2003);
 - VCCs and JECA were involved in extensive consultations concerning the change in state of Jozani from a ‘conservation area’ to a ‘National Park’;
- ▶ JCBCP successfully influenced GoZ to implement the tourism revenue sharing scheme;
 - Since 2001, revenues have been shared between DCCFF, GoZ (Ministry of Finance) and the local community CDF and farmer crop compensation scheme.

Weaknesses:

- ▶ Hartley et al (2003: 27) note that the Forestry Resources Management and Conservation Act is relatively vague in the description/role for ‘community management groups’ and the VCC is dependent on Sheha and GoZ (DCCFF) to recognise their role (TE)

Immediate Outcome 7:

Jozani adjacent communities develop appropriate alternative income generating activities which reduce community dependence on natural resources and assist in community development

Achievements:

- ▶ Through JOSACA a total of 45 savings and credit CBOs have been formed since the start of the project with 1169 members (F 708; M 460). Total savings amounted to US\$47,397 and loans given to members US\$77,115.
 - 26 savings and credit groups have graduated following training and granted operational independence and are self-sustaining;
 - Leadership training was conducted with 25 savings and credit groups to improve management and institutional sustainability;
 - The JOSACA training guide was translated into Kiswahili and is now used by the communities. The guide was extended to other CARE projects on mainland Tanzania;
- ▶ The JCPCP working through the JOSACA and JECA has developed 10 IGAs groups in agriculture (such as woodlots), mushroom growing and handicrafts (such as ukili bags). 2011 community members are engaged in IGAs;
 - 7 IGA CBOs are involved in mushroom growing and sell produce to major hotels and resorts located in Zanzibar Town and on the East Coast;
 - A guidebook on mushroom growing has been developed and translated into Kiswahili for use by growers;
- ▶ Community handicraft groups were linked to Swahili Importers Inc of USA to export ukili products such as baskets and bags. Orders in excess of US\$2,250 were secured;

- 70 women community members from Chwaka and Cheju are involved in quality control of ukili products;
- ▶ The Jozani Forest visitor shop is run by JECA – revenues average around US\$1000 per month with a profit of US\$300;
- ▶ A Beekeeping association was established for community beekeeping and has 257 members engaged in 12 user groups;
- ▶ Hartley et al (2003: 26) state:

“The IGAs promoted have helped to improve livelihoods and according to workshop participants they have increased community awareness and understanding of how to work more effectively with financial capital”. (TE)

Weaknesses:

- ▶ The savings and credit scheme is not tied to conservation efforts;
- ▶ IGAs have tended to benefit richer members of the community and have not reached everyone (Hartley et al, 2003: 26) (TE);
 - Although the pressure on Jozani resources has lessened over the course of the JCBCP the original hypothesis has not been tested (by re-running the original socio-economic assessment). Hence, it is unclear if the IGAs and savings and credit interventions have resulted in improved conservation.

Conclusion

At the end of implementation JCBCP was rated as ‘satisfactory’ in the final PIR. The TE conducted by Hartley et al (2003), which judged the project against revised outcomes (see Annex 4) concluded that JCBCP had made a significant impact both in protecting the biodiversity of Jozani and improving the livelihoods of communities. However, although the project monitoring and reporting was good throughout implementation, the socio-economic baseline study implemented at the beginning of the project (and intended to track impacts) was not re-run at its conclusion. Hence, the TE was unable to make any substantive comment on the original project hypothesis (see Section 5.1). In part, the findings of this report respond to the hypothesis²¹.

Sustainability and Phasing Out Plans

The sustainability and phasing out plans were developed 9 months before the winding up of the project. The plan gave the summary of implementation status and identified specific processes or activities that were to continue after June 2003 without CARE support.

This plan indicates activities (DCCFF or JECA), the budget required and how it can be financed. It identifies gaps in technical, the managerial / organizational, or other capacity areas before the next stage can become truly self sufficient in implementation. It shows how best to fill these gaps especially for the coming 9 months and generally pointed out that continued technical assistance and other support would be needed and should be provided from CARE. The project was provided with a no cost extension to March 2004 which are allowed for the phase-out of CARE support²².

²¹ Although it was not possible to re-run the socio-economic baseline survey the study team was able to use it to inform the development of the semi-structured survey questionnaire (see Section C).

²² Although CARE continues to work with GoZ and DCCFF on other projects.

B. METHODOLOGY

B.1 Case Study Process

The fieldwork process entailed four distinct but related periods:

- ▶ **Preparation period (July – September 2003):** developing the case study TORs (see Annex 1); selecting and hiring the independent consultant; reviewing documentation held by GEFM&E and UNDP (e.g., PIRs and the prodoc), and conducting web-based literature searches; establishing contact with key stakeholders such as CARE Tanzania and UNDP Tanzania to gain access to further data and to arrange fieldwork logistics.
- ▶ **Fieldwork Initiation (October 2nd – 13th 2003):** devising and testing qualitative and quantitative field methodologies with local communities, and selecting villages for main fieldwork; conducting consultations with national stakeholders and further literature reviews; and devising a work-plan to execute and fulfil the TORs.
- ▶ **Main Fieldwork and Draft Report (December 27th 2003 – January 5th 2004):** executing the work-plan; data analysis and production of the draft report for review by GEFM&E and stakeholders
- ▶ **Stakeholder Presentation (29th January 2004) and Final Report (February – July 2004):** draft report presented to stakeholders for discussion and comments (see Annex 6); draft report revised on the basis of comments received. Final report circulated.

B.2 Methodology

This section describes the methodology employed during the Initiation and Main Fieldwork Phases by the study team. The information collected during these phases was combined with a review of existing literature and reports.

Three data collection methods were used:

- ▶ Semi-structured Interviews with key informants at the national and local level;
- ▶ Focus group discussions/Rapid Rural Appraisal (RRA) with local communities;
- ▶ Semi-structured survey questionnaires with local communities (see Annex 7)

Identification of the suite of methods took place during the fieldwork initiation phase. Focus groups/RRAs were employed during the fieldwork initiation period to identify key issues among local communities which informed the development of the semi-structured survey questionnaire used during the main fieldwork phase. However, methods were triangulated by using a combination of survey questionnaire and focus group discussions during the main fieldwork phase. This allowed for greater contextualization of the emerging data and re-checking of responses given in the questionnaires and vice – versa.

The study team selected the following 8 villages adjacent to Jozani for fieldwork:

- ▶ Bwejuu;
- ▶ Charawe;
- ▶ Cheju;
- ▶ Chwaka;
- ▶ Ukongoroni;
- ▶ Unguja Ukuu;
- ▶ Pete;

- Kitogani.

Focus Groups/RRAs

The focus group/RRA discussions assessed the strength and viability of local CBOs involved in the JCBCP. Discussions also focused on the roles and responsibilities of men and women within these institutions and to what extent they are affecting local livelihoods, but also the extent that local institutions have matured and are sustainable in the post-project social landscape. The methodology involved consulting and listening to the group members both men and women telling the story of their CBO objectives and its impacts. In the case of savings and credit groups discussions focused on how much groups had saved, how individual members used the credit obtained in terms of expenditure and investments in IGAs, repayment and problems encountered. This approach was used with a view to generate a self-assessment by the beneficiaries. A total of 6 villages were visited, these being Kitogani, Ukorongoni, Cheju-Mchuchumile, Cheju-Kisomanga, Hanyegwa-Mchana and Chwaka for these discussions. During the field visits the consultants met and discussed with a total 127 people (45 men and 82 women) from 12 groups. A list of villages, groups and number of people met in each group are indicated below (see Table 1).

Table 1: Number of Persons interviewed per group contacted in each village visited, Jozani-Chwaka Bay, Zanzibar, 2003

Village	S&C and IG Groups Contacted	No. of people interviewed
Kitogani	Suruhisho group,	22 (9 men 13 women)
	Tumuombe Mungu,	24 (13 men 11 women)
	Umoja ni nguvu	24 (5 men 19 women)
Ukorongoni	Najaribu Fadhila,	7 (6 men 1 woman)
	Tupendane	2 (1 man, 1 woman)
Cheju Mchuchumile	Mnyonge Hatupwi	11 (3men 8 women)
Cheju Kisomanga	Tusaidiane	2 (2 women)
Hanyegwa Mchana	Wanyonge tusaidiane	1 (chairperson)
	Usirudie Makosa	4 (3 men 1 woman)
Chwaka	Nasie Tumo,	21 (4 men 17 women)
	Tabia njema	9 (6 men 3 women)
	Maendeleo group	1 (chairperson)

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

Interviews and focus group / RRAs often involved encouraging individuals to tell their story. In doing so, it allowed the study team to assess intra-group experiences of impacts – how individuals relate in their group; how groups are organized (noting gender aspects); and what groups planned in the future. The higher-level village politicians such as the Shehas were often requested to leave and discouraged from taking part in the interviews and discussion to avoid bias responses. CBO leaders were also not allowed to lead the discussions on behalf of the target group. Meetings and discussions with the Jozani Conservation and Development Organization (JCDO) secretary were held to obtain their experiences and views with regard to the savings scheme and underlying gender relations. 3 Community Contact persons (CCP) for JOSACA were also met and discussions held.

The following section drawing on data collection using the above methods will detail the impact of the project on the livelihood capitals.

Semi-Structured Survey Questionnaire

In each village 30 persons were interviewed using the semi-structured survey questionnaire (see Annex 7). A total of 240 semi-structured questionnaires were completed during the main fieldwork phase. The survey questionnaire was informed by the project baseline social survey that was conducted in 2000/01.

C. LOCAL LIVELIHOODS CAPITAL ASSESSMENT

This section describes the study team’s findings regarding the project’s impact on local livelihood capitals.

GEF Local Benefits Study’s generic categories and concentrated analysis project impacts based on the capitals below²³:

- ❖ Increased livelihood opportunities, **income and financial capital**, including increases to the productivity of existing and opportunities for new livelihood activities such as farming, fishing or tourism, increases in cash income and improvements to the ability to save or availability of capital.
- ❖ Improved **social capital**, equity and institutional capacities in local communities, including the enhancement of community-level institutional capacities and contact networks and the improved ability in local communities to deal with outside agencies. It also includes improvements to gender and social equity at the local level, especially through the empowerment of women and minority groups in decision-making.
- ❖ Improvements to **physical capital**, including investments in tools and machinery, access to or the ownership of land and buildings and access to infrastructure such as transport, telecommunications or water supply and irrigation.
- ❖ Improvements to **human capital**: the skills, knowledge, work ability and management capabilities of local community members. There is typically a need for a gender focus in this that emphasises issues such as functional literacy and management skills of women.
- ❖ Improvements to **natural capital** including improvement in air quality, plants and animals harvested from the local resource base, surface and ground water, fuel wood, and environmental services such as safe waste disposal.

In section C.1 we describe the local benefits *intended* by the project as laid out in project documents. In section C.2 profiles the local community respondents in terms of the key socio-economic and resource use characteristic that provide a backdrop for the discussion in section C.3 where we *discuss intended and unintended impacts* of the project, on the capitals above.

C.1 Intended Local Benefits from JCBCP

The review of the prodoc (UNDP, 2000) shows the following outcomes were expected with regard to local benefits:

- ▶ Improvements in the livelihood security of local communities adjacent to JCBCA in terms of:
 - Income and employment (financial capital)

²³ See Annex 1 and Figure 4 for full details & www.livelihoods.org

- Skills and knowledge to enable improvements in income/employment and local institutional capacities (human capital)
 - Access to natural resources (CFMAs/RUMAs) (natural capital)
 - Empowerment and local and national institutional capacity to manage natural resources sustainably (social and institutional capital; natural capital)
 - Women’s active participation in local institutions (gender/equity)
 - Demarcation of the JCBCA boundaries and CFMAs (physical capital)
- Implementation of legislation and policy to enable conservation and development linkages

C.2 Profile of Respondents

The following section provides an overview of the local community respondents who participated in the semi-structured survey questionnaire, and will be referred back to later in Section C.3.

C.2.1 Gender

The 240 individuals, who responded to the semi-structured questionnaire, did so on behalf of their households. 45% were females and 54% were males (see Table 2). There was a deliberate attempt here to achieve balance in gender of respondents, particularly as women are key users of resources and prominent in many of the CBOs such as savings and credit.

Table 2: Typology of Respondents to Survey, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Female	109	45.4
Male	131	54.6
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

C.2.2 Age

The mean age of the respondents was 39 years, with the median age being 38 years. The minimum age was 15, while the maximum age was 83 years, with the range being 68 years²⁴.

C.2.3 Education

The education system in Zanzibar requires compulsory attendance up to the second year of secondary education. The majority of the respondents had achieved partial or full secondary education (40%). Those without any education were 17% of the sample (see Table 3).

Table 3: Education of Respondents, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Adult Education	4	1.6
Madrassa	10	4.2
Primary	86	35.8
Secondary	98	40.8
Tertiary	1	.4
N/a	3	1.3
None	38	15.8
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

Literacy is high: over 75% of the interviewed population had had primary or secondary education. This is a good basis for the formation of savings and credit groups as well as IGAs. There is, how-

²⁴ The Zanzibar Poverty Reduction Plan reports an average life expectancy of just 48 years.

ever some difference in education achievements by gender, as proportionally more women are un-education compared to men. (see Table 4).

Table 4: Education Levels, by Gender, Jozani Chwaka Bay and surrounding villages, 2004.

	Female		Male	
	Frequency	Percent	Frequency	Percent
Adult Education	0	0	4	1.6
Madrasas	5	2.1	5	2.1
Primary	36	15.0	50	20.8
Secondary	46	19.2	52	21.7
Tertiary ²⁵	0	0	1	0.4
None	21	8.8	17	7.1
N/a	1	0.4	2	0.8
Total	109	45.4	54.6	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

C.2.4 Origin of Respondents

62% of respondents were born within the same villages within or adjacent to Jozani-Chwaka Bay. 36.7% had migrated from elsewhere – mainly from within the islands (see Table 5). This factor is important in that it partially explains the level of community cohesion that exists in the area, and can be a good basis, in terms of trust and familiarity (social and institutional capital) in the formation of the savings and credit and alternative IGAs.

Table 5: Origin of Respondents for Field Survey, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Elsewhere	88	36.7
Same place	149	62.1
N/a	3	1.3
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

Most migrants (women) came to this area as a result of getting married (17%) to men living in the JCBCA (most arriving within the last 15 years). There are a few who arrived in the recent past with their parents (12%) and settled here. The majority (61.7%), however, are from the area (see Table 6).

Table 6: Reasons for Migrating to Jozani-Chwaka Bay area, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Came for Business	1	0.4
Change of scenery	2	0.8
Came with parents	29	12.1
Followed relatives	3	1.3
Better land	2	0.8
Liked the environment	2	0.8
Marriage	41	17.1
From here	148	61.7
Returned home	7	3.3
Work	5	2.1
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

²⁵ College / University

C.2.5 Ethnicity

Most of the respondents are indigenous to this particular part of the islands, with 50% declaring themselves to be of Shirazi ancestry and the remaining are Islanders with ancestry from the mainland. There are a few whose parents originated from Pemba, and the Comoros (Ngazija). All are Muslims, and so this is therefore largely a homogenous society with little ethnic or religious diversity. Again this contributes to the relative strong community cohesion.

C.2.6 Livelihood Activities

The majority of the respondents (52%) are engaged in agriculture as a primary activity, followed by petty trading (12%), fishing (8%) handicraft (4%), and seaweed farming (2%). The remaining people are spread across a whole range of non-farm activities such as charcoal making, food vending, casual labour, livestock rearing, masonry, wage-employment, poultry keeping and tailoring. Most respondents also have a second income generating activity. 54% are in agriculture, petty trade (17%), fishing (3.8%) and handicrafts (5%). Some 32% do not have a secondary activity. The majority of the respondents (86%) changed their economic activity over the last 5 years (see Table 7). However, most did not give reasons for changing (86.3%) and those who did, attributed the change to a very wide range of personal reasons, but most stemmed from finding another more profitable means of earning an income.

Table 7: Changes in Economic Activity, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Did not change	207	86.3
Changed	33	13.8
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

C.2.7 Food Security

The survey showed that most households (72%) take 3 meals a day, still over one quarter (27%) take only two meals a day (see Table 8). This suggest that food availability for a number of household is still a problem in this area.

Table 8: Frequency of Meals per day (by Households), Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
2	65	27.1
3	172	71.7
4	2	.8
N/a	1	.4
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

The most popular and frequently consumed meals consist of potatoes, rice, ugali (hard porridge/grit), fish, cassava, plantain bananas, bread and beans. Just over a third of the population (36.7%) reported that the general food supply situation in the area is not good, further indicating there is still a degree of food insecurity prevailing in this area. Almost a half (48.3%) reported that the supply situation was good (see Table 9).

Table 9: General Food Supply Situation (by individual), Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Good	116	48.3
Fair	32	13.4
Not good	88	36.7
Don't know	3	1.3
N/a	1	.4
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

Almost the same proportion of respondents reported that their respective household food access situations were also not good (34.2%), however a half (49.6%) also said that it was good (see Table 10). The main problem cited being the inability to produce adequate food for the entire household food because of physical resource constraints such as lack of land, poor soils and water supply and thus creating a high dependence on purchase of food items (see Table 11). Therefore, having sources of alternative cash incomes through secondary livelihood activities (see Section C.2.6) are very important to these communities to maintain food security (see Section C.3.1).

Table 10: Household Food Access Situation, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Good	119	49.6
Fair	37	15.6
Not good	82	34.2
N/a	2	.8
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

The survey results show the main source of staples is from shops (62.9%), followed by the combination of own farms and shops (31.1%) (see Table 11), which indicates that many people are unable to produce enough through farming to meet their household needs. This highlights the importance of cash incomes (through income and employment) for accessing food.

Table 11: Sources of Household Food, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Farm	7	2.9
Farm & shops	77	31.1
Market & shops	4	1.7
Shop	151	62.9
N/a	1	.4
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

Most households (72%) have changed their food composition over the last 5 years (see Table 12). The changes in food composition here are negative. For example, less variety, changing from high preference foods such as rice and beef to lower ones such as cassava (more expensive to cheaper foods also) (see Table 12). Only a third gave reasons for this and they include mainly specific household situations such as declining incomes, more mouths to feed, drought, food price increases, poor harvests, and so on. Less than 2% attributed this to inaccessibility of land (restrictions based on JCBCA).

Table 12: Percentage of Households that Changes Food Composition, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Yes	72	30.0
No	167	69.6
N/a	1	.4
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

C.2.8 Fuel wood Uses and Access

The results of the survey show that most fuelwood is sourced mainly from the nearby forests (Jozani) (77%) and designated areas (e.g. CFMAs) (see Table 13). The remainder is fetched from bushes and thickets (31%) and little is obtained from own farms (5%), suggesting that further development of woodlots has potential (see Table 13). But at the same as people are having difficulty meeting their food security needs. The implication is that converting land from subsistence crops to woodlots may not be attractive to local communities and dependence on Jozani forest resources (legally or illegally accessed may continue).

Table 13: Sources of Fuelwood, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Bushes	31	12.9
Bought	10	4.1
Farm	14	5.8
Forest	184	76.7
N/a	2	.8
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

About half of the respondents reported that the availability of fuelwood is not very good (48%), and another half reported it to be good (see Table 14). However, this is more of a function of distance to different sources and availability differences from village to village.

Table 14: Availability of Fuelwood, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
Don't know	2	0.8
Fair	10	4.2
Good	113	46.6
Not good	116	48.4
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

Most respondents (predominantly women) who actually do the fetching of fuelwood spend between 2-4 hours doing so. Some make time specifically for fetching fuelwood and others go out to their farms and during farm work and/or upon returning home.

C.3 Realized Local Impacts of JCBCP

In this section, we examine the impact of JCBCP on livelihood capitals. The project shows that considerable progress has been made in the area on financial, social and institutional, physical natural and human capital as well as in the execution of national policy and legislation and this has improved livelihood security and reduced vulnerability.

C.3.1 Financial Capital

The JCBCP implementation strategy for improving income and employment opportunities for local people was based on the assumption that by providing alternative IGAs (and a range of other benefits) would reduce dependence on Jozani resources. The JCBCP promoted three activities as part of its strategy:

- Self-financing community-based savings and credit scheme to stimulate alternative IGAs;
- Development of alternative IGAs to provide substitutes for forest-based livelihoods; and
- Implementation of tourist revenue sharing scheme/farmer crop compensations scheme.

Based on fieldwork data the study team assessed the JCBCP impacts on financial capital to be positive and significant.

The following section will report on the study team’s assessment of the these strategies in building sustainable forms of financial capital – and more importantly, what impacts can be seen in terms of orientating people away from forest based livelihoods (see also Sections C. 3.2 & 3.8)

Savings and Credit Scheme: Origins and Operation

The savings and credit scheme constitutes the central intervention by the JCBCP to improve financial capital within the local communities. The project social baseline was a set of communities with a high degree of poverty, which meant people did not have access to investment capital to start alternative IGAs. A CARE JCBCP savings and credit adviser stated:

“At first we went into these villages ‘preaching’ IGAs. But we had no reaction and we quickly realized that people had no money to invest and no means to secure credit for IGAs. So that’s when we decided that savings and credit would be a good way to generate funds to stimulate IGAs.”

Focus Group/RRA survey respondents, both, men and women, stated prior to joining their respective groups, they never saved nor accessed large amounts of money before. They were spending their incomes as soon as they got it because their needs were many and they could not realize any surplus for saving or investing in IGAs. Furthermore, prior to the group formation they had never accessed nor used credit from any formal financial institutions. **The reasons for lack of access to capital in formal financial institutions are many and include;**

- ▶ Lack of collateral, high transaction costs incurred by the formal institutions to process and monitor the small volumes of credit that are normally demanded by the poor;
- ▶ Lack of credit rating or record;
- ▶ Negative perceptions by financial institutions that the poor are high-risk customers. The savings and credit scheme has therefore provided a unique opportunity for them to save and get access and indeed address many important livelihood concerns (see Box 4).

Box 4. Savings and Credit Group: Mata Masu Dubara

CARE engaged in training local communities on savings and credit prior to introducing the scheme. CARE also established a CBO – the Jozani Savings and Credit Association (JOSACA) to act as an umbrella/support network for all the groups. JCBCP then introduced a savings and credit scheme. The first approach used was borrowed from the Bangladeshi Grameen Banks. It involved mobilizing people to organize themselves into small groups, however savings were taken away to Zanzibar town and members did not trust the system as someone else was in control of their money. Hence, this approach was not very successful and was replaced in March 2001 by the *Mata Masu Dubara* (MMD) approach adopted from Niger (translates into “women on the move”). Its adoption in Zanzibar was slightly different in that while in Niger this was a women’s only group, in Zanzibar it was heterogenous. The scheme is basically set up such that members can buy limited shares during each meeting. Membership is open to all and once a group is formed it elects its own leadership and runs its own affairs in a democratic and transparent manner. Because of the high degree of transparency, sound leadership (trained by the project in management and leadership skills), the degree of trust and loyalty is very high, and thus the adoption and success rate was almost immediate.

Each savings and credit group consist of not more than 30 group members. Both men and women were encouraged to join the groups. JCBCP embarked on training people on how to raise and manage their savings and provided them with seed money (matching loans) ranging between TShs 50,000/- and 300,000/- per group. Members of the group contribute to group savings on a weekly basis. Members save through buying shares. One share is TShs. 500/- or 1,000/- and members can only buy a maximum of three shares a week. Thus one person can save a minimum of TShs. 500/- and a maximum of TShs.3,000/- per week.(approximately 0.5-3.0 US\$). The amount saved per person is recorded in the group register as well as in the individual members’ passbooks and each member keeps their own passbook. The amount of shares bought by each individual is recorded in terms of symbols. There are four columns in each row of the passbook. The recording system allows every member including the illiterate members in the group to count the symbols stamped and knows the amount saved to date.

Study team results show the large majority of households, men and women keep separate purses or accounts and each one has control over their own disposable incomes and makes their own decisions over expenditure. Under this situation women have been more motivated to save and generate additional incomes because they know that what they save is their own and have control over it. Savings and credit was perceived as benefiting members of the groups since it allows both male and female members of the group to have ready access to credit. One problem raised to the was that it restricted groups to being not larger than 30 members. This meant that the non-members interested in joining and saving with their friends, could not do so if the membership had already reached 30. They would have to start their own group and this was difficult as the often-such people would be few in numbers and it would take time to get the minimum number to start off.

Dividends from Saving

Each year every group is compelled to disburse its saving funds and let members obtain what he or she had already saved. Then the group’s saving process starts all over again. This system was imposed on all groups by the JCBCP as it gives people assurance that what they save is theirs. While this is good for generating trust and confidence in the system, it has also hindered growth of the savings fund because every year the group has to start saving again. The limitation on the amount to be saved by an individual however, limits the capital growth of the savings and credit funds (see Box 4). This system has not taken advantage of situations when people can obtain larger incomes e.g. when they harvest and sell their agriculture seasonal crops or sell in bulk their handicrafts during tourist peak seasons. Some members found an interesting solution to this limitation. For example, to counter this problem, six women joined other groups (each was a member of two groups), so that they could save more and also access more credit.

The Tumuombe Mungu group in Kitogani village is an exception: the group has not distributed their savings for the last three years and built substantial capital when compared to the other

groups. The group members wanted their group fund to grow to enable them to obtain substantial amount of credit at a later date both for IGAs and personal spending. This result indicates that the savings and credit groups are maturing and becoming more innovative by instituting their own rules and regulations.

Credit/Loans

Every member of a group, regardless of gender, qualifies for credit after saving with the group for six months. Interest is at 3% on any amount borrowed for 3 months, or 12% per annum. This rate is below the commercial rate charged by banks. During the survey, out of the 45 men and 82 women interviewed, 7 men and 12 women had obtained credit three times, 21 men and 36 women had obtained credit twice and 12 men and 31 women had obtained credit at least once. In terms of the Tanzanian economy, the amount of credit obtained was generally small as it ranged between Tz.Shs. 20,000 and 200,000/-. Generally women were requesting relatively lower amount of credit than men, with women requesting amounts ranging between 20,000/- and 80,000/- while that of men ranged between Tz.Shs 30,000/- and 200,000/-²⁶. It should be noted that with the food poverty line of Tanzania being around 6,000/- per person per month, therefore, these amounts are not small. These amounts have a potential to make significant impacts on the livelihoods and prospects of the local communities.

A very important outcome is that loan delinquency is negligible. One reason for the sound operation of these groups is the constant support provided by the project and the provision of business management skills training. But, it is also based on local cultural foundations – in these largely homogenous and intra-dependent communities it is very important to be a trustworthy person. It is also based on people's belief in their faith (Islam). Group meetings are also conducted with a high degree of transparency and accountability, and there is no room for delinquency which would result in a loss of trust. To lose trust means that one becomes a social outcast. The small size of the groups (maximum 30 persons) is also another factor as everyone knows the other person and mutual trust and support is high (see also Section C.3.2).

Savings and Credit Group Expenditure: Impacts

The members interviewed used their credit on the items shown in Table 15 (this is a total of 335 instances of purchasing/spending). The amount of credit taken is often split and used on various items. The results presented here are the main expenditure items per person.

The results show the largest share of credit (38.4%) is spent on IGAs (which are discussed in greater detail below), other important expenditures include education, food and access to health services total of 62%. In terms of expenditure by gender, women spend most of their incomes on IGAs, and education. Other expenditure items dominated by women include wardrobe (clothing), household furniture, land and jewellery. In contrast more men spend on food, agriculture, housing, and household assets. These results are not surprising given that these are rural communities where the majority of people gain their livelihood from farming or related activities.

²⁶ Discussions indicated that men had relatively higher savings and credit margins compared to women. This shows that men were generating higher income compared to women, but also possibly spending less.

Table 15: Men and Women Credit (Loan) Expenditure Items, Jozani-Chwaka Bay, Zanzibar, 2003

Credit Expenditure items	No. of Men	No. of Women	Total	% of Total Respondents
Invested in (small) petty businesses²⁷	10	67	77	23.1
Spent on children's' education	8	35	43	12.8
Purchased food items	21	12	33	9.9
Health services	14	18	32	9.6
Wardrobe (bought clothes etc.)	5	26	31	9.3
Invested in Agriculture	14	6	20	6.0
Housing & house improvements	11	4	15	4.5
Invested in Handicraft	0	12	12	3.6
Bought household furniture	1	10	11	3.3
Bought other household assets (Radio, Fridge/Freezer).	8	3	11	3.3
Bought land (farm/building plots)	0	9	9	2.7
Purchased personal jewellery		9	9	2.7
Invested in seaweed Farming	2	5	7	2.1
Bought Fire Wood	3	2	5	1.5
Spent on wedding celebrations (relatives/dependents)	3	2	5	1.5
Bought Poultry	2	2	4	1.2
Invested in a shop (incl. tailor shop)	2	2	4	1.2
Bought Farm Animals (cattle and goats)	2	1	3	0.9
Saved (for future use)	1	1	2	0.6
Married a second Wife (own wedding)	1	0	1	0.3
Bought fish net	1	0	1	0.3
			335	100.0

Source: Local Benefits Study, Focus Group Discussions, JCBCA, January 2004

Approximately 10% of people used their credit to buy food. Respondents perceived savings and credit as a means of improving access to food in times of drought or poor harvest and / or during important religious periods such as Ramadan. Moreover, almost twice the number of men, compared to women interviewed used all or part of their borrowed money to buy food for the households. This is because it is men who have the responsibility for providing food in the households. 86% of all respondents said the access to savings and credit improved food security and nutrition in their households. 9.6% of respondents used savings and credit to pay for health services while 12.8% used their credit on education for their children. The respondents were satisfied with the scheme has enabled them to get easy and timely access to basic social services (see Box 5). Therefore, improvement on food security and capability to access social services is likely in the long run to have an impact on infant mortality rates²⁸.

²⁷ Petty businesses include making and selling of various food and drink items, fruits and vegetables, souvenirs etc.

²⁸ Under fives mortality rates, and maternal mortality rates that result from malnutrition and food shortages in the households

Box 5. Health and Education Expenditure: Impacts of Savings and Credit

A woman from the *Mnyonge Hatupwi* group stated that she is happy she can pay for her children’s medical costs and this had reduced chances of her children dying. Another lady in Chwaka stated the scheme enabled her to save and pay for her children’s education, something that she aspired for but had worried for long. Insofar as she is concerned, when the children get quality education she was hoping that they will get more secure employment and better incomes.

The impacts of these expenditures on health and education are both short and long term. In the short term access to credit may resolve pressing health emergencies and in the long term (a healthy and educated/skilled individual in the future, with greater prospects or earning better incomes). The vulnerability reducing impacts of these opportunities are also considerable.

The number and savings and credit (S&C) groups has grown, all based on the *Mata Masu Dubara* approach. At the time of this field study there were 47 groups with savings amounting to US\$ 63,643 and had disbursed loans of up to US\$ 142,880²⁹. At project completion, 26 of the 47 savings and credit groups had become self-sustaining independent CBOs. It is clear that the establishment of the savings and credit scheme is one of the significant successes of the JCBCP in terms of stimulating IGAs (see below) but also increasing food security, access to basic health and education.

Alternative Income Generating Activities

The savings and credit scheme is intimately linked to the success of the IGAs since it provides much needed capital investment. JCBCP concentrated on business training and leadership development (see Section C.3.4) to support a small number of researched alternative IGAs. They include beekeeping, mushroom growing, woodlots (for poles and fuelwood), handcraft, mariculture and other on-farm products. Also a wide range of ‘petty trading’ was supported through the savings and credit groups. Table 16 shows that the total number of groups involved in both savings and credit and IGAs was 128 (nearly 3000 individuals).

Table 16: Income Generating / Savings and Credit Groups: Jozani-Chwaka Bay, Zanzibar, 2003

Sub-component	No of CBOs	Members		
		Female	Male	Total
Savings & Credit	47	742	472	1214
Business Management Training	37	393	569	962
Beekeeping	13	52	169	221
On-farm	7	68	51	119
Handicrafts	17	168	2	170
Mushroom	7	147	84	231
Total	128	1570	1347	2,917

Source: CARE (2003)

The JCBCP (working through JECA and SONARECO) has linked community IGA groups to markets such as the Jozani Tourist Gift Shop (managed by JECA), tourist hotels, and the export markets. For example, several of handicraft related CBOs have been linked with US (Swahili Imports Inc) and South African export/import businesses and have been able to secure orders for ukili products (see Section A.6). There are significant advantages in gaining export orders since IGA groups can then dramatically increase their selling prices (and profit margins) compared to internal market prices. One handicrafts groups reported that new orders had been placed for approximately 2000 ukili bags by a US company which was expected to generate revenues of US\$5000 – 7000³⁰. Similarly, beekeepers, mushroom and on-farm producers have been linked with tourist hotels both in Zanzibar Town and on the East Coast where they can obtain regular orders and good prices for

²⁹ The number of groups and individuals, and amounts of savings are provided in Annex 8.

³⁰ See also PIR (2003: 7)

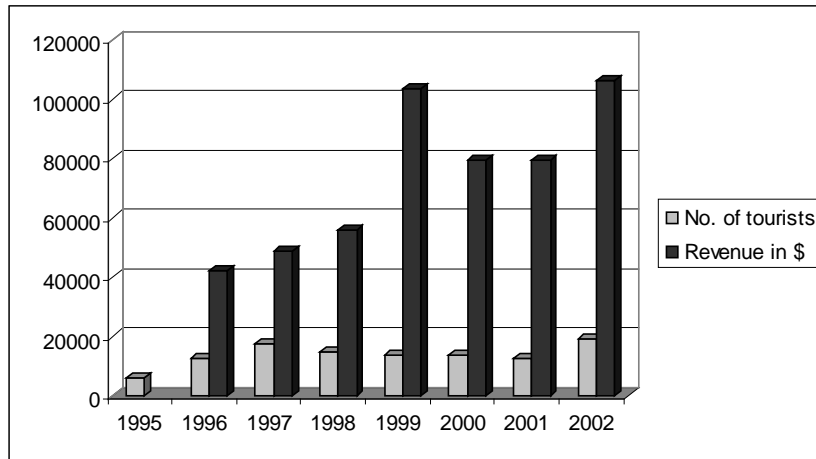
produce³¹. The results show that the key to the success of the IGAs has been realistic market research, training (see Human Capital: Section C.3.4) and partnering with JECA and SONARECO.

Jozani Tourism Revenue

The Zanzibar Poverty Reduction Plan (GoZ, 2002) asserts that achieving a more equitable distribution of tourism revenues is critical to poverty reduction and that the industry needs to improve linkages to local communities and increase the impact on local impact on household incomes and employment levels. JCBCP has definitely made some progress towards spreading direct benefits from tourism to local communities surround Jozani.

The trends for tourism for Jozani indicate that since 1995 both visitation and revenues have increased significantly. In 1995 tourist visits stood at only 6,191 and had increased to 19,205 in 2002. Similarly, revenues in 1996 were US\$42,398, rising to US\$106,427 in 2002 (see Figure 3). The tourism revenue sharing scheme has only been in operation since 2001 so local communities have only benefited for the last 3 years, via contributions to the CDF and the farmer compensation scheme. The income for the CDF has gone to finance community-wide improvements in health, water supply and education (see also Section C.3.3) and has thus contributed to improving community relations and acceptance of JCBCA (particularly in core villages like Pete).

Figure 3: Trends of tourist and revenue flows at Jozani-Chwaka Bay, Zanzibar, 1995-2002



Source: CARE 2003

Many of the IGA (and *de facto* savings and credit investments) are tourism based so the industry has a broader impact than just direct ‘fees’ paid by foreign visitors to view Jozani Forest and Red Colobus monkeys.

However, benefits accruing from tourism related revenues are not equitably distributed because of proximity differences between villages. For example, villages like Pete are located on the main Zanzibar Town – East Coast highway and close to the JCBCA Headquarters receive disproportionately more tourist that other villages. This is augmented by Pete VCC’s control of the mangrove forest boardwalk adjacent to JCBCA Headquarters, which in 2003 generated US\$17,687 for the village. In contrast, most other villages away from highway do not reap the same level of income benefits from tourism. At present the revenue sharing is not weighted to take account of difference in tourist market accessibility between villages.

³¹ CARE JCBCP staff pers. comm

Farmer Crop Compensation Scheme

The crop compensation compensates individuals who have suffered crop damage (and loss of income) caused by Red Colobus monkeys, since 2001. For example, by mid-2002 Tz.shs 4.64 million (approximately US\$4,640) had been disbursed to farmers to compensate them for loss of incomes due to crop raiding.

Many respondents (64%) reported to have experienced some loss of crop through raiding by the red colobus monkeys from Jozani forest, and just over half (55%) said that these raids were quite frequent (Table 17). The rest (18%) said they were infrequent.

Table 17: Reporting of Crop Raiding by Red Colobus Monkeys, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
No	82	34.2
Yes	155	64.6
N/a	3	1.3
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

The declared losses for the last season through crop damage ranged from Tz.shs 1000/- to 1,000,000/-, with the average loss being some around Tz.shs 185,000/- and the mean value being Tz.shs 62,530/-. The total sum of declared losses were Tz.shs 15,007,000/- (approximately US\$15,000)³². Generally, only communities that are directly adjacent to JCBCP are compensated – mostly to residents of Pete. One significant problem with the farmer compensation scheme is that it does not compensate farmers living away from the forest (again Pete seems to benefit most from the scheme), even though Red Colobus monkeys can now be found outside of Jozani.

These results reveal that crop losses happen among communities not directly adjacent to Jozani. The losses far exceed compensation and eligibility on offer under the present scheme. However, the GoZ and DCCFF agreeing to compensate farmers is a positive step to address community crop losses in terms of persuading communities like Pete to accept reduced access to the forest and the increased inconvenience caused by wildlife. Furthermore, given the difficult nature of administering a compensation scheme and the possibilities for fraudulent claims – which is a major reason why other government wildlife authorities in East African have not developed similar approaches (e.g., Kenya and Uganda), DCCFF and GoZ have shown that the scheme can be made to work, despite imperfections.

Most respondents (70.8%) did not suffer any loss of land (including access). However, almost a third (29%) reported to have lost some land to the activities related to the JCBCP (Table 18). Some of this land is land that has been designated for different uses under the RUMA and some is the protected forest land that people had encroached into.

Table 18: Loss of land by households, Jozani-Chwaka Bay, Zanzibar, 2003

	Frequency	Percent
No	170	70.8
Yes	70	29.2
Total	240	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

³² Although the respondents were clearly informed that the values they reported would not be used for any compensation exercise, the values are likely to be a bit less than reported, thus these figures are a general indication of crop values lost and should do not be compared to actual compensation figures over the project figure which approaches 5,000,000/- since the compensation was started. It need be noted that compensation is paid only to adjacent farmers and the survey covered the whole of the JCBCA.

Only a very few could put any value on the loss of land (3 persons) and the remainder reported the loss in terms of food and commercial crops (26%). Other losses that were reported included loss of land for agriculture (10%), crop damage (8%), and reduced access to the forest (2%).

Conclusion

The **overall impact of JCBCP on financial capital has been positive and significant** as evinced by numbers of people involved in saving and credit and IGA groups and the consequent reduction in vulnerability (improved health access and food security). Furthermore, the groups have been fairly successful at generating income. Indeed, based on household survey, 64% of the respondents appreciated that they have benefited from the JCBCP. 31% of the respondents reported that their incomes had been improved through savings and credit (availability of loans), new IGA activities and tourism allowing them to improve their livelihoods. The success of these activities has been further augmented by the implementation of the tourism revenue sharing/and farmer crop compensation scheme.

However, the study team noted that there were challenges still remaining:

- ▶ Firstly, **with a narrow range of IGAs there is much competition between groups to gain orders**. Many people were involved in similar IGAs for example women and men at Cheju-Chuchumila Village (Mnyonge Hatupwi group) were all involved in weaving baskets and selling them at the Jozani Tourist Gift shop, and this created competition within the same community and among households.
- ▶ Secondly, **some IGA groups lacked entrepreneurial skills, especially marketing**. The study team noted that many of the respondents were not very aggressive in marketing their goods, thus limiting income generation possibilities (e.g., the Jozani Tourist Gift Shop).
- ▶ Thirdly, the results indicate that the **IGA CBOs are highly dependent either directly or indirectly on the tourism industry** and with this comes considerable business risk should tourist visitation decrease in the future for any reason³³.
- ▶ Fourthly, **the links between savings and credit group activities and conservation is not always apparent to the communities**. Hartley et al (2003) “The savings and credit scheme is an aspect of the projects intervention that is not tied to conservation objectives.” The study team fieldwork results confirm this impression.
- ▶ Fifthly, **it is not clear if the IGA are reducing pressure on the JCBCA**. The above results on savings and credit expenditures show that the people’s priorities and project priorities/assumptions did not always converge or overlap entirely. It was assumed that when people save they would invest a large share of their savings on IGAs, thus change their livelihoods, and stop depending on selling fuelwood or accessing forest products and thus contribute towards conservation of Jozani Forest. But as the results show (see Section C.3.5) 58% of people depend on multiple income and employment activities, hence substitution of forest based livelihood for another is more socially complex. Furthermore, Table 13 (see Section C.2.8) indicated that 76% of survey respondents still sourced the majority of their fuelwood from the forest. Hence, links between improvement in financial and natural capital may not be strong.
- ▶ Sixthly, the **distribution of benefits via the tourism revenue and farmer crop compensation scheme is not equitable**. Some villages such as Pete are reaping far more benefits than others and this may result in some conflict between villages.

C.3.2 Social and Institutional Capital

Based on the review of fieldwork data the study team considered the JCBCP impact on social and institutional capital to be positive and significant.

³³ Hartley (2003) also notes the same dependency.

The JCBCP carried out several activities that aimed to strengthen the social and institutional capital of local community institutions to manage JCBCA resources and also link with other activities such as IGAs and savings and credit. These activities were:

- Increasing the capacity of JECA and CBOs to manage natural resources (VCCs) and sustain IGA and savings and credit; and
- Empowering minority groups, particularly women in management of natural resources.

The following section will report on the study team’s assessment of these strategies in building sustainable forms of social and institutional capital.

Local Community Institutional Group/CBO Formation

This section will provide an assessment of overall group/CBO formation and membership based on a sample of 240 people.

The results of the survey show that just over half (53%) of the respondents were members of IGA or savings and credit group / CBO created by the JCBCP. The main groups reported include the following (see Table 19), and most tend to belong to savings and credit groups (46.6%) and almost the same number did not belong to any group. Only a small percentage (approximately 6%) of the sampled people belong to enterprise orientated CBOs. It needs be noted that those in savings and credit groups tend to have their own household or individual level enterprises, but people running similar enterprises have not formed cooperative groups.

Table 19: Percentage of Respondents belonging to different Group Types, Jozani-Chwaka Bay, Zanzibar, 2004

	Frequency	Percent
Agricultural group	3	1.25
Beekeeping society	2	0.83
Environment group	1	0.42
Fishing/Agric group	1	0.42
Handicraft	2	0.83
JOSACA & JECA	2	0.83
Savings and Credit	112	46.6
Transport Cooperative	2	0.83
Umoja wa Kinamama	1	0.42
Not a member of any group	114	47.5
Total	126	100.0

Source: Local Benefits Study, Field Survey, JCBCA, January 2004

There are only 3 gender based groups, these being women specific group. All the rest are mixed – male and female. As mentioned earlier, the first groups were formed in 1998 based on the Grameen Model, but this failed and the MMD (see Box 4) model was initiated in 2000 and the group numbers grew substantially thereafter. Respondents who were group/CBO members cited a range of reasons for becoming group members but they all converge on securing some form of benefits:

- ▶ Diversification of incomes / obtaining alternative sources of income (28%)
- ▶ Seeking financial security through generation of savings (38%)
- ▶ Obtain loans and for making investments (13%)
- ▶ Assistance with household (food security) / individual expenditures (22%)

There are also a wide range of reasons given for not becoming a member. The main ones include: financial problems (44%)³⁴ (i.e. the minimum cash needed upfront to join a savings and credit group and buying shares) the range of other less frequent reasons include the fact that the spouse is

³⁴ This is indicative of the rural poverty situation on the ground.

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already a member; some are studying, and poor health. 20% of respondents were undecided and 15% were not interested in savings and credit or other groups.

All the respondents who are members were given support (to become members – i.e. encouragement, permission etc.) from their families or spouses, suggesting that even at the household level becoming a member of a group entails important family level decisions and support, but also expectations and key benefits such as improved household budgeting. Thus there is not only intra-community institutional strengthening, but also strengthening of social capital within each individual household.

Focus group discussions with the various groups revealed that they exhibited considerable cohesion and sustainability through intra-dependent ties formed through credit operations. The overall institutional sustainability of the savings and credit and IGA CBO/groups has also been fostered and improved through the formation of both JOSACA and JODCO that have served as umbrella organizations and community-based self-help institutions to support individual groups through training / troubleshooting (see Section C.3.4).

Besides the savings and credit fund, some groups, for example the *Umoja ni Nguvu* group, has gone further to set up an insurance fund as vulnerability reduction mechanism against social and natural ‘shocks’. Every group member was contributing Tsh 200/- voluntarily every week during meetings. For example, this mechanism was used to provide funds for new clothing and building materials to a household that had lost their possessions and home due to fire. This demonstrates how project ‘spin off’ effects are contributing to improving livelihoods and reducing vulnerability.

Empowerment of Women

The savings and credit groups have contributed towards raising the status of women within the household. For example, the study team results show that 85% of the women respondents reported that they have been able to contribute more substantially towards household expenditures, especially on children education, medical costs, children clothes and purchase of valuable household assets directly from the credit obtained or from the IGA. About 45 % of the women felt that this has increased their status and value in their respective households vis-à-vis men. They also said it has improved their relations with their spouses, in that they did not have to bother the men frequently for household expenditures and that the men were happy that their women were contributing to the households’ upkeep and development. This indicates that for a significant proportion of women, membership of the savings and credit groups has empowered them.

The majority of savings and credit and IGA groups assessed by the study team were heterogeneous consisting of men and women. In all groups women were the elected leaders and were also the keepers of the padlock keys of the each group’s special savings box. Part of the duties of the women leaders included leading / chairing the group meetings and the secretaries (again mostly women) were required to record and give account reports, count money and announce the account totals at the beginning of each meeting. This situation has had a major impact on this conservative rural Zanzibari society, in that it has given women an opportunity to socialize, discuss and exchange development ideas with men, which would otherwise not been easy. This has helped empower many women socially and has definitely increased their confidence that they can be effective and efficient leaders in their community.

Membership of the savings and credit groups has also reduced the economic vulnerability of women and given them a better status/value within their families and society. It has enabled them to save and acquire assets in their own names. The savings and credit scheme has helped both men and women to hire and purchase land (farming plots and/or building plots). Women tend to purchase land in their own names or their sons’ names and have control over the land bought. For example, in Chwaka village, there are two large seaweed farms that belong to women who obtained credit through their group. Women said that this type of investment helped to protect them against the miseries and insecurity associated with divorce. Out of all women interviewed only 2% (one in

Chwaka and two in Kitongani villages) were reported to have joint investment with their husbands at household level. The rest of the respondents said that there have been no joint efforts between a man and a woman in making joint family investments such as joint construction of houses or land purchases. This phenomenon is a result of socio-cultural influences and high possibilities of divorce, which put off women from taking part in joint investments and long term contributions in the household. Most women said that they did not wish to involve themselves in joint investments in a society that is prone to uncertainty due to divorce and polygamy. Because of this many couples had not been able to take advantage of employing large economies of scale and make substantial investments.

Equity Considerations

The 1991 Zanzibar household survey shows moderate to severe poverty in the Central and Southern districts adjacent to Jozani. These communities were generally characterized by inequities such as incomes below US\$100 per annum; high incidence of non-income poverty including social exclusion and lack of public services such as water supply and health; and poor education and consequently low literacy rates. In 2004, the communities around Jozani are still some of the poorest in Zanzibar with inadequate access to public services and significant food insecurity. The overall results across social and institutional and the other capitals indicate some improvements to social equity at the local level, especially through the empowerment of women through savings and credit groups, funding of health, education and water supply services through the CDF (see Section C.3.3) and participation in VCCs. Direct evidence of impacts on the poorest households within villages around JCBCA is lacking. Furthermore, as evidence above lack of available income is one of the key factors limiting individual / household involvement in the savings and credit, and IGA groups. Therefore, it is possible that the project has benefited richer members of the communities more so than the poorest who are also most likely to be more dependent on forest resources.

The Establishment of Village Conservation Committees (VCCs)

One of the most significant institutional developments promoted by the JCBCP (through CARE and DCCFF) is the implementation of Forestry Resources Management and Conservation directive for the establishment of 'community forestry management groups' or Village Conservation Committees (VCC).

From both the survey and the socio-economic survey carried out by the GEF / CARE (2003) the majority of the communities are aware of the existence of a Village Conservation Committee (VCC) in their respective villages. In the case of the GEF/CARE survey 85% of the respondents reported this, while discussions with the focus groups in the current survey also echoed the same. The VCCs represent the broad range of users and community members, including men and women and study team discussions demonstrated equal participation of men and women.

The study team focus group and RRA discussions revealed that the degree of awareness regarding their functions among the VCCs is consistently high. These included:

- ▶ Conservation activities such as tree planting and water supply
- ▶ Forest protection against illegal extraction and conducting patrols/law enforcement;
- ▶ Participating in the formulation of Community Forest Management Agreements (CFMAs) and Resource Use Management Agreements (RUMAs);
- ▶ Communication with DCCFF and local government on conservation and resource issues;
- ▶ Raising conservation awareness in their respective communities;
- ▶ Issuing special permits to extract and transport certain products and revenue collection; and
- ▶ Conflict resolution over land and resources both within and between villages.

Of these roles the resolution of resource conflicts is important in terms of maintaining good relations and trust. The discussions revealed that there are two types of resource use conflicts, the first

consists of conflicts between villagers and the second is that between villages. The second tends to be more problematic and concerns boundaries of resource access and use³⁵.

Participation in the VCCs is encouraged through weekly meetings to conduct briefings on recent developments and to gain inputs into critical issues such as the formulation of CFMAs / RUMAs. The extensiveness of VCC community participation according to the CARE (2003) report was 49% of community members who had been consulted on VCC issues before decisions were made. The same report notes that 44% of community members reported that they participated in JCBCP conservation activities including the formulation of CFMAs / RUMAs. The VCCs are all financially viable and stable (CARE 2003:13), as they have their own sources of revenues. The funds are used for running their operations. The sources include fines, permits for harvesting and transporting forest goods and from confiscating illegally harvested goods. (CARE 2003:13). They can also meet on emergency sessions for example, to settle resource conflicts. All matters arising from the meetings are reported to the relevant local government officials and DCCFF. Thus a high degree of transparency and accountability is maintained, indicating sound governance.

Although this study did not directly assess the development of DCCFF as an institution its actions and management operations are intimately related to the development of VCCs. Based on evaluation of JCBCP (Hartley et al, 2003) it has been noted that DCCFF has changed from a 'fortress conservation' approach excluding people to a 'people-centred organization' over the last 5 – 10 years. In short, the DCCFF values both science and social science knowledge to guide management decision-making and community interaction and it has benefited from training opportunities provided by the JCBCP (see Section C.3.4 & Hartley et al, 2003). This has allowed it to fully support the development of the VCCs and forge new partnerships with the local communities for the management of the new National Park.

Jozani Environmental Conservation Association (JECA)

Jozani Environmental Conservation Association (JECA) was established by CARE as a CBO/NGO umbrella organization to assist with the development of conservation awareness, establishing IGAs and savings and credit groups, training VCC members and also representing community interests to GoZ and DCCFF. JECA has fulfilled a useful role in building community confidence and trust between the communities and the GoZ and DCCFF. It has built internal networks with communities and external networks with the private sector through IGA activities.

Conclusion

The overall impact of JCBCP on social and institutional capital of the local communities has been significant. The local communities have gained trust and confidence to develop, and manage their own institutions as evinced by the recent 'graduation' of 26 out of 47 savings and credit groups / CBOs to independent status. Obviously, JCBCPs impact on savings and credit / IGA and VCCs are most notable and have a high potential for sustainability. The VCCs are also intimately linked to natural resource management and with the preparation of the CFMA / RUMAs there is a potential to conserve as well as reap benefits from biodiversity. Lastly, the JCBCP impact on empowering women has been substantial.

The study team also detected a number of challenges:

- ▶ **JECA's high dependency on CARE funds raises considerable concern about JECA's long run financial sustainability.** If JECA is not sustainable as an independent institution then its' collapse could impact the villages IGAs and relationship with DCCFF. It is also not clear how long JECA will be able to sustain itself as the "voice and choice" of the people, in the absence of a dynamic and communicative leader. DCCFF while recognizing the

³⁵ Although conflict resolution is successful within villages, much more work is needed in inter-village conflicts in term of negotiation and resolution skills is required for resolution as resources become scarce and increasingly under threat.

role that JECA plays in ensuring participation recognizes that it is not its mandate to sustain it and keep it propped up. The fate of JECA is thus not clear to village communities. Should JECA dissolve, VCCs will atomize and there will be no power in numbers or a common platform to serve as the voice of these communities to the GoZ;

- ▶ **VCC’s participation is uneven across the villages.** For example, villages such as Kitongani, Cheju and Charawe have between 62 – 66% of their respondents stating that they take part in VCC activities. In contrast in Bwejuu for example only 30% do so (CARE 2003);
- ▶ **VCC’s lack knowledge / skills in negotiation and conflict resolution** hence problems such as poor communication, conflict between villages persist. VCCs also lack power to control illegal resource harvesting by outsiders.

C.3.3 Physical Capital

Based on the fieldwork data the study team split the impacts on physical capital into direct and indirect affects on livelihoods. **The study team assessed the impacts to be significant**

The JCBCP project contributions to formation of physical capital through direct activities were to:

- Boundary demarcation of National Park and the CFMAs;
- Construction of DCCFF staff housing at the National Park Headquarters³⁶; and
- JCBCP/JECA support and facilitation for further infrastructure improvements through the CDF

The National Park demarcation involved the installation of clearly recognizable boundary ‘pillars’ and agreed to by the local communities. The benefits realized through the boundary marking have been; increased awareness of the JCBCA boundaries and a reduction in the probability of future conflicts over land; and the provision of indirect benefits in terms of improved working relations and trust with the DCCFF (see Section C.3.2 – Social and Institutional Capital). The DCCFF are the primary beneficiary of the construction of staff housing at the National Park Headquarters as it provides them with a permanent presence in the area from which to carry out operational management and protect forest resources. But, the local communities also benefit in terms of being able to access DCCFF staff to address their day-to-day issues (e.g. crop raiding) and to foster regular communication, and thus contributing to maintaining, and building on established relationships.

Table 19: Table 20: Cash disbursements from Tourism Revenue Sharing Mechanism disbursed to CDF and Farmer’s Crop Compensation Scheme, Jozani-Chwaka Bay, Zanzibar, 2003.

Village	Funds for community development	Community project funded	Total farmers compensation	Total amount of money disbursed
Charawe	206,300.00/-	Water system	1,571,933.00/-	1,778,233.00/-
Ukongoroni	206,300.00/-	Installation of water system	643,063.50/-	849,363.00/-
Bwejuu	206,300.00/-	Construction of Doctors’ Houses	643,063.50/-	849,363.00/-
Michamvi	206,300.00/-	Construction of Doctor’s House	428,709.00/-	635,009.00/-
Cheju	206,300.00/-	Digging of Well	214,354.50/-	420,654.00/-
Chwaka	206,300.00/-	Nursery School	571,612.00/-	777,912.00/-
Pete	206,300.00/-	Trenching of water system	214,354.50/-	420,654.00/-
Unguja Ukuu	206,300.00/-	Not started	142,903.00/-	349,203.00/-
Zanzibar town	0.00	-	214,354.50/-	214,354.00/-
Total	1,650,400.00		4,644,347.00/-	6,294,745.00/-

Source: CARE, 2003

³⁶ This is adjacent to the village of Paje.

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CARE (2003) indicated that 22.4% of Jozani tourism revenues have been paid into the CDF and farmers crop compensation scheme (see Box 4 / Section A.5.2). By mid 2002, a number of physical infrastructure investments had been made with CDF funding in water, health and education, and total of Tz.Shs 1,650,400 has been disbursed for community development as indicated on Table 20 (see also Section C.3.1).

One of the primary problems affecting community livelihoods and poverty (GoZ, 2002) adjacent to Jozani has been lack of water that is caused due to the porous nature of the limestone coral rag – there are no flowing rivers or standing water in lakes. Hence, in order to access clean fresh water wells need to be dug through limestone rock, which is relatively expensive and labour intensive. Therefore, for many of the villages the first priority use of CDF funds has been to install community water supply. A secondary problem affecting community livelihood has been lack of local health service provision and the CDF has funded the construction of lodging to enable health workers to provide services. Other CDF developments have included nursery schools (which have provided women with more free time for other activities such as savings and credit) and renovation of village mosques (e.g. in Pete). The indirect benefits of improving physical capital investments within the local communities is that this has contributed to a reduction in community vulnerability to natural shocks such as drought and disease. It has also contributed to change in attitudes as people can actually 'see' tangible gains from conservation and tourism that benefit all members of the community.

Conclusion

The JCBCP overall impact on physical capital has been significant in terms of building essential services for the communities. Lack of clean water, education and health are all cited in the 2002 Zanzibar Poverty Reduction Plan as key characteristics of non-income poverty, and JCBCP has addressed made significant progress in reducing them.

However, the study team notes that the following challenges remain:

- ▶ **The long-term sustainability of the physical capital improvements depends to large extent on the links made to GoZ line Ministries** such as Education, Health and Public Works to assist the communities in maintaining them.
- ▶ Doubts over the **sustainability of JECA (see Section C.3.2) as an institution may affect the functioning of the CDF over which it currently has management jurisdiction.**
- ▶ There are differences between villages in physical capital benefits. **Equity considerations are critical for the use of CDF funds** (see also Section C.3.1); and
- ▶ The present division of **tourism funding to the CDF and farmers compensation fund tends to skew benefits to those villages directly adjacent to Jozani.**

C.3.4 Human Capital

The study team overall assessment of JCBCP indicates that the impact on human capital was significant. The JCBCP project carried out several activities that aimed to strengthen the human capital of local community institutions to manage JCBCA resources and also link with other activities such as IGAs and savings and credit. These activities were:

- Training of savings and credit/IGA groups in administration, management and leadership; and
- Training for VCCs in planning, management and conflict resolution; and
- Conservation awareness raising and education

CARE initiated substantial training as a prerequisite to the focus on IGAs and savings and credit within the communities. Both men and women have benefited from the training given to the group

leaders. Women respondents from the focus group discussions stated that leadership / administrative training had been most useful in terms of allow them to; speak in any forum concisely and freely; maintain records and accounts for their groups in a transparent and accountable manner which created trust in the system; conduct meetings more effectively and resolve disagreements; generate more of their own resources (and savings) because people saw the benefits of the training; and also to advise each other on development issues and problem solving. In essence, these responses show that the individual and group capacity building has provided benefits beyond savings and credit groups and IGAs and empowered women within their communities. Moreover, in the Hartley et al (2003: 16) community 'self-evaluations' indicated that communities recognized significant improvements in business and marketing skills for IGAs.

JCBCP has assisted the DCCFF in implementing the VCC in each village and this has involved training the committee members in roles and responsibilities. Training has covered key issues such as conservation planning, conflict resolution and preparation of CFMAs / RUMAs. The training has enabled all VCCs to become functioning institutions in all villages around JCBCA. Again, community self-evaluations also recognized that VCCs had been empowered to carry out their responsibilities as a result of training inputs and members individual capacities (in terms of knowledge and skills) had been improved (Hartley et al, 2003: 16).

Conservation education and awareness has only reached a limited number of people in the area. According to the CARE (2003) report only 35% had been effectively reached and demonstrated knowledge of conservation priorities of the JCBCA. Awareness and education activities implemented through the school system have been more effective and all schools in the villages have conservation education as part of their syllabi. This shows there may presently be a gap in knowledge between present and future users of the JCBCA resources. The VCC are in part designated to fill this gap as part of their role is to improve conservation awareness within communities. Obviously, at the moment it is difficult to judge the effectiveness of conservation education alone, particularly as many other activities such as IGA and savings and credit groups have contributed to improved attitudes since the project start.

There is uncertainty in terms of the sustainability of human capital with regard to JECA. The leadership and vision of JECA to continue providing support to the villages / shehias is in doubt. This is an issue that was reported by Hartley et al (2003) who expressed concern that JECA owed much of its institutional development to one individual, who has subsequently left the organization. Hartley et al stated:

"Ability to retain staff of ...calibre within JECA is one of the key sustainability issues for the organization ... JECA is facing a financial and possibly a personnel crisis". (23)

The study team discussions revealed that JECA still needed (and requested) additional assistance to build individual and institutional capacities to sustain itself as a NGO without CARE support. As JECA has played a key role in carrying out some of the training with communities its potential demise could negatively impact further efforts to build human capital at the local level.

DCCFF human capital has been enhanced considerably by JCBCP and previous projects, as already asserted the organization has gone from a protectionist to people-centred approach in less than 10 years. However, both Hartley et al (ibid) and the study team noted that social science / community development skills within DCCFF are 'a little weak', particularly as CARE withdraws from its role around Jozani (ibid: 23).

Conclusion

The overall **impact on human capital has been positive and significant**. Most notably the training initiated by JCBCP has supported IGA and saving and credit, and the institutional development of the VCCs. There is also consistent evidence that individual and institutional capacity building has resulted in impacts (see also Section 3.1 – 3.3).

However, the study team noted the following challenges:

- ▶ **The long-term sustainability of the human capital improvements in relations to JECA** have not been secured. JECA became too dependent on one key individual and CARE for its institutional development;
- ▶ **DCCFF has made the conceptual ‘leap’ from protectionist to people-centred conservation organization**, but it is still somewhat weak on social / community development skills that it requires to continue to improve community conservation efforts.

C.3.5 Natural Capital

The study team overall assessment of the JCBCP indicates that the impact on natural capital was significant. However, the sustainability of the JCBCP gains is uncertain, and will depend on GoZ and DCCFF control of the fuelwood trade related to an overall energy strategy for Zanzibar. The JCBCP project carried out several activities that aimed to improve natural capital of JCBCA:

- Establishing the Jozani Chwaka Bay National Park to protect the habitats and endangered fauna and flora; and
- Alternative livelihoods to reduce dependence on forest products (agro-forestry, mushroom growing, beekeeping and handicrafts)
- Empowering / facilitating active role for local communities in management and use of natural resources through VCCs and CFMA/RUMA mechanisms;
- Studies of resource use

JCBCP and previous project phases have contributed to securing Jozani-Chwaka forest / coastal ecosystem and the globally significant biodiversity it contains. This is evidenced by recent censuses of key species – Red Colobus and Ader’s Duiker which have been stabilized and / or increased. For example, Red Colobus increased from 275 to 290 over 2002 / 03 and a recovery plan for Ader’s Duiker is being implemented. Most notably, the communities attitudes to the JCBCA have become much more positive and the gazettement of the area as a National Park was negotiated in a transparent manner and broadly endorsed by the local communities.

The natural capital impacts of the alternative livelihood / livelihood improvement activities of the project have not been clearly demonstrated (see particularly Section C.1). It is undisputable that livelihoods have been improved through IGAs and savings and credit activities and these have been appreciated by communities, however the linkages to conservation and reducing dependence on natural forest resources, particularly fuelwood are not evident (see also Hartley et al, 2003). Firstly, tables 13 and 14 (page, 32) indicate that over 75% of respondents still depend on fuelwood sourced from Jozani and 48% view fuelwood supply as not good. This indicates that supplies may be either stressed depending on village location to sources and / or restrictions of access imposed by improved protection are reducing the availability of wood on the market. Most respondents (70%) reported that there was less access of forest products and this indicates that use of forest products as a livelihood source has probably declined. 22.5% stated the situation remained the same (see table 21).

Table 21: Access to forest products

	Frequency	Percent
Less Access	168	70.0
Don’t know	18	7.5
Remained the Same	54	22.5
Total	240	100.0

Project IGA interventions such as agro-forestry (using relatively quick growing species) are not as yet reducing demand for forest fuelwood, however, improved law enforcements / patrolling (both by DCCFF and communities through VCCs) may be having a greater impact on reducing negative impacts on forest resources. Secondly, substitution of forest based livelihoods for alternatives is socially complex and is rarely a straight swap. For example, to reiterate study team survey data showed that 58% of respondents had multiple livelihood activities and new alternatives tended to be added to existing activities rather than substituting for them. Therefore, the links between improving financial capital and natural capital may not be strong.

JCBCP has created ‘institutional space’ for access and use / co-management of forest resources within villages and inside Jozani-Chwaka Bay National Park through VCC capacity building, and particularly assisting the communities develop CFMA / RUMA³⁷. Although it is too early to assess the outcome of these agreements they do provide the potential for villages to manage forest resources sustainably to meet their fuelwood needs, as well as providing managed access to other Non-Timber Forest Products (NTFPs) (according to prescribed zoning) (see also Section C.3.6 below).

The JCBCP has also taken account the broader context of the Jozani Forest in Zanzibar through a number of studies, most notably the study of fuelwood supply and use in Zanzibar (see Owen, 2002). Owen (2002) argues for explicit inclusion of woodfuel issues in a *Zanzibar Energy Strategy / Policy*. He noted:

“Total firewood and charcoal consumption in Zanzibar equates to just over 1 million c.u.m. of raw wood per annum ... Most of Zanzibar’s firewood is sourced from within the islands, with some mangrove imports ... there is ... little shortage of firewood in rural Unguja. In spite of the large volumes of charcoal imports, rates of woodfuel harvesting within Unguja are thought to exceed sustainable yield by a factor of about three. The high rate of commercial woodfuel extraction within Zanzibar, especially of charcoal means local woodfuel sources are rapidly disappearing ... government has lost control over the commercial woodfuel trade ... woodfuels have a low status in national development planning in spite of their overwhelming importance in terms of livelihood support, value of trade and the environmental impacts of their commercial extraction ... There is no national energy policy in Zanzibar. The national energy policy for Tanzania acknowledges the overwhelming importance of woodfuels but still prioritizes petroleum and electricity...” (ibid, i & ii)

Owen’s report indicates that pressure on forest resources is increasing over the entire island and this may mean that external pressure on Jozani-Chwaka Bay will increase in the near future as sources of wood are depleted in and around the villages. The report calls for the GoZ to formulate a national energy policy and to review legal provisions governing woodfuel use; strengthening community-based management and upgrading of enforcement capacity of DCCFF. However, at the time of the study teams visits to Zanzibar the outcome of the report was unclear.

One major issue effecting Jozani forest (and all of Zanzibar) is that there has been no qualitative and / or quantitative monitoring of forest coverage. In particular, remote sensing data has not been used to track changes, hence it is not possible to ascertain with any accuracy the current state of forest resources.

Conclusion

The project (and previous phases) have secured the natural capital through the creation of Jozani-Chwaka Bay National Park with the participation of local communities. Furthermore, the project has assisted the DCCFF and communities in setting up VCCs and developing CFMAs / RUMAs which will allow for access and use of forest resources and improved co-management opportunities.

³⁷ In accordance with GoZ environmental legislations and DCCFF policies.

However, the study team also noted:

- ▶ The IGA and savings and credit group activities have improved the livelihoods and attitudes to conservation, but it not clear that they have reduced dependence on forest resources or sufficiently linked to conservation;

C.3.6 National Benefits: Policy and Legislation

Based on fieldwork at the local and national level, the study team found the JCBCP Phase III impacts on the implementation policy and legislation to be significant. To recap the JCBCP had two sub-outcomes related to the implementation of policy and legislation³⁸:

- ▶ Gazettement of Jozani Chwaka Bay National Park under relevant legislation; and
- ▶ Implementation of legislation and policies appropriate to conservation and development

The National Park Legislation was passed in 1996, although the gazettelement of Jozani was not immediately forthcoming. The DCCFF supported by CARE and JECA undertook several rounds of exhaustive and wide ranging community negotiations / consultations to demarcate the boundaries and then to debate the proposed National Park regulations. Moreover, the DCCFF and CARE also engaged the communities in devising a management plan for Jozani. All these actions demonstrate the implementation of ‘participatory conservation’ involving all stakeholders as stated in the Forestry Legislation/Policy (1996). Hence, one of the key outcomes of the project has been successful establishment of the National Park with little social conflict – there has been no involuntary resettlement of communities³⁹ and conflicts have been negotiated with patience and willingness to listen on the part of DCCFF⁴⁰.

Implementation of conservation and development legislation has taken the form of two developments; (i) the establishment of VCCs and planning for CFMAs / RUMAs; and (ii) tourism revenue retention scheme/farmers crop compensation scheme.

JCBCP has assisted the DCCFF in operationalizing the Forestry Resources Management and Conservation Act directive for ‘community management groups’ through the creation of the VCCs (see also Section C.3.2 for a detailed discussion). The VCCs are all financially viable, moreover, communities are aware of their mandates and function. These include community conservation education and patrolling, and most importantly formulation of the CFMAs / RUMAs⁴¹ which allow communities to manage and use areas of forest (CARE, 2003: 13). JCBCP has also been instrumental in assisting VCCs in preparing CFMAs and ensuring that these are legally recognized through agreements between each village and GoZ in accordance with legislation. Implementation of the legislation and policy has progressed significantly, however study team observed that there is still a need to improve the capacity of VCCs so they can effectively implement the CFMAs and fulfil their law enforcement duties.

JCBCP partners have also influenced the GoZ to develop and adopt the revenue retention policy in the JCBCA. The revenue retention scheme that has been in operation since 2001 uses the following formula for distribution of revenues (see also Sections A.6 and C.3.1). The formula for sharing revenues provides just over 60% to DCCFF for both core operations and management of the National Park and 22.4% to the communities with the balance going to the GoZ Ministry of Finance for core government expenditure (see Box 4.)

³⁸ Forestry Resources Management and Conservation Act and Policy (1996) and National Park Legislation (1996).

³⁹ Although economic displacement has probably occurred due to restriction of access to resources inside the JCBCA.

⁴⁰ A good example of the inclusive approach of DCCFF has been the agreement developed with farmers who remained inside the proposed park boundaries.

⁴¹ In accordance with Act No 10 of 1996 on Forest Resources Management and Conservation.

Box 4. Tourism Revenue Sharing

Tourism revenues from JCBCA are shared between DCCFF, GoZ and local communities in the following proportions:

- ▶ 30.0% DCCFF for 'core' operations
- ▶ 33.6% Management and development of JCBCA (now National Park)
- ▶ 22.4% CDF and farmers crop compensation fund
- ▶ 14.0% GoZ Ministry of Finance

Source: CARE (2003)

The development of an effective policy and institutional environment is essential for effective conservation efforts. However, implementation has not been a straightforward issue and has evolved with continuous dialogue among the project partners, communities and the GoZ. Political will and sustained support for conservation goals is equally significant, and discussions with GoZ and CARE staff revealed that assuaging bureaucratic, and even subtle resistance to change has been achieved slowly⁴². This illustrates that capacity building for systemic changes takes time and this case study illustrates that over 10 years of sustained interventions have been required to assist GoZ in making necessary modifications to policies and legislation.

As in many developing countries now a major priority is poverty reduction. The JCBCP was relatively well linked with the GoZ development policies emphasizing poverty alleviation and UNDP country program. Indeed, the significance of the projects outcomes to the GoZ was clearly indicated at the stakeholder workshops to discuss the draft results where representatives of the Ministry of Finance attended and spoke out in favour of the project poverty alleviation impacts. Clearly, adopting a much broader 'conservation and development' approach which emphasizes the link between improving livelihoods (and reducing poverty) and development agendas may serve to leverage improved emphasis on conservation by the GoZ and executed through DCCFF.

Conclusion

The overall impact of the JCBCP on policy has been positive and significant⁴³. The project achieved the key objective of gazetting JCBCP as National Park and securing global environmental benefits. It has also assisted the DCCFF in implementing co-management for the sustainable use of forest resources through the VCCs and the revenue sharing, and compensation schemes.

⁴² For example, agreement to revenue sharing in 1996 was not implemented until 2001 even with legislative and policy prescriptions in place.

⁴³ Although the progress made during this phase of support to JCBCA has in part been made possible by the policy developments enabled by the previous projects.

D. KEY FINDINGS AND LESSONS

D.1 JCBCP Key Findings

There are two main groups of findings from this study. The first is associated with the defined local benefits, i.e.:

1. *“Project outcomes, which directly or indirectly have positive impacts upon people and ecosystems within or adjacent to project areas, and which provide tangible gains in the livelihoods of communities and the integrity of ecosystems.”*

The second is associated with the postulated hypothesis relating to alternative income generation, i.e.:

2. *“Increased household savings and income will increase household livelihood security and reduce pressure on natural resources and lead to the sustainable conservation of biodiversity, in the context of strong and environmentally aware community and government institutions, strong community based natural resources management, and environmentally sound criteria for the provision of financial and non-financial business services.”*

Reflecting on (1) it has been shown that:

- ▶ There is evidence of significant improvements in the livelihoods of the local communities and the integrity of the local ecosystems.

Applying the conceptual framework for the five livelihoods capital, one can trace quite clearly the various forms of capital being developed and enhanced and the tangible outcomes that are emerging:

Natural capital improvements have been reflected in the reversal of JCBCA ecosystem deterioration. The main indicative achievements here are the marked increase in the number of Red Colobus monkeys and recovery of the Aders Duikers populations. As well as reduced encroachment and illegal use of forest resources. Other indications of improvements (or potential for improvements) are in the operationalization of VCCs and development of CFMAs / RUMAs by the communities and DCCFF to establish co-management of forest resources for regulated access and use. Immediate improvements in community access to natural capital are evidenced by increased access to ground water and access to woodfuel and building materials through agro-forestry initiatives.

Financial capital improvements have been the most visible impact of the project. The project has enabled individuals / households to increase to the productivity of existing sources of livelihoods (mainly farm and to a lesser extent marine, but also non-farm and off-farm incomes such as shops and petty trade). More importantly, the project has enabled opportunities for new livelihood activities in areas such as improved farming (mushroom growing), mariculture, agroforestry and ecotourism, have taken place. This has led to increases in cash incomes and improvements to the ability to save and the access capital. The establishment of savings and credit groups, rigorous training and marketing have influenced the development and success income generating opportunities made by households and groups.

Social and institutional capital improvements were evidenced in development of community-level institutional most notably the savings and credit and IGA groups and the VCCs. The ability of community members has improved in terms of the effectiveness to interact with GoZ departments (particularly the DCCFF) and the private sector to market / sell their goods. There have been considerable improvements to social equity at the local level, especially through the empowerment of women in financial decision-making, but also in allowing women to finance issues that are critical

to them (e.g. health and education). The project has improved the livelihoods of some of the poorest communities in Zanzibar, however the precise impact within village communities in terms of reaching the poorest is still uncertain⁴⁴.

The JCBCP has provided improvements to **physical capital**, including investments in water supply, social infrastructure such as health and school buildings and tourist visitor facilities that include a souvenir shop and visitor centre and a mangrove boardwalk have been constructed. These developments have greatly improved access to clean water, health and education services in villages where previously these services were limited or non-existent.

There have occurred community wide improvements to **human capital**: for example the skills, knowledge of income opportunities, household financial management and most importantly co-management of resources through VCCs. Notably, the project paid particular and explicit attention to the role of women (which is a rarity in GEF projects) that emphasized issues such as functional literacy, confidence building, management and leadership skills of women within and outside their respective groups.

All of the improvements in the livelihood capitals have contributed to reduced **vulnerability and improved resilience** to natural disasters, environmental degradation and variability, food shortages, socio-political and market disruptions. Community respondents particularly emphasized improved capabilities to deal with illnesses; bereavements; weddings, putting children into school and accessing paid medical services; improved quantity and quality of food – i.e. not simple satisfaction of not spending days in hunger but also improved nutritional status.

The **policy and political environment**: The study has demonstrated that the development of an effective policy and institutional environment is essential for effective conservation efforts at the local level. This has not been a straightforward issue and is a factor that has evolved with continuous dialogue among the project, communities and the GoZ⁴⁵. The existence of a national policy and institutional structure now has the potential for wider application in the co-management of many other community related protected areas within Zanzibar and Pemba.

As in many developing countries now, working through other add-on policies, the GoZ major priority is poverty reduction and sustainable development, and those other policy areas, such as conservation, health and education, will receive support contingent upon how effectively they link onto these priorities. In the JCBCA, a much broader conservationist approach was adopted and applied which meant that the link to conservation and development agendas was stronger and more visible (although it has not been possible to definitively measure the poverty impact of the project). The experience of JCBCP also shows that this is not easy as the project has had to undergo three distinct phases until such results can be discerned, and they are likely to be sustained where conservation efforts are able to demonstrate that they will contribute to the overall national policy priorities, which in most countries are increasingly focused on the poverty reduction-livelihoods and sustainable development agenda.

The need for incentives: What emerges clearly here is that the basis for effective participation is to ensure that there are incentives for local communities to participate. People do not cut down trees for fun – they have a need, and people in the area do not take part in conservation for fun, they have other more pressing needs, and if they do take part, then there have to be some benefits in return for their time and effort, both immediate and long term. This also explains why not all of the households in each village are engaged in project activities and nor has everybody become direct beneficiary of the project, because it takes time to see what's in it for them.

⁴⁴ A detailed poverty assessment may reveal the finer details of the project impact at the village level.

⁴⁵ Even as this study was being conducted dialogue between DCCFF and communities was ongoing and constructive.

The project experience also clearly demonstrated that where design incorporates local benefits explicitly in a coordinated and nuanced manner they can be achieved. The **JCBCP project design and implementation process indicates several key factors that have contributed to success:**

- ▶ Design well grounded in social, political and institutional contexts with good appreciation of capacity constraints;
 - Use of social assessment / baseline in project design and early implementation stage to clarify key livelihood issues of importance to target beneficiaries (whose behaviour requires change)
- ▶ Innovative partnering with INGO with a strong background in social / rural development and natural resource management in the form of CARE International;
- ▶ Strong and active participation of local communities and GoZ (particularly DCCFF) in project design and implementation which engendered ‘ownership’ of the project process and results;
 - Focusing on transparency, accountability as part of the participatory process was well demonstrated in the success of the savings and credit groups (i.e. the *Mata Masu Dubara* approach -MMD). This experience has shown that good participation is fundamental to ensuring that a sustainable and appropriate flow of local benefits and through that it has become an important part of effective approaches to conservation. The lesson here is that participation is something that is reflected in the fundamental structure and approach of a project, rather than being treated as a modification that can be casually added to a poorly designed and organised project
- ▶ Linkage between national policy development and implementation to local level interventions – the implication is here that without coordinated efforts to boost social and institution capital (i.e., co-management) local – global benefits would be much reduced;
- ▶ Sustainable local – global linkages take time, in essence the success of the JCBCP was intimately linked to previous phases which laid the foundation.

While there are benefits, challenges remain (see Section C.3): Although the direct and indirect local benefits generated by project interventions have been clear and are broadly sustainable the study team emphasizes the following key challenges remain:

- ▶ Broadening the range of IGAs may be necessary in that there is too much dependence on tourism;
 - Some IGA groups still lacked entrepreneurial skills such as marketing.
- ▶ The activities of the savings and credit and some IGAs are not clearly tied to the conservation;
- ▶ Distribution of tourism revenue sharing benefits between villages is not equitable – some villages receive more than others (due to geographical advantages) and this creates tensions;
- ▶ The sustainability of JECA is in doubt following the closure of the project. As JECA has acted as key interlocutor (e.g. CDF, VCCs and IGA activities) between villages and other stakeholders such as the GoZ and private sector its collapse could impact the livelihood capital gains;
- ▶ VCCs will require more capacity building in the near term to improve their skills and knowledge of conservation issues;
 - Similarly, DCCFF community and social development capacity is still relatively weak despite the considerable gains it has made in changing from a protectionist to people-centred institution;
- ▶ Long-term policy and practical challenges remain in gaining control of the Zanzibar fuel-wood trade which may threaten the sustainability of Jozani in the medium term.

Linkages between local and global benefits: Reflecting on (2) the project was based on several linkage assumptions contained within the hypothesis:

3. Improvements in income and employment opportunities *lead to* reduced pressure on natural resources and sustainable biodiversity conservation;
4. Improvements awareness and knowledge, and community management of natural resource and other non-financial benefits *lead to* reduced pressure on natural resources and sustainable biodiversity conservation.

With regard to the first assumption the results indicate that household savings and income earning opportunities and to lesser extent employment has increased in many of the villages around JCBCA. Also communities are well aware that JCBCA is a source of income through tourism revenue sharing scheme, CDF projects and farmer compensation scheme. But, it is clear that the links between IGAs and savings and credit groups activities and conservation are not sufficient to reduce dependence on natural resources⁴⁶. The results show 58% of households depend on multiple livelihood activities hence a substitution is likely to be imperfect and may act as an addition to ongoing use of natural resources for livelihood security. Moreover, 70% of households still depend on the forest for woodfuel. Therefore, the study team conclude that there is no clear substitution or trade off between improved income and employment opportunities and reduced pressure on natural resources. Hence, primary assumption of the hypothesis is unproven.

The second assumption encompasses the broad institutional and non-financial interventions of JCBCP and they have contributed to improved community attitudes towards the JCBCA (CARE, 2003) and acceptance of the National Park gazettement. What is beginning to emerge now are the first signs of the sustainable conservation of biodiversity, in the context of strong and environmentally aware community and government and local institutions engaging in co-management of Jozani-Chwaka National Park. The caveat here must be that institutions such as the VCC and the CFMA / RUMA agreements are yet to be fully operationalized, but there is strong potential for the development of sustainable biodiversity conservation management based on partnership between communities and GoZ⁴⁷. The study team concludes the non-monetary benefits of co-management for provision of regulated access and use of forest resources is likely to have greater influence on links between local livelihoods and global environmental benefits than financial benefits.

It is important to view the JCBCP interventions holistically and the evidence shows that in a situation where the global goal is to conserve the biodiversity of resources that have high local demand and potential values, and are under a range of development pressures then ensuring a wide range financial and non-financial local livelihood benefits is a prerequisite for moving towards global environmental benefit. Hence, when the both assumptions are working together the hypothesis is proven.

D.2 JCBCP: Lessons for the GEF

- ▶ The global goals will only be realized on a scale needed to preserve the integrity of the ecosystems where local communities have become active agents of conservation management;
 - Local communities are far more willing to be active agents of conservation where they see direct and indirect benefits accruing to them from their participation. Participation alone is not enough to guarantee changes in behaviour necessary to sustain biodiversity;
 - Non-monetary benefits are just as important as monetary (i.e., income and employment benefits) in forging links mutually supportive links between local benefits and global environmental benefits;
 - Market analysis and appropriate local capacity building and key for the design and success of alternative livelihoods / new IGAs;

⁴⁶ This results is supported by Hartley et al (2003)

⁴⁷ Therefore allowing for the management of the majority of woodfuel supply which comes from the forest.

*GEFME LOCAL BENEFITS CASE STUDY JCBCP – WORKING DOCUMENT
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- ▶ National enabling conservation policies and legislation are critical to secure local benefits streams, particularly in relation to tourism revenue sharing, co-management and access, and sustainable use of resources;
- ▶ Protected area institutions are difficult to establish and maintain and have initial and longer term transaction costs given that benefits from conservation are not always apparent and stable. Community ownership has been critical in design and implementation of local conservation institutions charged with co-management;
- ▶ Understanding the balance of rights, responsibilities and returns to each participating party is an important tool in resolving resource conflicts;
- ▶ Social assessment / baselines can provide critical inputs into design and targeting livelihood / conservation interventions to enable local – global linkages;
- ▶ Partnership with NGOs with strong rural development / natural resource management and community focused approach may improve the design and implementation of GEF biodiversity projects (particularly MSPs) to enable local – global linkages.
- ▶ Sustainable local – global linkages take time and are unlikely to be observed over short project timeframes (i.e., 3 – 5 years). This indicates the advantage of multi-phased approach

Annex 1 Case Study Terms of Reference

Background Information

The Global Environmental Facility (GEF) is a financial mechanism that provides grant and concessional funding to projects and activities to protect the global environment in developing countries and countries in economies in transition. The GEF Secretariat services the GEF Assembly and the GEF Council and cooperates closely with global environmental conventions dealing with climate change, biodiversity, international waters, land degradation and persistent organic pollutants. Project financed by the GEF are mainly managed by its three Implementing Agencies- The United Nations development Program, the United Nations Environment Program, and the World Bank. The GEF Secretariat is located and is administratively supported by the World Bank. The Independent GEF Monitoring and Evaluation Unit (GEF M&E) is located within the GEF Secretariat.

Objective of the Portfolio Wide Study

The GEF mandate incorporates the role of local benefits through its emphasis on a sustainable development approach and by requiring that the programs and projects it funds be country-driven and based on national priorities designed to support sustainable development. In this study, local benefits are defined as:

“Project outcomes, which directly or indirectly have positive impacts upon people and ecosystems within or adjacent to project areas, and which provide tangible gains in the livelihoods of communities and the integrity of ecosystems.”

The GEF is conducting a portfolio wide study to better understand the relationship between local benefits and the attainment of global environmental benefits. The objective of this study is to assist in maximizing the level of local benefits included in future GEF policy, strategies, programs, project design and implementation within the context of GEF’s mandated focus on global environmental benefits. The study includes in-depth desk reviews, internal and external expert interviews as well as a total of twenty primary and secondary fieldwork case studies.

The Jozani-Chwaka National Park Development project has been selected as a case study because of the explicit linkages both projects designs make between improvements in local benefits (livelihoods) and the attainment and sustainability of global environmental benefits. The project has a strong potential to yield critical findings, lessons and recommendations, which will inform the future development of GEF interventions in the Biodiversity focal area.

Objectives of Case Study

The objective of the case study is to understand the relationship/linkage between local benefits (and/or negative impacts) and the attainment of global environmental benefits of the GEF supported projects: Jozani-Chwaka National Park Development Project (see also Section E.).

Time allocation will be flexible and will take account of the range of issues to be studied and of logistics.

Scope of Fieldwork Investigation

The Local consultant will report on progress in achieving results relating to project objectives, outputs and outcomes, within the specific context of:

- Assessment and description of the types and scale of local benefits and negative impacts, intended or unintended, which have resulted from GEF projects, including local perceptions of the benefits and impacts.
- Examination and description of the nature of the links between local benefits and the attainment of global environmental benefits. This will be based on an analysis of linkages in

terms of how global environmental benefits can affect local benefit/negative impacts and how the generation of local benefits/negative impacts can affect global environmental benefits.

- Evaluation and description of the extent to which the strategy and environmental management options in the project design and implementation properly incorporated the opportunities to generate greater levels of local benefits: essentially looking at what the projects did not do, as well as what they did do.

Analysis Framework and Expected Outcome

The case study will address the following questions:

What are the overall objectives and outcomes of the project?

Overview of the investment: a brief profile of the project being evaluated, which describes the project policy and institutional context, structure, objectives and anticipated results (outputs, outcomes, impacts) and relates this to the host country's development context. Specifies intended local benefits and target groups. Based on existing documents and on interviews with stakeholders.

Overview of Global Environmental objectives and achievements of the project: This overview will be done based on existing documents and interviews with expert stakeholders. It will include an assessment of the accomplishments of GEF funded activities in supporting institutions, policies and activities that contribute to the improvement in biodiversity conservation. It will include a review of the environmental resource characteristics of the area.

What have been the local impacts (human and environmental) of the project?

What are the types and scale of local benefits and negative impacts?

The study will assess the project's positive and negative impacts using a livelihoods approach focusing on livelihood capitals, including natural, financial, social and institutional, physical and human capitals. (Model of Livelihood).

This analysis will be differentiated by gender within each stakeholder group. Attention will be paid to indigenous/ethnically distinct people and other disadvantaged stakeholders where they constitute a distinct group.

What are the impacts of the GEF project in the relationship of local level processes to wider social (including gender), economic and environmental processes?

The study will examine how impacts on the various capitals have affected resilience and vulnerability of local communities to shocks from external factors that are normally beyond their control. Stronger or weaker livelihood capitals are assumed to lead to higher or lower resiliency respectively. The study should try to assess the extent to which this assumed relationship is actually taking place or at least should provide evidence that the impact on capitals is resulting in higher or lower resiliency. This assessment can be done by looking at processes that occur at different levels but have a direct impact on local populations, two examples are:

- Processes at the local level such as better-organized communities (social capital) that are more capable to respond to food insecurity and natural resource variations.
- Changes in external institutions such as laws and regulations that might result in benefits or costs at the local level.

What are the contributions or detriments of the project's local impacts (positive or negative) to the attainment of global environmental benefits?

The study will identify the links (positive and/or negative) between local benefits and the global environment. The following are four examples of possible patterns that the study might consider to assess these links:

- Changes in consumption patterns that reduce or exacerbate global environmental stresses (e.g., substitution of poultry for game meat).
- Cumulative local environmental changes that over large areas can have positive or negative global environmental consequences (e.g. deforestation or reforestation).
- Reduction of vulnerabilities that can contribute to changes to the balance in policy priorities (e.g. moving from the urgency of poverty reduction to improved environmental management).
- Changes in the external institutional environment, (e.g. the development of better governance as a consequence of local level empowerment and greater public awareness and political support for environmental issues)

Considering the projects objectives, did the overall strategies and environmental management options selected in the projects effectively incorporate the opportunities to generate local benefits?

Specific attention will be paid to opportunities for women, the poor and minority groups, as these are more likely to be overlooked in project design and implementation.

What are the key findings and lessons to be learned from the project⁴⁸?

Stakeholder Involvement

The Local Consultant should use appropriate participatory methods, to ensure active and meaningful involvement by investment partners, beneficiaries and other interested parties. Stakeholder participation will be integrated in fieldwork design and planning; information collection; development of findings; evaluation reporting and verifying findings.

Methodologies

The Local consultant will develop methodological tools for data collection based on the project contexts. The methods may include quantitative and qualitative approaches, such as survey questionnaires, Rapid Rural Appraisal (RRA), focus groups and semi-structured interviews. Identification of the suite of methods will take place during the fieldwork initiation phase and be agreed by the Team Leader and other Study Team members.

Accountabilities and Responsibilities

The GEF M&E Team Leader is responsible for:

- Overall responsibility and accountability for the case study
- Coordination within the Study Team and with the Local Consultant
- Guidance throughout all phases of execution
- Approval of all deliverables
- Co-ordination with other pilot case studies

The Local Consultant is responsible for:

- Conducting the case study fieldwork
- Day-to-day management of operations in the field
- Regular progress reporting to GEF M&E Team Leader
- Development of findings, lessons and recommendations
- Production of deliverables within contractual requirements
- Production of a Confidential Back-to-Office Report (BTOR)⁴⁹

The Local Consultant will report directly to the Team Leader.

⁴⁸ Including any relevant accountability issues, such as elements of approved project plan, which were not implemented?

⁴⁹ A standard requirement of all Local Consultants employed is a back to office report (BTOR). The primary objective of the BTOR is to allow consultants to make recommendations, record insights or note any confidential matters that may not be appropriate to include in a technical report. The report will remain confidential to the study and should be submitted to the Team Leader at the conclusion of the consultancy.

Case Study Process

The case studies will be carried out in conformity with the principles, standards and practices set out by GEF M&E (including the Code of Ethics).

The case study process is split into three phases:

Fieldwork ‘Initiation’ Phase: For the purposes of the Initiation phase the Local Consultant will be integrated into the ‘Study Team’⁵⁰.

- Firstly, the Team Leader will brief the Local Consultant on the case study; discuss terms of reference in the light of the available budget, and request that the Local Consultant prepare a draft workplan for the case study. The Local Consultant and Study Team will develop a case study workplan⁵¹ to: Develop and direct appropriate methods for the data collection, analysis and reporting. Describe how the case study will be carried out, bringing refinements, specificity and elaboration to the terms of reference.
- Secondly, the case study the Study Team will conduct national-level stakeholder interviews
- Thirdly, conduct an initial exercise to: survey project documentation and correspondence; interview key local stakeholders (e.g. project managers, local government officers, representatives of local communities, representatives of indigenous and gender groups, local NGOs/CBOs, and the private sector); conduct pilot community consultations to test methodologies and gather initial data which will feed into the main fieldwork phase.

These activities will further establish the main issues of relevance to the study, enable the selection specific field sites, application of appropriate data collection methods and therefore, allow the Study Team to develop, and finalize a case study workplan. This workplan will act as the agreement between the Local Consultant and the GEF M&E Unit for how the study will be conducted.

At the end of the ‘Initiation Phase’ the Team Leader and other members of the study team will hold a briefing with the Local Consultant to share findings and key impressions to date, before the international Study Team members depart. The Team Leader will ‘sign off’ on the agreed case study workplan, which the Local Consultant will execute. Phase 1 is expected to last 5 days.

Main Fieldwork phase: The Local consultant will conduct fieldwork at the case study sites and write-up a draft report. The draft report will contain key findings and lessons learned, together with the evidence on which these are based. The report will be submitted to the Team Leader for preliminary comments. Phase 2 is expected to be 15 days.

Stakeholder Presentation and Final Report: The Local Consultant and Team Leader will organize a brief presentation of the fieldwork results to national and local stakeholders (held at or near the project site) for comment. Following any revisions prompted by this presentation, the final report will be submitted to the Team Leader. Phase 3 is expected to last up to 10 days.

Deliverables

The Local Consultant will prepare:

- Case Study Workplan
- Case Study Report (with inputs from other Team members if necessary).

These deliverables are to be:

⁵⁰ This may include GEF M&E Specialist (Team Leader), Implementing Agency representatives and Local Consultants.

⁵¹ The workplan will address the following reporting elements: Overview of Investment; Expectations of the Case Study; Roles and Responsibilities; Methodology; Case Study Framework; Information Collection and Analysis; Reporting; Work Schedule.

Prepared in English only, except for the final evaluation abstract/executive summary that will be submitted in both English and Swahili for the benefit of local stakeholders in Zanzibar. Submitted to GEF M&E Unit electronically via e-mail and/or on diskette in MS Word. Submitted in hard copy format direct to:

Office of Monitoring and Evaluation
Global Environment Facility Secretariat
1818H Street NW, Washington DC 20433. USA

It is expected that the Local Consultant will take up to 30 working days to complete this assignment. This includes time for drafting the report, local stakeholder presentation and finalizing the document following comments received locally and from the GEF M&E.

Case Study Work-plan

The work-plan will be submitted to the Team Leader at the close of Phase 1 of the fieldwork. The work-plan will be submitted electronically, together with 3 copies in hard copy format.

Draft Case Study Reports

The first draft of the report will be electronically submitted to the Team Leader on or before January 28th 2004. The Team Leader will provide initial comments within 5 working days and these will be incorporated into a stakeholder presentation (scheduled for Feb 2004). Stakeholders (including those unable to attend) will be given 5 working days to provide written comments on the key findings.

Final Case Study Reports

The Local Consultant will electronically submit the Final Report (including an abstract/executive summary in English) within two weeks after the deadline for receipt of final comments from stakeholders.

Annex 2 GEF Benefits Study conceptual framework

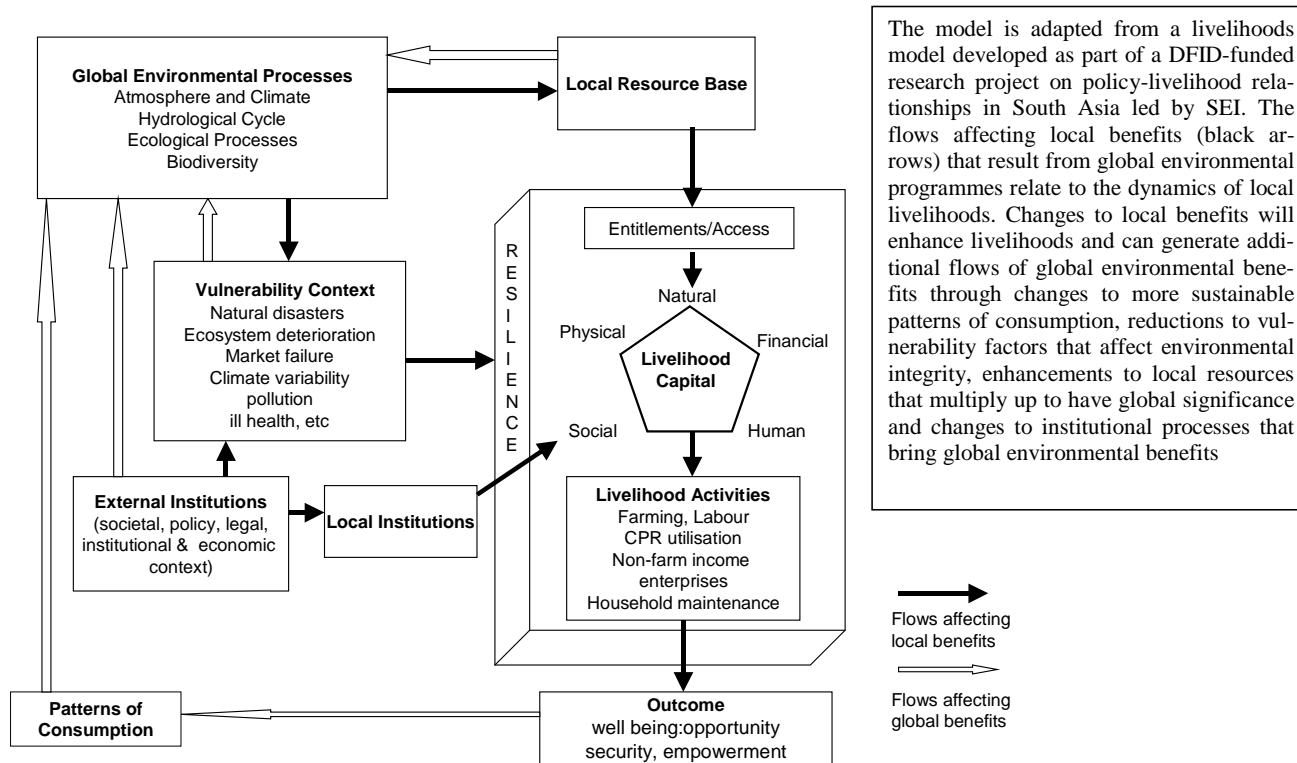
The main elements of this framework are a typology of local benefits, an identification of the ways that local benefits can enhance global environmental benefits and a model that links both local and global benefits to the dynamics of local people's livelihoods. The framework is depicted in Figure 2 below.

The typology identifies five generic categories of improvement to livelihood capital, which can be seen as the core of local benefits in global environmental projects:

- ❖ Improved access to **natural capital**, including plants and animals harvested from the local resource base, surface and ground water, fuelwood and environmental services such as safe waste disposal and tourism and recreation values. Such changes will increase the sustainability of **resource management**, reflected in factors such as the reversal of ecosystems deterioration, retained biodiversity values, the regeneration of forests, rangelands and wetlands and improvements to water quality.
- ❖ Increased **livelihood opportunities, income and financial capital**. This includes increases to the productivity of existing and opportunities for new livelihood activities such as farming, fishing or tourism, increases in cash income and improvements to the ability to save or availability of capital.
- ❖ Improved **social capital, equity and institutional capacities** in local communities. This reflects the enhancement of community-level institutional capacities and contact networks and the improved ability in local communities to deal with outside agencies. It also reflects improvements to gender and social equity at the local level, especially through the empowerment of women and minority groups in decision-making.
- ❖ Improvements to **physical capital**, including investments in tools and machinery, access to or the ownership of land and buildings and access to infrastructure such as transport, telecommunications or water supply and irrigation.
- ❖ Improvements to **human capital**: the skills, knowledge, work ability and management capabilities of local community members. There is typically a need for a gender focus in this that emphasises issues such as functional literacy and management skills of women.

Increases in the livelihood capitals available to communities will promote improved **health and food security**, including improvements to key indicators such as child and infant mortality, reduced morbidity from diseases that reflect poor environmental conditions and improvements to both the absolute level of nutrition and a balanced diet. Strengthened livelihood capitals and improved health and food security will, in turn increase the **resilience** of local communities to withstand shocks from external factors that are beyond their effective control. Increased resilience in turn promotes reduced **vulnerability** to, for example, natural disasters such as floods, droughts and cyclones, environmental degradation, loss of ecosystem integrity, deforestation and climate change and variability as well as to such forces as social, political and market disruption.

Figure 4: GEF Model of Livelihoods and Benefits Flows in Global Environmental Programs



The model is adapted from a livelihoods model developed as part of a DFID-funded research project on policy-livelihood relationships in South Asia led by SEI. The flows affecting local benefits (black arrows) that result from global environmental programmes relate to the dynamics of local livelihoods. Changes to local benefits will enhance livelihoods and can generate additional flows of global environmental benefits through changes to more sustainable patterns of consumption, reductions to vulnerability factors that affect environmental integrity, enhancements to local resources that multiply up to have global significance and changes to institutional processes that bring global environmental benefits

Annex 3 Global Environmental Benefit Indicators for JCBCP

Objective	Indicators	Verification
Impact (final goal) The core conservation area is effective, productive, harmonized and sustainable		
Effects (intermediate goals) The biodiversity of the Jozani-chwaka bay area is protected, managed and utilized sustainably	Legal and sustainable use of the proposed national park use zones established Low level of illegal activities maintained by end of project Jozani population of red colobus monkey stable and increases Jozani population of ader’s duiker decline halted and recovery promoted	Baseline and end of project surveys Patrol records Baseline population surveys and monitoring

Annex 4 JCBCP Redefined Goal and Outcomes

The TE assessed the JCBCP based on the redefined final goal and outcomes below. These changes were not officially reported to the GEF and the PIRs continued to report against the original project goals and outcomes.

Phase III redefined the **Project Final Goal** as:

The income and environmental security of 5,000 households in Jozani-Chwaka Bay Conservation area is enhanced, while biodiversity flourishes”

Four Intermediate Goals were identified:

Intermediate Goal 1: Communities around the Jozani-Chwaka Bay Conservation Area manage natural resources effectively.

Intermediate Goal 2: The Zanzibar Department for Commercial Crops, Fruits and Forestry implements enabling policies and provides adequate support to communities for effective community-based natural resources management.

Intermediate Goal 3: Communities around Jozani-Chwaka Bay Conservation Area develop and implement environmentally friendly on-farm and off-farm income generating activities (IGAs)

Intermediate Goal 4: JECA effectively supports communities to manage natural resources and income generating activities.

Annex 5 Stakeholder Consultations

	Persons	Organizations
1	Dr. Alan Rodgers	UNDP-GEF Regional Representative
2	Getrude Lyatuu	UNDP – Dar es Salaam
3	Thabit Masoud	CARE International (Tanzania /Zanzibar)
4	Dawn Hartley	CARE International (Tanzania)
5	Hamza Z Rijal	Consultant Ecology, Natural Resource Management and EIA
6	George Mkoma	CARE International (Tanzania) IGA and Savings and Credit Specialist
7	Dr. Bakari Asseid,	Director of Department of Commercial Crops, Fruits and Forestry (DCCFF)
8	Mr. Mgonco	DC Central District
9	Issa Mlingoti	Director for tourism
11	Hassan Khatib Hassan	Secretary of UWEMAJO (Local Agricultural Association) and owner of Red Colobus restaurant)-
12	Communities and Shehia leaders of	Pete
13	“	Cheju
14	“	Unguja Ukuu
15	“	Chwaka
16	“	Charawe
17	“	Ukongoroni
18	“	Michamvi
19	“	Bwenju
20	“	Kitogani
21	Saleh Combo	Former Director of JECA
22	Elias Haji	Director of JECA
23	Antje Forstle	SONARECO

Annex 6 Stakeholder Presentation Participants

Stakeholder Presentation at Jozani HQ 28th January 2004

	Name	Institution
1	I. M. Abdulwakil	IMBMM
2	S.A. Rashid	IMBMM
3	Shukuru R. Kidawa	Muyuni
4	Paulo M. Seleli	Bungi
5	Kassim Madeweya	IMBMM
6	Abdulla Mbarak	Charawe
7	F. S. Mlenge	Ukongoroni
8	Yusuph H. Kombo	IMBMM
9	Msabah Al. Juma	Chwaka
10	Ilyas .K. H. Haji	Chwaka
11	Shaban Mjoza	Pete
12	Y.A.Simai	Chwaka
13	Khasim M. Juma	DCCFF
14	Mtumwa K. Ame	IMBMM
15	Abbas S. Mzee	IMBMM
16	Vizzer Mackinda	Joldo
17	Lucy Peter	Jamii Pete
18	Mkanga Mirefi Haji	Mw/JECA
19	Amour Mienye	IMBMM
20	Fatuma Pandu	Cheju
21	Riziki Sleman	Muongoni
22	Maryam Hassan Ussy	Bwejuu
23	Mrisho Masesa	Hanyegwamchana
24	Mwinjuma M. Salleh	IMBMM
25	Sheha Idriss Hamadi	IMBMM
26	Nassor S. Mkarafu	Wizara ya Kilimo
27	Hassan K. Hassan	Uwemajo
28	Ameir Sima Amier	Pete
29	Hamid Abdulhamid Khamis	Ofisi ya DC
30	Thabit S. Masoud	Care TZ
31	Hamisa M. Makame	A G Chamber
32	Ali A. Hassan	-
33	Issa Mlingoti	K/utalii
34	Juma Hassan Reli	Wizara/Fedha
35	Nassor S. Mkarafuu	WKMMU
36	Sheha Idrissa Hamadi	IMBMM
37	Jyotsna (Jo) Puri	UNDP GEF
38	George Mkoma	Care (ZNZ)
39	Dr. Lee Alexander Risby	GEFM&E
40	Prof. George Jambiya	Independent Consultant
41	Dr. Bakari S. Asseid	DCCFF
42	Juma K. Tidwa	Mkuu (W) Kusini
43	Soud Mohd Juma	DCCFF
44	Ali A. Mwinyi	DCCFF

Annex 7 Survey Questionnaire

Jozani-Chwaka Bay Conservation Project

Hojaji Na []

Mhojaji []

Name:

Village:

Shehia

PROFILE OF HH

1. Status in Household (Baba, Mama, Mtoto ama...?) [.....]
2. Sex/Gender (Jinsia) Me [] au Ke []
3. Age (Umri) []
4. Education: (Elimu) 1. Primary (Msingi) [], 2. Secondary (Sekondari) [], 3. Tertiary (Elimu ya Juu) [] 4. Technical (Elimu ya Ufundi) [] 5. None (Hakuna) []
5. Were you born here? (Ulizaliwa hapa?) Yes Ndiyo [] No Hapana []
6. What is your ethnicity? (Kabila lako)
7. How many years have you resided here?
(Umeishi hapa kwa muda/miaka mingapi sasa) []
8. If you have moved here from elsewhere, from where did you migrate?
(Iwapo ulikuja hapa kutokea sehemu nyingine, ulitokea wapi (kuja hapa?)
9. Why did you come here? (Kwa nini ulichagua kuja hapa?)
10. What is your main economic activity? (Shughuli yako kuu ya kujipatia mapato ni nini?)
11. What is your secondary activity? (Una shughuli nyingine ya kujipatia mapato, kama ipo ni nini?)
12. For how long have you been engaged in this activity? (Umekuwa unaifanya shughuli hiyo kwa muda gani sasa? Muda/Miaka) []
13. Have you changed the activity in the past five years? (Je umewahi kubadili njia ya mapato/shughuli/kazi yako ktk kipindi cha miaka 5 iliyopita?)
Yes Ndiyo [] No Hapana []
14. If you have changed, why? (Kama ndiyo, kwa nini? – toa sababu)
15. How many meals does your household normally take in a day? (Kwa kawaida kaya yako hupata chakula mara ngapi kwa siku?) []
16. What is the composition of the main meal(s)? (Chakula gani kinaliwa kwa kawaida?).....
17. What is the food supply situation in the village/community? (Unaonaje hali ya kupatikana kwa chakula hapa kijijini?)
18. What is the food supply situation in your household? (Unaonaje hali ya kupatikana kwa chakula katika kaya yako?).....
19. Where from do you get your staple food? (Kaya yako inapata wapi chakula kiki-kuu?).....
20. Over the last 5 years, has the composition of food changed in any way? (Katika miaka mitano iliyopita, je mlo wa hapo nyumbani umebadilika?).....
21. If yes, Why? and (Kama ndiyo, kwa elezea kwa nini)
22. How? (na kwa namna gani).....
23. Kuni mnapata wapi?
24. Upatikanaji wa kuni ukoje?.....

INSTITUTIONAL ASPECTS/ASSOCIATION

25. Are you a member of any association or economic group in this community? (Je wewe ni mwanachama wa kikundi chochote cha kiuchumi hapa?)
Yes Ndiyo [] No Hapana []
26. If yes, which groups/associations? (Kama ndio ni kikundi gani?).....
27. Why did you join this group? (Kwa nini umejiunga na kikundi hiki?).....
28. Who initiated the formation of the association? (Ni nani alikupa habari za kikundi hiki?).....
29. When was the association formed? (Kikundi kilianzishwa lini?).....
30. Is this association based on any gender requirements? (Chama hiki kimeelelea jinsia yeyote?)
Yes Ndiyo [] No Hapana []
31. If yes, which gender and, (Kama kweli ni jinsia ipi).....
32. Why? (Kwa nini)
33. Why did you want to become a member? (Kwa nini ulipenda kuwa mwanachama?)
34. If you are not a member, why have you opted not to be a member? (Kama si mwanachama, kwa nini hukataa kuwa mwanachama.....)
35. Was/is your family/spouse supportive of your membership? (Je Mume/Mke/Familia yako iliungana nawe katika uanachama?)
Yes Ndiyo [] No Hapana []

JCBCP

36. Did you know of the existence of the JCBCP project? (Unafahamu kuwepo kwa mradi wa Jozani na Chwaka - JCBCP?)
Yes Ndiyo [] No Hapana []
37. Has the JCBCP project resulted in any benefits to you and your family? (Huu mradi wa JCBCP umekupatia faida yeyote kwako na familia yako?)
1.....
2.....
3.....
38. If any, what benefits? (Kama mmefaidika, ni faida gani?).....
39. Has the JCBCP project resulted in any losses for you and your family? (Huu mradi wa Jozani na Chwaka - JCBCP umekupatia hasara yeyote kwako na familia yako?)
.....
40. If so, what losses?(Kama ni hivyo ni hasara gani?)
41. Do you think the population of the red colobus monkey gone up or down? (Unafikiri idadi ya nyani hapa inaongezeka au inapungua?)
1. Increased -Imeongezeka. [] 2. The Same - Iko sawa tu na zamani, [] 3. Reduced – Imepungua []
42. Have you suffered any loss of crop from raiding? (Mnapata hasara yeyote ya mazao kuvamiwa na wanyama?) Yes Ndiyo [] No Hapana []
43. How often has this happened? Hili limetokea mara ngapi? []
44. Can you give a monetary figure of the loss (in shillings)(Unaweza ukaiieleza hiyo hasara (kwa shilingi)) []
45. Is the compensation against damaged crops enough to cover you costs?
Yes Ndiyo [] No Hapana []

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46. Is it equal more or less to what you would have earned by selling your crops? (Fidia ya mazao yaliyoharibika inatosha kulipia gharama zako? Ni sawa au kidogo kama ungevuna na kuuza mazao yako?) 1 Yes Ndiyo [] 2. No Hapana []
47. Has the availability of forest products increased or decreased? (Upatikanaji wa mazao yato-kanayo na misitu unaongezeka au unapungua?) 1. Yes Ndiyo [] 2. No Hapana []
48. Have the markets of forest products changed or remained the same? (Soko la mazao ya misitu limebadilika au limebaki vilevile?) 1. Changed Limebadilika [] 2. Same- Vile vile []
49. Have the type of the products remained the same or have they changed? (Je, aina ya haya mazao imebaki ile ile au imebadilika?) Changed Limebadilika [] Same - Vile vile []
50. Has the designation of Jozani as a conservation area implied loss of access to land for cultivation? (Utaratibu wa kuifanya Jozani kuwa sehemu ya hifadhi umepunguza upatikanaji wa ardhi ya kulima?) Yes Ndiyo [] No Hapana []
51. If so, how much were you getting from the land lost? (Kama ni ndio hapo zamani ulikuwa unapata nini kwenye ardhi iliyopotea?) (Mazao/Fedha/Thamani).....
52. What other losses have you incurred as a result of JCBCP project. (Ni hasara gani nyingine umepata kutokana na mradi huu wa Jozani –Chwaka-JCBCP?).....
53. What are your opinions of the JCBCP project? (Nini maoni yako juu ya mradi wa Jozani-Chwaka - JCBCP?).....
54. Would you like the JCBCP project to continue or not? (Je,ungependa mradi wa JCBCP) Continue uendele [] au Not continue - usiendele []?
52. If yes or no – explain why. (Kama ndio au hapana , elezea kwa nini – uendele ama usiendele).....
53. What are your opinions of the Resource/Land Use Management Plans (RUMAs) Una maoni gani juu ya mpango wa Matumizi ya Ardhi na Rasilimali?

Annex 8 CBO Groups/Men and Women: Savings and Credit

NO	Name of CBO	Shehia	No of mbr	Male	Female	No of Shares bought	Total value	Male	Female	Amnt. of Loans last month	Amnt of new loans	Total Amnt. of Loans	Loans repaid	Loans outstanding	Social Fund	Insurance Fund	Fine	Interest	Other income
1	Mvivu Hashibi	U/Ukuu	30	12	18	2598	2598000	1065000	1533000	7693000	500000	8193000	250000	7943000	26350	391350	24700	255000	99600
2	Tumuombe Mungu	Kitogani	29	15	14	6335	3167500	1668500	1499000	6208900	320000	6528900	3929550	2599350	153150	132500	38455	420860	772050
3	Tusirudie Makosa	H/Mchana	19	9	10	1113	556500	228000	328500	371600	0	371600	132500	239100	11800	17550	33100	0	49000
4	Mwanzo mgumu	Charawe	30	17	13	3152	1576000	743500	832500	2417320	295500	2712820	547000	2165820	57050	70000	75650	26700	60950
5	Mwanzo mwema	Bwejuu	30	7	23	2390	1195000	340500	854500	630000	300000	930000	152250	777750	5100	36500	17300	32800	23100
6	Maendeleo	Chwaka	21	6	15	2255	2255000	712000	1543000	3720000	1303000	5023000	2517000	2506000	80440	156400	33300	180330	96820
7	Amani	Pete	30	16	14	5255	2627500	1234500	1393000	5460000	880000	6340000	4491000	1849000	68000	117750	82810	581750	48950
8	Najaribu Fadhila	Ukongoroni	30	13	17	2274	1137000	375000	762000	1709000	705000	2414000	1141000	1273000	19150	72850	5000	72850	44350
9	Mnyonge hatupwi	Cheju	15	3	12	734	367000	82000	285000	295000	90000	385000	120000	265000	0	19250	6600	10000	3400
10	Mkombozi	Jozani	9	5	4	540	540000	361000	179000	0	20000	20000	0	20000	0	0	0	0	0
11	Umoja ni nguvu	Kitogani	30	9	21	847	423500	114500	309000	290000	115000	405000	0	405000	34300	20250	1600	0	14800
12	Akiba Haiози	Charawe	30	16	14	3018	1509000	671500	837500	3332000	380000	3712000	1649000	2063000	77325	87700	52200	226900	93600
13	Asaa Kheri	Chwaka	30	12	18	2921	1460500	598500	862000	1275000	1010000	2285000	1332000	953000	51400	50500	33500	71350	44450
14	Tusaidiane	Cheju	14	2	12	758	379000	23000	356000	205000	0	205000	15000	190000	17100	10250	3400	1000	11800
15	Nyota njema	Maruhubi	9	5	4	431	431000	219000	212000	152000	50000	202000	0	202000	21000	7600	2000	0	2400
16	Tudumishe	Charawe	30	14	16	2994	1497000	553500	943500	2928000	135000	3063000	1716000	1347000	54600	104725	70100	173800	74500
17	Tabia njema	Chwaka	30	10	20	2671	1335500	387000	948500	2095000	464000	2559000	1130000	1429000	78200	64750	9980	50400	94250
18	Suluhisho	Kitogani	30	10	20	1402	701000	203000	498000	559000	100000	659000	107500	551500	30200	20150	1100	2650	59850
19	Kutoa ni moyo	Kitogani	27	15	12	495	247500	126500	121000	0	190000	190000	0	190000	15700	0	4200	0	34200
20	Hawavumi	U/Ukuu	24	14	10	2943	2943000	1265000	1678000	8070000	320000	8390000	5621000	2769000	73980	58100	37490	285650	50350
21	Hatutaki kero	U/Ukuu	23	7	16	2390	1195000	323000	872000	3604300	313000	3917300	1572300	2345000	54400	116700	21400	304350	78800
22	Imani moja	Muungoni	30	12	18	4429	2214500	930000	1284500	5099500	1145000	6244500	2682000	3562500	172900	38750	33180	792400	87150
23	Tujikomboe	Muungoni	27	8	19	989	494500	145000	349500	0	200000	200000	0	200000	23100	10000	6850	1300	13050
24	Mshikamano	Muungoni	29	18	11	588	294000	191000	103000	0	140000	140000	66000	74000	18100	7000	6100	9000	36440
25	Tumeridhika	Michamvi	21	5	16	3124	1562000	363500	1198500	2559000	162000	2721000	1514500	1206500	104600	23350	55100	109000	51100
26	Tusirudi nyuma	Michamvi	19	10	9	2564	1282000	591500	690500	1238000	580000	1818000	966000	852000	69650	59900	54850	69300	100925
27	Sote tupendane	Charawe	30	14	16	4561	2280500	1096000	1184500	2559000	2904000	5463000	2952500	2510500	123650	105000	63750	303450	85100
28	Nia moja	Charawe	30	15	15	3943	1971500	847500	1124000	4163000	842000	5005000	2690800	2314200	66700	66100	37050	561600	84850
29	Mtaji wa masikini	Charawe	30	19	11	3030	1515000	787000	728000	2464500	351000	2815500	1595500	1220000	37046	89600	73060	122500	18990

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30	Nia njema	Muungoni	21	10	11	2457	1228500	465000	763500	1085000	615000	1700000	552000	1148000	78200	25000	23910	111850	71050
31	Kopa ulipe	Charawe	30	10	20	3408	1704000	550500	1153500	1795000	50000	1845000	882000	963000	60500	445000	32000	10000	70350
32	Twende wk	Pete	30	17	13	3096	1548000	806500	741500	994900	1093000	2087900	626300	1461600	60500	55300	31300	84480	19780
33	Tupendane	Ukongoroni	26	3	23	2090	1045000	141000	904000	243000	1190000	1433000	290000	1143000	23350	68150	7800	68150	27350
34	Hatuyumbi	Bwejuu	30	5	25	2155	1077500	153000	924500	0	0	0	0	0	40300	0	53650	0	103810
35	Nasie Tumo	Chwaka	30	6	24	2391	1195500	285500	910000	567000	1749700	2316700	298500	2018200	61500	81150	25730	15900	41060
36	Jiunge Ule	U/ukuu	30	12	18	1736	868000	355500	512500	0	545000	545000	68500	476500	62400	27250	8730	26500	63650
37	Mkorofi si Mwnzetu	U/ukuu	29	12	17	2280	1140000	524000	616000	0	750000	750000	0	750000	55000	37500	15700	0	70900
38	Bora Ukweli	Muyuni A	30	15	15	1380	690000	351500	338500	0	0	0	0	0	47350	0	10450	0	29550
39	Hatuyumbishwi	Charawe	30	11	19	1304	652000	104000	548000	0	620000	620000	15000	605000	22250	31000	6850	0	22100
40	Tuambizane Ukweli	Paje	30	0	30	1063	531500	0	531500	0	0	0	0	0	19350	0	5100	0	20550
41	Tunajaribu	Michamvi	16	5	11	681	340500	68000	272500	0	0	0	0	0	21000	0	9300	0	43100
42	Hongera	Chwaka	30	8	22	1290	645000	176500	468500	0	548750	548750	0	548750	13800	17550	12200	6300	6300
43	Salama	Bungi	23	10	13	441	220500	88500	132000	0	0	0	0	0	11000	0	1800	0	14735
44	Tuelewane	muungoni	24	13	11	605	302500	154000	148500	0	0	0	0	0	25000	0	3950	0	24350
45	Hatutaki filina	Michamvi	22	5	17	377	188500	33500	155000	0	0	0	0	0	11700	0	3450	0	41700
46	Tusichekane	u/ukuu	28	9	19	139	69500	22000	47500	0	0	0	0	0	5500	0	200	0	9500
47	Riziki Popote	Bwejuu	19	3	16	34	17000	0	0	0	0	0	0	0	0	0	0	0	0
Total			1214	472	742	97671	53219000	20525000	32677000	73783020	20975950	94758970	41622700	53136270	2163691	2742475	1135945	4988120	2914660

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