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Tanzania SERA: Enabling Policy Environment for Agriculture Sector Growth

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**QUARTERLY REPORT
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Booz Allen Hamilton**

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ACRONYMS AND ABBREVIATIONS

AgCLIR	Agricultural Commercial Legal Institutional Reform
ACT	Agricultural Council of Tanzania
AGRA	Alliance for a Green Revolution in Africa
AIRD	Associates for International Resources and Development
BOT	Bank of Tanzania
CIMMYT	International Maize and Wheat Improvement Center
COP	Chief of Party
COPB	Cereals and Other Produce Board
CSO	Civil Society Organizations
DCOP	Deputy Chief of Party
DRC	Democratic Republic of Congo
ESRF	Economic and Social Research Foundation
FtF	Feed the Future
GoT	Government of the Republic of Tanzania
iAGRI	FtF Implementing Partner focused on education and research
IFPRI	International Food Policy Research Institute
MAFC	Ministry of Agriculture, Food Security and Cooperatives
MF	Ministry of Finance
MIT	Ministry of Industry and Trade
NAFAKA	FtF Implementing Partner focused on cereals value chain
NBS	National Bureau of Statistics
OPV	Open pollinated varieties
REPOA	Research on Poverty Alleviation
TASTA	Tanzania Seed Traders Association
TAFSIP	Tanzania Agriculture and Food Security Investment Plan
SAGCOT	Southern Agricultural Growth Corridor
UONGOZI	Institute of African Leadership for Sustainable Development
USDA	United States Department of Agriculture
WFP	World Food Program

QUARTERLY REPORT

EXECUTIVE SUMMARY

The SERA project has two main objectives: i) to improve agricultural policies and ii) to build the capacity of individuals and organizations to undertake policy research and advocate for policy change. During the January – March 2012 quarter, the primary focus of efforts to improve agricultural policies were directed at understanding the impacts of the export ban and at identifying alternative policies to deal with food security. In order to accomplish this, three research teams from highly respected organizations travelled to Tanzania in March to collaborate on methodology, capture data, and begin analysis. Their preliminary reports are scheduled to be presented to the GoT in late-May and a policy options paper will be prepared for the GoT in June. Other policy activities included examining the appropriate role for the COPB and subsequent discussions with MAFC officials; meeting with seed industry stakeholders to develop the case for reduced taxes and duties on seeds and seed packaging; and working with the BOT and MF to develop the collateral registry system. The SERA team also started initial efforts to analyse rice policy in Zanzibar and to better understand the implications for food security in Zanzibar.

In support of SERA's second main objective, to build capacity of individuals and organizations to undertake policy research and advocate for policy change, SERA focused its activities on continuing efforts to launch the Policy Seminar Series at Sokoine University, and at identifying suitable organizations to begin developing capacity building programs for them. In addition to these activities, our advocacy and communications activities included conducting a stakeholder survey of approximately 100 individuals and institutions involved in the agricultural sector to better understand client perceptions and interests, and initial planning of a SERA website with guidance from FtF Tanzania. As a way of leveraging resources and extending the impact of our expertise, SERA collaborated with other FtF partners and provided leadership in policy analysis.

1. Introduction

The Tanzania SERA project assists both the Government of the Republic of Tanzania and the private sector in enabling a broad-based, sustainable transformation of the agricultural sector through policy reform. The project focuses on current policies and the regulatory environment for agriculture—from the transactional “hot” topics to the needed strategic foundational changes—and building capacity of local institutions to lead an informed dialogue on policy and regulatory issues in the agriculture sector and to advocate for the necessary changes.

The original proposal for SERA focused primarily on building sustainable capacity within the GoT to initiate, develop, and utilize evidence-based research in policy decisions and

implementation, thus empowering local research and private sector advocacy groups to more effectively use analysis and strategic communications to lobby for change and build national partnerships to reach consensus around agriculture policy and to monitor policy impacts. However, reduced program budgets and on-the-ground experience has led to greater focus on medium-term policy reform and a revised approach to capacity building. Without the policy reforms identified in the original SERA program, such as the export ban, other FtF partners risk encountering an unfavourable policy environment and difficulty in implementing many of their program objectives. SAGCOT will also find it difficult to attract investors and commercializing agriculture will be a challenge. Despite this change in emphasis towards achieving policy reform, SERA is still committed to developing sustainable capacity to conduct policy research and empower local institutions capable of advocating policy change. The SERA project continues to seek additional funding to allow greater emphasis on capacity building and mentoring of local firms to play a greater role in policy dialogue and future USAID projects as part of the AID Forward initiative.

2. Implementation Progress

Policy Research and Reform – The primary policy focus during the quarter was to develop policy alternatives to the export ban; that effort followed the approach proposed in the Concept Note prepared by SERA in October 2011. Three international research teams travelled to Tanzania to analyse the impact of the export ban, project the growth in the regional cereals market to 2025, and examine food security needs and capacity. The teams met in a workshop on March 19th and then travelled to the Southern Highlands and Northern Border areas on field trips (see Annex 1). Preliminary results suggest that the research will provide the GoT with a better understanding of the policy issues regarding the export ban and better alternatives to address food security needs. A second workshop is scheduled for late-May with the GoT to present the results of the research and discuss policy alternatives to the export ban.

In addition to our focus on developing policy alternatives to the export ban, work continued on improving seed policy, implementing a collateral registry system, and analysing the impacts of the Cereals and Other Produce Act of 2009. The SERA policy team worked closely with MAFC and TASTA to identify important tax issues affecting the seed industry and prepare material to support a request for MAFC to submit to MF to clarify seed taxation, eliminate duties and taxes on seed packaging materials, and exempt seeds from the district commodity cess on agricultural produce (Annex 2). Implementation of the collateral registry system initially proposed by the USAID's AgCLIR¹ project implemented by Booz Allen Hamilton is continuing under SERA and meetings were held with the MF to inform them of the activity as requested by

¹ USAID, AgCLIR: Tanzania, Commercial Legal and Institutional Reform in Tanzania's Agricultural Sector, May 2010.

the BOT in earlier meetings. Having completed that activity, the SERA policy team will continue discussions with the BOT on next steps in the implementation process. Meetings were also held with officials of MAFC on the appropriate role for the Cereals Board created by the Cereals and Other Produce Act of 2009. These meetings will continue as part of our efforts to improve food security in Tanzania. Initial meetings were held with the Ministry of Agriculture in Zanzibar and the SERA policy team agreed to undertake a rapid assessment of the rice import policy and examine its impact on food security.

SERA began the development of a database of agricultural, economic, and health and nutrition data during the quarter in an effort to strengthen our analytical capacity and provide a service to other FtF Implementing Partners and organizations. Monthly prices from 2004 to 2011 were obtained from the Ministry of Industry and Trade for eight major crops in district markets. The data was reviewed to remove any data entry errors and gap-filled using data from nearby regions. Annual district crop production data was also obtained from MAFC's Food Security Department from 1990 to 2011 for eight crops. Economic, health and nutrition data have been requested from NBS but not yet received. Monthly rainfall and temperature data will be obtained to allow comparison between current weather patterns and previous patterns, and the results on subsequent crop production and food security outcomes. This will help guide food security early warning efforts and direct food aid to those most affected by severe weather. The data will be shared with other FtF Implementing Partners.

Planned Activities for Quarter 3 include:

- Workshop in May to present the results of the analysis of the impact of the export ban, the potential of the regional cereals market up to 2025, and the needs and capacity of food security;
- In collaboration with MAFC and TASTA, develop a position paper on taxes and duties on seeds;
- Map the policy decision making and policy enacting process in consultation with other development partners;
- Meet with MF to obtain support for sponsoring the collateral registry.

Individual and Institutional Capacity Building – The work plan for capacity building has been modified from what was originally proposed in response to reduced resource availability provided in the final contract. The modified work plan focuses on two activities, developing policy research capability through the policy seminar series at Sokoine University, a joint collaboration with iAGRI and led by COP Don Mitchell, and developing key institutions through targeted capacity building activities, led by DCOP Marialyce Mutchler who joined SERA in mid-

January. The activities are driven by the current policy reform agenda, the USAID's AID Forward initiative, and project resources.

Potential partner institutions for capacity building were identified and vetted in the proposal process, and a rapid assessment of the institutional environment using primary and secondary sources of information was completed. Suitable partners were selected based on the following criteria:

- Relevance to policy reform and advocacy for agriculture and food security;
- Relevance to policy agenda, activity timelines;
- Ability to mobilize resources and support policy changes;
- Ability to develop meaningful plans;
- Willingness to participate in the program;
- Work and support from other donors;
- Importance to SAGCOT's region.

More than ten public and private organizations were reviewed during the rapid assessment phase, five institutions underwent in-depth interviews, and three institutions submitted requests for support. Institutions that best met the selection criteria submitted targeted actions for review and consideration by USAID SERA. The rapid institutional assessment indicated ACT, MAFC, and NFRA as the partners best positioned to work with SERA. These institutions are consistent with the potential capacity building partners identified in the USAID SERA technical proposal and contract. Additional information on the institutions can be found in Annex 4.

Partnering with other organizations will be a priority, and meetings were held with FtF Implementing Partners and other organizations to identify areas of collaboration for capacity building efforts. BEST-AC, ESFR and the Institute of African Leadership for Sustainable Development (Uongozi) were identified as organizations that share similar capacity building agendas and are potential partners.

In Quarter 3, capacity building actions will be developed with targeted institutions for activities that can provide the greatest impact for improving the enabling policy environment. These activities include:

- Study tours to establish linkages and gain a better understanding of organizational development challenges related to farmer's organizations. The Zambian National Farmers Union and the National Smallholder Farmers Association of Malawi have been identified as potential partners in this activity. This activity is identified as an input into ACT's strategic planning process;
- Participate in the evaluation of ACT's first strategic plan;

- Support the second strategic planning process for ACT;
- Primary needs assessment for the development of a policy analysis training course. Potential partner and beneficiary organizations include MAFC, ACT, TAHA, REPOA, ESRF, and Sokoine University;
- Opportunities to collaborate with BEST-AC, ESRF, Uongozi capacity building activities will also be explored.

Advocacy, Communications and Alliances – A stakeholder survey was conducted as part of our communications efforts and a questionnaire was sent to approximately 100 individuals and institutions who are either involved in agriculture in Tanzania or who are somehow active in the sector’s development. The questionnaire was designed to gain a better understanding of how stakeholders perceive agricultural policy issues in order to inform our advocacy strategy. Stakeholders surveyed included central government ministries or implementing agencies; local governments or implementing agencies; academic or research institutes; business and private sector organizations; Civil Society Organisations (CSOs); trade unions and the media. Once the data is analysed from this consultative process, key findings will be disseminated to key stakeholder groups for their comments and reflections. The survey instrument is attached as (Annex 5).

Collaboration with FtF Implementing Partners and other organizations continues to be a high priority for SERA and new alliances were developed and existing alliances were strengthened during the quarter. FtF Implementing Partner, NAFKA, provided support to the SERA policy analysis of export ban alternatives by funding the AIRD policy research team and providing vehicles and drivers for field trips undertaken by AIRD and the other research teams during March. The global FtF initiative provided support for the USDA team that visited Tanzania in March as part of the same activity and that team is examining food security issues and capacity. Partial funding for the IFPRI team estimating the economic impacts of the export bans was provided by the Food Security Bureau of USAID Washington. SERA is also working with REPOA on the policy options paper that will summarize the results of the policy analysis on export bans for the GoT, and SERA has recently been in discussions with ESRF and WFP on collaboration on analysis of food security and other important policy issues. Information exchange meetings were held with the Bill and Melinda Gates Foundation and AGRA during the quarter.

Both the Processing and Nutrition projects of the FtF Initiative have budget and staff for policy research and are engaged in discussions with SERA on how best to utilize their staff to accomplish their research objectives. Collaboration on joint research activities can benefit both the SERA work program and the policy reform agenda. Areas of possible collaboration include: reforms to policies to require fortification of imported refined palm oil; research to quantify the

relationships between improvements in health and nutrition indicators and the economic and policy environment that accounted for these improvements; and reforms to legislation restricting advertising directed at children which prevents advertising nutritional benefits of food fortification. SERA would provide intellectual leadership while the FtF Implementing Partners would provide funding and staff for these research and policy reform activities.

Alliances continue to be built with other groups working on policy reforms. SERA worked closely with the ANSAF Policy Working Group on the appropriate role for the COPB created by the Cereals and Other Produce Act of 2009 and engaged the government in discussions. SERA also worked closely with the Tanzania Association of Seed Traders (TASTA) on how best to support its efforts to reform seed policy and identified key opportunities to support the reform efforts. SERA has involved REPOA in its research activities on the policy impacts and alternatives to the export ban, and has recently met with ESRF to share our knowledge on the impacts of the export ban and data on agricultural prices and crop production.

Planned Activities in Quarter 3 include:

- Completing the analysis of the stakeholder survey and sharing the results with development partners;
- Designing and developing the SERA website;
- Communicating the results of the research on food security and alternative policies to the export ban.

3. Cross-Cutting Issues

Gender, poverty alleviation, economic growth, and equity are cross-cutting issues that all Feed the Future Implementing Partners are concerned with and the SERA project is working to improve the national agricultural policy environment to address these issues. Since most maize farmers are women, helping the government to identify better policies to address food security will result in more equitable treatment of maize farmers and will have an important gender dimension. Maize farmers currently bear a disproportionate burden in the national efforts to ensure food security despite the high incidence of poverty among small maize farmers. Improved national policies should increase maize prices during years of regional food crop shortages and provide a more predictable policy environment for producers to expand production and invest in the agricultural sector. Farmers in remote rural areas will not be strongly affected by national policy reforms because they are often outside the reach of the private sector. These farmers will require special programs to lift them out of poverty and SERA has begun to examine the global experience in dealing with such farmers.

Other SERA policy reform activities will also have an impact on these cross-cutting issues, including efforts to improve seed policies which will increase the supply of high quality seeds available to farmers and reduce seed prices. The collateral registry system will allow SMEs better access to credit and that will reduce post-harvest handling and processing costs resulting in higher prices for farmers. Increasing economic growth by encouraging greater participation in regional food crop markets will alleviate rural poverty and provide greater employment opportunities for rural people both in their local communities and in urban areas. At the local levels, better targeting of food aid assistance will help to ensure that the assistance goes to the most needy and SERA is working to better understand food security needs at the district level to deliver required assistance in a timely and efficient manner.

4. Stakeholders' Participation

The SERA project has involved stakeholders in many aspects of its work activities, but closer involvement with stakeholders is desirable. Agricultural producers and consumers are the ultimate stakeholders and closer ties to both groups would enable better understanding of policy issues, allow better targeting of communications and advocacy programs, and focus capacity building. Since SERA is primarily engaged in national policy reforms most of our initial efforts have been directed at government, policy research, reform advocates, and organizations that represent producer groups or industry associations. These stakeholder involvements have included: working with REPOA on food security and export policies, working with the EAGC and the ANSAF Policy Working Group on the analysis and policy discussions on the Cereals and Other Product Act of 2009, working with the Bank of Tanzania on the collateral registry, and working with TASTA on seed policy reforms. SERA has also had discussions with other organizations about policy issues. These include regular consultations with AGRA about policy issues and USAID COMPETE on regional trade issues. In the future, it would be beneficial to forge closer ties with stakeholders and stakeholder groups and this should be possible as the policy reform agenda extends to the regional and district levels.

5. Challenges and Constraints

Data quality and timeliness are major constraints to policy research and efforts to address food security concerns. Apparent inconsistencies among data collected by different government Ministries for different purposes raise serious doubts about the quality of the data. For example, per capita consumption of the basic food staple, maize, in mainland Tanzania is reported to be declining while economic and demographic data, such as per capita income and population, have been growing rapidly for more than a decade. That is possible if consumption of other food staples, such as rice or wheat, increased to offset the decline in maize, but that does not appear to be the case. Measure of nutritional well-being such as levels of malnutrition

and stunting have also declined which is more consistent with rising per capita staple food consumption than declining consumption. Those disparities raise doubts about the quality of production data since that is the basis on which consumption is estimated. Timeliness of data for food security policy decisions is also an area that needs improvement. If timely data is not available on food shortages, it is difficult for the government to utilize its resources effectively to alleviate food insecurity on both the mainland and Zanzibar.

Institutional capacity is also a constraint to policy analysis and reform as the best government officials are overworked and many lower level personnel are not well trained to undertake policy analysis or support reform efforts. This limits the number of effective counterparts and makes it more difficult to obtaining timely meetings and feedback on important issues. A similar situations is observed among the faculty at Sokoine University where the best faculty are in constant demand for consulting which limits their time for policy research or engagement with government policy makers. Even among the research institutes, it appears that staff are almost always fully committed and unable to provide timely feedback on policy research and the policy reform agenda. Obtaining data from MIT and NBS was especially difficult.

6. Management and Staffing

Marialyce Mutchler joined the SERA team in January as Deputy Chief of Party and Capacity Building Specialist. She most recently served as principal associate at Weidemann Associates, Inc. where she directed the operations of the company regarding new business, human resource allocation, and financial management of project portfolios. She was Chief of Party/Program Manager for the USAID-funded Business Growth Initiative (BGI), a project that supported best practices in the design and delivery of enterprise development projects. In that capacity, she was responsible for all technical and management aspects of BGI including ensuring quality on all project deliverables and reporting, managing partners and core staff.

Aneth Kayombo joined the SERA team in February as the Junior Policy Analyst. She is completing her MS Degree in Agricultural Economics at Sokoine University.

Don Mitchell has been the Chief of Party since full implementation in September 2011. Jason Kemp replaced Bill Kedrock as the Booz Allen Program Manager and will oversee the management of SERA from his office at Booz Allen headquarters. RoseMarie LeongSon is the Project Manager at Booz Allen headquarters in Virginia. Mary Kabatange is the Office Operations Manager for SERA in Tanzania. In the future, Marialyce Mutchler will share some of the management responsibilities with the Chief of Party.

7. Planned Activities

The next two quarters (April-June and July-September) of 2012 will be extremely busy for the SERA project as the policy work on food security, economic growth and poverty is completed and discussed with the government. The policy options paper to be jointly prepared with REPOA following completion of this work will also be delivered in mid-May or early-June and presented to the parliamentary committee or full parliament as requested by the government. Other activities including the continued development of the collateral registry system and reforms of seed policy will remain priorities. The communications stakeholder analysis will be undertaken and a communications and advocacy strategy developed. The development of a SERA website in collaboration with the team developing the Feed the Future website will also be a priority activity. The SERA capacity building activities will continue to focus on the agricultural policy seminar series at Sokoine University, but will now expand to other areas with the addition of a capacity building specialist. A capacity building strategy will need to be developed to direct the limited resources of SERA to best use. Follow up activities on Zanzibar will focus on more in-depth understanding of the food security and agricultural policy issues.

8. Financial Summary

	SERA Year 1 - Q4			Quarterly Total	Cumulative Total
	Jan-12	Feb-12	Mar-12		
Labor	\$75,942.40	\$58,895.76	\$99,521.93	\$234,360.09	\$545,806.48
Other Direct Costs	\$95,171.34	\$36,885.86	\$88,373.45	\$220,430.65	\$364,910.13
Total Costs incl. Fee	\$171,113.74	\$95,781.62	\$187,895.38	\$454,790.74	\$910,716.61
Project Cumulative	\$627,039.61	\$722,821.23	\$910,716.61		

ANNEXES

ANNEX 1: PMP Results

Table 1. Indicator progress – USAID Standard Indicators and Common Indicators: Feed the Future Indicators

Indicator	Y2 Target	Achieved to date	Q1	Q2	Q3	Q4	Units	Comments
IR 2.3.1. Value of exports of targeted commodities	0	0	0	0			US\$ m	Increase in value of exports dependent on policies/regulations and administrative procedures in Stage 5. I.R. 8.1.1.
IR 3.1.1. Number of MSMEs receiving business development services	0	0	0	0			Individual	This indicator is attributed to activities related to the development of a collateral registry system in Tanzania. Policies and legislation supporting the system are currently in development.
IR 8.1.1 Number of policies / regulations / administrative procedures in each of the following stages of development	5							Zanzibar Collateral registry
• Stage 1: Analyzed		3	2	1				Seed Policy, Cereals Board Grain Export Ban
• Stage 2: Drafted and presented for public/stakeholder consultation								
• Stage 3: Presented for legislation decree								
• Stage 4: Passed/ approved								
• Stage 5: Passes for which implementation had begun								

Table 2. Indicator progress – Project/Custom Level Indicators

Indicator	Y2 Target	Achieved to date	Q1	Q2	Q3	Q4	Units	**Remarks/why target not met/ superseded
IR 8.2.1. Number of individuals who have participated in USG support training activities	25	0	0	0			Individual	Training activities planned to begin Y2 Q4.
IR 8.2.2 Number of institutions receiving USG assistance	6	0	0	0			Institution	Institutional support planned to begin Y2 Q3.
IR. 8.2.3. Number of Policy Seminars conducted	1	0	0	0			Activity	Policy Seminars planned to begin Y2 Q4.
IR 8.1.1.1. Number of research outputs	4		0	0			Report	Planned for Q3.
IR. 8.1.3.1. Number of advocacy platforms that changed policy	0	0	0	0			Policy change	Advocacy activities planned to begin Y2 Q3.
IR. 8.1.3.2 Volume of improved seed sold in domestic market	0	0	0	0			US\$ m	Increase in volume of improved seed sold dependent on policies/ regulations and administrative procedures in Stage 5. I.R. 8.1.1.
IR.8.2.3.1. Number of Policy Seminar participants	20	0	0	0			Individual	Policy Seminars planned to begin Y2 Q4.

ANNEX 2: Trip Report to Southern Highlands and Northern Zone

The SERA Project team, with support from NAFKA of the USAID Feed the Future Initiative, visited the Southern Highlands to interview farmers, traders, transporters, and exporters. The objective was to better understand the maize and rice markets and trade.

The main findings of the visit were:

- Farmers reported that they did not plan to expand maize production because the price was not high enough, but they did plan to expand production of other crops. Farmers reported that they did not have access to adequate price information. Farmers like the input vouchers, but reported there were not enough for all farmers and vouchers arrived too late in 2011 to be fully effective. Fertilizer was reported to be readily available but expensive for farmers to buy.
- The export ban reduced maize wholesale prices by about 20-percent to 220 Tsh/kg in August 2011 and prices returned to the pre-export levels in January 2012 when the export ban was lifted. Prices fell when traders from Arusha, Dar es Salaam, DRC, and Kenya stopped coming to the Southern Highlands to buy. The ban reduced Tanzanian exports to DRC while encouraging exports from Zambia to these countries. Illegal exports of maize across panya routes to DRC are high because of the export ban, and illegal imports are high because an import permit is required from the Ministry of Agriculture and the permit must be obtained in Dar and can only be used for a single consignment.
- The NFRA bought less than two-percent of maize production in the Makumbako zone in 2011 and was not effective in supporting maize prices. It disrupted marketing by announcing a buying maize price of 350 Tsh/kg and was then unable to purchase significant quantities at that price due to budget constraints. The NFRA buying price of 350 Tsh/kg was well above the market price and that encourages favouritism in purchases and increases incentives for corrupt practices.

March 22, 2012: Interview with Ilonda Village Farmer

We interviewed eight farmers (three were women) in Ilonda Village, Mtwango Ward, Njombe District in the Southern Highlands of Tanzania. The area is a major maize producing area and the farmers produced maize as well as some other crops and livestock. All of the farmers interviewed had at least one hectare, one cow, and would probably be considered middle-income farmers. The farmers were members of an association of 22 farmers and they had a communal two acre maize plot as well as individual plots of maize and other crops. The association owned two power tillers and land preparation was by power tiller or oxen plough. Maize shelling was by mechanical sheller powered by the power tillers. Women farmers reported using similar inputs as men, but also reported problems in getting access to oxen for plowing that suggests they had lower capital and resources.

Maize production was non-irrigated and all farmers reported using hybrid seeds and fertilizer. The hybrid seed used was #6013 produced by Uyote Agricultural Institute that cost 40,000 Tsh

per 10 Kgs (enough to plant one acre). When hybrid seeds were not available they used their own seed, but preferred to have hybrids because the yield increase from hybrids was considered to be kubwa (large). Farmers used the government vouchers when available, but there were not enough vouchers so some farmers didn't received them. In the current season's crop (planted in November) the vouchers did not arrive until January which would have reduced their effectiveness since the seeds could not be used. Fertilizer was available for purchase but expensive (75,000 Tsh for a 50 Kg bag of fertilizer) for farmers, and most input sellers do not give credit unless the farmers have a personal relationship with the supplier. Fake seeds are a problem and farmers cannot determine if the seeds are fake by sight. Yields with hybrids were reported to be 2.2 tons per hectare. Farmers did not have access to commercial credit and self-financed by saving one or two bags of seed to be sold when the inputs were purchased before the next season.

The farmers reported selling 90-percent of their maize and retained ten 50 Kg bags per year for a family of five (0.27 kg per person per day). Other food items, such as rice, are purchased from the market but maize is not purchased for consumption. Maize marketing was done by the association on behalf of all farmers and the price received in the previous season was 350 Tsh/Kg after holding the maize for one month after harvest. Farmers reported storing maize in their houses, and the association did not have a common storage facility. The farmers were aware of the export ban and reported that the price dropped from 5,000 Tsh/18 kg tin (18kg) to 3,000 when the ban was announced. They believed the price would have risen without the ban, but the farmers did not feel they had adequate access to price information. Farmers were not aware of any restrictions on sales out of the district. The farmers reported a desire to expand production, but not of maize because the price was not viewed as desirable. Farmers did record input costs and calculated profits.

March 21, 2012: Interview with National Food Reserve Agency (NFRA) Regional Zonal Manager, Makambako Zone

NFRA has seven zones within Tanzania and the Makambako zone covers Iringa, Mbeya, and Njombe. There are eight buying stations located throughout the zone. The buying stations buy from farmers and traders, but there is a minimum purchase size of 3 tons according to the zonal manager. The budget allocation for NFRA and the buying price determine how much maize each zone is expected to buy. The Makambako zone had a target to purchase 30,000 tons in the current year but actually purchased only 18,000 tons due of limited funds. The buying price in the current year was 350 Tsh/kg, a price determined by the Ministry of Agriculture with input from NFRA zonal managers and others. The price is the same for all buying stations of NFRA. The budget for NFRA is approved in July and NFRA begins to buy in September-October. The

manager noted that this has the advantage that the maize has lower moisture content and has less chance of being rejected as unsuitable for storage. The Makambaku zone has three storage warehouses (Iringa – 13,500 tons, Makambako – 22,000 tons, and Mbozi – 12,000) tons. Once the maize is purchased at the buying station and transported to the warehouse, it is held in storage until orders are received to move it to another location for sale or distribution. Some of the maize was sold to WFP this year at a price of 394 Tsh/kg and the revenue from such sales go to the NFRA. Government institutions (such as prisons and military) can buy from NFRA at the same price that NFRA buys the maize, that is at 350Tsh/kg, but other sales such as to WFP are at a higher price to allow for buying, handling, and storage costs.

The NFRA zonal manager reported that payments for maize are made by check within one or two days, but this was disputed by traders interviewed in Makambaku. They reported that some had not been paid after three months. Transport of NFRA purchased maize from the buying station to the warehouses was conducted by local transporters contracted by NFRA while movements of NFRA maize between warehouses are contracted by tenders. A transporter interviewed in Makambaku indicated that he has not been paid by NFRA for moving maize from the buying station to the warehouse in September and October 2011.

The NFRA buying price of 350 Tsh/kg was well above the market price of 220 Tsh/kg during the 2011 buying season and this creates market disruptions, opportunities for rent seeking, uncertainty for traders, and increased price volatility. With such a large difference between the NFRA buying price and actual market price and with limited purchasing capacity by NFRA due to budget constraints, it is possible that the decision of who is allowed to sell is made based on non-market factors. Small farmers could also be disadvantaged because they lack transport and arrive later to sell compared to large traders who can quickly deliver from stocks. The market will be disrupted, as occurred in 2011, when traders stock in anticipation of NFRA purchases and de-stock when those purchases do not materialize. The uncertain volumes of NFRA purchases create uncertainty for traders because the actual volumes of NFRA purchases are often small relative to production and marketed production. For example, production in the NFRA Makumbako zone has on average approximately one million tons of maize in recent year and NFRA purchases were 18,000 tons in 2011—less than two-percent of production and roughly six-percent of marketed production. Thus NFRA has minimal impact on market sales. However, the NFRA announced buying price could impact market price if traders and farmers expect the NFRA buying price to prevail. When this price does not materialize, the market could plummet as it tries to adjust to actual market conditions and price volatility would have increased.

March 22, 2012: Interview with Tanduma Wholesale Traders in Mbozi

Interview with wholesale traders in Tanduma on the Tanzania border with Zambia. It is reported there are 95 traders operating in Tanduma who bought primarily maize, beans and rice from Rukwa and Mbeya and sold the products to traders from Dar es Salaam, Arusha, DRC, Kenya and Zambia. The traders were generally small, with storage for no more than 30 tons and made average sales of 5 tons per day. Margins were very small with only 500 Tsh charged on maize purchased for 30,000 Tsh per bag (6 x 18 kg tin) of maize and 1,000 Tsh per tin of beans purchased for 90,000 Tsh. Maize from Zambia was not imported into Tanzania, but it is reported there were large transshipments from Zambia to DRC and Kenya, while beans and rice from Tanzania were exported to Zambia. There were reports of substantial illegal cross border trade with Zambia and DRC when exports were banned. Imports require a permit from the Ministry of Agriculture in Dar es Salaam and that permit could only be used on a single consignment and that also encouraged illegal cross border trade.

Tanzanian exports of maize were banned from July 2011 until January 2012, while beans and rice exports were not officially banned but may have also been included in the ban because of the lack of clarity in the policy. There was also reported to be large legal transshipments from Zambia to Kenya and DRC where only a permit from customs and a bond were required to ensure the goods arrived in the designated country. The traders were very aware of the maize export ban imposed by Tanzania in July 2011 and had learned about the ban from local media, and felt the effects when traders from Arusha, DRC and Kenya stopped coming to buy. Price quickly fell, with maize prices falling by 20-percent from 30,000 Tsh to 24,000 Tsh per bag (6 x 18 kg tin) from 278 to 222 Tsh/kg. Prior to the ban, prices had been rising and were approaching 32,000 Tsh per bag even though the harvest was on-going. Prices remained depressed until the ban was removed in January; when traders returned, prices quickly rose from 25,000-26,000 Tsh to 30,000 Tsh per bag. These price changes were confirmed in a second independent interview with another trader in Tanduma who reported maize prices falling 21-percent, from 33,000 to 26,000 Tsh per bag following the ban. NFRA did not buy in the area around Tanduma and traders who stocked in anticipation of sales at the announced price of 350 Tsh/kg incurred large losses. In separate discussions, NFRA reported buying only 18,000 tons of maize from Mbeya and Iringa districts in September and October 2011, compared to production of about one million tons in these districts. In addition to the export ban, traders reported that the crop cess was a major problem because it discouraged traders from other countries from buying in Tanzania.

March 27 – 30, 2012: Trip Report to Northern Zone²

The SERA team with support from NAFKA of USAID's Feed the Future Initiative visited the Northern zone to interview traders, brokers, exporters, regional commissioners and customs official. The objective was to understand marketing and trade of maize and rice.

Main findings of trip

The government's stated commitment to always provide maize as food aid was reported to cause farmers to shift towards growing other crops even in semi-arid areas because they felt that the GoT had accepted responsibility for providing maize. The Prime Minister's Office (PMO) has been responsible for the identification and distribution of food aid through its disaster committee, however, there were reported to be long lags from the time of the survey of food aid needs and when the aid was being distributed. The regional officials suggested that the PMO should engage NGOs like World Vision instead of relying on its disaster committees. WFP does rely on the GoT's assessment of the ability of various groups to pay nominal amounts for food aid because they reported that the GoT is good at identifying those groups. But, in areas where food is used for political purpose it is hard to know if GoT information is accurate.

There are four customs offices/posts in Kilimanjaro, at Kilimanjaro International Airport, Moshi town, Tarakea, and Holili. The main duty of these offices/posts is to collect taxes and facilitate trade. The regional commissioners give export permits to traders when there is no export ban, and that saves traders the trip to Dar es Salaam to obtain the permit from the MAFC. After the exporter receives the permit she/he will pay a clearance fee of 300,000 Tanzanian Shillings per 30-tons truck in Tanzania and 7,000 Kenyan Shillings per truck in Kenya.

During the ban, there were reported to be large illegal exports of maize and even though there were customs mobile units that were watching the border, maize exports were reported to be half of the levels when there was not an export ban. There were reported to be many warehouses just along the Namanga border on the Kenya side to receive exported maize. The ban was reported to decrease farmers' prices and increase trader's profits. Maize was reportedly sold at 25,000 – 35,000 Tanzanian Shillings per 100kg bag (in Tanzania) and bought at 85,000 -100,000 Tanzanian Shillings in Kenya. But traders' profits were reduced by large bribes and increased risks. Any cargo caught being exported was confiscated by the police, and there were high risks associated with stocking grain because officials assumed it was for export.

² Prepared by Aneth Kayombo of the SERA team.

ANNEX 3: Position Paper on Taxes and Duties on Seeds

The increased use of improved seeds is essential to the success of Kilimo Kwanza, SAGCOT, and the commercialization of agriculture in Tanzania, and the Ministry of Agriculture, Food Security and Cooperatives is strongly committed to increasing the use of improved seeds. The yield increase possible from improved seeds compared to farmer-held seeds is substantial with a 22-percent increase in maize yields possible from the use of improved OPVs and a 38-percent increase in maize yields possible from the use of hybrid seeds according to CIMMYT research. However, only 15-percent of sown crop land in Tanzania is planted with improved seeds—the lowest in the region—while 85-percent is planted with farmer-held seeds. The increase in production that could result from increased use of improved seeds of maize and other crops would be substantial and would increase food supplies and national food security.

The low use of improved seeds in Tanzania is partly due to high taxes and duties on packaging materials which raise seed prices and discourage investment in seed production. These include a 25-percent import duty and an 18-percent VAT on most packaging material and an additional 50-percent excise duty on jute bags used for maize seed packaging and handling. In contrast, when seeds are imported already packaged, there is no duty or VAT on the packaging material and that encourages imports of already packaged seeds and the loss of local jobs. The cost of packaging for vegetable seeds is especially high because vegetable seeds are packaged in aluminium foil packs which can account for more than half of the total seed sale price. Locally produced seeds also incur the municipal crop produce cess of three to five-percent when they are transported from growing areas to central locations for certification, preparation, and packaging even though they are agricultural inputs rather than produce and should be exempt from the crop produce cess.

Eliminating duties and taxes on seed packaging material, exempting seed from the crop cess, and clarifying regulations on the VAT on seeds would encourage local production and greater use of improved seeds. This would require three changes to existing regulations. First, seed packaging materials used for domestic use or export should be imported duty-free, VAT exempt, and free of any excise duty. Second, seeds should be exempt from crop produce cess when accompanied by the seed movement permit. Third, the VAT treatment of seeds should be clarified by exempting seeds specifically prepared for sowing from VAT.

ANNEX 4: Capacity Building Matrix

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>SAGCOT Jennifer Baarn jennifer.baarn@sagcot.com</p> <p>Dunstan Mrutu danmrutu@gmail.com</p>	<p>The Southern Agricultural Growth Corridor of Tanzania (SAGCOT) is an agricultural partnership designed to improve agricultural productivity, food security and livelihoods in Tanzania.</p> <p>SAGCOT’s objective is to foster inclusive, commercially successful agribusinesses that will benefit the region’s small-scale farmers, and in so doing, improve food security, reduce rural poverty and ensure environmental sustainability. The risk-sharing model of a public-private partnership (PPP) approach has been demonstrated to be successful in achieving these goals and SAGCOT marks the first PPP of such a scale in Tanzania’s agricultural history.</p>	<p>SAGCOT is still in the start-up phase of the organizations. Minimal staff have been hired, demand for services has strained current resources.</p>	<p>SERA will continue to seek opportunities to support SAGCOT as the organization develops and moved out of start-up phase.</p>

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
Ministry of Agriculture and Food Security (MAFC)	To formulate sound policies, provide sound regulatory frameworks and support services as technical advice to farmers and private sector for a sustainable growth and poverty reduction. <ul style="list-style-type: none"> - Overseeing Agriculture Development Policy and its Implementation. - Agriculture and Land use Planning, Research and Extension Services. Construction of Food Security facilities, Food Policy and Irrigation. - Development of Human Resources under this Ministry. - Extra ministerial Departments, Parastatal Organizations and Projects under this Ministry. - Government Agencies falling under this Ministry. 	The Ministry of Agriculture Food Security and Cooperatives publishes the <i>Basic Data Booklet</i> , which provides information on Tanzania’s agriculture sector. It is intended for policy- and decision makers and other planners. Data included cover area, production, and yield for food and cash crops; agriculture and the domestic economy; rainfall; and agricultural input. Other information is available on crop prices and land-cover distribution. ³	

³ Institutional Mapping and Overview of Capacity Needs Assessment (Draft) for the implementation of the Tanzania Agriculture and Food Security Investment Plan (TAFSIP), May 2011, USAID Africa Lead Project.

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>Food Security Directorate/ National Food Security Division – MAFC</p> <p>Mr. Mtambo Director kmtambo@yahoo.com</p>	<p>Monitors the availability and adequacy of food supplies and reserve stocks both in the Public and Private sectors. Particular attention is also given to areas at high risk of food insecurity.</p> <ul style="list-style-type: none"> - Conduct vulnerability analysis assessments; twice a year there is a district-level data collection effort. - Analyze the sufficiency of food production and availability. - Play a lead role in conducting value-chain analysis for food security, e.g., opportunities to blend maize and cassava flour to increase the availability of basic food items. - Implementing an automated rainfall data collection system. - Develop guidance documents on various aspects of food production and processing, from production to post-harvest management and storage. 	<p>5000 extension workers to cover approximately 12,000 villages, estimated need is 11,000 extension workers.</p> <p>Workers actually employed at the Regional government level (reporting through to the PMO RLG). They collect the baseline data used.</p> <p>Compile data and prepare the Food Balance Sheet. The Food balance sheet is shared with the PMO, Pres Office and Cabinet and is used to make administrative decisions, example is the export ban.</p>	<p>Provide the Department of Food Security technical assistance on data gathering.</p> <p>Provide technical assistance to DFS with the collection, preparation, and production of food security data. This task should be undertaken in cooperation with other donors, as various multilateral agencies are already promulgating international best practices and standards. However, at this time the efforts are not coordinated, and DFS is not yet collecting data broadly and efficiently, publishing it in a timely manner, or making good use of it in general. There is clearly room for additional donor support here, even if only in the form of more effective donor coordination.⁴</p> <p>District-level training National standards for hiring/certifying district level nutritionists/staff?</p> <p>Meet January 26, 2012 RE: FS assessment with AIRD, IFPRR, USDA.</p>

⁴ USAID, AgCLIR: Tanzania, Commercial Legal and Institutional Reform in Tanzania’s Agricultural Sector, May 2010.

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>Directorate of Policy and Planning – MAFC Theresia Msaki</p>	<p>Provide expertise and services in policy and strategy formulation, implementation, monitoring and evaluation.</p> <ul style="list-style-type: none"> - To collect and analyze data and information on Agriculture, Food and Cooperatives sectors to make informed decisions - To prepare Ministerial contributions to the Government Budget Speech, Annual Performance and Economic Reports - To institutionalize strategic planning and Budget skills in the Ministry - To ensure that Agriculture Food Security and Cooperatives plans and budgets are integrated into the government budgeting process - To provide overall coordination of sector strategy and program implementation. 	<p>Four sections:</p> <ul style="list-style-type: none"> - Policy - Programs, Plans and Budget - Development Assistance Coordination - Monitoring and Evaluation/Statistics - Statistics? <p>Well staffed with good people. Bottlenecks and issues occur at more senior levels.</p>	<ul style="list-style-type: none"> - Policy analysis - Policy formulation - Strategic planning - Management Information System for informed policy and planning – with Monitoring and Evaluation system - Contract management - Planning for PPPs <p>General: Policy analysis, econometrics techniques, how to input, use and report on data. How to use data analysis. There are 10 people who need this kind of training.</p> <p>Additional training:</p> <ul style="list-style-type: none"> - SPSS software renewal and training, - Research methodology - Data collection, modeling, forecasting, cost benefit analysis - How to provide alternatives <p>Monitoring and Evaluation Unit</p> <ul style="list-style-type: none"> - Mainstreaming gender in data collection and analysis - Policy Analysis - Data management and analysis

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>Agricultural Council of Tanzania (ACT)</p> <p>Janet Bitegeko Executive Dir 255-22 2124851 255 0 754305985 jbitegeko@hotmail.com</p> <p>Cleophas C Rwechungura Communication Officer 255-22-2124851 255 0 767474044 crwech@yahoo.com</p> <p>Saidi S. Saidi 255 0 684405305 said@actanzania.org suleimanis@gmail.com</p> <p>AGS Building, 2nd Floor Nyerere Road/Gerezani</p>	<p>On behalf of the members engage in dialogue with the Government and other partners on broad issues on socio-economic policies and on policies and programs relating to agriculture and agribusiness. In additions to lobbying and advocacy, over the years, ACT (also referred to as the “Council”) has become increasingly strong in monitoring agriculture sector policy issues and conducting policy research and review.</p> <ul style="list-style-type: none"> - To unite and strengthen the private organizations in agriculture for rapid development including its modernization and commercialization; - To actively undertake participative and consultative lobbying and advocacy role on key private sector agricultural issues on behalf of members and stakeholders; - To promote, coordinate and protect the interests of all stakeholders involved in agriculture and agribusiness in the country; and - To enhance the position of agriculture in the development of the country. 	<p>Membership-based apex organization representing the private sector active in agriculture and agro-processing. Currently active in 25 districts through 75 registered members.</p> <p>BoD is made up of 14 members for terms of three years. BoD elects a Chairperson who employs the Exec Dir. Exec Dir is responsible for the management of the secretariat. The secretariat implements board resolutions and carries out programmed activities.</p> <p>Program Activities:</p> <ul style="list-style-type: none"> - Monitoring agricultural sector policy issues, conducting policy research and review - Advocacy and Dialogue - Partnerships development - Strengthening of member organizations - Publicity and networking 	<p>Leadership Training Short courses on project design and management Short coursed on policy analysis and research skill. Improved communications and skills.</p> <p>Potential Activities Study tour to Zambia and Malawi Policy analysis training Strategic Planning support</p>

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>National Food Reserve Agency (NFRA)</p>	<p>The National Food Reserve Agency (NFRA) was formed from the Strategic Grain Reserve (SGR) with the aim of maintaining a national optimal level of food reserve to address local food shortage and respond to immediate emergency food requirements and to have a well-managed business – like agency.</p> <p>Functions:</p> <ul style="list-style-type: none"> - Procure and store emergency food stock to the tune of 150,000mt that should suffice addressing a food disaster for three (3) months period regarded enough to order and secure food imports from abroad. - Stock re-cycling - Price stabilization. 	<p>The NFRA, while not charged directly with providing storage facilities for the agricultural value chain, does have ownership of 241,000 metric tons of grain storage capacity in the form of silos, go-downs, and general warehouses. The agency has a requirement to maintain three months of grain reserves (equivalent to 150,000 metric tons), which means it would have a minimum of 91,000 metric tons of excess grain storage capacity. <i>Reference TAFSIP Assessment</i></p> <p>NFRA works in 7 zones, procuring grain from both farmers and traders. Interviews with farmers and traders indicate that NFRA is sought as a primary buyer, but has limited financial resources. Both purchasing and selling prices are set in Dar with in the MAFC.</p> <p>NFRA is also a supplier for government institutions, including prisons and the military. NFRA recently began selling grain to the WFP.</p>	<p>Provide support to NFRA on change management in its strategic planning process.</p> <p>The National Food Reserve Agency is supposed to undergo a new strategic planning process designed to help it achieve better operational controls and a more business-like culture. However, the NFRA’s internal resources for analysis, planning, and implementing sweeping change are quite limited. <i>Reference AgCLIR Assessment.</i></p> <p>Meetings and interviews with NFRA and stakeholders indicate the agency is in transition. The most common constraint cited is a lack of resources and investment capital.</p> <p>At this time the NFRA has not expressed an interest in working with SERA. It is envisioned that the SERA policy agenda will provide an incentive and opportunity to work more closely with NFRA.</p>

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
Rufiji Basin Development Authority (RUBADA)	Corporate body established by the Act of Parliament No. 5 of 1975. The Authority is charged with multi-sectoral responsibility of promoting, regulating, coordinating and facilitating sustainable and balanced long-term ecological and socio-economic development activities in the sector of energy, agriculture, fisheries, forestry, tourism, mining, industry, transport and environment in the Rufiji Basin. The basin covers 177,000 square kilometers of land (about 20-percent of Tanzania’s land) and 30-percent of runoff water. The Rufiji Basin comprises mainly regions Coast, Morogoro, Iringa, Mbeya as well as parts of Ruvuma, Singida and Lindi.	The current Rufiji Basin Development Authority Act is not consistent with the SAGCOT initiative and is under review. The review will seek to expand RUBADA’s mandate of facilitating land allocation and become a land bank for the region	Currently the World Bank is supporting reform efforts. SERA will re-evaluate RUBADA for program year 3.

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>Prime Minister’s Office Regional Administration and Local Government (PMO- RALG)</p>	<p>The Ministry coordinates all Sector and Central administrative Ministries, Region Secretariats and Local Government Authorities.</p> <ul style="list-style-type: none"> - Regional Administration, Rural Development Management Policy and Urban Development Management Policy, Integration of the Development of Local Authorities, and the Financial Development of Local Authorities, Management of Secondary education; - Development of human resources under the office; - Extra Ministerial Departments, Parastatal Organizations and projects under the office; - Government agencies falling under the office. 	<p>The Ministry headquarter is Dodoma. The ministry has currently 362 employees but at full establishment the Ministry is expected to have 440 employees.</p>	<p>As SERA moves forward for policy initiatives it is envisioned that collaboration and support to the PMO-RALG will develop. PMO-RALG will be reevaluated in program year 3. <i>Reference TAFSIP Assessment.</i></p>

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>Agricultural Non-State Actors' Forum (ANSAF)</p>	<p>Established to explore best practices in the agricultural sector and produce policy action proposals for the government, donors and other development agencies to act on problematic issues while maximizing gains from best practices.</p> <ul style="list-style-type: none"> - Advocate for a pro-poor and conducive agriculture policy environment; - Analyze agriculture policies and suggest alternative directions; and - Provide a platform for learning, sharing, networking and coalition building around best practices and key issues in the agricultural sector. 	<p>Member-based network of civil society organizations and private sector actors. 25 core member, steering committee that acts as a BoD. Organizational, HR and financial management operational structures are in place and systems and procedures are well enforced.</p>	<p>Potential partner in advocacy. <i>Reference TAFSIP Assessment.</i></p>
<p>Research on Poverty Alleviation (REPOA)</p>	<p>Leading independent research institutions in Tanzania specializing in policy research on socio-economic and development issues.</p>	<p>AGRA Policy Hub initiative aims to strengthen policy research design and implementation and policy support systems.</p> <p>Research focus activities, initially created to support MKUKUTA. Strong linkages with Universities, offers grants and sabbaticals to professors for research activities. Research is prepared, review and presented.</p>	<p>SERA is collaborating with REPOA on several policy initiatives and is actively seeking way to engage REPOA directly in project activities.</p> <p>Opportunities to collaborate and support REPOA will be drive by interest and availability of the organization.</p>

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>Economic and Social Research Foundation (ESRF)</p>	<p>The Government and Capacity Building Unit. Equip policy analysts and decision makers with analytical tools that allow them to advise senior policy makers on the formulation, implementation and evaluation of policy packages and to effectively communicate with other stakeholders.</p> <p>ESRF is with the WB on a regional activity that seeks to analysis regional food price trends and builds the capacity of east African countries to forecast pricing. Other countries include Kenya, Uganda, Ethiopia, Rwanda and Tanzania.</p>	<p>Coordinates effort that involve training, information/knowledge dissemination seminars/workshops, networking and facilitation of field/work attachments.</p> <p>Was created as an off shoot of the Econ Dept of the University of Dar. ESRF does consulting work for the WB and other donors, including government training on the market economy (the basis of the GCBU). ESRF has training and implementation capacity and “the ability to push the government to make something happen”</p>	<p>ESRF is working on several complimentary issues to SERA. Early meetings indicate a strong interest and opportunities to collaboration. ESRF is a potential partner in training and workshop capacity building activities given their experience provide government services</p>

Institution	Mandate/Functions	Organizational Structure and Activities	Capacity needs and Partnership Opportunity
<p>Business Environment Strengthening for Tanzania – Advocacy (BEST-AC)</p>	<p>BEST-AC is a key part of the BEST program in the Prime Minister’s Office (link for information www.BEST.go.tz) It is the component of the BEST Program responsible for supporting private sector advocacy through membership organizations and private sector organizations. Specifically, it supports them through grants and technical assistance to become institutionally and intellectually competent to achieve positive changes in the business environment through advocacy to government. Its purpose is to sustainably enhance the quality and effectiveness of Tanzanian private sector advocacy for an improved investment climate.</p>	<p>BEST-AC is primarily a grant making organization that supports advocacy activities and organizations.</p> <p>Programs in the Agricultural sector including ACT and cover supporting institutional capacity building reports and human resource. Other organizations include TAHA, TEOSA and TANEXA.</p>	<p>SERA project has started discussions with BEST-AC on possible collaboration with support to ACT.</p>

ANNEX 5: Stakeholders Questionnaire

The Tanzania SERA Project is a five-year Feed the Future USAID-funded initiative that assists the Government of the United Republic of Tanzania and the private sector to enable broad-based, sustainable transformation of the agriculture sector through policy reform. The project conducts policy analysis, research, advocacy, and legal work in support of policy reform, and builds the capacity of public sector agencies and civil society organizations. The following survey is aimed at exploring the opinions of several important actors who are interested in improved agricultural policy in Tanzania. As an important actor in the agricultural sector, it is crucial for us to obtain your opinion and that of your organization.

We hope you will be candid. To complete the survey, please fill in the circle that most accurately reflects your view. **If you prefer not to answer a question, please leave it blank.**

Section A. BACKGROUND

A1. Which of the following best describes your current position or affiliation? (Please mark only one response)	
<input type="radio"/> 1. President, Prime Minister, Minister, Parliamentarian	<input type="radio"/> 10. Independent government institution (e.g. regulatory agency, Central Bank)
<input type="radio"/> 2. Permanent Secretaries or Deputy Permanent Secretaries	<input type="radio"/> 11. Agricultural research organisation
<input type="radio"/> 3. Employee of a Ministry, Ministerial Department, or Implementation Agency	<input type="radio"/> 12. Religious organisation
<input type="radio"/> 4. Regional Administration Office	<input type="radio"/> 13. Regulatory institution
<input type="radio"/> 5. Local Government Office or Staff	<input type="radio"/> 14. Training and research institution
<input type="radio"/> 6. Bilateral or multilateral aid agency	<input type="radio"/> 15. Other (please specify):
<input type="radio"/> 7. Private sector or business organization	_____
<input type="radio"/> 8. Civil society organisation	
<input type="radio"/> 9. Media (press, radio, TV, web, etc)	

A2. Please identify the primary specialization of your work. (Please mark only one response)	
<input type="radio"/> 1. Agriculture, agribusiness, forestry	<input type="radio"/> 7. Infrastructure (e.g. transport, water, energy, telecommunications)
<input type="radio"/> 2. Development or advocacy work	<input type="radio"/> 8. Law, justice
<input type="radio"/> 3. Communications, information services	<input type="radio"/> 9. Legislature, politics
<input type="radio"/> 4. Commerce, trade and manufacturing	<input type="radio"/> 10. Social services (e.g. education, health)
<input type="radio"/> 5. Environment, natural resource management	<input type="radio"/> 11. Other (please specify):
<input type="radio"/> 6. Finance, banking, insurance	_____

A3. On a scale of 1-10, where 1 is “not familiar at all” and where 10 is “extremely familiar”, how familiar are you with the work of the SERA Project in Tanzania?	Not familiar at all						Extremely familiar			
	1	2	3	4	5	6	7	8	9	10
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

A4. How long have you been involved with (or a close observer of) SERA’s activities?	<input type="radio"/> 1. Less than one (1) year	<input type="radio"/> 2. One (1) year	<input type="radio"/> 3. Never
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A5. What best represents your geographic location?	
<input type="radio"/> 1. Dar es Salaam region	<input type="radio"/> 3. Other urban centers (regional centers, municipalities)
<input type="radio"/> 2. Zanzibar	<input type="radio"/> 4. Other districts

Section B. OVERALL ATTITUDES TOWARD CURRENT POLICY REGIME

On a scale of 1-10, where 1 means you strongly disagree and where 10 means you strongly agree, please respond to the following statements about the current policy regime.	Strongly disagree					Strongly agree					Don't know
	1	2	3	4	5	6	7	8	9	10	
B1. Overall export bans act as a disincentive to Tanzanian farmers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B2. Access to high quality inputs is essential to raising productivity and improving competitiveness of the agricultural sector.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B3. There are mechanisms that promote capacity building with the institution in which I am affiliated with.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B4. Farmers are aware of the policy environment surrounding agriculture in Tanzania.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B5. There is a strong coordination between the national and regional authorities on national food security policy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

B6. Policy reforms have been successful in correcting price distortions that discourage food production.	0	0	0	0	0	0	0	0	0	0	0
B7. There are adequate policies on private sector involvement and initiatives in agricultural production.	0	0	0	0	0	0	0	0	0	0	0
B8. There are effective policies in place that enforce an enabling legal and regulatory framework for agricultural development.	0	0	0	0	0	0	0	0	0	0	0
B9. Agricultural development policies follow a top-down process without consultation.	0	0	0	0	0	0	0	0	0	0	0
B10. External agreements / announcements set the tone for national agricultural policies.	0	0	0	0	0	0	0	0	0	0	0
B11. Tanzania’s agricultural policies facilitate the widespread and timely availability of appropriate data and information to stakeholders.	0	0	0	0	0	0	0	0	0	0	0
B12. Multiple taxes, local government levies, crop cess licences and other fees ought not to be reviewed.	0	0	0	0	0	0	0	0	0	0	0
B13. Commodity Boards are still inadequate and need further restructuring and more stakeholder control.	0	0	0	0	0	0	0	0	0	0	0
B14. Lack of information on markets and prices of inputs and outputs curtails agricultural development.	0	0	0	0	0	0	0	0	0	0	0
B15. Public deliberation promotes shared understanding, builds consensus and encourages collective action.	0	0	0	0	0	0	0	0	0	0	0
B16. Key to improving agricultural productivity and household food security relies on enhancing women’s access to and control of land.	0	0	0	0	0	0	0	0	0	0	0
B17. Unnecessary trade barriers in domestic and cross-border trade act as a disincentive to agricultural growth.	0	0	0	0	0	0	0	0	0	0	0

Section C. STAKEHOLDER INVOLVEMENT AND ADVOCACY

For each item in this section, please provide two (2) responses: - First, <i>importance</i> , meaning, in your opinion, how important it is for you to be involved in the process. - Second, <i>effectiveness</i> , meaning, how effective do you believe you can have a positive impact on that area of development in Tanzania.	Not important at all					Very important					Not effective at all					Very effective				
	1	2	3	4	5	6	7	8	9	10	1	2	3	4	5	6	7	8	9	10
	C1. Lobbying for the removal of unnecessary trade barriers in domestic and cross-border trade.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C2. Promoting public awareness and outreach of the issues facing agricultural policy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C3. Engaging government to make agriculture profitable and attractive to investors through prudent trade policies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C4. Advocating for a review of the multiple taxes, local government levies, crop cess, licenses and other fees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C5. Undertaking continuous monitoring of agricultural policy implementation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C6. Promoting efficient and transparent tax administration in the agricultural sector.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C7. Lobby for a review of seed certification and licensing procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C8. Ensuring that attention is paid to gender disparities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C9. Promote advocacy platforms and strategies in support of pro-agriculture policy reform.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C10. Develop and execute strategies to engage Tanzanian citizens on agricultural issues.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C11. Lobbying for simplified warehouse licensing procedures.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C12. Support trade policy communication campaign.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C13. Increase awareness about gender and property rights.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

C14. Communicate the results of policy analysis and research.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C15. Participate in and support communications, outreach, and advocacy efforts around land reform.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C16. Encourage public private dialogue with key messaging.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C17. Lobbying influential people for support as part of the advocacy process.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C18. Establishing platforms to share best experience among non-state actors on strategies for improving agricultural policies.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C19. Developing more inclusive platforms to formulate agricultural policies.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C20. Strengthening civil society's capacity to engage in policy-making processes.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

ANNEX 6: Draft Gender Workplan

Project Component	POLICY REFORMS			
Activity	Timeframe	Resources	Locations	Potential Partners
To be determined				
Indicator	Targets	Resources	Locations	Potential Partners

Project Component	ACCESS TO CREDIT			
Activity	Timeframe	Resources	Locations	Potential Partners
Women's access to credit through the collateral registry.				
Baseline on a target area on women's access to credit for farm input.	Y3, Q2		TBD	NAFAKA
Communication strategy in target region using farmers' groups and associations.	Y3, Q2		TBD	NAFAKA
Training women on areas and use of the collateral registry.	Y3, Q3-Q4		TBD	Local training organizations
Training banks on gender sensitivity.	Y3, Q3-Q4		TBD	Ministry of Finance, Bank of Tanzania
Indicator	Targets	Resources	Locations	Potential Partners
Number of women in the collateral registry.	Targets will be determined based on the baseline data.		TBD	Ministry of Finance, Bank of Tanzania
Number of women who have loans against registry.	Targets will be determined based on the baseline data		TBD	Ministry of Finance, Bank of Tanzania

Project Component	INDIVIDUAL AND INSTITUTIONAL CAPACITY BUILDING			
Activity	Timeframe	Resources	Locations	Potential Partners
Gender consideration made in promotion of seminar series (women encouraged to participate).	Y1, Q2-Q3			iAgri, REPOA, ESRF, University of Dar es Salaam, Sokowini
The role of women and gender included in institutional assessments.	Y1, Q2-Q3			ACT, MAFC
Gender considerations address in institutional capacity building action plans.	Y1, Q3			ACT, MAFC
Indicator	Targets	Resources	Locations	Potential Partners
Number of women participating in the seminar series.	Targets to be determined			
Number of gender integration activities supported by partner institutions.	Targets to be determined			

Project Component	COMMUNICATIONS AND ADVOCACY			
Activity	Timeframe	Resources	Locations	Potential Partners
Number of women's organizations involved in project related advocacy.	Y1, Q3			
Women's organizations included in stakeholder analysis.	Y1, Q2			
Ability of women's organizations to advocate for sustainable agricultural policies.	Y1, Q3			
Indicator	Targets	Resources	Locations	Potential Partners
To be determined				

Contract No. 621-C-00-11-00003-00

Tanzania SERA: Enabling Policy Environment for Agricultural Sector Growth

Quarterly Report: January 1 – March 31, 2012

ANNEX 7: Property Inventory

Date (MDY)	Item	Model	Inventory No.	Location/assigned personnel	Cost Tsh	Cost (\$)	Vendor	Serial No	Comments
9/28/2011	Computer Router	CISCO 0261XM	0001	Back Corner Office	1,184,960	736.00	Sasatel	JHY0646KORR	
9/28/2012	CISCO DLINK Router	DIR-615	0002	Back Corner Office			Sasatel	F3074AB002850	
9/28/2011	Battery Backup for Router	BR650C1, BR650C1-RS	0003	Back Corner Office	330,002	204.97	Sasatel	3B1052X01657	
10/05/2011	Office Table Executive	GDM ZR 1913 Black	00023-24	COP Office	833,898	516.56	Furniture Center		
10/05/2011	Office Table Executive	GDM ZR 1913 Black	00026-27	DCOP Office	833,898	516.56	Furniture Center		
10/05/2011	Office Table	GDM RZ 814 Black	00029	Back Corner Office	472,881	292.93	Furniture Center		
10/05/2011	Office Table	GDM RZ 814 Black	00030	Back Corner Office	472,881	292.93	Furniture Center		
10/05/2011	Office Chair High Back	6061 A Black	00025	COP Office	505,932	313.40	Furniture Center		
10/05/2011	Office Chair High Back	6061 A Black	00028	DCOP Office	505,932	313.40	Furniture Center		
10/05/2011	Office Chair Low Back	590L Black	00013	General	163,599	101.34	Furniture Center		
10/05/2011	Office Chair Low Back	590L Black	00014	General	163,599	101.34	Furniture Center		
10/18/2010	Computer Printer	HP Photosmart	0004	Back Corner Office	249,996	149.52	MASUMIN	CN0A62K0BC	
10/18/2011	Computer Printer	HP Photosmart	0008	DCOP Office	249,997	149.52	MASUMIN	CN1372JIR6	
10/18/2011	Computer Printer	HP Photosmart	00033	Storage Closet	249,997	149.52	MASUMIN	CN0721C3H6	Broken. Cost of repair greater than the cost of the printer
10/18/2011	Computer Printer	HP Photosmart	0006	N.M workspace	249,997	149.52	MASUMIN	CN1382J039	
10/18/2011	Workstation (4 person)		00019-22	4 Person Office	2,633,050	1,574.79	Furniture Center		
10/18/2011	Office Chair	UF 017 Black	00015	General	165,559	99.02	Furniture Center		Broken
10/18/2011	Office Chair	UF 017 Black	00016	General	165,559	99.02	Furniture Center		Broken
10/18/2011	Office Chair	UF 017 Black	00017	General	165,559	99.02	Furniture Center		
10/18/2011	Office Chair	UF 017 Black	00018	General	165,559	99.02	Furniture Center		
10/18/2011	Visitor Chair	UF 016 Black	0009	General	166,010	99.29	Furniture Center		
10/18/2011	Visitor Chair	UF 016 Black	0010	General	166,010	99.29	Furniture Center		
10/18/2011	Visitor Chair	UF 016 Black	0011	General	166,010	99.29	Furniture Center		
10/18/2011	Visitor Chair	UF 016 Black	0012	General	166,010	99.29	Furniture Center		
11/12/2011	Office Shredder	Fellows PS-67Cs	00031	Back Corner Office	550,000	318.25	MASUMIN	CRC32164	
12/12/2011	Computer Printer	HP Photosmart	0005	COP Office	320,004	201.40	MASUMIN	CN1372J2GP	
02/18/2012	Dell Laptop Computer	Latitude E5520 15.6"	00032	MK	1,520,000	950.00	MASUMIN	5G5FMQ1	
02/18/2012	Dell Laptop Computer	Latitude E5420 14"			1,432,000	895.00	MASUMIN	G5Q4MQ1	Returned
02/25/2012	Dell Laptop Computer	Latitude E5520 15.6"	00037	NM	1,520,000	950.00	MASUMIN	5G59MQ1	
02/25/2012	Dell Laptop Computer	Latitude E5420 14"	00035	AM	1,432,000	895.00	MASUMIN	G5PYLQ1	
02/25/2012	Dell Laptop Computer	Latitude E5420 14"	00036	AM	1,432,000	895.00	MASUMIN	G5QOMQ1	
02/25/2012	Dell Laptop Computer	Latitude E5420 14"	00034	DM	1,432,000	895.00	MASUMIN	G5Q7MQ1	
03/17/2012	Computer Printer	HP Photosmart	0007	AK Workspace	239,000	152.00	MASUMIN	CN1443J088	