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Tanzania SERA: Enabling Policy Environment for Agriculture Sector Growth

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**YEAR 2 QUARTERLY REPORT 2
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ABBREVIATIONS AND ACRONYMS

ACT	Agriculture Council of Tanzania
AGRA	Alliance for a Green Revolution in Africa
ANSAF	Agriculture Non-State Actors Forum
BMGF	Bill & Melinda Gates Foundation
BoT	Bank of Tanzania
CPI	Consumer price index
DFID	UK Department for International Development
DFS	Department of Food Security
DPP	Department of Policy and Planning
EAGC	East African Grain Council
ERS	Economic and Research Service
FAO	Food and Agriculture Organization
FSNP	Food Security and Nutrition Program
FtF	Feed the Future
G8	Group of Eight High Income Countries
GDP	Gross domestic product
GoT	Government of the Republic of Tanzania
iAGRI	Research and Education, an FtF Implementing Partner
IFPRI	International Food Policy Research Institute
IR	Intermediate result
MAFC	Ministry of Agriculture, Food Security and Cooperatives
MCT	Media Council of Tanzania
MIT	Ministry of Industry and Trade
MoF	Ministry of Finance
MoJ	Ministry of Justice
MOU	Memorandum of understanding
MSME	Micro, small and medium enterprises
M&E	Monitoring and evaluation
MVIWATA	Mtandao wa Vikundi vya Wakulima Tanzania
NAFAKA	Staples Value Chain, an FtF Implementing Partner
NBS	National Bureau of Statistics
NFRA	National Food Reserve Agency
NPS	National Panel Survey
OECD	Organisation for Economic Co-operation and Development
OMIS	Opt Media Information Solutions
PMO	Prime Minister's Office

REPOA	Research on Poverty Alleviation
RGoZ	Revolutionary Government of Zanzibar
SAGCOT	Southern Agriculture Growth Corridor of Tanzania
SMEs	Small and medium enterprises
SOW	Statement of work
STTA	Short-term technical assistance
SUA	Sokoine Univeristy
TANEXA	Tanzania Exporters Association
TASAF	Tanzania Social Action Fund
TASTA	Tanzania Seed Traders Association
TEF	Tanzania Editors Forum
TFDA	Tanzania Food and Drug Authority
TMF	Tanzania Media Fund
TRA	Tanzania Revenue Authority
USAID	United States Agency for International Development
USDA	United States Department of Agriculture
USG	United State Government
VPS	Virtual private server
WFP	World Food Programme
ZDFSN	Zanzibar Department of Food Security and Nutrition

EXECUTIVE SUMMARY

The primary focus of the SERA Policy Project during the quarter was on institutional capacity building, continuing activities related to food security, preparing statement of works (SOWs) and selecting consultant teams for studies and activities to be undertaken in Q3, and providing support to development partners such as Gates Foundation and Tanzania Seed Traders Association (TASTA). Our institutional capacity building activities included completing a draft assessment of the Zanzibar Department of Food Security and Nutrition (ZDFSN) Program, and completing the Agriculture Council of Tanzania (ACT) Second Strategic Plan. Food security activities included a field trip to the northern border area with Ministry of Agriculture, Food Security and Cooperatives (MAFC) and local government staff to assess the food security and trade situation following the lifting of the maize export ban, and a field trip to Mbeya and Musoma with United States Department of Agriculture (USDA) and MAFC to estimate the cost of a typical food basket. In addition, consultations were held with the Ministry of Industry and Trade on food price data, the Tanzania Social Action Fund (TASAF) on their social safety net activities, and the Zanzibar Ministry of Agriculture and Natural Resources on ongoing and planned SERA work activities. The Concept Note and Scope of Work for the Land Compensation and Benefits Sharing study for the Ministry of Lands was completed and the consulting firm Landesa was selected to undertake the study. Meetings were held with the Director of Coordination of Government Actions in the Prime Minister's Office (PMO) and the Director of Food Security in MAFC to discuss ongoing food security studies and to plan a workshop to disseminate findings in Q3. Communications and advocacy activities included video recording of meetings with traders and farmers during field trips and completion of the draft SERA website.

Going forward, the SERA Project will be very active in Q3 with a consulting team arriving in May to evaluate the capacity and activities of the National Food Reserve Agency, and a second consulting team arriving in June to begin the Land Compensation and Benefits Sharing study. Discussions are underway to engage an expert to prepare an impact study on the use of export and import permits. A report prepared by SERA staff on the impacts of zero-duty on rice imports on the mainland will be completed and discussed at a subsequent stakeholders meeting. The initial draft of the rice market study for Zanzibar will be completed and presented to the Revolutionary Government of Zanzibar (RGoZ). Depending on stakeholder availability, a workshop on food security on the mainland is planned for Q3 or Q4 where we will present the food security work started in Q2 and scheduled for completion in Q3. Capacity building activities in Zanzibar will include the presentation of the Food Security and Nutrition Program Review and additional activities to support the development of an operational strategic plan. Communications and advocacy will continue to document the impact of the lifting of the export in Arusha and Kilimanjaro, and finalization of the SERA website.

INTRODUCTION

The Tanzania SERA Project assists both the Government of the Republic of Tanzania (GoT) and the private sector to enable a broad-based, sustainable transformation of the agricultural sector through policy reform. The vision for this project is twofold: to improve the policy and regulatory environment for agriculture growth and to build a group of public sector institutions, advocacy organizations, and individuals capable of performing rigorous policy analysis and advocating for policy reform. The SERA Project is part of the United States Agency for International Development (USAID) Tanzania Feed the Future (FtF) Initiative and works closely with other implementing partners and USAID.

Improving agricultural policies will be accomplished by working with the GoT and other stakeholders to identify important policy constraints to growth in the agricultural sector and helping to alleviate these constraints through policy reform. The SERA Project will conduct and commission evidence-based policy research to inform the GoT and other stakeholders of the impacts of existing policies and the potential benefits of improved policies. In addition, the SERA Project will develop the capacity of individuals and organizations to engage in policy analysis and advocate for policy change. At the conclusion of the project, we expect USAID will leave behind an improved policy environment and a legacy of enabling the GoT and other stakeholders to initiate, develop, and utilize evidence-based research in policy decisions and implementation. The project will also empower local research and private sector advocacy groups to more effectively use analysis and strategic communications to lobby for change, to build national partnerships that create consensus around agriculture policy, and to monitor the impacts of policy. The SERA Project will focus its activities around priorities identified in collaboration with the Southern Agriculture Growth Corridor of Tanzania (SAGCOT) initiative.

IMPLEMENTATION PROGRESS

COMPONENT I: POLICY AND RESEARCH

The SERA Project undertakes research on important policy issues in an effort to provide evidence-based analysis of policy impacts and provide policy options to government. This includes field research, such as the trip made in Q2 to the northern border area to investigate the impacts of lifting the export ban, and the research undertaken by other organizations in accordance with SOWs prepared by the SERA Project such as the study of National Food Reserve capacity. Other activities included the analysis of the impact of zero-duty rice imports, continued support to TASTA and the development of a collateral registry system in Tanzania. Some of the activities, such as the field trip to the northern border, were not in the Annual Work Plan but were undertaken because of concerns raised by the senior staff at the MAFC about the impacts of the export ban. This resulted in delays in completing some of the tasks planned for Q2. However, these activities not completed in Q2 are expected to be carried out in Q3 and the completion of final Work Plan deliverables should not be affected.

1. Intermediate Result 1: Improved Agriculture Productivity

A. Seed Policy

Access to high quality seeds is essential to raising productivity and improving competitiveness of the agricultural sector, and to the success of investments in SAGCOT. However the use of improved seeds in Tanzania is less than 15% of total seeds used and is the lowest in the region. This situation is reportedly due to weak enforcement of existing regulations and strong GoT controls on certain aspects of the seed industry. The SERA Project will endeavor to improve access to high quality seeds at internationally competitive prices, and stimulate investment in the seed sector by creating an enabling economic environment. Taxes on seeds have been identified as one of the constraints for expanded local production and sale of seeds. The SERA Project is working with the seed industry and TASTA to improve the tax treatment of seeds. In Q3, the SERA Project will also support an analysis of seed policy that will be conducted by a consultant team from FINTRAC.

Tasks Completed in Q2:

- No tasks were completed in Q2 for this activity.

Tasks Planned for Q3:

- Complete the analysis of seed tax issues.
- Submit to MAFC and PMO for their discussions with Ministry of Finance (MoF).

Resources:

- Don Mitchell, Alex Mkindi, Aneth Kayombo.
- Expat short-term technical assistance (STTA).
- Local STTA.

Key Partners:

- MAFC, TASTA, FINTRAC, Alliance for a Green Revolution in Africa (AGRA), SAGOT, Group of Eight (G8) Implementing Team.

Milestones:

- Submission of seed tax analysis to MAFC. (Q3)

Contribute to:

- Intermediate result (IR) 8.1.1 Number of policies/regulations/administrative procedures in each stage of development.

2. Intermediate Result 2: Expanding Markets and Trade

A. Trade Policy

Export permits are required to export food crops from Tanzania and the confusing, lengthy, and costly procedure for obtaining them leads to widespread efforts to circumvent the system in place. Research conducted under the SERA Project in Year 1 showed that export permits do not

provide accurate information on export levels nor do they control the flow of exports. It is therefore important to remove the export permits requirement in order to increase the competitiveness of exporters. The Director of Food Security in MAFC and district and regional officials contacted during the southern highlands field trip expressed their reluctance to lift the export ban and argued that the ban is essential for them to monitor food supplies in the region. Traders surveyed in the northern border area reported that the impact of export permits was to delay exports through official channels and encourage exports through informal channels.

Tasks Completed in Q2:

- No tasks were completed in Q2 for this activity.

Tasks Planned for Q3:

- Undertake a study of the impact of export and import permits and present results to GoT and stakeholders at food security workshop.

Resources:

- Don Mitchell, Alex Mkindi, Aneth Kayombo.

Key Partners:

- ACT, Tanzania Exporters Association (TANEXA), Research on Poverty Alleviation (REPOA), Agriculture Non-State Actors Forum (ANSAF), AGRA.

Milestones:

- Meeting with leadership of MAFC and PMO to discuss export and import permits. (Q3)
- Completion of study of export/import permits and presentation to GoT and other stakeholders. (Q3)

Contribute to:

- IR 8.1.1 Number of policies/regulations/administrative procedures in each stage of development.

B. Credit to smallholders and SMEs

Credit is essential to most investments and delivering credit to small and medium enterprises (SMEs) and small farmers has been a challenge in Tanzania because of the lack of assets that can be used as collateral. Land cannot generally be used as collateral because most land is owned by the government and held in common by local communities. Other assets such as machinery have been used as collateral in other countries, but not extensively in Tanzania due to the inappropriate legal structure and undeveloped registry to record liens against such assets. The SERA Project is working to improve this situation by completing the legal requirements and registry for a collateral registry system. Capacity to use this system will then be developed through trainings. This will primarily help SMEs who own moveable assets that can be used as collateral. Progress on developing the collateral registry system has not been as

rapid as expected despite efforts by the SERA team to support the GoT to implement a collateral registry. However, a meeting with the Governor of the Bank of Tanzania (BoT) in late Q2 provided a new opportunity to promote the collateral registry system and appears promising.

Tasks Completed in Q2:

- Met with BoT to re-engage work on the collateral registry system.

Tasks Planned for Q3:

- Support the BoT in advancing the collateral registry system through the financial system.

Resources:

- Don Mitchell, Alex Mkindi , Aneth Kayombo.
- Expat STTA.

Key Partners:

- MoF, BoT, Ministry of Justice (MoJ).

Milestones:

- Necessary legislation to establish the legal structure drafted. (Q4)
- Approval of legislation for the collateral registry. (Y3)

Contribute to:

- IR 3.1.1 Number of micro, small and medium enterprises (MSMEs), including farmers, receiving United States Government (USG) assistance to access loans.

3. Intermediate Result 8: Improved Enabling Policy Environment for both Agriculture and Nutrition

A. Food Security

The SERA Project is addressing food security concerns on both the mainland and Zanzibar with separate activities focused on the priority policy issues in each area.

Tasks Completed in Q2:

- Undertook a field trip to the northern border to investigate the impacts of the lifting of the maize export ban (Trip report in Annex 1).
- Completed the estimation of the cost of a typical food basket for two regions using monthly retail prices (Pilot Study report in Annex 2).
- Engaged a consultant to prepare a study of food security stockholding activities (SOW in Annex 3).
- Met with Executive Director of TASAF to discuss TASAF III operations, specifically how to establish national safety nets to incorporate conditional cash transfers linked to

participation in public works project and community driven interventions to enhance livelihoods.

Tasks planned for Q3:

- Undertake field trip to TASAF programs.
- Present food basket cost estimation for two regions at food security workshop.
- Present TASAF programs at food security workshop.

Resources:

- Don Mitchell, Alex Mkindi, Aneth Kayombo.
- Expat STTA.

Key Partners:

- USDA, REPOA, USAID FtF Staples Value Chain Project (NAFAKA).

Milestones:

- Completion of National Food Reserve Agency (NFRA) Assessment. (Q3)
- Completion of Food basket estimates for two regions. (Q3)
- Completion of TASAF field study. (Q3)

Contribute to:

- IR 8.1.1 Number of policies/regulations/administrative procedures in each stage of development.

B. Cereals and Other Produce Act of 2009

The Cereals and Other Produce Act of 2009 granted broad authority to the GoT to engage in commercial activities in cereals and other produce, and to regulate these same activities. This could reverse the liberalization of food crops undertaken during the 1990s and threaten private sector activities. It is also inconsistent with the recent liberalization of exports announced by the GoT in September 2012.

The Cereals and Other Produce Act of 2009 also created a regulatory authority for cereals and other produce. However, this authority would have a conflict of interest because the GoT would regulate the sector where it also engages in commercial activities. It is important to encourage the GoT to engage in public sector activities that do not directly compete with the private sector, and to involve the private sector in regulating the industry for the benefit of the sector and Tanzania. The SERA Project plans to organize other stakeholders and development partners to encourage the GoT to avoid direct engagement of the public sector in commercial activities that compete with the private sector.

Tasks Completed in Q2:

- No tasks were completed in Q2 for this activity.

Tasks Planned for Q3:

- Meet with MAFC leadership and PMO to express concern over the Cereals and Other Produce Act of 2009, and discuss alternative roles for the Cereals and Other Produce Board.
- Identify alternative activities for the Cereals and Other Produce Board that do not directly compete with the private sector.

Resources:

- Don Mitchell, Alex Mkindi, Aneth Kayombo.

Key Partners:

- ACT, TANEXA, REPOA, ANSAF, AGRA.

Milestones:

- Meeting with leadership of MAFC and PMO to express concern. (Q3)
- Coordinating meeting with stakeholders held. (Q4)
- Presentation of alternative activities for Cereals and Other Produce Board. (Q4)

Contribute to:

- IR 8.1.1 Number of policies/regulations/administrative procedures in each stage of development.

C. Land Policy

Only one-quarter of the land suitable for cropping in Tanzania is actually used to grow crops, which suggests that there is substantial land available to expand agricultural production by new investors and existing farmers. However, much of the land that is not used for crops is used for other livelihood activities by people with informal rights. When investors are allocated land, these current users are displaced. That has made land use and land policies very controversial and the GoT has requested donors to withhold their involvement until a clear approach to land allocation has been developed by GoT. In support of the GoT's changes to land policy, the SERA Project has been asked to prepare a study of existing land allocation and compensation schemes in Tanzania and the African region.

Tasks Completed in Q2:

- Finalized Landesa subcontract.

Tasks Planned for Q3:

- Complete Land Allocation and Compensation study.

Resources:

- Don Mitchell, Alex Mkindi , Aneth Kayombo.
- Landesa.

Key Partners:

- USAID, World Bank, United Kingdom Department for International Development (DFID).

Milestones:

- Completion of Land Compensation and Benefits Sharing Study. (Q3)
- Presentation of results to GoT and other stakeholders. (Q4)

Contribute to:

- IR 8.1.1 Number of policies/regulations/administrative procedures in each stage of development.

COMPONENT II: INDIVIDUAL AND INSTITUTIONAL CAPACITY BUILDING

The SERA Project’s approach to capacity building is twofold to meet the objective of creating a group of public sector institutions, advocacy organizations, and individuals capable of performing rigorous policy analysis in support of evidence-based advocacy and policy reform. The first approach focuses on institutional capacity building activities of selected organizations and activities that can provide the greatest impact to support an enabling policy environment. The second approach addresses increasing capacity for research and evidenced-based policy analysis of individuals through training and support for research and policy analysis. Close collaboration with local research institutions, the FtF iARGI Project, universities and regional research and development partners will be maintained.

1. Intermediate Result 8: Improving Enabling Policy Environment for both Agriculture and Nutrition

In Q2, SERA Project made significant progress in the implementation of Organizational Capacity Building Action plans for key partners, ACT, MAFC Department of Food Security (DFS), and Zanzibar Department of Food Security and Nutrition.

A. Implementation of Capacity Building Action Plans

i. Agriculture Council of Tanzania

In Q2 of Y2, the SERA Project continued to implement activities in the ACT Capacity Building Action Plan to meet *Objective 2: Improved organizational systems, operations and internal management structures to better initiate and respond to internal and external needs*. The SERA Project undertook a program of action to support the development and drafting of the organization’s second strategic plan. This activity was implemented in three phases and completed in Q2 of Y2. The Draft Strategic Plan was reviewed and adopted by the board of director in Q2 and presented at the Annual General Meeting of the ACT membership on January 12, 2013.

In Q2, ACT began developing their annual operation workplan. ACT and SERA will work together in Q3 to determine the next steps related to institutional support.

ACT has been invited to participate in the NFRA Assessment planned for Q3 as part of SERA Project's ongoing efforts to increase linkages with ACT and offer opportunities for individual capacity building.

Tasks Completed in Q2:

- Completed ACT's Second Strategic Plan.

Tasked Planned for Q3:

- Review of the Institutional Capacity Building Action Plan.
- Identify follow-on activities for continued support.
- Participate in the NFRA Assessment team.

Resources:

- Marialyce Mutchler.
- Local STTA.

Key Partners:

- BEST-AC Project.

Milestones:

- Identification of targeted implementation follow-up and support activities. (Q3)

Contribute to:

- IR 8.2.2 Number of institutions receiving USG assistance.

ii. Ministry of Agriculture, Food Security and Cooperatives, Department of Food Security

SERA Project is continuing its collaboration with USDA Economic and Research Service (ERS) for this activity. In Q2 of Y2, the USDA ERS team travelled to Tanzania to undertake field research and begin an in-depth analysis of the feasibility of a food basket approach to measuring food requirements and availability. In addition, the PMO requested that nutritional considerations be added to the analysis.

The ERS team engaged and worked with a member of the DFS Early Warning team on this activity. The team travelled to the Mbeya and the Mara districts to meet with officials involved in data collection. The objective was to gather price data from key markets in the regions and validate food basket estimates. This information is being used to calculate the cost of a representative food basket as well as to estimate food requirements and availability using the new methodology.

Tasks Completed in Q2:

- USDA ERS team travelled with DFS staff to two regions to meet with regional and district officials and collected data to calculate the cost of representative food baskets for each region.
- Assessment of prices, income, and consumption data currently available to gain a more accurate production estimate of the food security at the sub-national level.

Tasks Planned for Q3:

- Complete analysis and develop food basket methodology for the two regions.
- Present feasibility finding for review/revision and adoption by the Department of Food Security and MAFC.
- Develop capacity building program to transition to the new methodology.

Resources:

- Marialyce Mutchler.
- Nancy Cochrane, Cheryl Christensen, USDA ERS.

Key Partners:

- DFS, USDA, Food and Agriculture Organization (FAO).

Milestones:

- New methodology piloted and evaluated. (Q3)
- New methodology adopted. (Q3/Q4)
- Transition and capacity building plan drafted. (Q4)

Contribute to:

- IR 8.2.1 Number of individuals who have participated in USG support training activities.
- IR 8.2.2 Number of institutions receiving USG assistance.

B. Institutional Assessments and Capacity Building Action Plans

i. Ministry of Agriculture, Food Security and Cooperatives, Department of Policy and Planning

The USAID Feed the Future Africa LEAD Project is initiating a Policy Systems Assessment. At this time, SERA Project has no plans to directly engage the Department of Policy and Planning (DPP). We will monitor activities and seek to identify opportunities for collaboration.

ii. Tanzania Seed Traders Association

TASTA is receiving capacity building support from the Bill & Melinda Gates Foundation (BMGF). SERA Project will work in collaboration with BMGF to leverage resources and avoid duplication of efforts.

Tasks completed in Q2:

- Met with BMGF regarding capacity building support to TASTA.
- Met with Feed the Future Africa LEAD team.

Tasked planned for Q3:

- Follow-up with BMGF team.

Milestones:

- N/A.

Contribute to:

- IR 8.2.2 Number of institutions receiving USG assistance.

C. Institutional Readiness and Absorptive Capacity Enhanced

The SERA and iAGRI Projects continued to meet and discuss possible activities to support the institutional readiness of key policy institutions. Original concepts based on sponsoring policy round tables have developed into training and institutional support based concepts.

The following activities are under consideration:

- Sponsoring round table discussions.
- Leadership training.
- Institutional capacity support for Sokoine University (SUA) consultancy service.

Tasks Completed in Q2:

- Met with iAGRI to discuss follow-on support activities.

Tasks Planned for Q3:

- Identify activity, develop concept note, and identify potential partner institutions and individuals.

Resources:

- Marialyce Mutchler, Don Mitchell, Alex Mkindi.
- David Kraybill, iAGRI.

Key Partners:

- iAGRI, Uongozi Institute.

Milestones:

- Concept note developed, institutions and individuals identified. (Q4)

Contribute to:

- IR 8.2.2 Number of institutions receiving USG assistance.
- IR 8.2.1 Number of individuals who have participated in USG support training activities.

D. Policy Seminar Series at Sokoine University

The four research teams receiving support from SERA and iAGRI are preparing their research papers for presentation at the policy seminar series at Sokoine University. The presentations are planned for Q3.

Tasks Completed in Q2:

- Presentation of policy seminars were not completed due to delays in research by the teams.

Tasks Planned for Q3:

- Present policy seminars.

Resources:

- Don Mitchell, Andy Temu.

Key Partners:

- iAGRI, Sokoine University.

Milestones:

- Presentation of seminar papers. (Q3)

Contribute to:

- IR 8.2.3 Number of policy seminars conducted.

E. Field Extension Officer Training

The USDA ERS team capacity building strategy for the DFS will include field extension training. Changes in the approach to this activity will delay tasks identified in the Year 3 Workplan.

Tasks Completed in Q2:

- No tasks were completed in Q2 for this activity.

Tasks Planned for Q3:

- Drafted preliminary capacity building plan.

Resources:

- Marialyce Mutchler, Don Mitchell, Alex Mkindi, Aneth Kayombo.
- Nancy Cochrane, Cheryl Christensen, USDA ERS.
- Expat STTA.

- Local STTA.

Key Partners:

- MAFC, USDA.

Milestones:

- *To be revised based on the new SOW.*

Contribute to:

- IR 8.2.2 Number of institutions receiving USG assistance.
- IR 8.2.1 Number of individuals who have participated in USG support training activities.

COMPONENT III: ADVOCACY AND COMMUNICATIONS

Communication and advocacy is intended to stimulate and nudge agricultural policy reforms through framing the essential issues, identifying potential supporters and opponents, conducting policy analysis and developing persuasive messages, communication plays the key role of translating advocacy into action. The primary target audiences of the communications efforts are government and policy-makers at all levels. The project's advocacy and communication strategy is aligned with the FtF's objectives in Tanzania.

1. Intermediate Result 8: Improving Enabling Policy Environment for both Agriculture and Nutrition

A. Project Website

Several hosting solutions for the website were reviewed during the quarter and after extensive assessment, Media Temple appears to offer a unique hosting plan that offers most of the features we were looking for, including a control panel, access to site statistics and an easy-to-use site builder that can help one create polished, professional-looking websites. The web hosting service also provides robust email features and raw access logs that allow one to see raw site data without charts or graphs. The service also provides different types of hosting, including Windows and UNIX hosting, as well as dedicated virtual private server (VPS) hosting and WordPress hosting for blogs.

Tasks Completed in Q2:

- Completed development of SERA website.

Tasks Planned for Q3:

- Request necessary approvals from USAID.
- Launch website.

Resources:

- Nicodemus Odhiambo Marcus,
- Opt Media Information Solutions (OMIS).

Key Partners:

- USAID FtF personnel.

Milestones:

- USAID website approval received. (Q3)
- Website launch. (Q3)

Contribute to:

- IR 8.2.5 Number of hits/visits to the SERA website.

B. Policy Briefs

A series of policy briefs are being prepared as part of the advocacy activities of the project. The briefs are short papers that convey urgent policy problems and outline courses of action to resolve them. They specifically target policy-makers, aiming to give them access to the latest thinking on pertinent policy issues. Each brief begins with an assessment of a current issue, then critiques existing policies, and concludes with policy recommendations. During the quarter, the Export Ban Policy Brief was translated into Kiswahili. The next activity is the publication of the land compensation brief in Q4.

Tasks Completed in Q2:

- Export Ban Policy Brief translated in Kiswahili.

Tasks Planned for Q3:

- No activity is planned in Q3.

Resources:

- Nicodemus Odhiambo Marcus, Don Mitchell.
- Graphic designer.
- Translator.

Key Partners:

- USAID FtF personnel, public relation firm.

Milestones:

- Publication of Land Compensation Policy Brief. (Q4)

Contribute to:

- IR 8.2.4 Number of communications products produced and disseminated.

C. Electronic Newsletter

The SERA Project intends to consolidate its advocacy activities in the form of an electronic newsletter to inform stakeholders of what is happening at the forefront of the project. The template for the newsletter was created in Q2. The first newsletter is planned for Q3 to coincide with the June Food Security Workshop.

Tasks Completed in Q2:

- Designed newsletter template.

Tasks Planned for Q3:

- Compile stories and features.
- Circulate newsletter electronically.

Resources:

- Nicodemus Odhiambo Marcus.

Key Partners:

- USAID FtF personnel.

Milestones:

- Newsletter circulated and published. (Q3)

Contribute to:

- IR 8.2.4 Number of communications products produced and disseminated.
- IR 8.2.5 Number of hits/visits to the SERA website.

D. Media Relations

Media relations will involve liaising directly with journalists. The goal of media relations is to maximize positive coverage in the mass media without paying for it directly through advertising. The Food Security Workshop planned for June 2013 will require the development of media packages and outreach.

Tasks Completed in Q2:

- Completed the communications plan for the upcoming July 2013 Food Security Workshop.

Tasks Planned for Q3:

- Create SERA Media Package.

Resources:

- Nicodemus Odhiambo Marcus.

Key Partners:

- Tanzania Editors Forum (TEF), IPP Media.

Milestones:

- Creation of SERA Media Package. (Q3)

Contribute to:

- IR 8.2.4 Number of communications products produced and disseminated.
- IR 8.2.6 Number of instances SERA is mentioned in the press and social media.

E. Audio-Visual

During the quarter, video footage, pictures and audio testimonies were also compiled for the field trip to the northern regional Arusha and Kilimanjaro. SERA documented on video complete testimonies of farmers and other stakeholders discussing the effects of the lifting of the export ban. These testimonies are being compiled in a follow-up multimedia piece similar to the one developed in Q1 following the field trip to the Southern Highlands in November 2012.

Tasks Completed in Q2:

- Completed compilation of video footage on the impacts of the lifting of the export ban.

Tasks Completed in Q3:

- Develop videos for website on impacts of the export ban.

Resources:

- Nicodemus Odhiambo Marcus.
- Local Communications consultant.

Key Partners:

- ACT, East African Grain Council (EAGC), Mtandao wa Vikundi vya Wakulima Tanzania (MVIWATA), MAFC, ANSAF.

Milestones:

- Completion of videos interviews about the impact of the export ban. (Q3)

Contribute to:

- IR 8.2.4 Number of communications products produced and disseminated.
- IR 8.2.6 Number of instances SERA is mentioned in the press and social media.

F. Media Capacity Building

SERA visited four media organizations during the quarter for face-to-face interviews and to assess relevant personnel. A report will be produced to include detailed recommendations for a

skills' development seminar during the year. The overall aim of the seminar is to create a more balanced, reliable, and in-depth coverage of agricultural policy issues on mainstream TV and radio, in printed and online newspapers and magazines, reaching decision-makers, influencers, and the wider public.

Tasks Completed in Q2:

- Initial rapid assessment completed.

Tasks Planned for Q3:

- Conduct an in depth analysis for the training, identifying parameters and intended beneficiaries for media capacity building.
- Identify potential partners.

Resources:

- Nicodemus Odhiambo Marcus.
- Partner organizations.

Key Partners:

- MAFC, Media Council of Tanzania (MCT), Tanzania Media Fund (TMF), REPOA.

Milestones:

- Completion of needs assessment. (Q3)
- Completion of training seminar. (Q4)

Contribute to:

- IR 8.2.4 Number of communications products produced and disseminated.
- IR 8.2.6 Number of instances SERA is mentioned in the press and social media.

ACTIVITIES IMPLEMENTED IN ZANZIBAR

1. Intermediate Result 2: Expanding Markets and Trade

A. Rice Import Policy

The SERA Project is studying the rice market in Zanzibar with special focus on imports. Rice is the main food staple in Zanzibar where 85% of the consumption is imported. The study examines the marketing margins between imported, whole-sale, and retail rice prices and compares them with the margins in other African countries. Data on rice import prices was collected and comparisons were made between common and high quality rice in Zanzibar and the mainland.

Tasks Completed in Q2:

- Initiated study of rice imports and marketing margins in Zanzibar. Study was not completed due to difficulties encountered in obtaining data.

Tasks Planned in Q3:

- Complete study of rice imports in Zanzibar.

Resources:

- Don Mitchell, Alex Mkindi, Aneth Kayombo.

Key Partners:

- Zanzibar Ministry of Agriculture.

Milestones:

- Study on the rice market in Zanzibar completed and presented to RGoZ. (Q3)

Contribute to:

- IR 8.1.1 Number of policies/regulations/administrative procedures in each stage of development.

2. Intermediate Result 8: Improving Enabling Policy Environment for both Agriculture and Nutrition

A. Zanzibar Department of Food Security and Nutrition

In Q2 of Y2, the SERA Project continued to review Phase 1 of the Food Security and Nutrition Program (FSNP). Final meetings were conducted with FSNP stakeholders and preliminary findings and recommendations were presented to the leadership of the Zanzibar Department of Food Security and Nutrition. The SERA team met with the leadership of ZDFSN to determine the next steps; the team presented the assessment findings, reviewed the department's Monitoring and Evaluation (M&E) Plan, and established the agenda for a capacity development workshop.

Activities towards the development of a memorandum of understanding (MOU) between USAID SERA and FAO regarding the support for the implementation of the Early Warning System Framework in Zanzibar did not occur in Q2. This activity is now planned for Q3.

Tasks Completed in Q2:

- Completed the Mid Term Assessment of the implementation of the Food Security and Nutrition Program and submitted to ZDFSN for review.
- Reviewed ZDFSN Monitoring and Evaluation Plan.
- Completed stakeholder and environmental analysis.

Tasks Planned for Q3:

- Finalize of the Food Security and Nutrition Program Assessment.
- Organize and facilitate the Strategic Implementation Planning Workshop 1.

- Finalize the MOU of collaboration with the FAO regarding the support for the implementation of the Early Warning System Framework.

Resources:

- Marialyce Mutchler.
- Expat STTA.
- Local STTA.

Key Partners:

- USAID FtF M&E Project, USAID FtF Mwanza Bora Project, ZDFSN, FAO.

Milestones:

- Finalization of MOU of collaboration with the FAO regarding the support for the implementation of the Early Warning System Framework. (Q3)
- Creation and approval of Strategic Plan. (Q4)

Contribute to:

- IR 8.2.2 Number of institutions receiving USG assistance.
- IR 8.2.1 Number of individuals who have participated in USG support training activities.

PROBLEMS / CHALLENGES

Data quality, availability, timeliness continue to be a challenge both on the mainland and in Zanzibar. This is of particular importance in reporting impact and results. SERA research has indicated that GoT reporting of customs data is not accurate and cannot be used to measure exports from mainland Tanzania. The use of this data to report results would lead to inaccurate conclusions regarding the possible impact of SERA Project activities. The SERA team is exploring alternative methods for data collection.

Access to government counterparts continues to be a challenge given competing priorities and limited time of highly qualified officials. The SERA Project continues to work closely with USAID Tanzania on this issue.

The impact of lifting the maize export ban is a priority activity for SERA and FtF, but the methodology to conduct the study, the appropriate researchers to undertake the study, and funding have not been secured yet.

PLANNED ACTIVITIES

All SERA Project components have major activities planned in Q3.

The following activities will contribute to the Food Security Workshop planned for July 2013.

- Analyze the mainland's rice import policy.
- Undertake a study on the impact of export and import permits and present results to GoT and stakeholders at the workshop.
- Undertake field trip to TASAF programs.
- Presentation of TASAF at food security workshop.
- Assess institutional capacity of NFRA.
- Present food basket cost estimation for two regions.

Additional activities include:

- Component I: Policy and Research
 - Seed Policy: Complete the analysis of seed tax issues and submit to MAFC and PMO for their discussions with Ministry of Finance.
 - Trade Policy: Undertake a study of the impact of export and import permits and present results to GoT and stakeholders at food security workshop.
 - Credit to Small Shareholders and SMEs: Support the BoT in advancing the collateral registry system through the financial system.
 - Land Policy: Land Allocation and Compensation study initiated.
- Component II: Individual and Institutional Capacity Building
 - Present the Zanzibar Food Security and Nutrition Program Review and capacity building workshop in April 2013.
- Component III: Advocacy and Communications
 - Launch website.
 - Distribute newsletter.
 - Distribute media kits.
 - Design media capacity building training.

SPECIAL ISSUES

The SERA Project has collaborated with other FtF implementing partners and other stakeholders to improve policy and build capacity in the agricultural sector. This includes jointly sponsoring the Policy Seminar Series at Sokoine University with FtF implementing partner iAGRI, working with FtF implementing partner NAFKA to research the impact of the export ban, working with the Mwanza Bora Nutrition Project on the Food Security and Nutrition Program Assessment in Zanzibar, and planning a multi-year study to measure the impact of the lifting of the export ban with FtF implementing partner TMG. In addition, the SERA Project continued to work closely with the USDA's ERS to support the MAFC's Department of Food Security. The SERA Project has also developed a closer working relationship with SAGCOT

following the appointment of a new Executive Director and has recently assisted them with activities related to rice imports and seed policy. The SERA Project has also worked directly with AGRA, ANSAF, EAGC, and FAO; these working relationships continue on important policy issues and capacity building activities. A joint research proposal is being prepared with the World Bank to on rice demand and competitiveness.

CROSS-CUTTING ISSUES

1. Gender

In Q3, the SERA Project will engage the USAID Innovations in Gender Equality to Promote Household Food Security to identify possible opportunities to assess the impact of the lifting of export ban on women in the SAGCOT region. The SERA Project will develop a concept note in collaboration with the Innovation in Gender Project and work to identify possible partners and resources.

FINANCIAL SUMMARY

QUARTERLY REPORT	SERA YEAR 2 - QTR 2				
	Jan-13	Feb-13	Mar-13	Quarter Total	Project Cumulative
Reimbursable Costs	\$123,539	\$223,646	\$190,323	\$537,507	\$2,325,283
Fee	\$9,089	\$17,890	\$10,621	\$37,601	\$170,166
Reimbursable Costs plus Fixed Fee	\$132,628	\$241,536	\$200,944	\$575,107	\$2,495,449
Contract Cumulative	\$2,052,969	\$2,294,505	\$2,495,449		

PERFORMANCE MANAGEMENT PLAN

Table 1. USAID Standard Indicators and Common Indicators Targets for Life of Contract

Indicator		FY13 Target	Quarter 1 Actual	Quarter 2 Actual	Quarter 3 Actual	Quarter 4 Actual	% Achieved
IR 4.5.2-35 Percent change in the value of intra-regional trade in targeted agriculture commodities (RiA)	Maize	20%	N/A	N/A			
	Rice	20%	N/A	N/A			
IR 4.5.2-36 Value of exports of targeted agricultural commodities as a result of USG assistance.	Maize			N/A			
	Rice			N/A			
IR 4.5.2-30 IR 3.1.1. Number of MSMEs, including farmers, receiving USG assistance to access loans.	Medium	0					
	Small	0					
	Micro	0					
IR 4.5.1-24 IR 8.1.1. Number of policies/regulations/administrative procedures in each of the following stages of development	• Stage 1: Analyzed	1		1			100%
	• Stage 2: Drafted and presented for public/stakeholder consultation	2					
	• Stage 3: Presented for legislation decree	3					
	• Stage 4: Passed/ approved	4					
	• Stage 5: Passes for which implementation had begun	3					

Table 2. Project/Custom Level Indicators Targets for Life of Contract

Indicator		FY13 Target	Quarter 1 Actual	Quarter 2 Actual	Quarter 3 Actual	Quarter 4 Actual	% Achieved
IR 8.2.1. Number of individuals who have participated in USG support training activities	<i>Continued</i>	400	1	1			0%
	<i>New</i>			1			
IR 8.2.2 Number of institutions receiving USG assistance	<i>Continued</i>	3	2				234%
	<i>New</i>		6	1			
IR. 8.2.3. Number of policy seminars conducted		3					
IR. 8.2.4 Number of communications products		3	1	1			67%
IR. 8.2.5 Number of hits/visits to the SERA website.		2,000					
IR. 8.2.6 Total number of SERA mentions in the press and social media.		12					
IR 8.1.1.1. Number of research outputs		2	1				50%
IR. 8.1.3.2 Volume of improved seed available in domestic market		0	*	*	*	*	

*Data tracked annually

ANNEXES

ANNEX 1: Report – Field Trip to the Northern Border

The SERA Policy Project undertook a field trip to the northern border area from February 10-14, 2013 to investigate the food situation and maize export activities following the lifting of the export ban in January 2012. The team included Don Mitchell, Alex Mkindi, Aneth Kayombo, and Nicodemus Odhiambo from SERA, and Marystella Mtalo of the Department of Food Security, Ministry of Agriculture, Food Security and Cooperatives (MAFC). Daniel Loiruck, the regional agricultural advisor in Arusha accompanied the team from February 11-12, 2013 and four staff from the Kilimanjaro regional government and the Tanzania Revenue Authority (TRA) regional manager accompanied the team in Moshi on February 13th. The field trip was cut short by one day because of the funeral of the catholic bishop in Moshi on February 14th which made meeting with the government and private sector not possible. The team traveled to the Namanga border post, met with traders in Arusha and visited the Patanumbe village in Meru district on February 11-12, 2013. In Moshi, the team visited regional government officials and met with the Acting Regional Administrative Secretary Mr. Shayo and his staff, and then met with customs officials at the Holili border post and interviewed traders and farmers in Himo in the Moshi Rural District.

The main findings of the field trip were:

The food situation in Longido district in Arusha region and Rombo and Moshi Rural Districts in Kilimanjaro is better than last year according to agricultural officials in Arusha and Moshi due to higher cereals production. However, crop production has been reduced by poor rains for three consecutive years and many villages are food insecure and are asking for food aid from the government. Maize prices are higher than last year and were reported to be 700-750/kg compared with 550-600/kg at the same time last year. Food security in the northern border region is complicated by unreliable rains, the high priority given to livestock accumulation, and the reliance on government to ensure food security.

- Traders reported less problems in exporting maize in 2012 than in 2011 following the lifting of the export ban, but they expressed dissatisfaction with needing two weeks or more to obtain the export permit from MAFC, the necessary approvals from TRA and Tanzania Food and Drug Authority (TFDA), and the radiation and phytosanitary certificates. They would like to see a one-stop shop at the border posts where approvals could be completed in one day instead of the current two weeks required in Dar es Salaam. Maize is being imported from Kenya following the Kenyan harvest, but import permits are not being granted by Tanzania which effectively bans legal imports through border posts.
- The Patanumbe village in Meru district participated in the World Food Program's Food for Assets Creation program from 2005-2010 and through the food for work provided by that program, the village was able to significantly increase maize production by extending the irrigation canal. The village chairman reported that hunger had declined by 70 percent, and the program has been very successful by combining food aid with

asset creation. The village is now seeking support to improve the canal and increase irrigation water delivery to farmers so they can further increase production.

- Traders confirmed that they did not buy maize in the southern highlands in 2011 during the ban but began buying when the export ban was lifted in 2012. This caused maize prices in the southern highlands to be highly correlated (0.88) with prices in the northern border in 2012 compared to 2011 when the correlation was 0.50.

Food Situation in Longido and Kilimanjaro Regions

The food situation along the northern border is a complex mix of unreliable rainfall, preferences for livestock accumulation instead of crop production, and the belief that the government should ensure food security. These factors result in a large number of food insecure villages and frequent requests for food aid from the government. The situation is unlikely to change unless local food production can be increased, but even then there will be periods when production fails or is inadequate to meet food needs due to poor rainfalls. The large land areas devoted to livestock grazing make cropland increasingly scarce, leaving little alternative to increasing yields in order to raise crop production. One successful example of increasing food crop production and food security is in Patanumbe village in Meru district where the World Food Programme (WFP) Food for Asset Creation program provided food for villagers to extend the irrigation canal and it more than quadrupled food production.

Rainfall along the northern border has historically been more variable than in the southern highlands (Figure 1), but appears to be even more variable in recent years. The region has had three years of poor rainfalls (2009-2011), and irrigation appears to offer the best opportunity to increase and stabilize food production and increase food security. Villages that are not able to increase food production face food insecurity since wages are low and employment opportunities few, which results in limited capacity to purchase food even when prices are low. Preferences for livestock accumulation over crop production and reluctance to sell or consume livestock limit the contribution of livestock to food security but contribute to the demand for productive crop land. During the severe drought of 2005, for example, many pastoralists refused to sell their livestock even when grazing areas were parched and animals were starving. This preference for livestock also results in overgrazing in some areas and conflicts between pastoralists and crop farmers. The reliance on the government to meet the food security needs of the region further complicates the food security situation and is illustrated by the Ngorongoro Conservation Area where villagers receive large payments from the Conservancy but expect the government to provide food since they are not permitted to hunt or grow crops in the Conservation Area. This reliance on the government instead of using resources available poses a difficult challenge for the government and a political opportunity for opposition candidates during elections.

Figure 1. Average Monthly Rainfall, 2003-2008.

The WFP's Food for Asset Creation program has been successful in increasing food production in Patanumbe village by increasing irrigation and other similar programs appear to offer good prospects to increase food security in the northern region. The program operated from 2005-2010 and provided food to households in exchange for work to extend the village irrigation canal from four to seven kilometers over a three year period. That allowed the irrigated area to expand from 200 to 500 hectares and yields to increase from three-to-five to ten bags per hectare according to village officials. It also allowed two crops to be harvested per year instead of the single crop before the expansion of the canal. The food situation improved to the extent that some new families moved into the village from surrounding areas.

Maize Exports and Imports

Exporters in Arusha and Himo who were interviewed during the field trip reported that exporting maize has become much easier since the export ban was lifted in January 2012. However, the lengthy procedure for obtaining export permits is still a concern and efforts to bypass the official requirements are still common. Consequently, the export permits requirement increases the cost of exporting and does not provide reliable data on who is exporting or the volumes of exports. Efforts to add further requirements to obtain export permits without increased enforcement commitment by customs officials will likely lead to even greater efforts to bypass the official requirements and be even less reliable in terms of information provided by the export permits.

Export permits are available only from the Ministry of Agriculture, Food Security, and Cooperatives in Dar es Salaam, and typically take three days to obtain. Additional approvals to export are required from TRA, TFDA, and Customs. Phytosanitary and radiation certificates are also required, and obtaining those extends the total time required to obtain approval to export to at least two weeks. Since export permits and other necessary approvals can only be obtained in Dar es Salaam, exporters incur travel and lodging costs while waiting for the various authorizations. The applications and approvals cannot be obtained electronically and usually

require physical presence. This leads to widespread efforts to bypass the official authorization process by using agents to obtain the permits or by bribing custom officials to completely avoid the permit process. Traders would like to have a one-stop one-day process for obtaining the necessary permits to export or import maize, and they suggest that it could be done by stationing appropriate agents of each authority at major border posts such as Namanga and Holili.

An additional concern is that the procedures for exporting are not consistent at all border posts. For example, in the Kilimanjaro region, the Regional Commissioner contracted a single agent in 2012 to authorize exports and that agent was contracted to pay the District Council 1.5 million Tanzanian Shillings per day to be the sole authority to permit exports. The fees to allow such payments were collected from exporters, and the border customs officials enforced the export requirements. It is not clear whether an export permit was also required from MAFC or whether the agent appointed by the District Council had the authority to bypass the MAFC requirement. But appointing a single agent to approve exports could lead the agent to charge excessive fees for exporting.

Maize exports to Kenya stopped in November and maize imports from Kenya started when the Kenyan maize crop was being harvested. There was no ban on import into Tanzania, but the MAFC did not issue import permits which effectively banned imports. Kenya also banned exports of maize which meant that all maize imported from Kenya was illegal in Tanzania and maize exported to Tanzania was illegal in Kenya. This likely increased the cost of importing maize and reduced the volumes imported which kept maize prices in Tanzania higher than they would have been with liberalized imports. This increased maize prices to consumers without a corresponding benefit to Tanzanian maize producers since most would have already sold their maize stocks. Prices are expected to remain high until the main Tanzanian maize harvest begins in May.

Maize Prices

Maize prices¹ in Mbeya were not closely aligned with maize prices in Arusha during 2011 due to the export ban which made it difficult to transport maize to the northern border. Consequently, the rise in prices in Arusha due to large exports to Kenya had little effect on prices in Mbeya. However, when the export ban was lifted in January 2012, and remained lifted during 2012, the prices were more closely aligned (Figure 2). The correlation coefficient, which measures the co-movement of these prices, was 0.50 in 2011 and 0.88 in 2012 reflecting the much closer alignment of prices in 2012. This has allowed Mbeya and other regions of the southern highlands to more fully benefit from higher prices.

¹ Data are the monthly average wholesale prices of maize from the Ministry of Industry and Trade.

Figure 2. Monthly Maize Prices in Arusha and Mbeya, 2011 and 2012 (Tsh/kg)

Wage Rates

According to interviews with farmers and traders, the increased trade that resulted from the lifting of the export ban has not resulted in higher wages in Kilimjaro and Longido. This differed from the results found in the southern highlands during a field trip in November 2012 which found that wages had increased by 20-30 percent or more. The difference is probably due to the greater abundance of idle labor in Kilimanjaro and Longido.

ANNEX 2: USDA ERS Trip Report – Proposed Food Basket Analysis for Tanzania

Proposed Food Basket Analysis for Tanzania

by Nancy Cochran and Cheryl Christensen

The United States Department of Agriculture (USDA) team consisting of Nancy Cochran and Cheryl Christensen spent two weeks in Tanzania from February 18 to March 1, 2013. The purpose of their trip was to assess the feasibility of using a food basket methodology developed by USDA's Economic Research Service (ERS) to measure access to food in different regions of Tanzania. The method involves estimating a basket of foods typically consumed by the population and using local retail prices to calculate the monthly cost of that basket. The cost is then compared to monthly per capita income to measure access to food. If the ratio of the food basket cost to income is high, then that is an indication of a potential food security threat. This analysis, combined with information already being collected by the Department of Food Security, can provide a more complete picture of the food security situation in Tanzania.

We traveled to two regions—Mbeya and Mara—to test the validity of this method. Before our arrival, we estimated food baskets for each region using data from the 2010/11 National Panel Survey (NPS). In each region, we met with local government officials to get their feedback on the accuracy of our estimates. We also attempted to get a set of local retail prices for each region. Based on interviews, we believe that our estimates of the quantities of food in the two baskets are close to the reality on the ground. We were not able to obtain a retail price series needed to complete the analysis before our departure from Tanzania. At this time (April 2013), we have received most of the price and income data from the SERA Project, and we have obtained some preliminary results.

Preliminary results show the food basket cost to be higher in Mara than in Mbeya, and the nominal cost in both regions has been rising in recent months, influenced primarily by rising prices of corn and rice. However, the real cost, deflated by the consumer price index (CPI), has been more stable—Mbeya has seen a small rise in the real cost, while Mara has seen little change. The rising real cost in Mbeya may be the result of the large shares of maize and rice in the population's diet. Maize and rice prices have been rising faster than other food prices.

In both regions, our results suggest that access is a serious problem for the lowest income quintile. We still don't have gross domestic product (GDP) data for 2012. But in 2011, the cost of the food basket was higher than the average monthly income of the lowest decile and over 50 percent of the average monthly income of the lowest quintile.

Their conclusion was that this methodology has considerable promise and could help inform the Tanzanian policy making process. Once we receive all the data, we will complete the analysis and present it to Tanzanian Government officials. We can then work with Tanzanian counterparts to expand the analysis to include more regions, with the ultimate objective of leaving the Tanzanians with the capacity to continue the analysis on their own.

Background: Estimating the Food Baskets for Mbeya and Mara

These two regions were selected because they are quite different both in their maize self-sufficiency and in their dietary preferences. Mbeya is a major maize growing region in the Southern Highlands, and NPS results show that maize comprises over 50 percent of calories consumed in that region. Mara is a maize deficit region bordering on Lake Victoria, and survey results show that less than 50 percent of the population's calories are derived from maize. Cassava has a large share in the typical Mara diet, but has a very small share in Mbeya.

Initially, because of small sample sizes, we estimated food baskets by zone rather than region: the Southern Highlands zone, including Mbeya, Iringa, and Rukwa, and the Lake Zone, including Mara, Mwanza and Kagera. The results of these calculations are in the tables 1 and 2:

Table 1: Food Basket Calculations for Southern Highland Zone

Food item	Calorie Shares	Calories per kg	Calories per day Assuming a Diet of 1800 Calories	kg/day	kg/mo
Maize	0.545	3,680	981.38	0.267	8.00
Rice	0.061	3,640	110.22	0.030	0.91
Beans	0.069	3,330	124.62	0.037	1.12
Bananas	0.033	1,350	60.22	0.045	1.34
Millet/sorghum	0.004	3,450	6.98	0.002	0.06
Potatoes	0.011	790	20.09	0.025	0.76
Wheat/other grains	0.002	3,400	3.09	0.001	0.03
Cassava	0.055	3,340	98.26	0.029	0.88
Poultry	0.003	1,390	5.33	0.004	0.12
Beef/goat	0.006	1,550	11.00	0.007	0.21
Fish	0.009	820	15.56	0.019	0.57
Cooking oil	0.049	8,840	87.41	0.010	0.30
Ripe bananas	0.004	920	7.21	0.008	0.235
Mangoes/other fruit	0.004	850	7.55	0.009	0.267
Total Calorie Shares	0.855				

Table 2: Food Basket Calculations for Lake Zone

Food item	Calorie Shares	Calories per kg	Calories per day Assuming a Diet of 1800 Calories	kg/day	kg/mo
Maize	0.300	3,680	540	0.147	4.40
Rice	0.062	3,640	112	0.031	0.93
Beans	0.066	3,330	118	0.036	1.07
Bananas	0.094	1,350	170	0.126	3.77
Millet/sorghum	0.024	3,450	44	0.013	0.38
Potatoes	0.002	790	3	0.004	0.11
Wheat/other grains	0.003	3,400	5	0.001	0.04
Cassava	0.195	3,440	350	0.102	3.05
Poultry	0.005	1,390	8.98	0.006	0.19
Beef/goat	0.009	1,550	17.04	0.011	0.33
Fish	0.018	820	31.54	0.038	1.15
Cooking oil	0.028	8,840	50.34	0.006	0.17
Ripe bananas	0.004	920	6.79	0.007	0.221
Mangoes/other fruit	0.008	850	13.82	0.016	0.488
Total Calorie Shares	0.817				

However, people we spoke to in each region had some disagreements with these estimates. This was particularly the case in Mara. The Lake Zone estimates show bananas having a calorie share of nine percent, and everyone we talked to maintained that bananas constitute a very small part of the typical Mara diet. There appeared to be fewer differences between Mbeya and the Southern Highlands Zone, but it seemed that bananas have a higher share in the diet than what appears in the estimates for the Southern Highlands as a whole. In each case, we found that our estimates for the Mbeya and Mara regions were closer to what our interviewees saw as the reality.

Table 3: Food Basket Calculations for Mbeya Region

Mbeya	Calorie Shares	Calories per kg	Calories per day Assuming a Diet of 1800 Calories	kg/day	kg/month
Maize	0.558	3,680	1,005	0.273	8.19
Rice	0.073	3,640	132	0.036	1.08
Beans	0.074	3,330	134	0.040	1.21
Bananas	0.056	1,350	100	0.074	2.23
Millet/sorghum	0.003	3,450	6	0.002	0.05
Potatoes	0.012	790	21	0.027	0.80
Wheat/other grains	0.000	3,400	1	0.000	0.01
Cassava	0.008	3,440	15	0.004	0.13
Poultry	0.003	1,390	4.83	0.003	0.10
Beef/goat	0.006	1,550	10.44	0.007	0.20
Fish	0.008	820	13.99	0.017	0.51
Cooking oil	0.051	8,840	91.87	0.010	0.31
Ripe bananas	0.006	920	10.24	0.011	0.33
Mangoes/other fruit	0.004	850	7.29	0.009	0.26
Other	0.137				
Total Calorie Shares	0.863				

Table 4: Food Basket Calculations for Mara Region

Mara	Calorie Shares	Calories per kg	Calories per day Assuming a Diet of 1800 Calories	kg/day	kg/month
Maize	0.210	3,680	377	0.102	3.07
Rice	0.048	3,640	86	0.024	0.71
Beans	0.033	3,330	59	0.018	0.53
Bananas	0.004	1,350	7	0.005	0.15
Millet/sorghum	0.072	3,450	130	0.038	1.13
Potatoes	0.000	790	0	0.000	0.01
Wheat/other grains	0.013	3,400	23	0.007	0.20
Cassava	0.376	3,440	677	0.197	5.90
Poultry	0.009	1,390	16.78	0.012	0.36
Beef/goat	0.009	1,550	15.43	0.010	0.30
Fish	0.017	820	31.03	0.038	1.14
Cooking oil	0.026	8,840	46.74	0.005	0.16
Ripe bananas	0.002	920	3.35	0.004	0.109
Mangoes/other fruit	0.006	850	10.42	0.012	0.368
Other	0.176				
Total Calorie Shares	0.824				

The Next Steps

In order to calculate the cost of these food baskets, regional retail prices are needed for each of the foods listed in the table. Table 6 shows the approximate cost of the Mara food basket based on prices we obtained February 24 at the Musomo market. The prices are only approximate, since we only interviewed a few vendors and we could only estimate the kilogram equivalent of the units of measure being used in the market.

Table 6: Food Basket Calculations for Mara Region

Product	Monthly Consumption (kilograms)	Price in Musoma Market (shillings/kg)	Total monthly Cost of Food Basket (shillings)
Maize	3.07	1,500	4,612
Rice	0.71	1,800	1,279
Beans	0.53	2,000	1,056
Bananas	0.15	500	75
Millet/sorghum	1.13	2,000	2,263
Potatoes	0.01	1,000	7
Wheat/other grains	0.20	1,000	203
Cassava	5.90	400	2,361
Poultry	0.36	6,000	2,173
Beef/goat	0.30	5,000	1,493
Fish	1.14	4,500	5,108
Cooking oil	0.16	3,600	571
Ripe bananas	0.11	500	55
Mangoes/other fruit	0.37	500	184
Total Cost of Food Basket			21,441

We were finally able to obtain a monthly series of retail prices for most of the products in the basket from the National Bureau of Statistics covering January 2010 to February 2013. We are still missing prices for fish and cooking oil. Tanzania has recently experienced a surge in maize and rice prices (see figure 3), and the impact can be seen in the trend in the nominal cost of the food basket (figure 4). There is a general upward trend in the nominal cost.

However, a different picture emerges when we deflate the cost of the food basket using the CPI from National Bureau of Statistics (NBS) to determine whether there have been changes in the real cost of food (figure 5). The real cost of the food baskets has risen slightly in Mbeya but has been relatively stable in Mara.

Measuring Access

To measure the population's access to food, it is necessary to calculate the ratio between the cost of the food basket and per capita income. If this ratio is rising, then one can conclude that access is becoming more difficult, especially for lower income households. So far we have obtained an annual series of per capita GDP by region through 2011 from NBS, so we have not yet been able to calculate access for 2012. Nor can we precisely calculate monthly changes in access.

If one compares the food basket cost to average per capita GDP per region, it appears that access is not a serious problem. In December 2011, for example, the average nominal cost of the food basket in Mara was 13,880 shillings. Average per capita GDP (also nominal) was 61,780 shillings, giving a ratio of 22 percent.

To get a true picture of the food security situation, however, one needs to compare access across income quintiles, focusing on the lowest two quintiles. There is a large degree of income inequality in Tanzania, and the lower quintiles are likely to suffer considerably more during a price spike than higher income groups. The World Bank reports on a national level the share of income held by each quintile for the year 2007. The table below shows the average per capita GDP in each quintile for 2011 at the national level, under the assumption that income distribution remained the same in the years subsequent to 2007.

Table 7: National per capita GDP by Quintile, Nominal, 2011

Income group	Lowest 10 percent	Lowest 20 percent	Quintile 2	Quintile 3	Quintile 4	Quintile 5
Share of GDP held by quintile	2.8	6.8	11.1	15.6	21.7	44.8
Total income held by quintile (million shillings)	1,050,923	2,552,241	4,166,159	5,855,142	8,144,653	16,814,767
Per capita income (shillings)	140,000	340,000	555,000	780,000	1,085,000	2,240,000
Average monthly per capita GDP	11,667	28,333	46,250	65,000	90,417	186,667

Sources: NBS, World Bank, author's calculations.

For the lowest quintile, the food basket cost is over fifty percent of the average monthly income. The situation is most serious for the lowest decile: average per capita GDP for that group is less than the food basket costs in both Mara and Mbeya (one should keep in mind that the food basket costs calculated above cover just 80-85 percent of the total basket needed to provide 1800 calories per day.) There are no data on income distribution by region. But NBS data show considerable income disparity among regions—average per capita GDP in Dar es Salaam is nearly twice that in Mbeya and over two and a half times that in Mara. Thus it is reasonable to assume that a disproportionate share of the top income quintile lives in Dar and other urban areas, and a higher concentration of lower income people live in Mbeya and Mara. It is thus possible that 20 percent or even more of the population in these two regions are facing serious problems with food access.

Issues with Price Collection and Reporting

We learned that at the region and district level, most of the prices we need actually are being collected. Wholesale prices are collected in regional markets and sent to the Ministry of Industry and Trade. Retail prices are collected in several villages in each district, but there is little supervision over methodology, and these prices are highly aggregated by the time they reach authorities in Dar es Salaam. Village prices are sometimes collected daily, but they are averaged at the district level with other villages, and then the daily prices are further aggregated into monthly averages.

Prices are sent to three different agencies in Dar es Salaam: the Ministry of Industry and Trade (MIT), the Ministry of Agriculture's Food Security Department, and the National Bureau of Statistics for the computation of the CPI. Sometimes, as in Mbeya, the same official sends reports to all three. In Musoma, the tasks were carried out by different officials. The Musoma district officer only collected retail prices for the Ministry of Agriculture. Wholesale prices for MIT were collected by the Musoma Rural district officer. He collects prices from four markets in that district. The data are collected by the extension officers and sent to him to summarize. He sends wholesale prices weekly to MIT, as well as retail prices for sugar and rice. But none of these prices come from the central market in Musoma, which is what MIT believes is being reported.

Prices vary across the four Musoma Rural markets. The relationship among the markets is complex. Sometimes traders go to rural markets and buy to bring to the city market. In these cases, rural market prices are lower than city market prices. In other cases traders may buy maize in the city market and take it to rural markets—especially now as cassava is less available. In these cases, rural market prices can be higher than the city market. But all that detail, which could be very informative for officials in Dar es Salaam, is lost long before it reaches the center.

There are also inconsistencies in the methods used to collect and report the prices. Some prices are reported in shillings per kilogram; others are per piece or bunch. Maize prices are consistently reported per kilogram, but reporting of cassava prices is much less consistent: some markets report shillings per kilogram, while other report by piece. In order to provide a true picture of the market and allow comparisons across markets, the “minimum” and “maximum” prices reported should be for the same product, same quantity, and same quality. But instead the differences between minimum and maximum often reflect differences in size or quality. The prices reported for bananas are reported by bunch, and we were told that the “minimum” price reported is actually for a small bunch, while the “maximum” is for a larger bunch. There are no consistent reporting requirements concerning quality or variety. There are several varieties of beans, and it is clear that reporters are not all monitoring the same varieties.

In order to carry out a timely food basket analysis, it is essential that the Ministry of Agriculture receive region and district market prices on a timely basis. The food basket could be updated

weekly quite easily as new prices come in. But as of now the Ministry is not receiving these prices in a timely way. They receive weekly reports via email, but it is not clear that all districts are sending in the reports. And, Ministry staff do not compile these reports into a single database that could be used for time series analysis. Twice a year, staff from the Department of Food Security visit each district and work with the district staff to compute monthly average district prices for the previous six months. This is a labor (and travel) intensive effort, and the Department gets the six month series only after the fact, too late to be of use in anticipating food security problems resulting from price spikes. If the Department could receive these prices every month, there would not be a need to visit each district and spend time computing the monthly averages.

Tanzania's information system could be greatly strengthened with some capacity building in the area of market price collection. Improvement of the system would not require the hiring of new staff or the creation of a new system—both are already in place. What is needed is training at the region and district levels, a handbook of reporting instructions, more timely submission of reports, and more effective quality control from the top. Better communications technology would also be beneficial. Many district offices lack computers or internet access; some officers provide their reports over the phone; others send them by post. Rwanda has successfully introduced a system whereby reporters submit their reports through their mobile phones. Something similar could work in Tanzania.

ANNEX 3: SOW – NFRA’S Role in Assuring Food Security

In 2012, Associates for International Resources and Development (AIRD), together with three other research groups,² completed a series of studies for the SERA Policy Project of USAID’s Feed the Future initiative in Tanzania. The studies were designed to explore policy options for increasing Tanzania’s exports of maize and rice in East Africa while improving its food security. A major issue that this study did not fully address was the country’s public stockholding of grain under the National Food Reserve Agency (NFRA). In particular, critical questions not fully examined were the extent to which NFRA operations contribute to food security goals, the impact these have on grain markets, and the costs associated with these operations. The proposed study aims to fill this gap by first examining the main sources of food insecurity and then identifying detailed options for addressing this insecurity through the operations of the NFRA.

Critique of Public Grain Stockholding

Stockholding of grain by the public sector is done principally for two reasons. The first is to use these stocks as a buffer against large fluctuations in market prices; the second is to hold the stocks as an emergency grain reserve to be drawn upon in time of need.

Holding stocks for the purpose of stabilizing prices has been widely criticized, especially in Africa. First, the empirical evidence suggests that governments’ performance in stabilizing grain prices has been poor. “...the weight of the research evidence in Africa shows that price stabilization has only rarely contributed to price stability, and in many cases it has [worsened] it, at massive costs and foregone investment in other areas where positive impacts might otherwise have been achieved.”³ Second, there is little evidence to support the view that countries that do stabilize grain prices achieve faster growth or greater food security than those that do not.

There is a need to distinguish between price volatility and levels of food prices that are high for structural reasons. Where the latter is true, net purchasers of food are clearly injured, but it is hard to see how the holding of public stocks of food can alleviate this problem. Furthermore, the evidence suggests that in most developing areas of the world, incomes are rising more rapidly than food prices, so the problem of affordability is becoming less acute and should continue to do so as long as governments make the right investments to promote increases in agricultural productivity.⁴

Yet most governments are very concerned about the problems that might arise if there were to be a significant decline in their country’s food production or a rise in food prices. The temptation to deal with these problems by stocking food is very strong, and, in Africa at least, the result often is stocking by the public sector. This is certainly true in Tanzania, with these

² These were the International Food Policy Research Institute (IFPRI), U.S. Department of Agriculture (USDA), and the World Bank

³ T.S. Jayne, discussant comments on “Managing Price Volatility: Approaches at the Global, National, and Household Levels,” Stanford Symposium Series on Global Food Policy and Food Security in the 21st Century, Center on Food Security and the Environment, Stanford University, 2011, p. 35.

⁴ T.S. Jayne, discussant comments, p.38.

stocks being held by the NFRA. Although the major purpose for holding these stocks is to have an adequate reserve for emergencies, there is also some indication that buying and selling of these stocks is done in such a way as to influence local grain prices.

To the extent that a country such as Tanzania trades in food, the holding of stocks may complement the use of trade policy for these two purposes. For example, emergency grain reserves can be used to cover an immediate shortfall while the country orders food imports from abroad or from neighboring countries within the region. The size of the emergency reserve depends primarily on the magnitude of the shortfall that can be expected and the time required to bring additional imports into the country. The size of the buffer stocks needed for price stabilization, on the other hand, depends on many factors, including the degree to which trade acts in itself to stabilize domestic food prices. However, in general, the size of stocks necessary to assure food security in an emergency situation is considerably lower than the size required to ensure food price stability. Price stabilization without adequate buffer stocks can in fact be quite destabilizing. Recent research by the International Food Policy Research Institute (IFPRI) has emphasized the importance of focusing the role of publically held food stocks on the holding of emergency grain reserves, coupled with food-based safety net programs, rather than holding buffer stocks designed for food price stabilization.⁵

That said, it is also clear that governments are concerned with excessive dependence on regional or international food markets for food, even if this dependence is just during emergencies. The memories of the price spikes in 2007-08 are too recent. Even if these spikes occur infrequently, the possibility of juxtaposition of a shortfall in food production and a price spike in food prices on the world market is very worrisome. In a paper prepared for the Organisation for Economic Co-operation and Development (OECD), Philip Abbot has looked at such a possibility and what its implications are for the combination of policies related to storage and trade that might optimally be employed to deal with such a possibility.⁶

Contribution of the Study of Policy Options

The Study of Policy Options for Increasing Tanzanian Exports of Maize and Rice in East Africa While Improving Its Food Security to the Year 2025 was undertaken by AIRD in 2012 under the SERA and NAFKA Projects.⁷ This study was focused principally on policy constraints to the growth of maize and rice exports and of farmer income. It centered to a lesser extent on assuring food security – the major objective of NFRA. The study did reach several important conclusions regarding the operations of NFRA and their impact on grain markets:

- NFRA sets a purchase price for grain – principally maize -- that is high enough so that it can be assured of getting access to the grain it needs. This price is frequently higher than the going market price. Traders are tempted to sell to the NFRA, but they face the possibility

⁵ Shahidur Rashid and Solomon Lemma, "Strategic Grain Reserves in Ethiopia: Institutional Design and Operational Performance," IFPRI Discussion Paper 01054, January 2011.

⁶ Philip Abbot, "Stabilization policy in Developing Countries after the 2007-08 Food Crisis," February 2010.

⁷ Dirck Stryker and Mukhtar Amin, "Study of Policy Options for Increasing Tanzanian Exports of Maize and Rice in East Africa While Improving Its Food Security to the Year 2025", Revised Final Report, NAFKA/AIRD, July 26, 2012.

that the Agency may run out of storage space or cash with which to purchase the grain. This creates uncertainty in the grain market.

- If NFRA were to set a minimum price and buy all of the grain that would be offered at that price, this would effectively set a floor price for grain in Tanzania. But the Agency has neither the financial nor the physical capacity to achieve this objective.
- In terms of its sales or distribution of food, NFRA is less disruptive of the market. To the extent that sales are made to World Food Programme (WFP) for distribution outside of Tanzania, there is almost no market distortion. Even distribution of food assistance for free or at a minimum price does not adversely affect the market to the extent that this implicitly adds purchasing power along with stocks of grain to consumers.
- Complaints about the high cost of delivering food assistance are supported by evidence from other studies of transport costs on feeder roads and those supplying secondary markets. These costs are higher in Tanzania than in other East African countries. This not only raises the cost of delivering food assistance but also inhibits the movement of food by private traders from surplus to deficit areas in response to price signals.⁸

Major Issues Not Covered in the Earlier Study

There are several important issues related to food security in Tanzania that were not covered in the earlier study.

- What are the sources of food insecurity? The most important of these is a shortfall in domestic food production. This not only decreases the availability of food, which may cause food prices to rise, but also it reduces farm income and the capacity of farm-households to purchase food even in the absence of a price rise. Second in importance is the effect of a rise in food prices in neighboring countries, and more generally on the world market. To the extent that Tanzania is connected to these markets via trade, these price movements are likely to be transmitted to the Tanzanian market, which will have an adverse effect on consumers. The degree to which this happens, and the resulting impact on these markets and on consumers, is related very much to trade policy. For example, during the sharp rise in prices on the world market for grain in 2007-08, many countries responded by lowering or suspending taxes on imports of these products. It is also related to dependence on imports. This is especially important for rice, particularly in Zanzibar, which imports about 85% of its rice consumption needs from Asia.
- What have been the sources of food insecurity over the past ten years -- shortfalls in domestic production or increases in international or regional prices? How has the government responded to these disturbances, and with what degree of success?
- What is the best way to assure food security in response to each of these disturbances? In particular, how can food storage and trade be used in an optimal way to assure maximum food security at minimum cost in terms of market disturbances and their consequences for trade, growth, and employment?
- What is the best way to link the delivery of emergency food assistance with access by the most vulnerable members of the population to that food?

⁸World Bank, *Eastern Africa: A Study of the Regional Maize Market and Marketing Costs*, December 31, 2009.

- Who should store food (NFRA, farmers, private traders) and to what degree? What are relative storage costs, delivery costs, financial needs, and other advantages or disadvantages?
- To what extent can a regional approach to storage and trade be used to replace reliance on national storage and international trade?
- How can a country assure food security in the face of an unlikely coincidence of a food production shortfall at home and a spike in food prices on the world market?
- What reforms in the consistency, transparency, and predictability of market interventions by NFRA would be necessary to assure minimum adverse impact of those interventions on private grain markets?
- What improvements can be made in private domestic risk management coupled with public goals and objectives? For example, could a warehouse receipts system be coupled with the option of NFRA using part of its storage capacity for private storage, conditional upon the private trader making those stores available for public distribution at an agreed upon price in the event of an emergency?

Methodological Approach

This study will examine these issues in the context of storage of maize and rice by NFRA, private traders, and small farmers, as well as both regional and international commercial trade. Although NFRA stocks do not currently include rice, it is the second most important food staple in Tanzania and is extensively traded both regionally and internationally. The methodological approach that will be used to explore the issues outlined above will consist of the following.

1. Setting out the conceptual framework for the study based on a review of the relevant literature (e.g., Philip Abbott study for OECD; IFPRI studies in Ethiopia, Kenya, Malawi, and Mali; Sarris and Morrison, eds., *Food Security in Africa, Market and Trade Policy for Staple Foods in Eastern and Southern Africa*). This framework will include all of the issues enumerated in the previous section.
2. Examination of national time-series data on grain production, imports, exports, consumption, changes in stocks, and market prices to determine the magnitude of past shortages or price rises.⁹
3. Legislative and operational history of NFRA. This will include a description of (a) NFRA's role in emergency food storage and distribution versus price stabilization and (b) the determination of its buying and selling prices as well as levels of stocks.
4. Examination of NFRA time-series data on food purchases, sales, stocks, emergency shipments, purchase and sales prices, costs of storage, and financing. Assessment of how NFRA responded to past shortages or price rises.
5. Examination of the need for food security stocks by district over time using MAFC data, including an analysis of the extent to which this food was needed because of local crop failure versus an exogenous rise in food prices from the district's perspective. Analysis of

⁹ The study of policy options referred to above found that official data on agricultural production substantially underestimate data from other sources, such as consumption corrected for net trade. Although the level of production may not be very accurate, it may be possible to estimate variations in production from underlying levels and trends, and to compare these variations with data on net imports and market prices, as well as anecdotal information, to determine years of crop shortage.

the impact of grain production on food security using micro data obtained from food and nutrition surveys and comparative studies of farm types across districts.¹⁰

6. Analysis of the impact of NFRA operations, including (a) the experience of medium and large traders with operations of NFRA, e.g., delays in payment, and (b) a financial analysis of NFRA operations.
7. Analysis of the time and cost required (a) to obtain supplementary shipments of imported food and (b) to deliver emergency shipments to areas of need.
8. Simulation analysis of potential crop shortfalls and international/regional price increases, and their impact on the need for emergency food assistance, including the probability of simultaneous disturbances from both sources.
9. Time-framed analysis of alternative actions to provide food assistance via storage and/or trade, including the volume of stocks to be held, the volume of emergency international or regional trade, the use of import subsidies, the financial implications of each action, and what financial instruments might be brought to bear to deal with these needs.
10. Analysis of the implications of government policies regarding storage and trade when assurance of food security is the only goal and when that goal is altered to include price stabilization as an additional objective.

Implementation

Implementation will involve the following actions, including the number of days required of the Trade Specialist and the Agricultural Economist/Policy Specialist. Actions (3) through (7) and (10) will take place in Tanzania; the others will be undertaken at the home base.

1. Review of the literature and development of conceptual framework (TS 5 days, AEPS 2 days)
2. Examination of national time-series data (TS 1 day, AEPS 4 days)
3. Analysis of mirror trade data to see what impact the elimination of the export ban in 2012 had on actual maize and rice exports (AEPS 1 day)
4. History of NFRA (TS 2 days)
5. Examination of NFRA time-series data (TS 2 days, AEPS 2 days)
6. Examination of need for food security stocks by district ((TS 3 days, AEPS 6 days)
7. Impact of NFRA operations on maize markets
 - a. Survey of private traders (AEPS 8 days)
 - b. Analysis of impact of NFRA operations on maize markets (TS 3 days, AEPS 2 days)
8. Analysis of time and cost required (TS 3 days, AEPS 3 days)
 - a. To obtain supplementary imports of imported food
 - b. To deliver emergency shipments to areas of need
9. Simulation and policy analysis (TS 6 days, AEPS 8 days)
10. Preparation of draft final report (TS 5 days, AESP 5 days)
11. Presentation of draft final report, including a special presentation to the Ministry of Agriculture in Zanzibar (TS 5 days)

¹⁰ One such comparative study is Joseph P. Hella, Ruth Haug, and Illuminatous M. Kamile, "Global Food Prices – Crisis or Opportunity for Smallholder Farmers in Tanzania?" *Development in Practice*, Volume 21, Numbers 4–5, June 2011.

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12. Revision of final report (TS 3 days)

Deliverables

1. Draft final report
2. Final report

