

Investing in Tanzania's People

Valuing the U.S. Tanzania Partnership for Prosperity

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Appendix

To access the technical annex for this report, please refer to the electronic version which can be found at: <https://www.aiddata.org/publications/investing-in-tanzanias-people>

Acronyms

AGOA	African Growth and Opportunity Act	OPIC	Overseas Private Investment Corporation
CRS	Creditor Reporting System	PEPFAR	President's Emergency Plan for AIDS Relief
CSO	Civil Society Organization	PIOET	Pandemic influenza and other emerging threats
DFC	U.S. International Development Finance Corporation	PPFD	Private Philanthropy for Development
FDI	Foreign Direct Investment	TDV25	Tanzania Development Vision 2025
FYDP	Five Year Development Plan	TZS	Tanzanian Shilling
GAVI	Global Alliance for Vaccines	U.S.	United States
GDP	Gross Domestic Product	USAID	United States Agency for International Development
GEF	Global Environment Facility	USD	United States Dollars
IDA	International Development Association	WHO	World Health Organization
MIGA	Multilateral Investment Guarantee Agency	YALI	Young African Leaders Initiative
NGO	Non-Governmental Organization		
ODA	Official Development Assistance		
OECD	Organization for Economic Cooperation and Development		

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Executive Summary

The United States is an important partner to Tanzania and the relationship between the two countries is built on three pillars: diplomacy, development, and defense. However, the Tanzanian public has little information readily available to assess the value of this partnership in their daily lives, particularly as they measure progress toward achieving the development goals the country has set for itself in Tanzania's Development Vision 2025. This report considers whether and how the U.S.-Tanzania partnership contributes to Tanzania's growth and prosperity—both in the resources it mobilizes as well as in the outcomes it achieves.

The authors take a whole-of-society perspective in examining not only official development assistance (aid) but also private sector contributions via trade, tourism, investment, philanthropy, and remittances. This research analyzes historical financial flows from these U.S. sources to Tanzania over roughly a decade, from 2012 to 2022, and integrates insights from a survey and interviews on how Tanzanian public, private, and civil society leaders assess the partnership today. This analysis was produced by AidData, a U.S.-based research lab at the College of William & Mary's Global Research Institute, in collaboration with REPOA, a Tanzanian policy research organization.

Following the money, U.S. government agencies, organizations, and individuals collectively contribute an estimated USD 2.8 billion annually (TZS 7,140 Bn) to Tanzania's development. The U.S. government contributes approximately USD 1.0 billion annually (TZS 2,550 Bn), with a focus on the health, agriculture, and infrastructure sectors. This includes direct bilateral (USD 824.2 million) and multilateral (USD 205.3 million) assistance. We also find contributions through supportive trade and investment policies that are hard to quantify. U.S.-based non-governmental sources contribute approximately USD 1.8 billion annually (TZS 4,590 Bn) including foreign direct investment (USD 1.3 billion), remittances from Tanzanians working in the U.S. (USD 96.4 million), tourism revenues (USD 226.8 million), private foundation giving (USD 88.0 million), as well as individual donations and microloans (USD 0.3 million).

Beyond these monetary gains, the U.S.-Tanzania partnership contributes to growth and prosperity in other significant ways.

- **Economic competitiveness and productivity:** Sixty-six percent of leaders surveyed said that their partnership with the U.S. was improving economic conditions in Tanzania, particularly highlighting local job creation, vocational training and education, trade and tourism flows, and upskilling technology expertise to enter new sectors. Companies such as Coca-Cola and Vodacom, among others, were seen as not only generating tax revenues and jobs, but also spurring local companies to grow and develop. Tanzania has developed its textile industry to capitalize on preferential trade policies to increase its duty-free textile exports 45-fold to the U.S. market in ways that also benefit exports to third countries. Tanzanian smallholder farmers are leading the way forward, supported by U.S. assistance, to increase agricultural yields and resilience. U.S. investments in expanding power generation capacity, extending grid connections, and supporting off-grid solar power also play a role in facilitating this economic activity.
- **Quality of life and livelihoods:** Tanzania has made dramatic inroads in improving life expectancy and reducing mortality for its population. Tanzanian leaders interviewed routinely cited U.S. government and private foundation investments in building their capacity to prevent and treat HIV/AIDS, malaria, tuberculosis, and other diseases as some of the most successful examples of partnership between the two countries. As a case in point: as the single largest provider of HIV/AIDS-related funding between 2003 and 2022, the U.S. played an important role in helping Tanzania save roughly $\frac{3}{4}$ of a million lives from deaths averted. U.S. foundational investments in basic education may have also contributed to Tanzania's gains in literacy rates over the last two decades.
- **Sustainable and democratic society:** Tanzanian leaders surveyed also gave high marks to their partnership with the U.S. as improving governance (61 percent) and environmental conditions (59 percent) in the country. Respondents highlighted U.S. contributions to helping Tanzanian counterparts facilitate better access to quality services and ensure an open civic space through media freedom, access to justice, and participation in civic groups. Leaders also highlighted improvements related to the sustainable use of natural resources and reducing vulnerability to climate change

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Chapter 1: Introduction

Tanzania has set an ambitious goal to increase its economic competitiveness and strengthen its industrial base by 2025 in ways that fuel its human development (Tanzania Development Vision 2025, *TDV25*). In practice, the Tanzanian government views boosting manufacturing efficiency and productivity as critical to achieving this vision (ibid.) using the resources available in abundance within the country. Alliances with the U.S. and other development partners play an important part in Tanzania's bid to realize its *Vision 2025* plan. This fact is not lost on Tanzanian President Samia Suluhu Hassan, who has underscored that while "self-reliance comes from our own home-grown efforts and capabilities," Tanzania must also "proactively learn success stories from abroad, to achieve the development we define and seek" (Keynote, FYDP III).

Since its independence in 1961, Tanzania has maintained diplomatic relations with the U.S. and collaborated on various economic and development initiatives across multiple sectors. The U.S. government has invested in Tanzania's people and institutions, partnering with public, civil society, and private sector actors in areas such as healthcare, infrastructure, education, environment and governance, among others. American companies, universities, charities, non-governmental organizations (NGOs), and individuals have also increasingly engaged with their counterparts in Tanzania over the last several decades. Despite this enduring partnership, leaders and the public from both countries do not have information readily available to assess the value of Tanzania's partnership with the United States.¹

The U.S.-Tanzania partnership is not perfect, as Washington and Dodoma have weathered differences over concerns regarding corruption, human rights, and electoral practices (Gavin, 2022; Wilson Center, 2022). As a case in point: the U.S. Millennium Challenge Corporation (MCC) suspended operations in Tanzania in 2016, before reinstating the country's eligibility for a threshold compact in 2023 (Cooke and Huber, 2016; East African, 2023). The U.S. is also not the only player involved in supporting Tanzania's growth and prosperity, as Tanzanian leaders have cultivated close working relationships with other Global North donors and South-South cooperation providers like the People's Republic of China (PRC). However, the U.S.-Tanzania partnership has endured for more than 60 years and remains a valuable cornerstone in helping

Tanzania achieve its development goals in line with *Vision 2025*.

In this report, we take a whole-of-society perspective to estimate not only U.S. official development assistance (aid) but also private sector contributions via trade, tourism, investment, philanthropy, and remittances. At a minimum, we estimate this total contribution to be approximately USD 2.8 billion annually (TZS 7,140 Bn), on average (see Table 1). This research analyzes historical financial flows from these U.S. sources to Tanzania over roughly a decade² and integrates insights on how Tanzanian public, private, and civil society leaders assess the partnership today from a survey and interviews. This analysis was produced by AidData, a U.S.-based research lab at the College of William & Mary's Global Research Institute, in collaboration with REPOA, a Tanzanian policy research organization.

In Chapters 2 and 3, we follow the money, examining the role of the U.S. government and American private sector actors in supporting Tanzania's growth and prosperity. Even with the temporary suspension of MCC operations, the U.S. government contributed approximately USD 1.0 billion annually (TZS 2,550 Bn), on average, including direct assistance (USD 824.2 million/year) and an additional USD 205.3 million per year in value mobilized through favorable U.S. domestic policies that benefited Tanzania's economy. Of course, the U.S.-Tanzania partnership is more than just government-to-government interactions. Taking into account the role of individuals, companies, and organizations, we estimate that these people-to-people connections generate an estimated USD 1.8 billion per year (TZS 4,590 Bn), on average, in additional resources that can contribute to Tanzania's prosperity. These contributions take various forms, from the actions of individuals (e.g., tourism, remittances, individual donations) to more institutionalized efforts (e.g., grants from U.S.-based philanthropies and foreign direct investment).

In Chapter 4, we turn to assessing whether and how U.S. financial contributions translate into realized benefits for Tanzania's people and prosperity. We analyze the results of a 2024 survey and series of background interviews in which Tanzanian public, private, and civil society leaders reflected on their impressions of Tanzania's partnership with the U.S. We

¹ Prior research focuses on evaluating individual projects financed by U.S. government agencies, and does not capture the universe of U.S. contribution.

² For financial data, we cover the time period from 2012 to 2022. For data related to trade, health, education and investment outcomes, we cover a longer time period as it takes time for impact to be realized.

also integrate secondary data sources to understand potential downstream economic, social, and governance benefits of U.S. engagement in Tanzania.

We conclude in Chapter 5 by highlighting the major takeaways from this research.

Table 1. Breakdown of estimated annual U.S. contributions to Tanzania's growth and prosperity, millions USD and TZS

	2012-2022, Total USD Millions	2022 Value, USD Millions	2012-2022, Total TZS Billions
<i>Total U.S. Government and Society</i>	<i>31,381.9</i>	<i>3,006.9</i>	<i>80,023.9</i>
Bilateral Assistance	7,402.3	499.5	18,875.9
Multilateral Assistance	2,299.5	324.7	5,863.7
Direct U.S. Contributions	9,701.8	824.2	24,739.6
Trade (Imports)	1,490	170.90	3,799.5
Investment Guarantees	93.3	30.8	237.9
Scholarships	37.1	4.5	94.6
Benefits of U.S. Policies	1,615.4	205.3	4,119.3
Total U.S. Government Contribution	11,317.2	1,029.5	28,858.9
Remittances*	1,141.2	148.6	2,910.1
Foreign Direct Investments	14,365.7	1,403	36,632.5
Tourism	3,495	327.5	8,912.2
Philanthropic Contributions	1,059.2	98	2,701
Micro Loans*	3.6	0.3	9.2
Total U.S. Society Contributions	20,064.7	1,977.4	51,165

Notes: This table shows the average U.S.-based contributions to Tanzania's growth and prosperity by category (constant 2022 USD). We used 2022 data for the most recent year, with some exceptions where data was not available and we had to generate estimates (indicated by asterisks). The number of years used to construct the average varied depending on the years covered in the source data. A conversion factor of 1 USD = 2550.00 TZS was used. Source: AidData estimates. See technical annex for further details.

Chapter 2: How does the U.S. government contribute to Tanzania's prosperity?

In 2023, the U.S. and Tanzanian governments celebrated 62 years of diplomatic ties and development cooperation. Washington and Dodoma are poised to continue this in the future. U.S. Vice President Kamala Harris committed USD 560 million in bilateral assistance for 2024 during her April 2023 visit with President Samia Suluhu Hassan (U.S. Embassy - Italy, n.d.). The MCC announced in December 2023 that Tanzania had been selected for a threshold compact—a small grant program to support reforms to address economic growth constraints. In consultation with the Ministry of Finance and Tanzania's Planning Commission, the MCC is jointly determining the focus sectors for this new program (MCC, February 2024).

The U.S. government supports Tanzania's growth and prosperity in three ways: (1) bilateral assistance, (2) multilateral assistance, and (3) creating a favorable policy environment to facilitate trade, immigration, and investment. Taken together, we estimate that U.S. government-driven assistance contributes roughly USD 1.0 billion annually to Tanzania's economy. This includes USD 824.2 million (TZS 2,550 Bn) in direct bilateral and multilateral assistance per year on average since 2012, as well as USD 205.3 million in indirect contributions from supportive policies. In this chapter, we examine each of these three channels in turn to understand how they generate value for the Tanzanian people.

2.1 Direct U.S. government contributions to Tanzania

Official development finance is an important channel of U.S. government support to Tanzania's growth, prosperity, and stability. This includes grants, no or low-interest loans, in-kind and technical assistance (aid), along with loans approaching market rates and export credits (debt). Over the past decade, the United States has been Tanzania's single largest development partner in terms of gross bilateral assistance ODA flows. The U.S. government is also a leading financial supporter of multilateral organizations that work in Tanzania. In the remainder of this section, we examine how U.S. bilateral and multilateral assistance between 2012 and 2022 worked together to help the Tanzanian people achieve their goals outlined in *TDV25*.

Insight #1. The U.S. government is Tanzania's leading direct bilateral development assistance supplier, contributing an estimated USD 673 million annually

Between 2012 and 2022, the U.S. government deployed over USD 7.4 billion dollars (USD 673 million annually) in direct bilateral assistance to support Tanzania's growth and prosperity, twice that of the next-largest supplier. In 2021, the last year of comparable data, the level of U.S. government assistance exceeded the next six bilateral partners combined (see Table 2).³ Nineteen government agencies contributed to this effort—from mainline development actors like the U.S. Agency for International Development (USAID) and MCC to sector-focused contributions from other departments.⁴

Public health has been a major focus of U.S. bilateral assistance (Table 3), particularly efforts to combat HIV/AIDS (USD 3.8 billion) and malaria (USD 534 million). Aligned with *Vision 2025*, the U.S. channeled resources to support Tanzania's agricultural sector (USD 546 million) and critical infrastructure (USD 579 million dollars). The U.S. Departments of Defense and State facilitated capacity- and relationship-building activities with Tanzanian counterparts (e.g., fellowships, education, and training) in areas such as counternarcotics and combating poaching. Compared to other East African countries, military and security assistance was a smaller share of overall U.S. bilateral assistance in Tanzania, given its relatively stable security situation (BBC, 2023; START, 2022).

³ PRC, UK, Japan, Sweden, Canada, and South Korea.

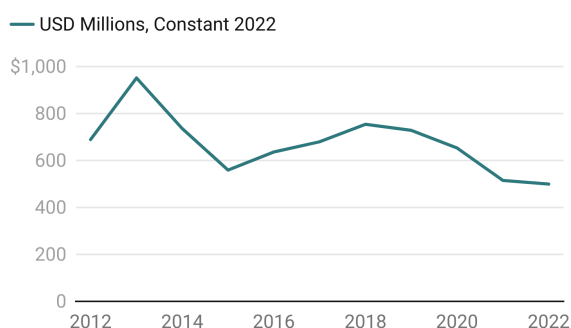
⁴ These agencies are the African Development Foundation, Department of Agriculture, Department of Commerce, Department of Defense, Department of Energy, Department of Health and Human Services, Department of Homeland Security, Department of Justice, Department of Labor, Department of State, Department of the Army, Department of the Interior, Department of the Treasury, Department of Transportation, Federal Trade Commission, Millennium Challenge Corporation, Peace Corps, Trade and Development Agency, and the U.S. Agency for International Development.

Table 2. Top bilateral assistance suppliers to Tanzania

	Bilateral Assistance Supplier Name	2012-2022, Total USD Millions	2021 Disbursements, USD Millions
1	United States (U.S.)	7402.3	515.1
2	People's Republic of China* (PRC)	3075.18	167.88
3	United Kingdom (UK)	2520.05	90.27
4	Japan	1274.58	44.67
5	Sweden	1184.42	89.34
6	Canada	1076.30	52.33
7	South Korea	783.12	63.30
8	Denmark	771.46	54.61
9	Germany	762.51	66.77
10	Norway	748.33	55.26

Notes: This table shows Tanzania's top 10 bilateral assistance suppliers (including grants, loans with varying concessionality, and export credits). PRC funds only represent commitments, rather than disbursements, from 2012-2021. All other figures represent disbursements between 2012 and 2022. All values are constant USD 2022. Source: ForeignAssistance.gov (2012-2022), AidData's Global Chinese Development Finance Dataset, Version 3.0.

Figure 1. Annual bilateral assistance from the U.S. government to Tanzania, 2012-2022



Notes: This graph visualizes total U.S. government bilateral assistance disbursements (grants, loans, technical assistance, and export credits) to Tanzania each year from 2012 to 2022. This figure includes both development assistance and security aid given directly via U.S. government agencies. It excludes assistance given by the U.S. via multilateral agencies that may also benefit Tanzania. Source: ForeignAssistance.gov (2012-2022).

Table 3. Top 5 sectors for U.S. government bilateral assistance to Tanzania, 2012-2022

U.S. Sector Name	Disbursement, USD Million (2022 Constant)	Project Count
HIV/AIDS	3778.85	6629
Infrastructure	579.07	370
Agriculture	546.10	1730
Malaria	533.53	1261
Direct Administrative Costs	320.30	8205

Notes: This table shows the top five sectors for U.S. government bilateral assistance in Tanzania from 2012 to 2022. Source: ForeignAssistance.gov (2012-2022).

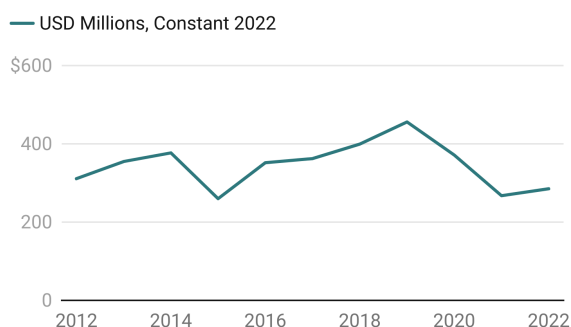
Insight #2. The U.S. government channels an average of USD 394 million annually to support Tanzania's efforts to curb the spread of infectious diseases like HIV/AIDS and malaria

The U.S. government has been at the forefront of working with the Tanzanian government and private sector partners to tackle major public health

challenges. As the largest funder of HIV/AIDS prevention and treatment programming in Tanzania, the U.S. channeled an average of USD 345.1 million annually to such efforts since 2012. Many of these activities fall under the President's Emergency Plan for AIDS Relief (PEPFAR) (U.S. Embassy Tanzania, February 2023), launched by former U.S. President George W. Bush in 2003. Projects funded by PEPFAR include activities like the Caring for Children and Empowering Young People (C2EYP) project, which ran from 2016 to 2021. The C2EYP initiative took a holistic approach to supporting Tanzanian orphans and vulnerable children⁵ through access to appropriate health care, education, employment skills, and social support to both children and parents (USAID, 2016).

Apart from HIV/AIDS, malaria is another serious public health and social burden—it is the leading cause of death among Tanzanian children (PMI VectorLink, 2022). In response, the U.S. government has directed over USD 48.5 million dollars a year, on average, via the U.S. President's Malaria Initiative (PMI) to help Tanzanian counterparts reduce child mortality and morbidity. Malaria treatment and prevention (John Snow Inc, 2016) projects such as PMI's VectorLink (2018-2023) played an important role: protecting approximately 2 million Tanzanians a year through safe indoor residual spraying (IRS), distributing bed nets, and providing personal protective equipment and health coupons to individuals (PMI VectorLink, 2022). VectorLink is only one part of the USAID-backed toolkit in the fight against malaria, and accounts for just under 7.3 percent of the total funding the U.S. government has committed.

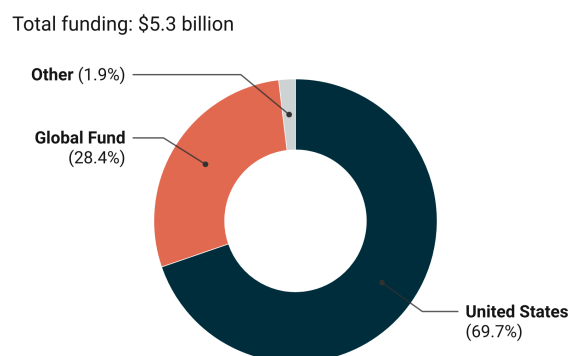
Figure 2. Annual bilateral assistance from the U.S. government for HIV/AIDS relief in Tanzania, 2012-2022



Notes: This graph shows annual funding from the U.S. government that was directed towards HIV/AIDS relief in Tanzania from 2012 to 2022. Source: *ForeignAssistance.gov* (2012-2022).

⁵ Children, adolescents, and young people orphaned and made vulnerable by HIV and other adversities.

Figure 3. All OECD donors' funding for HIV/AIDS relief in Tanzania, 2012-2022



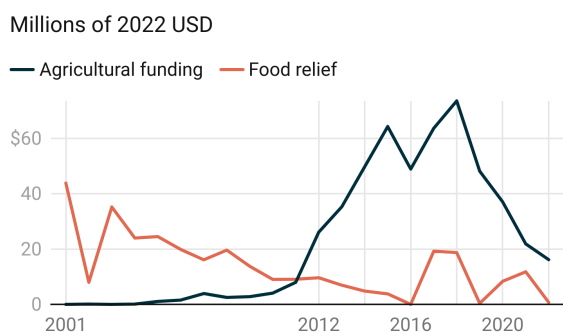
Notes: This graph shows the breakdown of OECD donors that contributed to HIV/AIDS relief in Tanzania, from 2012 to 2022. Source: *OECD Creditor Reporting System* (2012-2022).

Insight #3. A growing share of U.S. government assistance is helping Tanzania make the pivot from a recipient of emergency food aid to an investor in resilient agricultural systems

Accounting for one-third of Tanzania's GDP and two-thirds of its jobs, agriculture is a cornerstone of the nation's prosperity (USAID, August 2022). In the early 2000s, nearly 100 percent of U.S. agricultural assistance to Tanzania was Title II emergency food relief. However, between 2019 to 2022, less than 5 percent of U.S. government assistance to agriculture in Tanzania was spent on short-term food aid. Instead, the vast majority funded longer-term investments in resilient food systems to strengthen value chains and yields in areas such as cereal production (Figure 4). A USAID-supported Feed the Future project (NAFAKA II) reached nearly 300,000 farmers and increased the amount of rice and maize sold by producers by 435 percent over the lifespan of the project (ACDIVOCA, n.d.). This shift reflects a shared vision for Tanzania to develop and own a resilient food system.

Yet, even as the U.S. reinforces the agricultural sector at large, it is not blind to the immediate needs of Tanzania's citizens and has remained responsive to short-term priorities. In response to COVID-19 and the disruptions to global food supply chains in 2020 and 2021, USAID mobilized over 20 million dollars in immediate Title II relief, less than a year after it had almost phased out this program in Tanzania.

Figure 4. Annual bilateral assistance from the U.S. government to the agriculture sector and Title II emergency food relief in Tanzania, 2001-2022



Notes: This graph shows annual U.S. government funding for the agricultural sector (dark blue line) and Title II emergency food relief (orange line) in Tanzania from 2001 to 2022. Source: ForeignAssistance.gov (2012-2022).

Insight #4. Sustainable road, water, and energy infrastructure investments have been long-standing, signature areas of collaboration between the U.S. and Tanzanian governments

Recognizing that infrastructure is critical to individual households and the broader economy, the U.S. and Tanzanian governments invested substantial resources in collaborative efforts to strengthen road, water, and energy systems. Tanzania's first compact (2008-2013) with the MCC unlocked USD 698.1 million in infrastructure-focused funding, including investments to improve three trunk roads (Tanga-Horohoro, Tunduma-Sumbawanga, and the Mtwara Corridor) and build the capacity of the National Road Agency (TANROADS) to sustainably design and implement new projects (MCC, February 2024). The MCC also supported expanded energy access, rehabilitating power stations serving 215,000 customers, extending 247 distribution lines, and constructing a 40km submarine electric and telecom transmission cable connecting Unguja Island to the mainland.

Power Africa—former U.S. President Barack Obama's initiative to fund accessible, reliable, and sustainable electricity across the continent—was launched in Tanzania in July 2013 (AfDB, n.d.). In conjunction with the Tanzania Electric Supply Company Limited (TANESCO), U.S. government agencies, and private sector companies, Power Africa mobilized USD 2.7 million per year in energy generation and distribution

projects, expanding the country's electricity generation by 671 megawatts. Additional information on this public-private partnership to improve the reach and reliability of Tanzania's electricity is detailed in the next chapter.

Insight #5. Training and skills development has been a growing emphasis of U.S. government assistance in recent years, helping Tanzania strengthen human capital, improve labor productivity and foster stability through military cooperation

In line with Tanzania's *Vision 2025* emphasis on building labor force productivity, performance, and competitiveness (FYDP III), the U.S. government channeled USD 248.7 million in funding to support training and skills development with Tanzanian partners between 2012 and 2022 (Figure 5). Thirteen U.S. agencies and departments,⁶ along with six multilateral organizations,⁷ supported 3,355 different activities during this period.

U.S. technical assistance supported capacity building in a wide range of sectors. Workforce development was a common theme in many projects. The Mkapa Fellows Program (2020-2025) aims to recruit healthcare professionals to reduce job vacancy rates in the health sector (currently at 56 percent) (USAID, January 2023). In collaboration with Tanzania's Ministry of Education, Science, and Technology, the World Bank (with support from the U.S. government) has supported vocational or university training programs in key economic sectors for 45,718 Tanzanian students through its Education and Skills for Productive Jobs Program (ESPJ) (World Bank, June 2023). Civil society strengthening has been another important focus, as evident in USAID's Data-Driven Advocacy Project, which mobilized USD 11.5 million to help 50 Tanzanian organizations improve skills in evidence-based advocacy, organizational management, and documenting human rights abuses (USAID, October 2022).

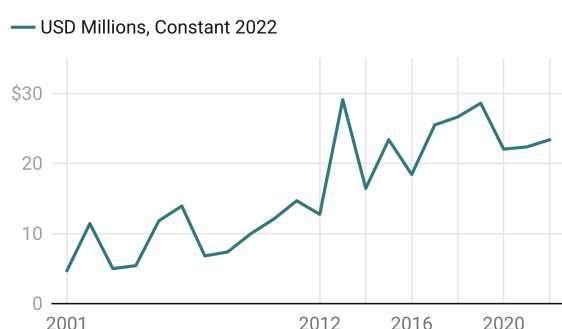
Other capacity-building projects have sought to help Tanzania sustainably grow its economy in ways that

⁶ These agencies included the African Development Foundation, Department of Agriculture, Department of Defense, Department of Energy, Department of Health and Human Services, Department of Homeland Security, Department of Justice, Department of Labor, Department of State, Department of the Treasury, Peace Corps, Trade and Development Agency, and USAID.

⁷ These organizations were the African Development Fund, Global Environment Facility, International Atomic Energy Agency, International Development Association, International Labor Organization, UNAIDS, and UNICEF.

guard against negative influences. The U.S. Africa Command, for example, spent over USD 8 million to support the Tanzanian government with training and equipment to combat drug trafficking and organized crime under the U.S. Department of Defense's ten-year International Counter-Drug Program (2009-2019) (ForeignAssistance.gov; DOD, 2023). The WEKEZA⁸ project (2012-2017) focused on providing livelihood services to 5,383 households and educational services to 13,096 children engaged in or at risk of child labor (DOL, n.d.).

Figure 5. Annual bilateral and multilateral assistance from the U.S. government for skills development in Tanzania, 2001-2022



Notes: This graph shows annual U.S. government funding, through bilateral and multilateral channels, directed towards skill development in Tanzania from 2001 to 2022. Source: ForeignAssistance.gov (2012-2022) and OECD Creditor Reporting System (2012-2022). Estimates calculated by AidData.

In an increasingly interconnected world facing complex threats, it is essential that militaries are able to cooperate and communicate with one another. The U.S. and Tanzania have conducted hundreds of joint military exercises and training activities over the past decade to foster connections for stability and facilitate cooperation. Between 2012 and 2019, nearly nine thousand Tanzanian soldiers took part in joint training activities (Table 4). Officers from Tanzania learned specialized skills at dozens of military bases across the United States, and thousands of troops trained together to support regional peacekeeping operations.

Table 4. Number of trainees by joint military training program, 2012-2019

U.S. Foreign Military Training Program	Total Program Trainees (2012-2019)
Peacekeeping Operations	8461
International Military Education and Training	179
Combating Terrorism Fellowship Program	127
Department of Homeland Security - U.S. Coast Guard Activities	99
Regional Centers for Security Studies	90
Combating Terrorism and Irregular Warfare Fellowship Program	14
Foreign Military Financing	11
Service Academies	3
Total Trainees	8984

Notes: This table shows the total number of trainees who participated in U.S. foreign military training programs. Total program trainees are counted by program, on an annual basis, and therefore may double-count individuals who participated in multiple activities. However, this figure is representative of the total number of opportunities for Tanzanians to train across all programs. Source: Security Assistance Monitor (2012-2019).

Insight #6. Almost 25 percent of U.S. government bilateral assistance to Tanzania is channeled in partnership with other donors, supporting critical infrastructure and public health projects

Joining forces with other development partners, the U.S. channeled USD 209 million dollars annually (on average) of its bilateral assistance between 2012 and 2022 via multilateral institutions (e.g., UN agencies, and regional development banks). Over the last decade, the share of USG assistance to Tanzania directed through multilateral institutions increased from 18 percent in 2012 to 39 percent by 2022 (Figure 7).

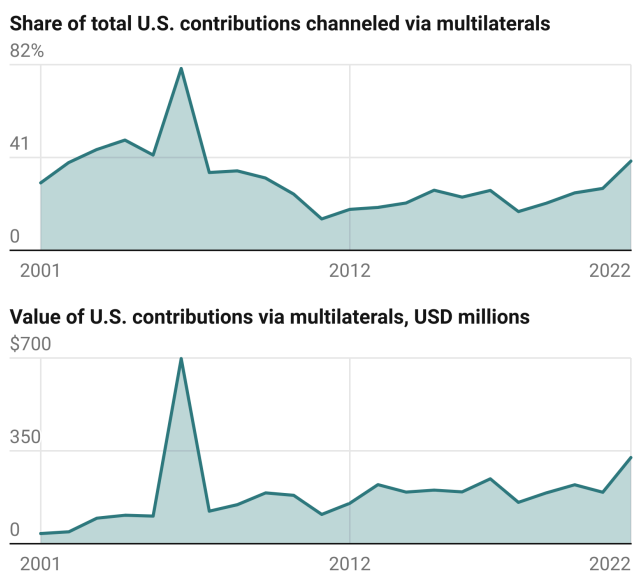
Investments in Tanzania's critical infrastructure are an important part of this story, including USD 205 million in assistance channeled via the World Bank to support

⁸ The full name of the project is Wezesha Ustawi, Endeleva Kiwango cha Elimu Kuzia Ajira kwa Watoto/INVEST – Supporting Livelihoods and Developing Quality Education to Stop Child Labor.

the Dar es Salaam Maritime Gateway port improvement (World Bank, n.d.a) and the AFR RI-3A Tanzania-Zambia Transmission Interconnector energy infrastructure project (World Bank, n.d.b), among others. Another significant share of this funding flowed via the Global Fund (104 million) to combat HIV/AIDS and malaria.

While not directed exclusively to Tanzania, the United States also provides core support to several East African regional initiatives. USAID signed a five-year, USD 28.7 million assistance agreement in 2016 to support greater regional coordination across the East African Community (EAC) in four areas: trade and investment; agriculture; environment and natural resources management; and energy (USAID, 2022a). Other illustrative initiatives include a collaboration with the African Union to protect marine life and prevent transboundary diseases from affecting Tanzania's livestock (USD 6.9 million) (IBAR n.d., IBAR 2015) and the Young African Leaders Initiative (YALI) Regional Leadership Center in East Africa to support skills development for the next generation of business, civil society, and public sector professionals across 14 countries including Tanzania (USD 22.4 million) (YALI, n.d.).

Figure 6. Share of annual assistance from the U.S. government channeled via multilateral partners, 2001-2022



Notes: This figure shows the estimated total share (left) and total dollar value (right) of U.S. government contributions to Tanzania that was channeled through multilateral institutions from 2001 to 2022. Source: ForeignAssistance.gov (2012-2022) and OECD Creditor

Reporting System (2012-2022). Estimates calculated by AidData.

2.2 Indirect U.S. government contributions to Tanzania

In the previous section, we described how direct assistance from the U.S. government has supported Tanzania in advancing its national development goals. However, there is a second role for the U.S. government that has the potential to crowd in more, longer-term resources to spur Tanzania's growth: promoting favorable investment, trade, and immigration policies that leverage the power of America's much larger private sector. Although these indirect contributions are more difficult to quantify, in the remainder of this section we spotlight several examples, such as the use of insurance guarantees, preferential trade agreements, and visas for students, scholars, and skilled professionals.

Insight #7: U.S. government-backed financial leverage and insurance guarantees have helped Tanzania attract an estimated USD 93.3 million in private-sector investments since 2012

Tanzania's *Vision 2025* plan identifies foreign direct investment (FDI) as the primary external private sector source to fund its agenda. U.S. government-backed finance and insurance guarantees⁹ play an important role in increasing the confidence of prospective foreign investors by reducing perceived political risk and lack of local market knowledge to invest in Tanzania's economy.

The U.S. International Development Finance Corporation (DFC), formerly the Overseas Private Investment Corporation (OPIC), is an independent government agency that assists American corporations to do business and invest in low- and middle-income countries. Between 2012 and 2022, the U.S. government provided USD 79.2 million (approximately USD 7.2 million annually) in bilateral financing and risk insurance for 8 projects to expand transportation, small and medium enterprises (SMEs), and access to housing in Tanzania. The largest of these projects was a USD 31.3 million insurance guarantee¹⁰ in 2017 to support Alistair James Company Limited to expand its logistics

⁹ Investment or insurance guarantees help insure companies against potential losses from their investments in another country where they are less familiar with the market (Gordon, 2008; Burgess and Custer, 2023).

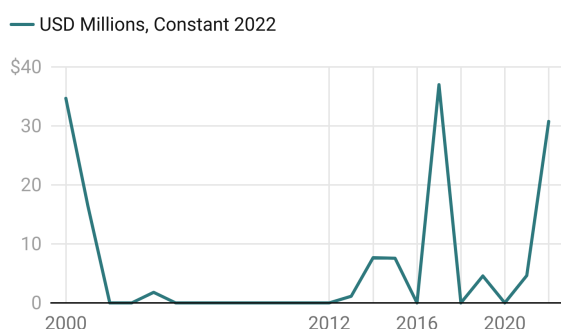
¹⁰ USD 37.0 million in constant 2022 dollars.

and transportation in its Tanzanian operations. DFC also supported three projects in 2022 that expanded insurance and lending to SMEs and female homebuyers (DFC, n.d.a; DFC, n.d.b).

Similarly, the U.S. supports the operations of the World Bank's Multilateral Investment Guarantee Agency (MIGA) to provide investment guarantees in the agribusiness, mining, telecommunications, manufacturing, and financial services sectors. In 2014 and 2015, MIGA supported two political risk insurance operations for Silverlands Tanzania Limited, a poultry supplier business, with U.S. contributions estimated at USD 14.1 million to support 925 jobs (MIGA, n.d.).

Taken together, U.S. support to investment guarantees bilaterally through the DFC and multilaterally through MIGA has enabled Tanzania to attract an estimated USD 93.3 million in private sector investments since 2012 (Figure 7). Over the past decade, the balance has shifted as MIGA scaled back, signing only two agreements with Tanzania, while the DFC has ramped up its activities with Tanzania's private sector.

Figure 7. Total investment support backed by the U.S. Government across MIGA and DFC, 2000-2022



Notes: This graph shows the estimated total investment support provided by the U.S. government through MIGA and DFC in Tanzania from 2000 to 2022. Source: Development Finance Corporation (2012-2022), World Bank Multilateral Investment Guarantee Agency (2012-2022). Estimates calculated by AidData.

Insight #8. Tanzanian exports to the U.S. increased by 16 percent since 2016, benefiting from preferential trade policies

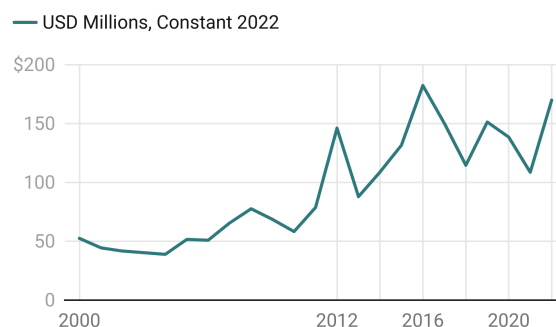
Growing Tanzania's export base is critical to Tanzania's economic competitiveness. Initiatives like the African Growth and Opportunity Act (AGOA), passed in 2000, have opened up duty-free access to the U.S. market for

over 1,800 products.¹¹ A special clause in the legislation requires the United States to import textiles from AGOA-eligible countries like Tanzania before sourcing from other regions.

In 2013, the U.S. government launched a second signature trade initiative: the East Africa Trade and Investment Hub under the Trade Africa initiative. The hub attracted USD 74 million between 2014 and 2021 to facilitate integration, trade, and investment across East Africa (USAID, n.d.a.). The results are promising, as the hub is estimated to have facilitated over 800 new export-buyer linkages and created over 33,000 new jobs of benefit to Tanzania and its East African neighbors (USAID, 2017).

These policy initiatives have borne fruit, bolstering trade between the United States and Tanzania. Since 2012, overall U.S. imports from Tanzania have increased 16 percent—from USD 146 million to USD 170 million. While this growth was slightly diminished during the COVID-19 pandemic, it rebounded substantially in 2022 (+USD 61.4 million), showing the resilient benefits of the trade policies and continued commitment of U.S. importers to shared growth with Tanzania's exporters.

Figure 8. Total value of U.S. imports from Tanzania, 2000-2022



Notes: This graph shows the total value of U.S. imports from Tanzania, from 2000 to 2022. Source: World Bank Group World Integrated Trade Solution (2000-2022).

¹¹ To participate in AGOA, approximately 40 eligible countries are required to meet conditions related to improving their rule of law, human rights, and labor standards (Burgess and Custer, 2023). Initially passed for a period of eight years, AGOA has since been renewed twice in 2015 and again in 2018, lasting until 2025 (CRS, 2023).

Insight #9. Roughly 1,100 Tanzanian students and scholars annually benefit from studying at U.S. institutions of higher learning to advance their careers

To modernize its economy, Tanzania needs its local workforce to gain new skills to increase industrialization and improve the productivity of a smaller agriculture sector. In support of this objective, the U.S. government facilitates opportunities for Tanzanian students and scholars in training and education at U.S. institutions of higher learning through its visa programs designed for students (F-1 visas) and scholars (J-1 visas). These programs have enabled an average of 1,095 Tanzanian students and scholars¹² to study in the US each year over the past decade.

Besides offering Tanzanians the opportunity to acquire marketable skills necessary for high-paying jobs, U.S. institutions also foster the development of the next generation of Tanzania's leaders, global thinkers, and innovators. Many Tanzanian leaders and academics have received degrees from universities based in the United States. One notable example is the former Vice President of Tanzania, Dr. Mohamed Bilal, who earned his bachelor's degree from Howard University and his Ph.D. in physics from the University of California, Berkeley.

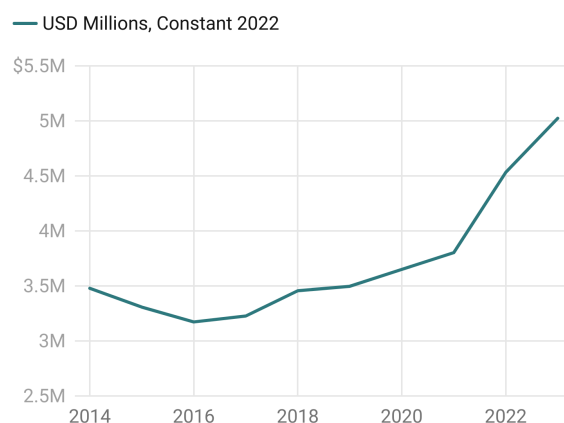
Tanzanian students and scholars receive an estimated USD 3.7 million annually in financial support during their studies through scholarships provided by U.S. universities or U.S. government programs (Figure 9), such as the Fulbright Scholarship or the International Visitors Leadership Program. Other opportunities for Tanzanian students and scholars to benefit from training in the United States include the Young African Leaders Initiative Mandela Washington Fellowship, the Pan Africa Youth Leadership Program (PAYLP) and the Kennedy-Lugar Youth Exchange and Study (YES) program. This estimate is based on the average of about 100 scholarships and exchange programs

¹² Another reputable source, the Institute of International Education (IIE) reports slightly lower numbers. However, their data defines "an international student as an individual enrolled in coursework at an accredited, degree-granting higher education institution in the United States on a temporary visa that allows for academic study." This would include individuals on an F1 visa. In addition to these numbers, our data includes individuals with a J1 visa (exchange visitors) who are authorized to study, observe, conduct research and receive training, which may not culminate in a degree being awarded, in the United States as well as high school students. We sourced this data from the U.S. Department of State and Department of Homeland Security Student and Exchange Visitor Information System (SEVIS).

offered to Tanzanian students to study in the U.S. each year, and the stipends provided to students actively pursuing a Ph.D. program at U.S. institutions in any given year between 2014 and 2023. This is a conservative estimate and likely undervalues the full financial benefit from the U.S. to Tanzanian students.

Tanzanian students pursuing doctorate degrees in the United States are generally fully funded by their host institutions, including tuition fees, health insurance, and monthly stipends. This is a conservative estimate and likely undervalues the total value of U.S. educational assistance to Tanzanian students and scholars, as those pursuing other levels of education (e.g., bachelor's, master's, certificate programs) may also receive financial assistance from their host institution or the U.S. government.

Figure 9. Estimated scholarship and stipend dollars provided to Tanzanian students in the U.S., 2014-2023



Notes: This graph shows the estimated annual value of scholarships and stipends provided to Tanzanian students in the U.S. from 2014 to 2023. Source: U.S. Department of State and Department of Homeland Security Student and Exchange Visitor Information System (SEVIS) (2014-2023). Estimates calculated by AidData.

While most students and scholars return to Tanzania following the completion of their educational programs, some choose to join the U.S. workforce in specialty occupations through the H-1B visa program. This program allows highly skilled workers from foreign countries to become a part of the U.S. workforce and acquire valuable on-the-job skills and experience. Another avenue available for Tanzanian citizens to work in the U.S. is through permanent residency. According to the U.S. Department of Homeland Security's statistics, between 2013-2022, an average of 1,634 Tanzanian nationals received permanent residency status in the United States each year. Tanzanian citizens working in the U.S., through these different visa

options, sometimes send remittances back to their home country which has its own benefits, detailed further in Chapter 3.

In this chapter, we highlighted several ways in which the U.S. government has deployed grants, loans, and technical assistance via bilateral and multilateral channels to support Tanzanian counterparts in advancing the country's development in line with Tanzania's Vision 2025. We also analyzed how the U.S. government also plays a role in promoting favorable

U.S. domestic policies related to investment, trade, and immigration with the potential to crowd in greater private sector involvement from U.S. companies and higher education institutions in creating jobs, increasing access to capital, and upskilling the local labor force. In the next chapter, we explore whether and how the American and Tanzanian peoples are building mutually beneficial relationships, well beyond the role of the U.S. government alone.

Chapter 3: How do U.S. companies, organizations, and individuals contribute to Tanzania's prosperity?

The U.S.-Tanzania partnership extends well beyond government-to-government interactions, but it is often difficult to quantify and appreciate the dynamism of American companies, philanthropies, universities, civil society organizations, and individuals working together with Tanzanian counterparts toward shared goals. In this chapter, we attempt to close this knowledge gap by examining different dimensions of this whole-of-society partnership between Tanzania and the U.S.—from private philanthropy and people-to-people assistance to market-based interactions of tourism and foreign direct investment.

In sum, we estimate that U.S. companies, organizations, and individuals contribute roughly USD 1.8 billion¹³ annually to the Tanzanian economy. These average annual contributions include USD 96.3 million in private philanthropic funding, USD 1.3 billion in foreign direct investment, USD 317.7 million in tourism-related flows, and USD 103.7 million in remittances from Tanzanians who work in the United States. In the remainder of this chapter, we break down each of these four channels to understand how they generate value for the Tanzanian people.

3.1 U.S. private philanthropy and people-to-people assistance to Tanzania

Outside of traditional government-to-government channels, U.S.-based private philanthropic institutions contribute to Tanzania's growth and development in various ways, funding grassroots projects and providing core support for local and international organizations operating in the country. In parallel, improvements in information, communication, and transportation technologies have increased the ease by which individual Americans can engage with their Tanzanian counterparts through tourism and philanthropy. In this section, we examine how U.S. private philanthropic institutions and people-to-people assistance are helping Tanzania achieve its growth and development goals in line with *TDV25*.

Insight #10. Twenty-two U.S. private foundations and philanthropies mobilized USD 96.3 million annually to support Tanzania's progress toward *TDV25*

Some of the world's largest private donors are U.S.-based philanthropies associated with American companies: Arcus Foundation, the Bill & Melinda Gates Foundation, the Conrad N. Hilton Foundation, the David & Lucile Packard Foundation, the Ford Foundation, and the John D. & Catherine T. MacArthur Foundation, among others. Sub-Saharan Africa is the single largest geographic region, attracting roughly one-third of these development investments (Burgess and Custer, 2023). In Tanzania, 22 U.S.-based philanthropic foundations mobilized approximately USD 96.3 million¹⁴ annually between 2012 and 2022 to fund development activities.¹⁵ This includes both funding provided bilaterally by these philanthropies as well as funding channeled through health-focused multilateral vehicles, such as the GAVI Alliance, the Global Fund to Fight AIDS, Tuberculosis, and Malaria, and the World Health Organization (WHO).

Beyond corporate philanthropies, online crowdfunding platforms are opening up new opportunities for Tanzanian entrepreneurs to access capital in the form of microloans to start or scale small businesses or support their families. Rather than institution-to-institution support, these crowdfunding platforms allow individual Americans to engage directly with Tanzanian counterparts, supplying micro-loans from as little as USD 25 to much more. These small people-to-people transactions not only matter to individual entrepreneurs but also add up to substantial resources. Just one leading micro-lending platform, Kiva, facilitated microloans worth USD 3.6 million from people in the U.S. to individuals and their small businesses in Tanzania between 2012 and 2022. While this figure does not capture the universe of such

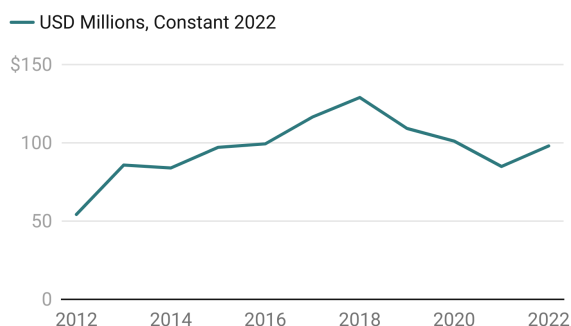
¹³ This total is calculated using all available data between 2012 and 2022.

¹⁴ To estimate U.S.-based philanthropic contributions to Tanzania, we used data from the OECD Credit Reporting System (CRS) database on Private Philanthropy for Development (PPFD). These data capture self-reported contributions to Tanzania from U.S.-based philanthropic foundations. While there are likely other significant U.S.-based philanthropies in Tanzania, reported donations from the CRS give us a conservative estimate of the scale of U.S. philanthropic contributions to Tanzania.

¹⁵ Based on a ten-year average of 2013-2022, in constant 2021 USD.

people-to-people ties, it serves as an illustration of the deep and varied partnerships that exist between the two countries and their economies.

Figure 10. Donations from U.S. philanthropic foundations to Tanzania, 2012-2022



Notes: This graph shows total donations made by U.S. private philanthropic foundations to Tanzania each year from 2012 to 2022. This figure includes 22 private philanthropies as well as funding from the Bill & Melinda Gates Foundation which is channeled through multilateral institutions. Source: OECD Creditor Reporting System (CRS) database.

3.2 Foreign direct investments that promote shared prosperity in Tanzania

Philanthropic funding and state-directed assistance offer valuable financing for development but are arguably more limited in scope and less sustainable than other forms of economic partnership (Burgess and Custer, 2023). Reducing barriers to private sector investment at scale is therefore a critical priority for Tanzanian leaders, with President Samia Suluhu Hassan setting her sights on reaching USD 15 billion in annual inbound FDI flows by 2025 (Christopher, 2023). Tanzania is already one of the top 10 destinations for foreign direct investment in Africa and is an attractive market for private sector capital with the potential for these resources to fuel its development agenda (Okafor, 2023; UNCTAD, 2023). The United States, as the single largest supplier of outbound FDI globally in 2022 (BEA, 2023), has a long history of investing in Tanzania but there is ample room to grow those private sector partnerships in the future.

Insight #11. U.S. companies see Tanzania as a desirable investment destination: they hold 1.3 billion annually in FDI stock and help create jobs in the energy and tourism sectors

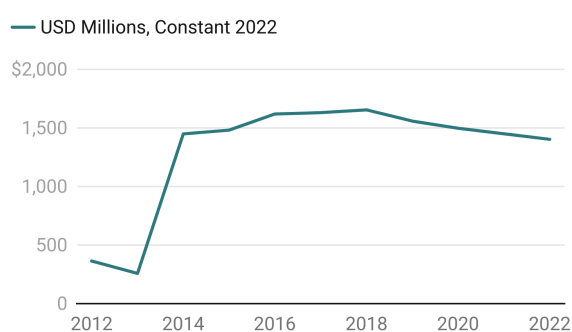
Since 2010, American companies have invested an estimated USD 14.36 billion overall in Tanzania. Although FDI levels vary from year to year (Figure 11), U.S.-based companies have held an average of USD 1.3 billion annually in FDI stock¹⁶ in the Tanzanian economy from 2012 onwards (Financial Times, n.d.). Energy-related sectors such as coal, oil and gas, and renewable energy attracted the largest volume of U.S. investment capital between 2010 and 2022, accounting for a total of USD 851.3 million (see Table 3 in Chapter 2).

Tanzania's ample natural gas reserves off the southern coast have attracted many multinational corporations to invest in the country, with the U.S. as a major player. Symbion Power, a U.S. power engineering and construction firm, acquired a 120 MW natural gas power plant in Ubungo, Dar es Salaam in 2011 and also constructed two emergency power plants at Dodoma (55 MW) and Arusha (50 MW) to deliver power to the Tanzanian national grid during droughts, when shortages of water deplete hydro-electric resources. In 2013, then-U.S. President Barack Obama launched the U.S. government's Power Africa Initiative at the Symbion Power Plant.

In addition to bringing in capital, FDI can also create jobs that benefit Tanzania's local workforce. The hotels and tourism sector, the third-largest employer in Tanzania, leads in jobs created from U.S. FDI (Financial Times, n.d.). The minerals, food and beverages, and oil, coal, and gas sectors are also leaders in creating jobs through U.S. FDI (ibid). Service sectors such as finance, business, IT, and software are also attracting a growing share of U.S. FDI and show promise for growth in capital and high-value jobs (ibid). According to the Tanzania Investment Center (2015), U.S. FDI helped create a total of 55,746 Tanzanian jobs between 1990 and 2015.

¹⁶ OECD defines FDI stock as the value of foreign investor' equity in and net loans to enterprises that reside in the reporting economy. FDI stock is the measure of the total level of direct investment at a given point in time.

Figure 11. Running total of U.S. FDI in Tanzania, 2012-2022



Notes: This figure shows the annual stock of U.S. foreign direct investment (FDI) in Tanzania from 2012 to 2022. FDI dollars are in USD millions. Source: US Bureau of Economic Analysis.

Table 5. Top 10 sectors of U.S. companies investing in Tanzania, 2010-2023

Rank	Sector	Total FDI (in millions USD)
1	Coal, oil & gas	670.6
2	Renewable energy	180.7
3	Communications	119.5
4	Hotels & Tourism	100.3
5	Business services	83.4
6	Financial services	45.9
7	Software & IT services	26.6
8	Minerals	24.5
9	Food & Beverages	23.7
10	Transportation & Warehousing	14.8

Notes: This table breaks down foreign direct investment dollars in the 10 largest sectors that U.S. companies were active in investing in Tanzania, ranked by the value. FDI dollars are in USD millions. Source: Financial Times fDi Markets database.

3.3 U.S. tourism and remittance dollars benefiting the Tanzanian economy

Tanzania receives hundreds of thousands of international visitors every year, drawn to the Serengeti, Mount Kilimanjaro, and the beaches of

Zanzibar, among other tourist attractions. The United States is one of the top 5 source markets for this inbound tourism to Tanzania, accounting for 11 percent of international tourists (Tanzania National Bureau of Statistics, 2022) and a major source of revenue.¹⁷ Additionally, as discussed in Chapter 2, the U.S. hosts many Tanzanians living overseas, either temporarily or permanently, who send some of their earnings back home in the form of remittances (e.g., a transfer of money from a foreign worker to an individual in their home country). In this section, we take a closer look at how U.S. tourism and remittances generate revenues that may benefit individual households and the broader Tanzanian economy.

Insight #12. The U.S. is a top source market for tourism and remittance flows to Tanzania, making an outsized contribution to the country's foreign exchange and GDP

According to the Tanzanian National Bureau of Statistics, American tourists far outspend their peers from other countries. On average, they spend USD 400-495/person/night—double the next highest spender.¹⁸ Each of these dollars counts in the tourism sector, which is the single largest source of Tanzania's foreign exchange, the second largest contributor to GDP, and the third largest employer in the country (World Bank Group, 2021).

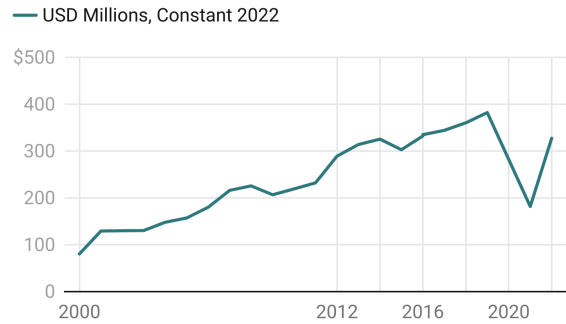
Tourism revenue from the U.S. to Tanzania grew steadily for much of the last two decades (Figure 12), bringing in an annual average of USD 317.7 million between 2012 and 2022. The COVID-19 pandemic and related travel restrictions disrupted these flows temporarily; however, there was a quick resurgence to pre-pandemic levels in 2022. The Tanzanian government's proactive efforts to promote its tourism industry with the American public—such as President Samia Suluhu Hassan attending the global premiere of the travel documentary "Tanzania: The Royal Tour" in New York (Travel Agent Central, 2022)—and planned direct flights between the two countries set to begin in

¹⁷ The other 4 top source markets included Kenya, the UK, France, and Germany, according to the 2022 International Visitors' Exit Survey Report published by Tanzania's National Bureau of Statistics. The same report also separately breaks down the number of international visitors to Zanzibar. In this case, the top 5 source markets for international tourists were France, Germany, the U.K., the U.S. and Spain.

¹⁸ In mainland Tanzania, the average visitor from the U.S. spends USD 400 per night, compared to the next highest spender (U.K. tourists spending on average USD 218 per person per night) (Tanzania National Bureau of Statistics, 2022). For Zanzibar, the average American tourist spends USD 495 per night, compared to the second-ranked U.K. (USD 254/person/night).

2024 (The Citizen, 2023) will likely increase the desirability of Tanzania as a destination for Americans and bring in more revenue.

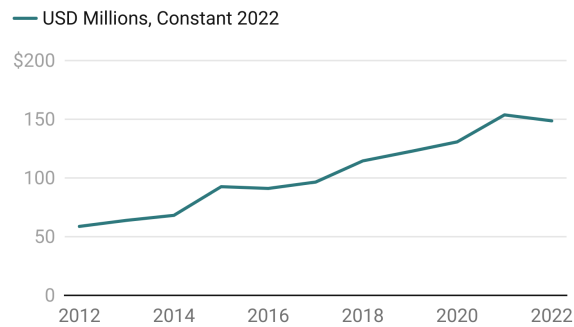
Figure 12. U.S. tourists and associated revenues for Tanzania, 2000-2022



Notes: This graph shows the estimated revenue from U.S. tourists visiting Tanzania each year between 2000 and 2022. Source: National Bureau of Statistics, Tanzania.

Beyond tourism, the United States is the top-ranked (Statista, n.d.) sender of remittances to Tanzania. These remittances are an important form of financial support to family members to weather shocks or supplement their earnings, but they can also provide capital to spur individual entrepreneurial activity or invest in Tanzanian businesses or real estate. Between 2012 and 2022, Tanzanian individuals, families, and enterprises received an average of USD 103.7 million annually from senders in the United States. These transfers from the U.S. to Tanzania have risen steadily over the past decade (Figure 13), despite global crises like the COVID-19 pandemic and the Russian invasion of Ukraine.

Figure 13. Estimated remittances from the United States to Tanzania, 2012-2022



Notes: This figure shows estimated annual remittances from Tanzanians living in the United States between 2012 and 2022. Source: The World Bank's Bilateral Remittance Matrix. Estimates calculated by AidData.

In this chapter, we outlined several ways in which American private sector companies, philanthropies, and individuals are building linkages with Tanzanian counterparts in ways that benefit Tanzania's growth and development. We examined how these people-to-people ties complement government-to-government engagement, allowing Tanzania to diversify revenue sources and tap into additional capital and expertise to fuel its economy. In the next chapter, we examine ways in which this cooperation may contribute to downstream economic, social, and governance benefits for Tanzania, as well as how the country's relationship with the United States is viewed by Tanzanian leaders.

Chapter 4: What are the real and perceived benefits of U.S.-Tanzania engagement?

Previously, we broke down U.S. contributions to Tanzania's growth and prosperity in discrete ways, through dollars mobilized annually on average via a number of government, private, and individual channels. However, the enduring partnership is about more than financing, as both countries have a shared interest in seeing Tanzania achieve the goals it has set for itself in *TDV25*.

In this chapter, we review Tanzania's progress in four key areas of U.S. engagement (energy, trade, health, and education) to track how partnering with the United States may contribute practically to improvements in Tanzanian society (Section 4.1). We also surveyed and interviewed Tanzanian leaders working across 13 sectors to gauge how they perceived the United States' partnership with Tanzania. We asked public, private, and civil society leaders to share their views on the level of U.S. activity they see in their sector; the significance of U.S. contributions to Tanzania's development progress; and other related topics (Section 4.2).

4.1 How might the U.S.-Tanzania partnership benefit people in their daily lives?

To answer this question, we examine four discrete examples from sectors where the United States has concentrated a disproportionate share of its financial and technical assistance to Tanzania over the last two decades. First, we assess how partnering with the U.S. may have contributed to Tanzania's efforts to expand its power generation capacity and broaden access to reliable electricity for more communities. Second, we review how Tanzania has made use of preferential trade policies such as the African Growth Opportunity Act to gain duty-free entry to the American market for its exports. Third, we explore how investments made by Tanzanian and U.S. counterparts to strengthen investments in public health and combat specific diseases may contribute to improved life expectancy and productivity. Finally, we explore how investments in literacy and numeracy may benefit education levels and gender equality.

Insight #13. Partnering with Tanzanian counterparts, the U.S. contributed to a four-fold increase in electricity production and helped develop the natural gas industry

Over the last decade, sustained investments from the U.S., the Tanzanian government, and other partners in Tanzania's power grid (described in Chapters 2 and 3) have helped make electricity more reliable and accessible to the public at large. Since 2000, access to electricity has increased more than four-fold, reaching nearly 45 percent of the Tanzanian population by 2021 (Figure 14). One part of this success story has been Tanzania's diversification of energy sources (Figure 15), from reliance on hydroelectric power to a growing capacity to generate electricity from natural gas (and also renewables, to a lesser degree) (USITA, 2022).¹⁹ Tanzania's total power capacity across all energy sources reached 1,938 MW by the end of 2023 and the government aims to further increase this to 5,000 MW by 2025, partly fueled by its growing use of natural gas (TanzaniaInvest, 2023).

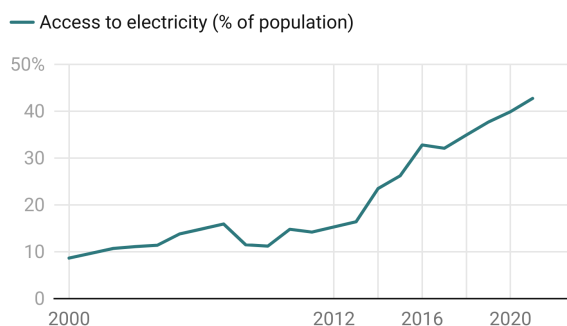
Power Africa—a public-private partnership between 170 U.S. companies and 12 U.S. government agencies—has been an important facet of America's engagement in supporting the diversification and expansion of Tanzania's electricity generation capacity since 2013 (USAID, 2022). The initiative supported the State utility, TANESCO, and Tanzanian companies to review feasibility surveys, purchase equipment, and install electricity grid components. Together with Tanzanian partners, Power Africa facilitated financing and technical assistance (USAID, 2015) to support the Kinyerezi I (150 MW) and Kinyerezi II (240 MW) gas-fired thermal plants, the Kiwira Rivera small hydropower plant (10 MW), and the Kigoma solar power plant (5 MW), among others. Since many Tanzanian communities are still not connected to the power grid, Power Africa's work with commercial off-grid power providers such as Devergy is critical to helping households convert solar power into a reliable

¹⁹ Starting in 2004, Tanzania began producing natural gas commercially (Bishoge, et al., 2018). The local production of natural gas has given Tanzania the opportunity to develop natural gas as a fuel source for thermal-electric power plants which greatly increased electric power generation capacity. By 2011, natural gas exceeded hydropower for electricity generation and has exceeded hydropower ever since.

source of local electricity with roughly 2.38 million new connections created (USAID, 2019).

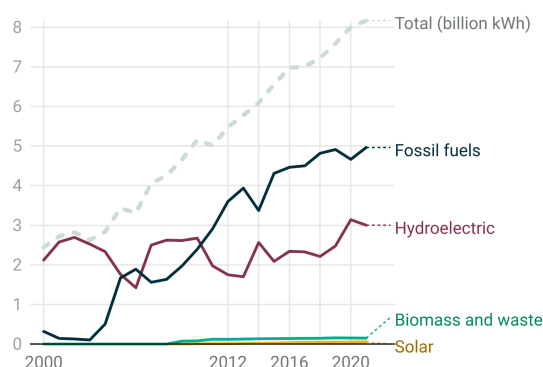
The MCC was involved in numerous energy sector investments in collaboration with Tanzanian partners—extending electricity lines to 337 communities, financing lower-cost connections for poor households, promoting solar power production via installation of photovoltaic (PV) systems in the Kigoma region, connecting the Zanzibar power grid to the mainland, and upgrading several substations (MCC, n.d.; MCC, 2015; Mathematica, 2024). Independent evaluations conducted for these projects showcase how energy investments can translate into tangible benefits for Tanzanian communities: increased use of solar PV systems as a low-cost, energy source (Mathematica, 2017a); higher connection rates, improved safety at night, and reduced poverty levels from electricity line extensions (Mathematica, 2017b); expansion in income-generating activities using grid electricity (Mathematica, 2017c); and perceived improvements in the quality of electricity among hotel staff and guests from the submarine cable connector to Unguja island (Mathematica, 2015).

Figure 14. Tanzanians with access to electricity, 2000-2021



Notes: This graph shows the percentage of Tanzanians with access to electricity from 2000 to 2021. Source: World Development Indicators, The World Bank.

Figure 15. Electricity generation by fuel source in Tanzania, 2000-2021



Notes: This graph shows electricity generation (billion kWh) in Tanzania by energy source from 2000 to 2021. Natural gas is included under fossil fuels. While the underlying data from the EIA does not distinguish between natural gas and other fossil fuels, we can estimate the amount of electricity generated by natural gas by applying the proportion of fossil fuel electric generation due to natural gas. Natural gas represents 876 MW of generation capacity of the 1,116 MW total generation capacity for fossil fuels (USAID, 2019) which is 78.5 percent of the fossil fuel generation capacity in Tanzania. Source: Energy Information Administration (EIA).

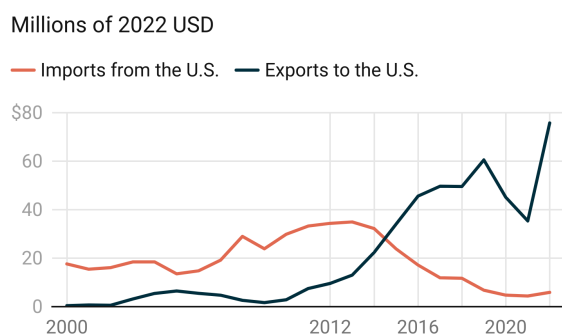
Insight #14. Participating in the African Growth and Opportunity Act, Tanzania increased its duty-free exports of textiles and clothing to the U.S. by 45-fold between 2009 to 2022

Tanzania is an active user of the African Growth and Opportunity Act: more than 90 percent of its exports to the U.S. (excluding crude petroleum) benefit from the duty-free classifications under this legislation (USITC, 2023; Office of U.S. Trade Representative, 2024). This enabling legislation paved the way for Tanzanian businesses to accelerate their textile exports to American consumers 45-fold between 2009 and 2022 (Figure 16). From a modest start, Tanzania strengthened the quality and quantity of its textile exports, delivering USD 75 million in such products to the U.S. in 2022 alone, with COVID-19 only temporarily dampening this upward trend.

The Tanzanian government—in line with its 2016 Cotton-to-Clothing Strategy and National AGOA Utilization Strategy—has invested in the vertical integration of its textile and apparel industry to maximize its domestic cotton supply, which has also

facilitated exports to countries beyond the U.S. (USITC, 2023; MITI, 2016a and 2016b; Signe, 2022). Higher productivity in this sector could generate outsized benefits for households, as the average Tanzanian apparel industry worker is estimated to financially support nine family members (Manduna, 2024).

Figure 16. U.S.-Tanzania textile trade, 2000-2022



Notes: This graph shows the balance between Tanzanian exports to (dark blue line) and imports from (orange line) the U.S. in the textile and clothing industry from 2000 to 2022. Source: World Integrated Trade Solution, The World Bank and UNCTAD.

Insight #15. Tanzania, in partnership with the U.S., is becoming more resilient in the face of HIV/AIDS, having supplied life-saving medical treatment to avert roughly 3/4 of a million deaths

The health of the Tanzanian population improved dramatically from 1990 to 2021, as measured by rising life expectancy over the last three decades (Figure 17). Working in close collaboration with the Tanzanian Ministry of Health, the U.S. government and private philanthropies active in the health sector achieved major reductions in several leading causes of death, including HIV/AIDS as well as infant and child illnesses. A healthier population generates other positive benefits for Tanzanian society writ large. Healthy individuals are more productive for longer in the workforce, as they miss fewer days of work and school, which contributes to higher quality of life but is also a boon to the broader economy. Improved access to life-saving and life-enhancing health services may also reduce social tensions over inequities between groups.

Since the start of the HIV/AIDS epidemic, Tanzania experienced a dramatic rise and fall of HIV across the country. Between 1990 and 2002, HIV/AIDS deaths more than tripled (from 35,000/year to 120,000/year). However, from 2005 to 2022, Tanzania charted a major

turnaround in its ability to curb the death toll from the disease, reducing mortality rates to 22,000 deaths/year (UNAIDS, 2024).²⁰ The administration of life-saving antiretroviral therapy (ART) treatment since 2004 has been a critical part of this success story (Somi et al., 2009),²¹ averting an estimated 778,000 deaths in Tanzania by 2022 (Figure 18).²² The percentage of people living with AIDS receiving ART treatment increased from 18 percent in 2010 to 94 percent in 2022. The U.S. has supported HIV programs in Tanzania since 2003 with over \$6 billion in assistance. In 2021, the U.S. contributed 75 percent of the funding for HIV programs in Tanzania (PEPFAR, 2021).

Child health in Tanzania has also experienced substantial gains over the past 30 years, and as with HIV/AIDS, the numbers are all moving in the right direction. By 2021, infant mortality²³ had dropped to one-third, child mortality²⁴ to one-fifth, and neonatal mortality²⁵ to half of what it was in 1990 (Figure 19). These improvements in child health occurred in the midst of the HIV/AIDS pandemic, which early on threatened to reverse these downward trends due to transmission of HIV from mothers to children. Effective maternal child health programs, (supported by U.S. financial and technical assistance) to prevent the transmission of HIV from mothers to children, promote immunization, and improve infant and child feeding, as well as other child health interventions may have contributed, at least in part, to these gains.

²⁰ UNAIDS estimated HIV/AIDS deaths averted from 2010 to 2022. Prior to 2010, we estimated HIV/AIDS deaths averted by taking the difference between deaths in 2006 (110,000) and the estimated HIV/AIDS deaths in the year. This estimate assumes that deaths due to HIV/AIDS from 2007 to 2009 would have remained at 2006 levels had there been no delivery of ART.

²¹ ART prevents deaths directly of individuals with AIDS and indirectly by reducing the transmission of HIV to others.

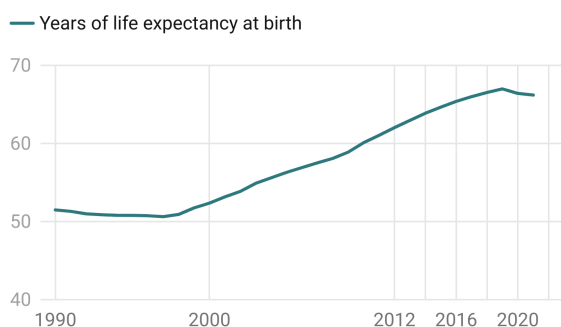
²² In 2007, 20,000 deaths were averted, and that number rose to 68,000 in 2022.

²³ The WHO defines the infant mortality rate as the probability of a child born in a specific year or period dying before reaching the age of one, if subject to age-specific mortality rates of that period, per 1000 live births.

²⁴ The WHO defines the child mortality rate as the probability that a child born in a specific year or period will die before reaching the age of 5 years, subject to the age-specific mortality rates of that period, per 1000 live births.

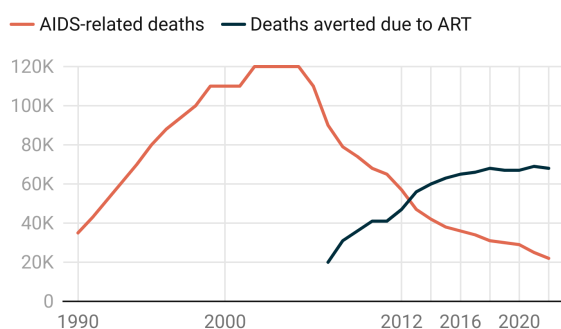
²⁵ The WHO defines the neonatal mortality rate as the number of deaths during the first 28 completed days of life in a given year or other period, per 1000 live births.

Figure 17. Tanzania life expectancy at birth, 1990-2021



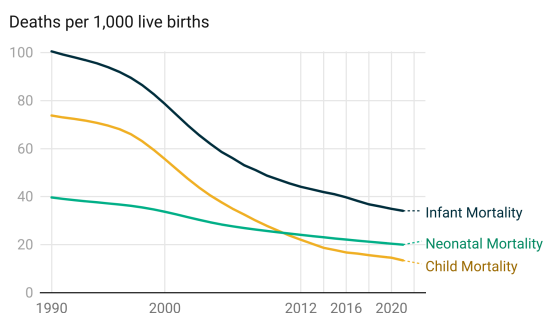
Notes: This graph shows the life expectancy of Tanzanians at birth from 1990 to 2021. Source: World Development Indicators, The World Bank.

Figure 18. AIDS-related deaths (1990-2022) and HIV/AIDS deaths averted through ART (2010-2022), in Tanzania



Notes: This graph shows the number of HIV/AIDS-related deaths of Tanzanians and deaths averted due to ART from 1990 to 2021. Source: AIDSINFO, UNAIDS.

Figure 19. Neonatal-, infant- and child mortality in Tanzania, 1990-2021



Notes: This graph shows the rates of infant-, neonatal-, and child mortality of Tanzanians from 1990 to 2021. Source: UN Inter-agency Group for Child Mortality Estimation.

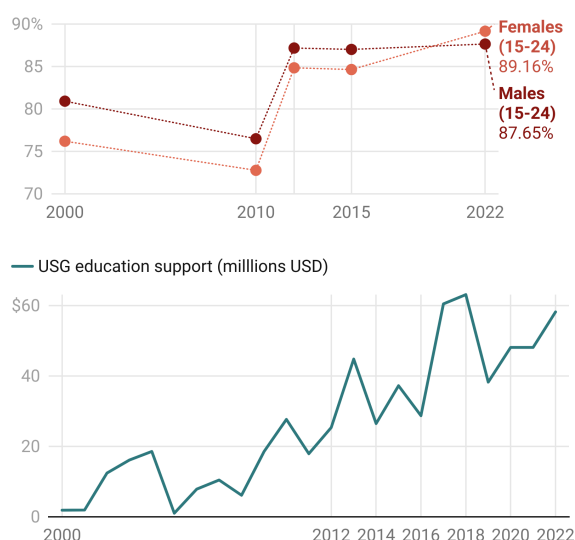
Insight #16. The U.S. has supported primary education in Tanzania for decades and youth literacy continues to improve, with females now outperforming males

Basic education, including literacy and numeracy, is critical for Tanzanian children and youth to participate fully in society, contribute productively to the economy, and provide for themselves and their families. The Tanzanian government has made strengthening access to and quality of basic education a priority. The results are encouraging: literacy levels have increased for both females and males from 2000 to 2022, with females aged 15-24 outstripping their male peers by 2022 in a periodic assessment (Figure 20).

U.S. government agencies, non-governmental organizations, and private foundations have partnered with the Tanzanian government for several decades to strengthen literacy and numeracy for children and youth in Tanzania. Funding from the U.S. government for education has grown relatively steadily over the past twenty years (Figure 20). U.S. support has placed a particular emphasis on developing reading materials, teacher training, community engagement, and guidelines on literacy assessment.

USAID, for example, has provided financing and expertise via several flagship programs. The five-year Tusome Pamoja (Let's Read Together) program (2016-21) aimed to improve learning outcomes in early grade reading, writing, and math for 1.4 million children in more than 3,000 participating schools across 42 districts (RTI, 2018; USAID, 2012-2017). A related effort, Hesabu na Elimu Jumuishi (Arithmetic and Inclusive Education), focused on arithmetic and inclusive education in the same districts (RTI, 2021). The four-year Jifunze Uelewe (Learn to Understand) program (2021-2025) emphasized improving teacher instruction and supporting safe, inclusive learning communities for 1.28 million children in Morogoro, Iringa, Mtwara, Ruvuma, and Zanzibar (USAID, 2021; USAID, n.d.b.). In 2022, USAID began implementing a four-year Kijana Nahodha (Young Captains) program oriented towards youth empowerment and education, prioritizing out-of-school youth aged 15-25 (USAID, February 2023).

Figure 20. Tanzania youth literacy and U.S. government financial aid to education, 2000-2022



Notes: This graph shows the literacy rates of female (orange) and male (dark red) Tanzanian youth and U.S. government financial support to education from 2000 to 2022. Source: World Development Indicators, World Bank; ForeignAssistance.gov.

Early progress reports and impact assessments of these programs highlight tangible benefits for Tanzanian communities. The Tusome Pamoja program reportedly trained over 10,000 Tanzanian teachers on early grade reading instruction, distributed 1 million reading materials to students in grades one and two, and supported 280 savings groups for mothers and caregivers which saved nearly USD 435,000 (TZS 1 billion) to encourage adolescent girls to stay in school (USAID, n.d.c.). To encourage greater community involvement in children's educational success, Jifunze Uelewe established 2,045 community-based forums (Parent Teacher Partnerships) to help resolve problems and build engagement (USAID, February 2023). The program also distributed an additional 1 million early grade reading materials and trained over 23,000 Tanzanian teachers to date in literacy and numeracy instruction and inclusive education, among other topics (ibid).

The Department of State supported other educational programs that increase English language skills and empowerment of youth. The English Access Microscholarship Program (Access) program has improved the English language skills of over 500 underprivileged teenagers across Tanzania (U.S. Embassy Tanzania, 2022). Graduates of Access often demonstrate greater leadership skills and perform better in school. Another program in Tanzania moves

beyond the classroom setting of Access to the Kinful virtual reality (VR) platform (Kinful, n.d.). Tanzanian youth don VR headsets to experience a learning experience that inculcates social and emotional skills, improves digital literacy, and enhances English language skills. Kinful program graduates attest to how the program helps them in school and in life (U.S. Embassy Tanzania, 2022).

4.2 Leader perceptions of U.S.-Tanzania partnership

In the previous section, we discussed evidence to suggest that Tanzania is making advances on its development priorities on several fronts and the United States has been a partner in these efforts. However, we cannot say with certainty how these contributions are seen and perceived by public, private, and civil society leaders who are making and implementing development policies in Tanzania. To obtain a better understanding, we conducted an online survey²⁶ and interviews²⁷ of Tanzanian leaders from a systematic sampling frame of government agencies, universities and think tanks, non-governmental and civil society organizations, development partners that are active in Tanzania, and the private sector.

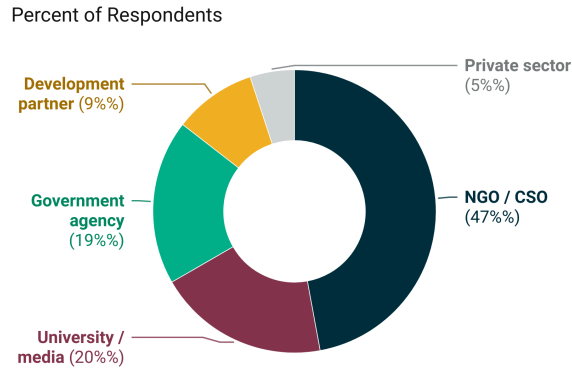
One-hundred and thirty eight individuals shared their views via the online survey conducted in January 2024 for a response rate of 12.4 percent. Respondents represented 13 different sectors of expertise and shared their views about development cooperation in Tanzania and the contribution of the U.S. and other actors. Figure 21 provides a breakdown of the percentage of respondents by stakeholder group (i.e., the types of institutions for whom they worked). Additionally, 12 senior officials from 11 government or civil society institutions participated in face-to-face

²⁶ The online survey was conducted using Qualtrics. AidData's in-house Listening to Leaders sampling frame formed the base of the sampling frame which was then augmented with additional relevant contacts using systematic search criteria. Prospective survey participants held leadership positions within the organizations they worked for during the 2015-2024 period. The survey pre-notification, invitation, and reminders were sent to 1,137 individuals, and 138 individuals responded to share their views via the survey. Respondents to the survey included representatives with expertise in: agriculture and food security; democracy, human rights, and governance; economic growth and trade; education; environment; gender equality and women's empowerment; health; energy; water, sanitation, and hygiene; social development; science and technology; industry and infrastructure; and other. Seventy-five percent of respondents worked primarily in continental Tanzania; the remainder included those working in Zanzibar or both Zanzibar and the mainland.

²⁷ Interviews were conducted with senior officials who had long-term experience with and knowledge of the financial resources of their respective institutions. Interviews used a semi-structured interview guide.

interviews and focus group discussions conducted in February 2024.

Figure 21. Respondents to AidData’s 2024 Tanzania Snap Poll by stakeholder group

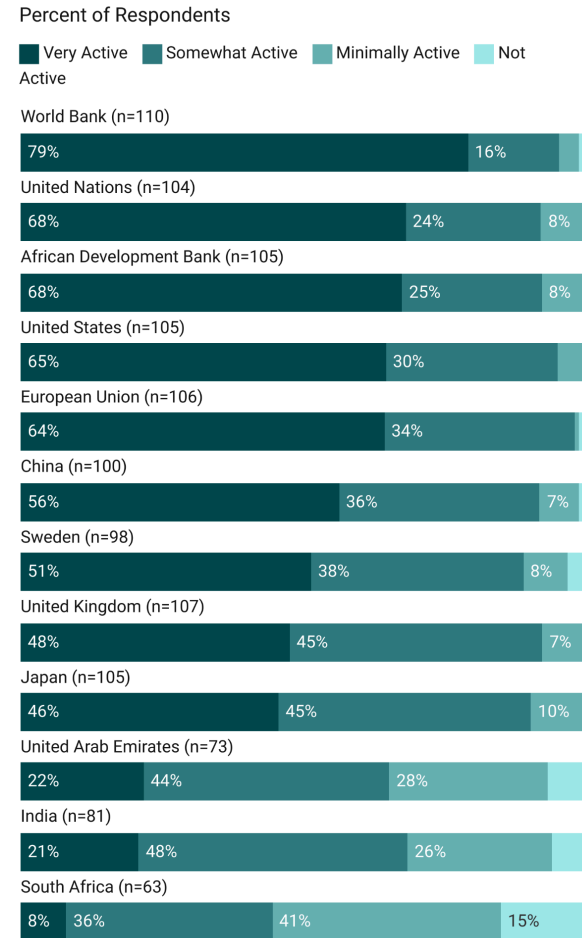


Notes: This figure shows the share of respondents who identified themselves as belonging to a given stakeholder group. Source: AidData’s 2024 Tanzania Snap Poll.

Insight #17. America is viewed as an engaged partner: Tanzanian leaders see the U.S. as active (95 percent) and making a meaningful contribution (96 percent) to their country’s development

Ninety-five percent of respondents identified the U.S. as somewhat or very active in supporting Tanzania’s development progress (Figure 22). Other leading bilaterals such as the United Kingdom, Japan, the People’s Republic of China, and Sweden were also frequently identified as common partners, if not quite as active as their American counterparts. As a cohort, multilateral organizations such as the World Bank, the African Development Bank (AfDB), and the United Nations (UN) were consistently seen as being actively engaged in Tanzania’s development. This finding reinforces the importance of donors like the U.S. and other advanced economies pooling resources to invest in these critical multi-donor channels to extend the reach of their support of the Tanzanian people.

Figure 22. Leader perceptions of development partners’ activity levels in Tanzania



Notes: This figure shows the number of respondents who selected a given answer choice, compared to the total number of respondents who answered any part of the question: “To your knowledge, how active are the following external actors in supporting Tanzania’s development (e.g., making investments, providing assistance, brokering partnerships)?”. Source: AidData’s 2024 Tanzania Snap Poll.

Interviews with Tanzanian government and civil society leaders reinforced the view that U.S. support is visible and valued:

“[T]he U.S. government contributes to multilateral organizations like the World Bank, AfDB, UN and [International Monetary Fund] (IMF) as a member. You cannot avoid the U.S.; when you avoid them through bilateral, you will find them in these multilateral organizations.”—Tanzanian government official

"U.S. support is everywhere; they touch every sector, everywhere you go, you will see 'Supported by [the] American People'."
—Tanzanian civil society leader

Interviewees identified several ways in which the U.S. government was an active partner. Consistent with the financial analysis in Chapters 2 and 3, interviewees highlighted U.S. contributions in public health (malaria control through the distribution of mosquito bed nets and indoor residual spraying), agriculture productivity (capacity building for farmers, improved seeds), as well as trade and investment promotion. In addition, interviewees surfaced other beneficial areas of cooperation, such as U.S. technical assistance to improve democracy and governance through legal and policy reforms, gender equality, women and children's empowerment.

High-level visits from U.S. political leaders; engaging local officials and civil society leaders; and projects that directly touch the lives of citizens (e.g., distributing bed nets to fight malaria) were mentioned by interviewees as influential in raising the profile of U.S. development cooperation in Tanzania. Conversely, others felt that the U.S. may over-promote its assistance relative to the size of its contributions, be less attentive to highlighting the efforts of its partners, and be overly reliant on non-governmental organizations to implement projects, all of which may undercut its visibility. To increase the visibility of its contributions in future, interviewees suggested that the U.S. government should look beyond social media and billboards, which reach a smaller share of the Tanzanian population, and emphasize events, workshops, and campaigns that engage local communities around its projects.

Leaders who identified a given development partner as somewhat or very active were asked to assess the degree to which that actor had made a meaningful contribution to Tanzania. Ninety-six percent of respondents indicated that the U.S. was not only active but had made "a fair amount" or a "lot of contribution" to their country's development. When asked to estimate how much U.S. government agencies contributed to Tanzania on average annually, only thirty-nine percent of respondents assumed U.S. contributions were substantially lower than the actual volume of assistance.²⁸

²⁸ Respondents were asked the following question: "How much do you estimate U.S. government agencies contribute to Tanzania on average annually?" Respondents could choose from the following options: below 100 million USD (9 percent), 100 million to 500 million USD (30 percent), 500 million to 1 billion USD (31 percent), and over 1 billion USD (30 percent).

In-depth interviews highlighted specific examples that Tanzanian leaders viewed as successful cases of development cooperation over the last decade. Consistent with the discussion in Section 4.1, health was a recurring theme—from programs to curb infectious diseases (e.g., HIV/AIDS, malaria, and tuberculosis) and improve maternal-child healthcare to distributing nutritious food for primary school students via school-based feeding projects. Interviewees reported on the powerful impact of antiretroviral therapy and other related interventions supported by the U.S. government in helping to reduce the rate of HIV/AIDS infections from double to single digits.

Interviewees also appreciated the pivot from food aid to increasing Tanzania's agricultural productivity and the resilience of its food systems to weather future crises. Feed the Future's Tanzanian Agricultural Development Program, implemented by USAID, was singled out as one success story in working with smallholder farmers to increase yields and incomes through training in modern farming techniques, strengthening market linkages, and other activities. In a similar vein, interviewees also cited the ASPIRES (Agriculture Sector Policy and Institution Reforms Strengthening) and PS3 (Public Sector Systems Strengthening) projects as effective examples of collaborating with Tanzanian counterparts to increase agricultural productivity.

Comparatively, interviewees felt that U.S. assistance had been less present and successful in Tanzania's extractives sector, particularly mining. Interviewees saw this as partly a challenge of inadequate infrastructure (e.g., poor roads) but also navigating negative spillovers from such projects related to environmental degradation, social conflicts, disputes over land rights, and other issues. Despite the uptick in tourism, trade, and investment flows between the U.S. and Tanzania over the last decade (see Chapter 3), interviewees felt that the U.S. was less active in supporting these areas, particularly in recent years. Also somewhat at odds with high-profile government and private investments in this area, interviewees felt that the U.S. had been less supportive of the energy sector in recent years. Reflecting on why this might be the case, interviewees speculated that this may have to do with some of the previous tensions between Washington and Dodoma over Tanzania's democracy and human rights record. However, interviewees reported that they were beginning to see a positive change towards increasing

As discussed in Chapter 2, U.S. government agencies provide 673 million annually in direct bilateral assistance to Tanzania, which means that most respondents viewed the U.S. about as or more favorably than its actual allocations.

support for Tanzania in response to its efforts in strengthening democracy and freedom of expression.

As the U.S. is not the only actor operating in Tanzania, we asked senior leaders during interviews about the extent to which they saw the U.S. government coordinating with other bilateral and multilateral development partners—from sharing information to pooling resources toward shared goals. Interviewees were somewhat divided in their perspectives on this topic. Consistent with Chapter 2, interviewees pointed to the high degree of U.S. financing channeled via multilateral organizations such as the World Food Program as indicative of a sign of coordinated effort in tackling Tanzania's development challenges. However, there was less certainty about U.S. coordination with other bilateral donors. Although leaders did report that some public activities received joint support from several donors, some interviewees argued that the U.S. wanted to keep their activities separate to make it easier for them to monitor closely how their support was used and assess the impacts.

Insight #18. Tanzanian leaders see the breadth of U.S. government, civil society, and private sector institutions as best suited to deliver different types of support

Respondents who had identified the U.S. as an active development partner were asked which types of American organizations were active in their sector and in what ways. The majority of leaders surveyed identified U.S. government agencies as actively engaged in providing development assistance via grants and loans (Table 6). Of these agencies, USAID and the MCC were most often referenced in individual interviews. Private foundations were also seen as relatively more active in providing development assistance than other activities. In interviews with senior leaders, several of these actors were also referenced by name as being particularly influential, including the Bill & Melinda Gates Foundation, Rockefeller Foundation, and the Ford Foundation. U.S. civil society institutions—non-governmental organizations, universities, and think tanks—were identified as leading contributors in terms of capacity building and training.

Interviewees also reflected on the contributions of these actors:

"We have so many projects with the U.S., and 99 percent of the projects are funded by USAID through implementing agencies like international NGOs or universities"—Tanzanian government leader

"U.S. foundations have provided considerable support. It is imperative to assess their contributions to the overall support received by the country to gauge the magnitude of their assistance." —Tanzanian civil society leader

"U.S. foundations...have established numerous laboratories within this nation, notably aiding the Medical Store Department (MSD) in enhancing the supply chain. The tangible effects are evident, as reflected in the rise of life expectancy in Tanzania due to the improved healthcare system." —Tanzanian civil society leader

The U.S. private sector was seen by senior leaders as helping drive Tanzania's growth and development, spurring local companies to grow by providing training on technology-driven approaches and providing seed funding. U.S. consumer goods companies such as Coca-Cola, Vodacom, and Kentucky Fried Chicken were identified as relatively more influential for their contributions to job creation, tax revenues, and other investments with multiplier effects. The research and development capabilities were also identified as valuable.

"The U.S. private sector plays an important role in supporting Tanzania's growth and development. Also, U.S. companies have employed many people in the country. In addition...the U.S. private sector has supported community initiatives and programs in social services."—Tanzanian government official

"[A] company like Coca-Cola in the economy influences even local companies to grow; we now have Mo Cola, Jambo Cola which are typical examples of the impact of having Coca-Cola in the country." —Tanzanian civil society leader

Table 6. Leader perceptions of organizations and their best contributions to Tanzanian development

	Foreign investment or joint venture partnerships	Development assistance	Technical assistance and policy advice	Capacity building and training	In-kind support	Favorable US foreign policies
US government agencies (n=76)	4%	71%	9%	13%	1%	1%
US NGOs, CSOs or faith-based organizations (n = 43)	5%	26%	19%	42%	9%	0%
US universities and think tanks (n=20)	0%	5%	20%	70%	0%	5%
US based private foundations (n=18)	22%	56%	6%	11%	6%	0%
US private sector companies (n=11)	55%	18%	18%	0%	9%	0%
US individuals (n=11)	9%	36%	27%	9%	18%	0%

Notes: These percentages refer to the number of respondents who selected a given answer choice compared to the total number of respondents who answered for each organization type in the question: "What types of activities by these organizations contributed most to Tanzania's development progress?". Respondents were only able to select one type of activity for each kind of organization. Respondents were only presented with an organization type if they had previously identified that organization type had actively contributed to Tanzanian development. Source: AidData's 2024 Tanzania Snap Poll.

Given the breadth and diversity of these actors, we asked senior leaders for their assessment of the degree to which they saw the U.S. government coordinating its efforts with American private sector actors. Interviewees had mixed views on this subject. Some leaders saw U.S. government and private sector actors bringing different strengths and resources to bear in ways that could complement each other. One example was in the health sector, where U.S. government-led initiatives such as the President's Emergency Plan for AIDS Relief (PEPFAR) supports HIV/AIDS initiatives and TB diagnosis, treatment, and care, while the Gates Foundation facilitates access to antiretroviral therapy (ART) and strengthening TB research and development laboratories. By contrast, agribusiness was an area where interviewees felt that there was much less coordination between U.S. private sector and government actors as they focused on different areas—with U.S. companies focused on food processing and value chain development versus U.S.

government efforts to support food security and sustainable farming.

Insight #19. Tanzanian leaders consider the U.S. to be a highly reliable partner (93 percent) and view support from American organizations as a net asset in boosting their credibility (87 percent)

It is one thing for a development partner to be seen as delivering big money or in-kind support episodically, but to what extent is it viewed as having staying power? The predictability of funding and assistance is often a concern expressed by Global South leaders regarding their interactions with development partners. In the case of the U.S.-Tanzanian partnership, however, confidence is high. Ninety-three percent of respondents said they saw the U.S. as a somewhat or very reliable partner in Tanzania's development, as compared to the alternatives.

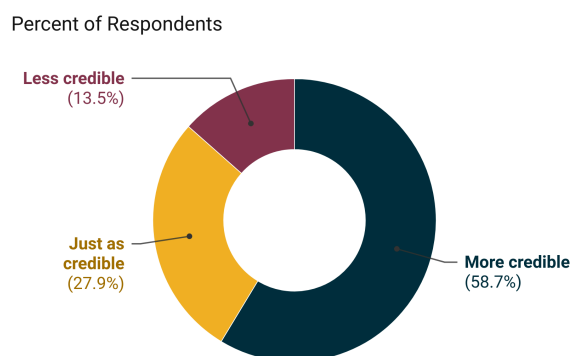
However, that is not to say that Tanzanian leaders view their engagement with the U.S. as static. In some areas, interviewees observed that U.S. development support had evolved to respond to new challenges in the form of climate change or COVID-19. Some senior leaders highlighted climate resilience as a growing emphasis in U.S. agricultural assistance, as well as a focus on strengthening health systems (especially those related to pandemic preparedness and response in the health sector). Other interviewees acknowledged that changes in bilateral relations between the two countries can affect development cooperation, such as previous U.S. concerns regarding worsening governance conditions in Tanzania that prompted MCC to cease its operations in 2016, until it began to re-engage in 2023.

"[T]here have been small changes given the increasing impact of climate change on agriculture. The emphasis shifted to support climate resilience and adaptation measures. ... U.S. private sector support to Tanzania's agriculture sector growth and development has undergone significant changes over time, reflecting shifts in priorities, approaches, and external factors. It has shifted towards more technology-driven approaches." —Tanzanian civil society leader

"The first phase of MCC was completed, but the second phase, which had almost half-billion USD in grants, was not even started because of perceived governance challenges...However...the MCC is returning, and negotiation and design are in place now [to renew cooperation]." —Tanzanian civil society leader

External funding for development projects can involve a tricky balancing act of lending substantive support in ways that do not undermine the credibility of local counterparts. In the case of the U.S., Tanzanian leaders viewed the prospect of partnering with American organizations and agencies favorably. Asked about their attitudes towards a hypothetical project funded by a U.S.-based organization, 87 percent of respondents said that this would make a development effort just as or much more credible in their eyes (Figure 23). Comparatively, relatively few respondents (13 percent) saw U.S. funding as undermining a project's credibility.

Figure 23. Leader perceptions of partnering with the U.S. and associated credibility

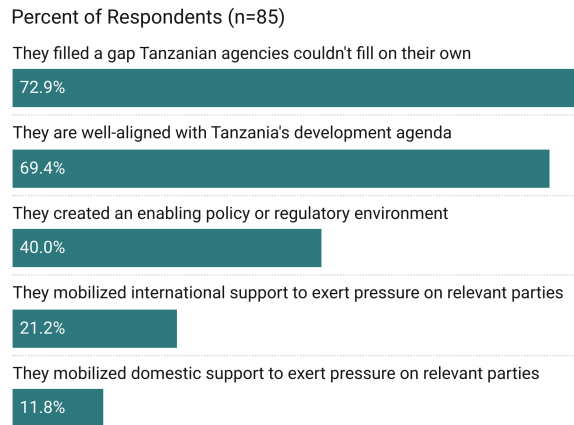


Notes: This figure shows responses to the question: "If you learned a development project was being funded by an organization based in the United States, would you consider the project more, less, or just as credible than if it was run by an organization based in Tanzania?". Response options "Much more credible" and "Somewhat more credible" were combined into "More Credible" in analysis. Response options "Much less credible" and "Somewhat less credible" were combined into "Less credible" in the analysis. Source: AidData's 2024 Tanzania Snap Poll.

Insight #20. U.S. assistance is seen as most helpful when it addresses a critical gap in Tanzania's capacity and when it aligns with Tanzania's own development vision

Leaders who identified U.S. organizations as making a contribution to development in Tanzania were asked to identify up to three reasons why this was the case. Survey respondents generally saw the role of U.S. development interventions as helpful when they assisted the government with its own goals, both by providing additional support to fill gaps (73 percent) and aligning their work with Tanzania's development agenda (69 percent) (Figure 24). TDV25 is top of mind for Tanzania's leaders, and they recognize that the U.S. tries to align with the agenda, though some senior leaders interviewed would like to see a greater emphasis on being responsive to the government's priorities particularly in building sustainable infrastructure.

Figure 24. Leader perceptions of U.S. activities that contribute to Tanzanian development



Notes: This figure shows responses to the question: "Why do you think these activities contributed to the development progress in Tanzania?". Respondents were able to select up to 3 response options. Source: AidData's 2024 Tanzania Snap Poll.

Interviewees asserted that Tanzania does benefit from partnering with the U.S. in many ways, chief among them including financial assistance, trade opportunities, access to technology, and FDI from U.S. companies. In addition to these tangible inputs, senior leaders also highlighted other intangible benefits from America's role in increasing public awareness on human rights, good governance, and environmental issues. The U.S.' broader influence and economic power were also seen as valuable to its partners.

"There are so many advantages in partnering with the US... It is easy to have a seat in international conversation." —Tanzanian civil society leader

However, Tanzanian leaders also say that partnering with the U.S. does have its drawbacks. One of the common challenges reported was in monitoring and coordinating U.S. funds, which is more difficult since so much of U.S. government assistance is channeled through various private sector and civil society organizations. These challenges are not unique to the U.S., as other donors struggle with this issue, but other reported partnership challenges pertained to power dynamics and cultural differences, particularly the need to avoid dependencies, unequal partnership, or unsustainable programs that are overly reliant on American implementers and temporary assistance.

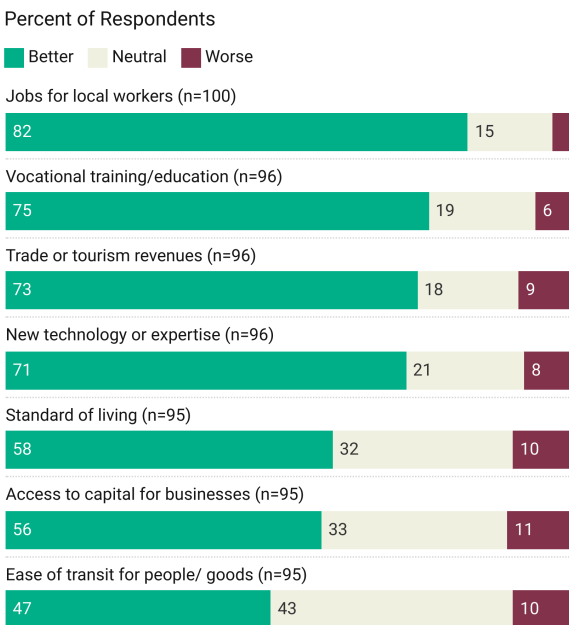
As one interviewee challenged:

"While other countries are doing big development projects, the Americans have been giving soft aid that causes Tanzania to continue to be dependent on them."
—Tanzanian government leader

Insight #21. Roughly 60 percent or more of Tanzanian leaders saw U.S. government support as helping their country improve across key economic, environmental, and governance indicators

Tanzanian leaders weighed in on the extent to which they saw U.S. government support making economic, environmental, and governance conditions better in their country. Survey respondents expressed the greatest appreciation for America's contribution to improving economic conditions in Tanzania—with an average of 66 percent of respondents saying the U.S. had improved economic conditions across 7 indicators (Figure 25). Over 70 percent of leaders responded favorably regarding U.S. government support in four areas: local job creation (82 percent), vocational training and education (75 percent), trade and tourism flows (73 percent), and upskilling technology and expertise to enter into new sectors (71 percent).

Figure 25. Leader perceptions of U.S. contributions to economic development in Tanzania

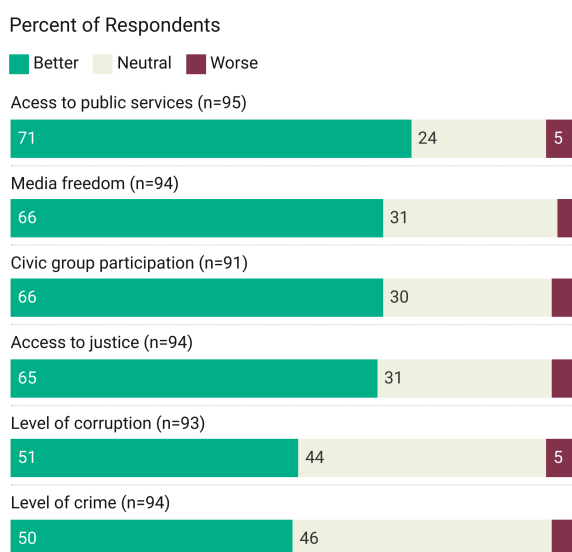


Notes: This figure shows responses to the question: "Has US government support to development projects in Tanzania made things better, worse, or had no impact on the economy in the following areas?". Response options "Much better" and "Somewhat

better” were combined into “Better” in the analysis. Response options “Much worse” and “Somewhat worse” were combined into “Worse” in the analysis. Source: AidData’s 2024 Tanzania Snap Poll.

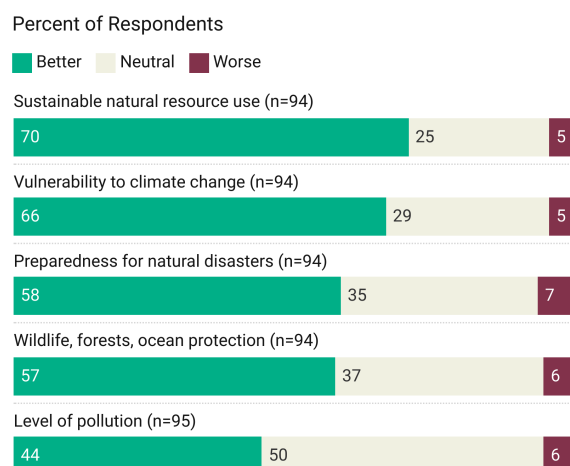
Respondents also credited the U.S. for contributions to improving governance²⁹ (Figure 26) and environmental³⁰ conditions in Tanzania (Figure 27). In its support of good governance, leaders most frequently pointed to the U.S. contribution in helping Tanzanian counterparts facilitate better access to quality public services (71 percent) and ensure an open civic space through participation in civic groups (66 percent), media freedom (66 percent), and access to justice (65 percent). When it came to environmental protection, respondents highlighted improvements in the sustainable use of natural resources (70 percent) and reducing vulnerability to climate change (66 percent) as U.S. contributions.

Figure 26. Leader perceptions of U.S. contributions to governance in Tanzania



Notes: This figure shows responses to the question: “Has US government support to development projects in Tanzania made things better, worse, or had no impact on the governance in the following areas?”. Response options “Much better” and “Somewhat better” were combined into “Better” in analysis. Response options “Much worse” and “Somewhat worse” were combined into “Worse” in analysis. Source: AidData’s 2024 Tanzania Snap Poll.

Figure 27. Leader perceptions of U.S. contributions to the environment in Tanzania



Notes: This figure shows responses to the question: “Has US government support to development projects in Tanzania made things better, worse, or had no impact on the environment in the following areas?”. Response options “Much better” and “Somewhat better” were combined into “Better” in the analysis. Response options “Much worse” and “Somewhat worse” were combined into “Worse” in the analysis. Source: AidData’s 2024 Tanzania Snap Poll.

²⁹ 61 percent of respondents across 6 indicators

³⁰ 59 percent of respondents across 5 indicators

Chapter 5: Conclusion

We began this report with a question: How can Tanzanians and Americans assess the value of their countries' partnership?

In Chapter 2, we estimated that the U.S. government delivers USD 1 billion annually through bilateral official development assistance—including grants, concessional lending, and technical advice—in addition to support provided through multilateral organizations (e.g., UN agencies, development banks) and multi-donor funds operating in Tanzania. We also attempted to quantify how favorable U.S. trade policies are helping Tanzania progress rapidly towards modernizing and developing its economy.

In Chapter 3, we uncovered an additional USD 1.8 billion annually in value generated by growing people-to-people ties between companies, organizations, and individuals in Tanzania and the U.S. The Tanzanian economy benefits from U.S. companies that invest capital, create jobs, and buy goods and services. U.S. philanthropic organizations complement government expenditures to build capacity in Tanzania with private funds, while U.S.-based NGOs implement projects that improve the daily lives of Tanzanians. Additionally, revenues from American tourists, and remittances from Tanzanians living and working in the U.S. all have an impact on the economy.

In total, we estimate that the United States-Tanzania partnership generates a total of approximately USD 2.8 billion each year to support Tanzania's growth and prosperity.

In Chapter 4, we examined how U.S. assistance may help Tanzania make progress on economic, governance and environmental goals in line with its *Vision 2025*. We found that the majority of Tanzanian leaders surveyed viewed the United States as actively engaged and making a substantial contribution to their country's development progress. Though partnerships are never without challenges, overall the benefits of partnering with the U.S. are valued.

Given the challenges of quantifying non-official investments and financial flows, the numbers in this report are conservative estimates, and the total contribution of the United States to Tanzania's growth and development may, in fact, be far greater. Nonetheless, we hope that this report has provided a helpful baseline for Tanzanian citizens and leaders to assess for themselves the value they derive from their country's partnership with the United States.

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About AidData

AidData is a research lab at William & Mary's Global Research Institute. We equip policy makers and practitioners with better evidence to improve how sustainable development investments are targeted, monitored, and evaluated.



About REPOA

REPOA is an independent Tanzanian local think tank that engages in policy research and dialogues that promote socio-economic transformation for inclusive growth.