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SERA POLICY PROJECT YEAR 3 ANNUAL REPORT

TANZANIA ENABLING POLICY ENVIRONMENT FOR AGRICULTURAL SECTOR GROWTH

OCTOBER 1, 2013 – SEPTEMBER 30, 2014

This document was produced for review by the United States Agency for International Development (USAID/Tanzania). It was prepared by the USAID Feed the Future SERA Policy Project, Contract Number 621-C-00-11-00003-00

SERA POLICY PROJECT

YEAR 3 ANNUAL REPORT

Contract No. 621-C-00-11-00003-00
USAID Feed the Future SERA Policy Project
Tanzania Enabling Policy Environment for Agricultural Sector Growth

Implemented by Booz Allen Hamilton

DISCLAIMER

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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ABBREVIATIONS AND ACRONYMS

BMGF	Bill & Melinda Gates Foundation
BoT	Bank of Tanzania
CI	Custom Indicator
COP	Chief of Party
DFS	Department of Food Security
DFSN	Department of Food Security and Nutrition
DMD	Department of Disaster Management
ERS	Economic and Research Service
FB	Food Basket
FBM	Food Basket Methodology
FtF	Feed the Future
GoT	Government of the Republic of Tanzania
HODECT	Horticultural Development Council of Tanzania
iAGRI	Research and Education, an FtF Implementing Partner
IR	Intermediate Result
MAFC	Ministry of Agriculture, Food Security and Cooperatives
MLHSD	Ministry of Land, Housing and Human Settlements Development
MoF	Ministry of Finance
MSU	Michigan State University
NAFAKA	Staples Value Chain, an FtF Implementing Partner
NFRA	National Food Reserve Agency
NGO	Non-governmental organization
PMO	Prime Minister's Office
PMP	Project Management and Performance
PS	Permanent Secretary
RGoZ	Revolutionary Government of Zanzibar
SAGCOT	Southern Agriculture Growth Corridor of Tanzania
SERA	USAID FtF Policy Project
SOW	Scope of work
SPP	Strategic Priority Plan
SUA	Sokoine University
TASTA	Tanzania Seed Traders Association
TFNC	Tanzania Food and Nutrition Centre
TOSCI	Tanzania Official Seed Certification Institute
USAID	United States Agency for International Development
USDA	United States Department of Agriculture
USG	United State Government

EXECUTIVE SUMMARY

The Tanzania SERA Policy Project of the United States Agency for International Development (USAID) Feed the Future Initiative (FtF) completed its third full year of operation on September 30, 2014. SERA Project has made significant achievements towards improving the agricultural policy environment and developing individual and institutional capacity in the three and one-half years of the Project. SERA Project is well placed to continue those achievements over the remaining one and one-half years of the Project, and has achieved a reputation for fair, balanced, and timely analysis and cutting edge research on important policy issues. This has led the Government of the United Republic of Tanzania (GoT), the Revolutionary Government of Zanzibar (RGoZ), and development partners to regularly turn to SERA Project for research and advice on policy issues. SERA Project has also actively engaged in a program of individual and institutional capacity building to improve the ability of individuals and institutions to engage in policy analysis and advocacy, and to implement policies and improved methodologies identified through research. The SERA Project website was launched in Year 3 and will be a primary information and advocacy tool for policy reform efforts.

Policy Research and Reform activities in Year 3 focused on quantifying the impacts of the GoT's decision to lift the maize export ban in 2011, finalizing a study on land compensation schemes and the powers of local communities to lease village lands, and on an analysis of rice irrigation in Zanzibar. In addition, SERA Project continued active discussions with Government and other stakeholders on policy issues that arose during the year including the impacts of duty-free rice imports, the appropriate stocking levels for food security, the need for export permits, promoting exports of surplus cereals, and improving data for policy analysis. Efforts also continued to improve the tax treatment of seeds and seed packaging materials through support to the Ministry of Agriculture, Food Security and Cooperatives (MAFC) and the Tanzania Seed Traders Association (TASTA). SERA Project's effort to support the development of a modern collateral registry at the Bank of Tanzania (BoT) also progressed and the activity is now reported to be high priority of the BoT. The Food Security Policy Options Paper planned for completion in Year 3 was not completed due to the focus on other policy issues and the busy schedule of the MAFC which precluded the opportunity to discuss preliminary findings prior to finalizing the Paper.

The focus of SERA Project's Capacity Building activities in Year 3 was on the training of staff of the MAFC and other Ministries on the implementation of the Food Basket Methodology (FBM), and on the Data Assessment of Food Security and the Early Warning Systems. FBM capacity building activities included two trainings of two weeks, each undertaken in collaboration with the staff of the United States Department of Agriculture (USDA) Economic Research Service (ERS). This capacity building activity seeks to strengthen the capacity of the MAFC's Department of Food Security (DFS) to monitor food costs at the regional level in a more objective and timely manner. The Data Assessment focused on identifying data needs and availability for food security analysis and will likely lead to further capacity building activities. In addition to these important activities, SERA Project continued to support institutional capacity building in the

Zanzibar Department of Food Security and Nutrition (DFSN) and the Policy Seminar Series at Sokoine University (SUA).

INTRODUCTION

The Tanzania SERA Policy Project assists the Government of the Republic of Tanzania, the Revolutionary Government of Zanzibar, 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. Capacity building will also provide training to support implementation of improved policies and methodologies identified through research.

Improving agricultural policies will be accomplished by working with the GoT, RGoZ, and other stakeholders to identify important policy constraints to growth in the agricultural sector and by helping to alleviate these constraints through policy reform. The SERA Project conducts and commission evidence-based policy research to inform the GoT, RGoZ, and other stakeholders of the impacts of existing policies and the potential benefits of improved policies. In addition, the SERA Project develops 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 researchers 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.

OVERVIEW

The Tanzania SERA Policy Project has three primary components: Research and Policy Reform, Capacity Building, and Advocacy and Communications. Year 3 activities for each are discussed in this section. In addition, there are sections on Collaboration and Leadership, and Monitoring and Evaluation.

Policy Research and Reform

The crowning achievement of SERA Project has been to convince the GoT to lift the maize export ban in 2012. SERA Project undertook research in Year 3 to quantify the impacts of this policy reform using state-of-the-art econometric analysis done jointly with the World Bank. The purpose of this research was to strengthen the understanding of the benefits of the reform and build sustainable support for this reform. The research found that the export ban, in place from July to December 2011, caused monthly maize prices to be 8.8 percentage points lower for every month that the ban was in effect and 36 percent lower by the time it was lifted. This

reduced incomes of smallholders, increased rural poverty, and limited smallholder's ability and willingness to invest in improved technology or increase production. With the lifting of the export ban, combined with good weather related growing conditions and other policy improvements, farmers have produced a surplus of maize and other crops in 2014. This has led to a new challenge of facilitating the exports of the surplus maize and other crops before the next season begins. In support of this, SERA Project has been involved in efforts to fast track exports by relaxing policy constraints such as the requirement that traders obtain permits prior to exporting.

Land policy is also critical to efforts to commercialize agriculture and encourage foreign investors to partner with local communities on joint production activities on village lands. SERA Project partnered with Landesa, a U.S. non-governmental organization (NGO) specializing in land issues in developing countries, to undertake a study of compensation schemes for local communities and individuals who make land available for investors. This study was completed in Year 3 and submitted to the Ministry of Land, Housing and Human Settlements Development (MLHHS). However, in addition to researching alternative compensation schemes, the study also concluded that local communities have the legal authority to engage directly with investors and retain rights to their village land. This unexpected finding differed from the approach of the MLHHS which encouraged local communities to allow their village land to be converted to general land under the authority of the MLHHS. The finding was submitted to a respected professor and land lawyer for review and the finding was supported by his review. SERA Project was not able to meet with the MLHHS to discuss, but will pursue this action in Year 4. The finding has the potential to increase the willingness of local communities to provide land to investors because they would share more directly in the benefits and retain the rights to their land.

Another major activity of SERA Project in Year 3 was to reach agreement with the Bank of Tanzania on the development and implementation of the collateral registry system. This activity will provide the necessary legal framework and computerized registry to allow financial institutions to use moveable assets, such as equipment or crops, as collateral on loans with the assurance that the collateral can be claimed in the event that the loan is not repaid. This has been a high priority for SERA Project since inception, but progress on the activity was slow. Following a meeting with the Governor of the Bank of Tanzania by the SERA Project Chief of Party (COP), the activity was reviewed and listed as a priority in the National Financial Inclusion Framework released by the BoT in December 2013. SERA Project is providing support for local and international experts to support the development of the legal framework, and has been in preliminary discussions with the World Bank on support for the necessary hardware and software to implement the system.

Other Policy Research and Reform activities of SERA Project include continued research on the impacts of duty-free rice imports by the GoT, the impact of export permits on maize exports, policy constraints to fast tracking exports of cereals within the region, and the potential of irrigated and rain fed rice on Zanzibar. SERA Project has become a key partner with the GoT and donors in policy analysis and is recognized as being able to deliver objective analysis in a timely

manner using SERA Project staff and consultants. This has extended the influence of SERA Project by allowing it to engage in policy discussions when policies are in the formative stages.

Capacity Building

SERA Project is engaged in both institutional and individual capacity building in support of policy reform, and training to support implementation of policy reforms. In Year 3, SERA Project undertook two major capacity activities; the training of MAFC and other Ministries staff on the implementation of the Food Basket Methodology, and an Assessment of Data for Food Security Monitoring and Analysis. Other activities included ongoing support to the seed industry to facilitate meetings for stakeholders to discuss policy issues, and support to the Zanzibar Department of Food Security and Nutrition for strategic planning and development of a communications strategy. Individual capacity building activities included continued support, jointly with FtF Implementing Partner iAGRI, for the Policy Seminar Series at Sokoine University.

A major activity of SERA Project in Year 3 was to provide training on the Food Basket Methodology for estimating the cost of a typical food basket at the regional level. This involved two trainings of two weeks each for 19 staff of the MAFC and other Ministries and included field trips within Tanzania as well as classroom training. The training was provided in collaboration with an expert from the USDA's ERS. SERA Project staff were involved as trainers and participated in all activities; they are prepared to support the MAFC with ongoing technical assistance as needed. The FBM provides a more quantitative, objective, and timely means to measure typical food basket costs at the regional level and greatly enhances the ability of the Department of Food Security to monitor food costs.

A second major activity of SERA Project in Year 3 was a Data Assessment of Tanzania's Food Security and Early Warnings System. This was undertaken jointly with the Disaster Management Department (DMD) of the Prime Minister's Office (PMO) and the Department of Food Security in the MAFC during June and July, 2014. The report of that activity will be finalized and shared with GoT in Year 4 and concludes that the resources devoted to identifying vulnerable populations need to be expanded, and the focus of current activities on production deficit regions fails to capture vulnerable populations in regions that do not have a production shortfall. Follow-up capacity building activities are expected in Year 4 to address these findings.

SERA Project also provided financial and technical support to the Tanzania Seed Traders Association in its efforts to improve seed policy and tax treatment of the seed industry. SERA Project provided support to TASTA to present its case for improved tax treatment of the seed industry to the Ministry of Finance's Committee on Taxation on April 15, 2014 in Dar es Salaam, and provided financial support for a stakeholder's workshop on September 29, 2014, in Arusha. That workshop allowed industry stakeholders to address the proposed mandatory labelling of seed packages by the Tanzania Official Seed Certification Institute (TOSCI) and led to a rejection of the proposal. SERA Project played a key role by quickly responding to a proposed policy that the industry stakeholders did not support.

SERA Project continued support to the Department of Food Security and Nutrition of the Ministry of Agriculture and Natural Resources in Zanzibar. Activities included support for the development of a communications strategy and continued support for strategic planning as follow up activities to Year 2 activities. FSND core staff received training on the development and implementation of the PMP and began using the plan in 2014. In the second half of Year 3 the SERA Project began working with the FSND on the development of two communications products, an informational brochure and a newsletter.

Individual capacity building in Year 3 consisted of continued support for policy research on topics relevant to Feed the Future Initiative. This activity, called the Policy Seminar Series, provides support to teams of researchers to undertake policy research and present their results in a policy seminar to faculty and invited guests at Sokoine University. The activity is co-sponsored by SERA Project and iAGRI and began in Year 1 when four research projects were selected from eleven proposals. The activity has not been as successful as expected because the research teams have been slow to deliver and the quality of the research has been below expectations. In response, a new approach was developed in Year 3 which provides greater supervision for the next round of seminars, and will be implemented in Year 4.

Advocacy and Communications

The approach to Advocacy and Communications is to provide information and disseminate research findings rather than to publicly advocate for policy reform. This is consistent with our approach to policy reform which is focused on government counterparts for policy reform rather than using grass roots organizations to advocate for policy reform. A public advocacy approach could alienate our government counterparts and harm our working relationship and ability to engage in dialogue. Our approach requires that we provide our findings in Workshops, Policy Briefs, and other forums, and to disseminate them to both English and Kiswahili speaking audiences. The SERA Project's website, which is critical to this activity, was approved by USAID in Year 2 and launched in Year 3.

Collaboration and Leadership

SERA Project has excelled at collaborating with other development and FtF partners, leveraging its limited resources, and providing intellectual leadership on important policy issues. That has allowed SERA Project to achieve a high level of visibility, respect and credibility with the GoT, RGoZ, USAID, and other development partners. This collaboration included working with FtF implementing partners NAFKA on food security research and iAGRI on the policy seminar series at Sokoine University. SERA Project has also developed a close working relationship with the Economic Research Service of the U.S. Department of Agriculture to implement a food basket approach to measuring access to food. SERA Project is collaborating with the World Bank on the implementation of the collateral registry, with SERA Project providing support for the development of the policy framework and the World Bank providing support for the necessary computer hardware and software. These collaborations have allowed SERA Project to leverage its limited resources by cost-sharing or managing activities funded by other projects.

Monitoring and Evaluation

Measuring the impacts of our policy reforms and capacity building activities is a high priority for SERA Project, but provides significant challenges. Some activities, such as support to the Zanzibar Department of Food Security and Nutrition are difficult to quantify while others, such as the impact of lifting the maize export ban, are difficult to measure. The lifting of the export ban, for example, which was credited to SERA Project's research, has raised farm gate maize prices and these impacts should be credited to SERA Project and FtF activities. SERA Project undertook research in collaboration with the World Bank in Year 3 to measure these impacts in a rigorous and academically accepted manner using a state-of-the-art econometric model. This research was completed in Year 3 and will be published as a Policy Research Brief by SERA Project, a World Bank Working Paper, and will be submitted to a peer-review for publication in an academic journal.

IMPLEMENTATION PROGRESS

COMPONENT I: POLICY RESEARCH AND REFORM

The SERA Project undertakes analysis and research on important policy issues in an effort to provide evidence-based analysis of policy impacts and provide policy options to government. Some of this research is conducted by SERA Project's staff, and some is contracted to consultants. In all cases, high standards are maintained. Increasingly, the SERA Project's team is invited to join policy discussions at an early stage to provide input on important policy issues

1. Intermediate Result 1: Improved Agriculture Productivity

A. Seed Policy

Access to high quality seeds is essential to raising agricultural productivity and improving the competitiveness of the agricultural sector. However, improved seeds in Tanzania comprise less than 15 percent of total seeds sown, which is among the lowest in the region. This situation is due, at least in part, to weak enforcement of existing regulations and strong GoT controls on certain aspects of the seed industry which limits private sector involvement. The SERA Project seeks to improve access to high quality seeds at internationally competitive prices, and to stimulate investment in the seed sector by creating an enabling economic environment for the private sector. In Year 3, SERA Project planned to review the seed sector and meet with local experts and MAFC officials in order to identify priority policy reforms needed to create an enabling environment. Unfortunately, this activity was delayed due to other work priorities and will be taken up in Year 4.

Tasks Completed in Y3:

- Reviewed existing policy studies.
- Identified priority policy issues with seed experts and MAFC officials.

Contribute to:

- Intermediate Result (IR) 4.5.1-24 Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of United States Government (USG) assistance in each case: State 1, Analysis;

State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.

- Custom Indicator (CI) 1.1.1 Volume of improved seed available in domestic market.
- CI 4.1.1 Number of research outputs.

B. Seed Taxes

High taxes on seed packaging materials have been identified as one of the constraints to expanding local production and sale of seeds, and the SERA Project is working with the Tanzania Seed Traders Association and the MAFC to improve the tax treatment of seeds and seed packaging materials. The case for reducing taxes on seeds and seed packaging materials was prepared by SERA Project in collaboration with TASTA and MAFC in Year 2 and submitted to MAFC for submission to the Ministry of Finance. However no policy action was taken and SERA Project worked with TASTA and MAFC to strengthen the case for reduced taxes on seed packaging materials and resubmitted the proposal to the MAFC in Year 3. The material was presented to the Ministry of Finance in Q3 as planned, but no action has yet been taken by the Ministry of Finance.

Tasks Completed in Y3:

- Prepared the material to support MAFC's request to Ministry of Finance (MoF) to reduce taxes on seed packaging materials.
- Presented the request for improved treatment of seeds and seed packaging materials to Ministry of Finance's Committee on Taxation.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.
- CI 1.1.1 Volume of improved seed available in domestic market.

2. Intermediate Result 2: Expanding Markets and Trade

SERA Project is working to expand markets through improved trade policies, improved market performance, and increased access to credit. Trade policy is an important component of economic policy and an enabling economic environment. The SERA Project has focused on two important trade policy issues. The first is to remove the requirement that traders obtain export and import permits from GoT before importing or exporting food crops. The second is to introduce a rules-based transparent policy for emergency food imports to replace the ad hoc approach of GoT to emergency food imports which can disrupt markets and is vulnerable to abuse. Improved credit also contributes to expanding markets and trade and is addressed by the collateral registry system being developed with the Bank of Tanzania and support from the World Bank. SERA Project has also begun efforts to improve the performance of food crop markets through a study of price transmissions between regions and the causes of delayed and incomplete transmissions.

A. Export Permits

Permits are required from the MAFC's Department of Food Security to import or export food crops to or from Tanzania. The confusing, lengthy, and costly procedure for obtaining permits has led to widespread efforts to circumvent the system. Research conducted by the SERA Project in Years 1 and 2 showed that export permits do not provide accurate information on export levels nor do they control the flow of exports. Imports are similarly controlled by permits and traders report that food crops are often imported without appropriate permits. The SERA Project is working with the MAFC and the PMO to remove unnecessary permits and provide a better method of recording trade in order to facilitate trade in food crops.

Tasks Completed Y3:

- Met with MAFC and PMO to discuss removal of export/import permits.
- Reviewed current legislation and Acts regarding trade of agricultural products.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.
- CI 4.1.1 Number of research outputs.

B. Transparent and Rules-Based Import Policy

The GoT allowed duty-free rice imports from January to March, 2013, that led to market disruptions and protests by the private sector. A more transparent policy would be for the GoT to enforce existing tariffs and allow the private sector to import and export freely based on market conditions. The SERA Project will assist the GoT in designing and implementing a rules-based and transparent mechanism to allow emergency food imports. The stakeholder's workshop planned for Year 3 was not completed and will now be combined with other food security activities and presented in Year 4.

Tasks Completed Y3:

- Met with MAFC and PMO to discuss a transparent and rules-based mechanism to allow duty free food imports.
- Drafted rules-based import policy.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.
- CI 4.1.1 Number of research outputs.

C. Credit to Smallholders and SMEs

The SERA Project encouraged the GoT to establish a modern collateral registry as part of its efforts to improve the financial system. A modern collateral registry would provide the legal framework and computer registry that would improve access to credit by allowing lenders to more easily use collateral for lending. This two year-long effort resulted in the Bank of Tanzania releasing its National Financial Inclusion Framework in December 2013 which included the development of the collateral registry as one of its priority activities. A Concept Note was prepared by the BoT with SERA Project support and will be submitted to GoT for approval and a mandate to develop the collateral registry. The SERA Project has engaged local and international experts to contribute to the BoT effort. In Q4, the local and international expert worked closely with BOT representatives to develop a workplan. Activities in Q4 included a review of existing legislation, a review of draft legislation and consensus on the process of the proposed legislations. In addition, the World Bank expressed interest in contributing to the creation of the collateral registry under its support program to the BoT. Specifically, the World Bank expressed interest in procuring the necessary hardware and software for the implementation of a modern computerized registry system. This support will be finalized in Year 4.

Tasks Completed in Y3:

- Support provided and Bank of Tanzania announced plans to develop the legal framework for the collateral registry.
- Met with Bank of Tanzania officials to offer support to their commitment to develop the legal framework for the collateral registry.
- Provided support to the development of the legislation pending approval of the concept note.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; State 3, Drafting or revision; State 4, Approval (legislative or regulatory); State 5, Full and effective implementation.
- IR 4.5.2-7 Number of individuals who have received USG supported short-term agricultural sector productivity or food security training.

D. Improving Markets

Research has shown that food markets in Tanzania are not as efficient as those in neighboring countries with slower and less complete price adjustments to changes in market fundamentals. The SERA Project has begun to design research to determine the causes for these inefficiencies and recommend policy changes that will improve market performance.

Tasks Completed in Y3:

- Identified a consultant to undertake research and discussed research approach.

- Developed a concept note and scope of work (SOW) for research on food crops market performance.
- Undertook research on food crop market performance.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.
- CI 4.1.1 Number of research outputs.

3. Intermediate Result 4: Improving Enabling Policy Environment for both Agriculture and Nutrition

A. Food Security

The SERA Project’s research on the impacts of the maize export ban continues to influence GoT policy as shown by an interview in the Daily News with the Minister of Agriculture, Food Security and Cooperatives (October 2, 2013). In that interview, the Minister said that research by the SERA Project of USAID Feed the Future Initiative has shown that the export bans were not effective at ensuring food security, controlling food prices or preventing exports and the idea of banning food exports was a failure. In an effort to reinforce this message, additional research on the impacts of the 2011/2012 maize export ban was undertaken. A Policy Options paper will also be prepared for the mainland GoT bringing together research from Years 1 and 2 on important issues such as trade policy, social safety nets, and food reserves. This paper will be presented to GoT in Year 4, and will conclude SERA Project research efforts to provide Tanzania with a more comprehensive food security program except for new challenges that may develop and require analysis.

Tasks Completed in Y3:

- Consultant identified and engaged for Policy Options Paper.
- Undertook preparation for a Policy Options Paper on Food Security for GoT.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.
- CI 4.1.1 Number of research outputs.

B. National Food Reserve Agency

An assessment of the policies, procedures, and operations of the National Food Reserve Agency (NFRA) was initiated in Year 2 and continued in Year 3. That will provide an improved understanding of Tanzania’s emergency food requirements and implementation capabilities. NFRA’s policies and procedures will also be examined in order to create a more efficient and

effective Agency. Data and information requested of NFRA has not been received and the assessment could not be completed.

Tasks Planned but Not Completed in Y3:

- Complete the NFRA assessment.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.

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. However, much of this land is used for other livelihood activities by people with informal use rights. These people are often displaced when land is allocated to investors, and that has made land use and land policies very controversial. The SERA Project was invited to undertake a study on compensation and benefits sharing approaches in the region. The draft report was completed in Q1, and provided substantial new findings that local communities can engage directly with investors while still retaining the rights to their land. This research found both legal authority and precedence for local communities to directly enter into agreements with domestic or foreign investors without transferring their land to the national government. This finding has the potential to increase the willingness of local communities to provide land to investors since they would be able to retain the rights to the land. The approach currently advocated by the MLHSD is for local communities to transfer their land to the national government before land is leased to investors. However, local communities are reluctant to follow this approach since they are unlikely to have the land returned at the conclusion of the lease or to share adequately in the lease fees or other revenues generated by the project. The findings were presented to USAID management in Q1 and the Ministry of Lands in Q2. A national workshop was planned to disseminate the findings of the land study in Q3, but was delayed due to conflicting schedules and the workshop is now planned for Year 4.

Tasks Completed in Y3:

- Completed Land Compensation and Benefits Sharing study.
- Completed presentation to USAID management.
- Submitted report to the Ministry of Lands for consideration and review.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.

- CI 4.1.1 Number of research outputs.

D. Business Environment

Existing studies of competitiveness and the regulatory environment by the World Economic Forum and the World Bank do not compare the economic environment for investors in individual sectors such as agriculture. The SERA Project plans to undertake a study to compare the input and output prices, taxes and fees, and government incentives available to agricultural producers in Tanzania with those of neighboring countries. This activity will help to inform the GoT on how their agricultural sector compares with others in the region and provide a basis to adjust current investment incentives as necessary to be more competitive. Due to the heavy work load and priorities of other activities, the activity will be undertaken in Year 4.

Tasks Completed in Y3:

- Reviewed of competitiveness indicators prepared by World Bank and World Economic Forum.
- Prepared a concept note and SOW for a report comparing the incentives available to large-scale agricultural investors in Tanzania and neighboring countries.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.
- CI 4.1.1 Number of research outputs.

COMPONENT II: INDIVIDUAL AND INSTITUTIONAL CAPACITY BUILDING

The SERA Project's approach to capacity building is twofold. The first approach focuses on institutional capacity building activities for selected organizations that can provide the greatest support to the development of an enabling policy environment. The second addresses increasing capacity for research and evidenced-based policy analysis of individuals through training and support for research and policy analysis.

The SERA Project focuses primarily on public sector institutions, and individual capacity building to support the implementation of policy reforms. The majority of activities focus on GoT and RGoZ agriculture line ministries and institutions. The SERA Project continued the individual capacity building efforts already underway and will initiate new ones based on interest and opportunity. In some cases, individual capacity building will be part of larger institutional capacity building activities.

In Year 3, the SERA Project undertook two major activities on the mainland: the Food Basket Methodology training with the Department of Food Security in the Ministry of Agriculture, Food Security and Cooperatives; and the Assessment of the Tanzania Food Security Early Warning System. Support was also provided to TASTA and the first Policy Seminar Series was completed

with iAGRI. SERA Project also continued activities with the Zanzibar Department of Food Security and Nutrition (see the section Activities Implemented in Zanzibar).

1. Intermediate Result 4: Improving Enabling Policy Environment for both Agriculture and Nutrition

In Year 3, the SERA Project made significant progress in the implementation of Organizational Capacity Building Action Plans for key partners, including MAFC's DFSN, the MUCHALI Framework, and Zanzibar Department of Food Security and Nutrition.

A. MUCHALI - Institutional Assessments and Capacity Building Action Plan

MUCHALI is the Tanzanian Food Security and Nutrition Analysis System. The system includes two core institutions, the national MUCHALI team and secretariat, and local government authorities (Council) MUCHALI teams. MUCHALI is jointly managed by the PMO Disaster Management Department (PMO-DMD) and the MAFC and provides the final assessment of food security needs to the GoT including recommendations on the locations and levels of food assistance required from the National Food Reserve Agency.

The PMO-DMD and MAFC requested a comprehensive assessment of the MUCHALI framework. The assessment incorporated many individual activities identified in the Year 3 Work Plan, specifically:

- Retail price data analysis and support
- MAFC ICT system review and inventory

The objectives of this assessment were to determine information requirements, data sources, and review systems that provide data and information for the Tanzania national food security system; specifically the FBM and the MUCHALI framework. The activity identified strengths, limitations, opportunities and gaps/weaknesses in the current food security early warning information system utilized by the MAFC. Specifically, this activity:

- Provided a technical review of the MUCHALI field tools and reporting templates.
- Assessed the collection, maintenance and use of existing data required for the MUCHALI Framework.
- Conducted a feasibility assessment on the integration of the FBM into the early warning system.
- Completed a training needs assessment of the MUCHALI national team.
- Presented activity finding to beneficiaries.

The in-country assessment activity began with a kick-off meeting introducing the activity and team members to the various stakeholders of MUCHALI. A follow-up session with the same stakeholders was also conducted to present initial findings and solicited feedback and comments. The assessment met with 43 stakeholders. The activity included a field trip to Morogoro region where the team was accompanied by MUCHALI representatives from MAFC, Tanzania Food and Nutrition Centre (TFNC) and PMO-DMD.

Tasks Completed in Y3:

- Completed initial assessment of the MUCHALI Framework and supporting information management systems.

Contribute to:

- IR 4.5.2-7 Number of individuals who have received USG support short-term agricultural sector productivity of food security training.
- CI 4.1.1. Number of institutions receiving USG assistance.

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

The Economic Research Service of the U.S. Department of Agriculture, the MAFC Department of Food Security, and the SERA Project developed a capacity building program based on the Food Basket Methodology researched in Year 1 and piloted in Year 2. In Q2, 29 individuals from four different GoT institutions received training on the FBM. The training included a one-day introduction open to representative from Ministry of Industry and Trade, National Bureau of Statistics and the Ministry of Livestock and Fisheries. A combination of classroom training and field meeting for a total of 19 staff from the MAFC was completed in a two-week course. A review of the training process indicated gaps in participants understanding and application of the FBM, and the following changes were made to the training approach; 1) show applications of the FBM to strengthen student understanding, 2) spend more classroom time with individuals working in smaller groups, and 3) eliminate the field training.

The SERA Project conducted a second training for the group in June 2014. The two-week classroom training focused on skills and implementation and addressed information gaps identified in the first training. The core participants were selected from the first training group. In addition, two new participants from the DFS MUCHALI team and Sokoine University joined the training. At the conclusion of the training the participants were trained to implement the FBM starting on 1 July, 2014.

The objectives of the workshop were for trainees to:

- understand basic principles of the FMB and its application for early warning system,
- understand required data and data source for the calculation,
- construct the food basket,
- estimate food basket costs and scale up to derive total food basket costs,
- measure food access by income quintile,
- compare food basket costs across regions and time series.

The participants' deliverable was the presentation of a complete analysis of 19 regional food baskets by the participants. Sixteen participants were invited, and nine completed the course. Participant attendance was inconsistent due to outside demands and weak support from the MAFC. The low level of participation had a direct impact on meeting the workshop objectives and food basket costs were compared for only 12 of the 19 regions planned.

SERA Project is continuing to work with the DFS to complete an operations manual and support the integration of a monthly regional Food Basket (FB) analysis. It is expected that this activity will continue in Year 4. In addition, SERA Project will design and deliver a Training of Trainers for the nine participants that completed the training course in Year 3.

The Letter of Collaboration outlining the commitments of the SERA Project and the DFS regarding the implementation of the FBM training as developed and submitted for approval in Q1. However, it is unknown whether this letter was provided to the Permanent Secretary (PS) for the necessary approval, but approval was not received.

Tasks Completed in Y3

- Completed letter of collaboration and SOW.
- Completed initial training of MAFC staff in January 2014.
- Completed phase two of the training planned in June 2014.
- 16 staff of MAFC DFS received training on the FBM, 9 completed the training.

Contribute to:

- IR 4.5.2-7 Number of individuals who have received USG support short-term agricultural sector productivity of food security training.
- CI 4.1.1. Number of institutions receiving USG assistance.

C. Economic Modeling – Ministry of Agriculture, Food Security and Cooperatives, Department of Policy and Planning (Joint activity with iAGRI)

The SERA Project committed to working with the USAID Feed the Future iAGRI Project to support efforts to develop an economic modeling activity at Sokoine University. This activity was delayed in Year 3 due to efforts securing interest and commitment from Sokoine University. The appropriate location and leadership has been identified and it is anticipated that the activity will begin in Year 4.

Tasks Completed in Y3:

- Leadership and location in SUA identified

Contribute to:

- IR 4.5.2-7 Number of individuals who have received USG support short-term agricultural sector productivity of food security training.
- CI 4.2.1 Number of institutions receiving USG assistance.

D. Strategic Support

In Year 3, SERA Project continued support to TASTA and reviewed new request for support from the Horticulture Development Council of Tanzania (HODECT).

- SERA Project provided logistical and financial support for two TASTA stakeholder workshops. The first, held in Q1, discussed and reviewed the proposal to the Ministry of Finance on seed taxation issues, and the second took place in Q4 and focused on seed packaging labeling requirements.

- HODECT requested capacity building support from SERA in Q3 to conduct a rapid institutional assessment in Q4. The assessment determined that HODECT does not meet SERA Project requirements for strategic support at this time.

Tasks Completed Y3:

- Strategic support to TASTA for stakeholder engagement.
- Rapid Institutional Assessment of HODECT.

Contribute to:

- IR 4.5.2-7 Number of individuals who have received USG support short-term agricultural sector productivity of food security training.
- CI 4.2.1 Number of institutions receiving USG assistance

E. Policy Seminar Series at Sokoine University

The SERA Project and iAGRI have jointly sponsored a Policy Seminar Series for faculty and students at Sokoine University to encourage policy research. Four research teams received support to prepare research papers for presentation at the Policy Seminar Series and the papers were presented in Year 2 and finalized in Year 3.

Tasks Completed in Y3:

- Reviewed the first Policy Seminar Series and made program adjustments.
- Held the Policy Seminar Conference for the first round of papers.
- Selected teams to undertake the second round of policy research for the Policy Seminar Series and support them to undertake research.
- Presented and completed the second round of policy research for the Policy Seminar Series.

Contribute to:

- IR 4.5.2-7 Number of individuals who have received USG support short-term agricultural sector productivity of food security training.
- CI 4.2.1 Number of institutions receiving USG assistance.

F. Policy Analysis Training Course

The SERA Project sought partners and alternative means of supporting policy analysis training in Year 3. SERA Project planned to deliver this activity on the mainland with a local partner organization. Research and investigation to identify an appropriate partner that has the technical, administrative capacity and financing did not result in qualified candidates. In addition, the capacity building activity supported by the Michigan State University/Bill & Melinda Gates Foundation (MSU/BMGF) and located in the MAFC Department Policy Planning started technical assistance activities and training on policy analysis in Year 3. Since the activity is based in the MAFC, and MSU/BMGF can address both access and sustainability, the SERA Project will work with the MSU/BMGF activity and support their training and activities.

COMPONENT III: ADVOCACY AND COMMUNICATIONS

In year 3, SERA Project revised the Advocacy and Communications strategy to align activities with Project priorities. The strategy focuses on informing stakeholders on policy issues through the development of Policy Briefs and the SERA Project Website.

1. Intermediate Result 4: Improving Enabling Policy Environment for both Agriculture and Nutrition

A. SERA Website

The SERA Project Website was officially launched on 30, September, 2014. There were significant delays in this process resulting from unforeseen issues with content development and the transition from the testing site in Tanzania to the operations site in the U.S. The delays, however; offered an opportunity for extensive training on content management and day-to-day administration. The Communications and Capacity Building Specialist will monitor and maintain the Website.

Tasks Completed in Y3:

- Launched website.

Contribute to:

- CI 4.1.3 Number of hits/visits to the SERA Website.

B. Policy Briefs

SERA Project started work on four policy briefs in Year 3, including, the Food Basket Methodology, Land Compensation, Collateral Registry and Drivers of Maize and Rice Prices. These briefs will be completed in Q1 and Q2 of Year 4.

Tasks Completed in Y3:

- Completed drafting of four briefs.

Contribute to:

- CI 4.1.2 Total number of SERA mentions in the press and social media.

C. Revised Communications and Advocacy Strategy

The SERA Project Advocacy and Communications Strategy was revised in Year 3 to address changes in the SERA stakeholder focus. The revised strategy is overseen by the Communications and Capacity Building Specialist.

Tasks Completed in Y3:

- Reviewed and revised Communications and Advocacy Strategy.
- Implemented the revised Advocacy and Communications Strategy

Contribute to:

- CI 4.1.2 Total number of SERA Project mentions in the press and social media.

ACTIVITIES IMPLEMENTED IN ZANZIBAR

1. Intermediate Result 2: Expanding Markets and Trade

A. Rice Import Policy

Rice is the main staple food crop in Zanzibar and about 75 percent of consumption is imported. That makes Zanzibar very dependent on the world market. There are also close linkages with the mainland rice market as rice is traded between Zanzibar and the mainland to take advantage of the price differences caused by market demand and differential tariff rates. The SERA Project worked closely with the DFSN to better understand the rice market in Zanzibar and to advise the RGoZ on the strategic rice reserve. A study of the economic feasibility of increasing domestic rice production to reduce dependence on imported rice was completed in Q4 and will be presented in Y4. Due to conflicting schedules with the RGoZ, this activity encountered delays and was not completed in Y3.

Tasks Completed Y3:

- Completed profitability analysis of irrigated and rain fed rice.
- Presented rice study to RGoZ.
- Presented results of profitability study of rice irrigation.

Contribute to:

- IR 4.5.1-24. Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case: State 1, Analysis; State 2, Stakeholder consultation/public debate; Stage 3, Drafting or revision; Stage 4, Approval (legislative or regulatory); Stage 5, Full and effective implementation.
- CI 4.1.1 Number of research outputs.

2. Intermediate Result 4: Improving Enabling Policy Environment for both Agriculture and Nutrition

A. Zanzibar Department of Food Security and Nutrition

SERA Project completed support to the DFSN on the development, training, adoption, and implementation of the Strategic Priority Plan (SPP) and Performance Monitoring Plan (PMP) in Y3. SERA Project and USDA continued to provide strategic support to the establishment and adoption of a food basket approach as part of the Early Warning Information System. In addition, SERA Project will begin to provide support for the implementation of the Zanzibar Food Security and Nutrition Department Communication Strategy, specifically in the development of a department brochure and newsletter.

Tasks Completed in Y3:

- PMP training.
- Finalization and adoption of SPP and the PMP.
- Developed Food Basket Methodology.

Contribute to:

- IR 4.5.2-7 Number of individuals who have received USG supported short-term agricultural sector productivity or food security training.
- CI 4.2.1 Number of institutions receiving USG assistance.

PROJECT MANAGEMENT AND PERFORMANCE

Year 3 was a transitional year for SERA Project, with two personnel changes and a contract modification.

Personnel Changes:

A new Operations Manager, Mr. Ernest Yusto Mufuruki, started with the SERA Project in Q2 of Year 3, replacing Mrs. Mary Kabatange who departed SERA Project in Q1 of Year 3.

The Communications Specialist, Mr. Nicodemus Odhiambo Marcus departed the SERA Project in Q1. The position of Communications Specialist was revised to Communications and Capacity Building Specialist. This change reflects the focus of the SERA Project on public sector capacity building. Mr. Josephat Kanyunyu was selected for this position and began in Q2.

Contract Modification

In Q3, the SERA Project received a contract modification that restored the SERA Project ceiling value to its original competed amount.

PROBLEMS / CHALLENGES

Challenges faced by the SERA Project include the limited capacity of counterparts, weak systems for collecting and disseminating data, and delays in completing agreed tasks in a timely manner. These impact the entire range of SERA Project activities from policy analysis to capacity building activities. For example, lack of consistency and rigor in collecting data reduce the accuracy of data and limit the effectiveness of the systems that rely on this data such as the food basket methodology. The lack of detail on crop quantities and grades limits the value of crop price data and makes analysis of policy impacts less precise and more difficult. Delays in disseminating data from key ministries increases the resources required to obtain and maintain databases used for research. Many of these challenges are due to inadequate training and the heavy work load that many GoT officials face. The SERA Project makes every effort to overcome these challenges without placing undue burden on counterparts or engage in unnecessary activities that do not have clear and beneficial outcomes.

SPECIAL ISSUES

Not applicable.

CROSS-CUTTING ISSUES

1. Gender

Gender is an important cross cutting issue and the SERA Project consistently explore new ways identifying the gender impacts of its policy reform activities.

Women are actively encouraged to participate in training and capacity building activities, and in Year 3 women represented 66.67% of individuals receiving training.

2. Poverty

Poverty is also an important cross cutting issue and SERA Project's policy reform activities are expected to be pro-poor because they deal with food crop produced by most rural households.

FINANCIAL SUMMARY

ANNUAL REPORT	Year 0.5	Year 1	Year 2	Year 3	Cumulative	Contract Award	Contract Balance
	Apr 11 - Sep 11	Oct 11 - Sep 12	Oct 12 - Sep 13	Oct 13 - Sep 14	Apr 11 - Sep 14		
Reimbursable Costs	\$162,022	\$1,177,257	\$1,569,631	\$1,761,408	\$4,670,318	\$7,870,500	\$3,200,182
Fee	\$12,950	\$84,837	\$134,853	\$144,972	\$377,613	\$629,480	\$251,867
Reimbursable Costs plus Fixed Fee	\$174,972	\$1,262,094	\$1,704,484	\$1,906,380	\$5,047,931	\$8,499,980	\$3,452,049
Contract Cumulative	\$174,972	\$1,437,066	\$3,141,550	\$5,047,931			

PERFORMANCE MANAGEMENT PLAN

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

Indicator		Baseline	Year 0.5 Actual	Year 1 Actual	Year 2 Actual	Year 3 Target	Year 3 Actual	LIFE OF CONTRACT TARGET
IR 4.5.2-7 Number of individuals who have received USG supported short-term agricultural sector productivity or food security training (RiA).	New	0	N/A	N/A	N/A	159	10	437
	Cont.					80	55	
	Male					159	39	
	Female					80	26	
IR 4.5.2-36 Value of exports of targeted agricultural commodities as a result of USG assistance.	Maize	\$25,418,241	N/A	0	*\$38,510,000	\$31,910,000	**\$8,857,000	\$56,749,200
	Rice	\$69,327	N/A	0	0	0	0	0
IR 4.5.2-30 Number of MSMEs, including farmers, receiving USG assistance to access loans.	Medium	N/A	N/A	N/A	N/A	N/A	N/A	2,400
	Small		N/A	N/A	N/A	N/A	N/A	350
	Micro		N/A	N/A	N/A	N/A	N/A	250
IR 4.5.1-24 Number of agricultural and nutritional enabling environment policies completing the following processes/steps of development as a result of USG assistance in each case:	Stage 1: Analysis;		N/A	7	4	0	1	
	Stage 2: Stakeholder consultation/public debate;		N/A	4	2	2	3	4
	Stage 3: Drafting or revision;		N/A	1	2	1	0	
	Stage 4: Approval (legislative or regulatory);		N/A	1	2	3	4	
	Stage 5: Full and effective implementation.		N/A	1	0	3	1	11

Notes:

* Source WITS, 2014, not verified.

** Source WITA, 2014, not verified.

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

Indicator	Baseline	Year 0.5 Actual	Year 1 Actual	Year 2 Actual	Year 3 Target	Year 3 Actual	LIFE OF CONTRACT TARGET
1.1.1 Volume of improved seed available in domestic market. (tons)	26,545	N/A	0	0	0	0	36,000
4.1.1 Number of research outputs.	N/A	N/A	3	4	2	3	7
4.1.2 Total number of SERA mentions in the press and social media.	N/A	N/A	10	11	10	2	40
4.1.3 Number of hits/visits to the SERA website.	N/A	N/A	N/A	N/A	2,500	0	9,000
4.2.1 Number of institutions receiving USG assistance.	N/A	N/A	2	12	4	11	15

ANNEX 1: Deliverables and Reports

- Work Plan for Year 3, October 1, 2013 – September 30, 2014
- Quarterly Report for Q1, October 1, 2013 – December 31, 2013
- Quarterly Report for Q2, January 1, 2014 – March 31, 2014
- Quarterly Report for Q3, April 1, 2014 – June 30, 2014
- Food Basket Analysis as a Tool to Measure Food Access in Tanzania
- MUCHALI Framework Capacity Building Action Plan
- Assessment of the Tanzania Food Security Early Warning System
- SOW: Study on the Impact of the Maize Export Ban on Tanzanian Maize Prices
- Case Presentation: Exempt Taxes on Seeds and Seed Packaging Materials in Tanzania
- Preliminary Findings and Conclusion: Food Security Policy Options
- Training Schedule: Food Basket Methodology, June 10-20, 2014
- SOW: Assessment of the Tanzania Food Security Early Warning System
- Executive Summary: Land Compensation and Benefits Sharing Study
- Summary: Determinants of Maize Prices in Tanzania
- SOW: Study of Maize Market Efficiency
- Zanzibar Rice Irrigation
- List of Participants: Assessment of Tanzania’s Food Security Early Warning System, June 27, 2014
- List of Participants: Food Basket Methodology Training, June 10-20, 2014
- SOW: Support to ZDFSN to Compile Communications Materials

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