



ZIMBABWE

JOINT SECTOR REVIEW ASSESSMENT

Advancing Mutual Accountability through Comprehensive, Inclusive, and Technically Robust Review and Dialogue



ZIMBABWE

JOINT SECTOR REVIEW - AGRICULTURE

Strengthening Mutual Accountability and
Preparing for the Malabo Biennial Review through
Joint Sector Review Assessment

This report was prepared in November 2016

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ACRONYMS AND ABBREVIATIONS

ASSC	Agricultural Sector Steering Committee
ASIMC	Agricultural Sector Inter-Ministerial Committee
AUC	African Union Commission
CAADP	Comprehensive Africa Agriculture Development Programme
CAPF	Comprehensive Agricultural Policy Framework
COMESA	Common Market for Eastern and Southern Africa
CSO	civil society organization
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FNSP	Food and Nutrition Security Policy
GDP	gross domestic product
GoZ	Government of Zimbabwe
JSR	Joint Sector Review
M&E	monitoring and evaluation
MAMID	Ministry of Agriculture, Mechanisation and Irrigation Development
NAIP	National Agriculture Investment Plan
NEPAD	New Partnership for Africa's Development
NGO	nongovernmental organization
PASCC	Provincial Agriculture Sector Coordination Committee
ReSAKSS	Regional Strategic Analysis and Knowledge Support System
RISDP	Regional Indicative Strategic Development Plan
SC	steering committee
TWG	Thematic Working Group
ToR	terms of reference
USAID	United States Agency for International Development
ZAIP	Zimbabwe Agriculture Investment Plan
ZIMASSET	Zimbabwe Agenda for Sustainable Socio-Economic Transformation

EXECUTIVE SUMMARY

Introduction and Background

The Comprehensive Africa Agriculture Development Programme (CAADP) encourages the use of evidence-based agricultural policy planning and implementation processes through peer review, dialogue, benchmarking, and the adoption of best practices so as to strengthen mutual accountability for actions and results utilized in the implementation of agriculture sector policy. The Joint Sector Review (JSR) is a tool that ensures mutual accountability at the country level for policy actions by state and nonstate players. The initial comprehensive Zimbabwe agriculture sector JSR was conducted to collectively review the effectiveness of policies and institutions in the sector, the status and quality of the JSR process itself, and the extent to which results and outcomes in the sector are being realized. This assessment will serve as a benchmark for future JSR assessments for the agriculture sector. The JSR assessment process included an initial workshop, the desk review of a wide range of documents, engagements with agriculture sector stakeholders, a JSR report validation workshop, and internal and external reviews of this report.

Status and Quality of the Joint Sector Review Process

There have been no comprehensive JSRs carried out in Zimbabwe prior to this particular agriculture sector assessment other than a few independent reviews coordinated by various donors and international development organizations. As part of the Zimbabwe Agriculture Investment Plan (ZAIP), stock-taking exercises and a growth and investment analyses (gap analysis) were carried out in 2009, 2012, and 2015. Furthermore, provincial stakeholder awareness campaigns were conducted in 2009, 2012, 2014 and 2015. The planning, formulation, and implementation stages of the ZAIP involved a number of stakeholders, working jointly under the umbrella of an independent ZAIP Secretariat that was governed by a clear reporting system of and oversight by the Ministry of Agriculture, Mechanisation and Irrigation Development (MAMID).

Zimbabwe's JSR process is coordinated by MAMID to ensure a continuous evaluation of ZAIP performance. Despite commendable progress in improving the quality of the JSR process, some gaps remain. These include the lack of resources in terms of capacity and the time frame stipulated to undertake the review at the national level. Monitoring and Evaluation (M&E) continues to be weak, with few supporting mechanisms to link into systems at the provincial and district levels. The capacity to gather and synthesize information relating to indicators at the district level is, in general, inefficient. Moreover, there are no adequate mechanisms to gather, collate, and share data with the MAMID and other actors within government ministries, international development organizations, the private sector and nongovernmental organizations (NGO), thus affecting the quality of information essential to the JSR. Agriculture sector reports have primarily focused on the activities of the MAMID in detriment to the activities of other stakeholders in the agriculture sector, which are underreported.

Policy Review

Zimbabwe has major policies in place to guide economic and agricultural growth, such as the Zimbabwe Agenda for Sustainable Socio-Economic Transformation (ZIMASSET), Food and Nutrition Security Policy (FNSP), and Zimbabwe Agricultural Policy Framework (ZAPF). These structures, however, are underfunded and offer little contribution to the country's economic and agricultural growth.

The ZAPF, developed in 1994, is now out of date, given the socioeconomic developments occurring in the country. Zimbabwe's CAPF, which will replace the ZAPF, is yet to be ratified by the Government of Zimbabwe (GoZ).

There are a number of agricultural subsector policies that are either in the process of development or under review. Some of these, however, appear to be fragmented and require harmonization with overall agriculture sector objectives. There have been major challenges in the planning, implementation, and review stages of agricultural policy making, which include (i) the continuing application of policies that are no longer viable; (ii) slow approval process; (iii) unclear institutional arrangements to support policy implementation, resulting in ineffective execution; (iv) lack of financial resources; (v) difficulties in comprehensive engagement of stakeholders; and (vi) ad hoc policy formulation and implementation in lieu of evidence-based policy processes.

Institutional Review

The ZAIP is currently being implemented in Zimbabwe. Economy-related ministries, farmers' groups, agroprocessors, financial institutions, agro-input providers, academia, researchers, traders, and development partners define the various stakeholder groups engaged in policy formulation, and their participation is expected to continue in relation to ZAIP implementation. The success of the ZAIP will rely on the relationships between stakeholders in the agriculture sector. Synergies and linkages within government, with the private sector (i.e., agribusiness and farmers), and with development partners are critical during this process. The proposal for new ZAIP implementation structures at the national and subnational levels should be compatible with existing structures and will need to be promoted sufficiently to reduce resistance by stakeholders. A well-staffed and dedicated Coordination Unit within MAMID should be established to effectively facilitate planning, implementation, and M&E coordination of ZAIP activities within government and with nonstate actors.

There is evidence that engagement with nonstate stakeholders during the JSR data collection process was inadequate. So as to ensure effective policy implementation and mutual accountability within the agriculture sector, it is crucial that nonstate actors actively participate with their state counterparts in the three phases of agricultural policies and programs.

Review of Key Financial and Nonfinancial Commitments

The GoZ, as well as its development partners, the private sector, civil society organizations (CSO) and farmers' groups, have made various commitments toward implementation of agriculture sector policies and programs. Given the economic recession that has lasted more than a decade, however, to meet these commitments is a significant challenge as countries prepare for the high-level business meeting. It is worth noting that nonstate actors, including the private sector, farmers' groups, and CSOs, have not committed to financial support, other than nonfinancial efforts to achieve ZAIP targets of impact. Farmers' groups and the private sector have committed effective partnerships with the GoZ to establish enterprises and initiatives that will have measurable impact in reducing poverty in the country and increasing economic growth. Despite the lack of concrete financial support, the private sector has played an active role in steering agricultural production through backward linkages with farmers. Contract farming figures indicate a major role by the private sector, especially in the production of cotton and tobacco.

The financial support committed to by development partners has flowed to areas such as policy assistance, agriculture research, and projects relating to livestock, irrigation, marketing, smallholder rural development, and drought mitigation. The Food and Agriculture Organization of the United Nations (FAO), United States Agency for International Development (USAID), and European Union (EU) are agencies that have continued unwavering support of Zimbabwe's agriculture sector through the implementation of various programs. Other organizations, such as the Common Market for Eastern and Southern Africa (COMESA), have committed to assist in the implementation of Zimbabwe's CAADP program by mobilizing international and regional political, financial, and technical support.

Agriculture Sector Performance Baselines

The GoZ has committed to allocating agriculture investment resources as the driver for economic growth and transformation in the country. Zimbabwe, however, faces macroeconomic challenges and political unrest, straining the economy and challenging the allocation of these resources. Despite considerable investment in the sector, indicated by the share of government expenditure, the sector nevertheless experienced negative annual growth rates between 2002 and 2008. The country is facing socioeconomic sanctions following implementation of the Fast Track Land Resettlement Programme, coupled with the unfavorable climatic conditions experienced in most parts of the country and other factors that have further worsened the sector's performance. Despite these negative experiences over most of the last 15 years, the sector has reported annual growth rates above the 6 percent CAADP target in 2009, 2010, 2012, and 2014, indicating the potential of the agriculture sector to perform beyond current levels in the presence of adequate investments and the support of an enabling macroeconomic and policy environment.

The production level of Zimbabwe's main crops, including maize, substantially declined in 2002 and 2008, with overall trends indicating that these crops have experienced production declines over various years. Furthermore, improvements in production since 2009 have not been sustained in recent years. The country's livestock index relating to annual production growth between 2000 and 2013 has declined over the years, significantly so in the period 2002-10. The ratio between agriculture imports and exports indicates that imports have increasingly overtaken exports for the period under analysis. In addition, land and labor productivity have declined. Substantial efforts to invest in productivity-enhancing activities to increase productivity levels and overall sector performance are sorely needed to meet national development goals and priorities.

Main Conclusions and Recommendations

The GoZ's first JSR assessment of the agriculture sector provides considerable lessons in terms of future JSRs. Sufficient time and resources are required as well as the establishment of adequate formal structures to conduct the reviews in an effort to promote evidence-based agricultural policy planning and implementation processes. Some of the recommendations from this assessment include:

- Institute a dedicated Coordination Unit to provide effective planning, implementation, and M&E coordination of ZAIP activities within the GoZ and with nonstate actors; this should be accompanied by clear M&E frameworks that are supported by adequate capacity-building services. A strong M&E system is crucial to a successful ZAIP implementation.

Strengthen the gathering, collation and sharing of information to ensure widespread coverage of state and nonstate activities and issues in the JSR. Ineffective and poorly coordinated information flow from agricultural stakeholders restricts M&E of sector performance.

- Ensure that nonstate actors are actively involved in the planning, implementation, and M&E process of agricultural policies and programs, so as to improve accountability and ownership as required by the CAADP.
- Identify and set a clear time frame to which policies and programs are aligned with the ZAIP; ensure that there is an adequate policy mix to steer agricultural growth; put in place the essential structures to facilitate the implementation of the ZAIP at the national and subnational levels.
- The GoZ, the private sector, and international development organizations should fully support the agriculture sector with adequate resources, since mobilization of adequate financial and nonfinancial resources is key to realizing the desired outcomes.

The GoZ should commit to improving support and the creating an enabling macroeconomic and policy environment to increase and sustain agricultural production. Engagement of the private sector and international development partners is a top priority in efforts to revive the agriculture sector.

1. INTRODUCTION AND BACKGROUND

1.1. Background

At the 2003 Maputo Summit, African Heads of State and Government agreed to implement the CAADP in order to accelerate agriculture-led economic growth, reduce poverty, address food and nutrition insecurity, and enable the expansion of agricultural exports. Countries are required to develop national agriculture investment plans, with a commitment to invest 10 percent of their national agriculture budget to generate an annual agriculture growth rate of 6 percent (AU 2014). Two key steps in the CAADP implementation process include the preparation and signing of the CAADP Compact at the national level (Zimbabwe signed in 2013) and the preparation of the National Agriculture Investment Plan (NAIP). The Compact is a high-level agreement between the GoZ, regional representatives, farmers' groups, the private sector, CSOs, researchers, and development partners to implement the CAADP at the national level. It is a framework of national priorities that outlines key agreements on policy and strategy, priority areas, investment plans for comprehensive development of the agriculture sector. NAIP outlines the agricultural investment priorities for boosting agricultural performance, as well as the means for implementation.

In addition, African Heads of State and Government— during the 2014 Malabo Declaration—further committed to reinforce accountability of actions and results to improve country policy processes in an effort to promote evidence-based agricultural policy planning and implementation processes through dialogue, peer review, benchmarking, and the adoption of best practices. The CAADP Mutual Accountability Framework, adopted by the African Union Commission (AUC) and the New Partnership for Africa's Development (NEPAD), sets out the principles, while the CAADP Results Framework guides the priority areas and defines performance indicators for Malabo Declaration objectives. Priority areas are contained in the post-Malabo implementation strategy and roadmap adopted by heads of state and government in January 2015 in Addis Ababa, Ethiopia. At the national level, the JSRs for agriculture are a means of operationalizing the mutual accountability framework and support CAADP Results Framework implementation. The JSRs are a key tool for planning and implementing evidence-based policies, since they set the stage to collectively assess the policy and institutional effectiveness in the agriculture sector, as well as to review the extent to which objectives are being achieved. National ownership is central to the CAADP process, encompassing not only agricultural public sector agencies but also CSOs and the private sector. State and nonstate stakeholders are thus able to hold each other accountable with regard to fulfilling their pledges and commitments, as stipulated in the CAADP Compact, national food and security investment plans, and other cooperation agreements. JSRs function as a management and policy support tool for comprehensive stakeholder planning, programming, budget preparation and execution, M&E, and overall development of the agriculture sector by involving a broad range of stakeholders to gain insight into and influence over policy making and the priorities of the sector.

The launch of the CAADP in Zimbabwe took effect in August 2009 at St. Lucia Park in Harare. Its objective is to strengthen stakeholder ownership of the CAADP in terms of country implementation. The design of the ZAIP was completed in 2011 and validated in 2013. The document continues to build on the recommendations of the Independent Technical Review (ITR). The ZAIP coordinates, directs, and mobilizes public and private sector financial resources into national agricultural priorities. The submission of the CAADP Compact to the GoZ took place in 2013.

1.1.1. Summary of the Zimbabwe Agriculture Investment Plan

Zimbabwe approved its Comprehensive Agricultural Policy Framework (CAPF) and the associated ZAIP to guide investment in the agriculture sector. ZAIP's overall objective is to facilitate the sustainable increase in the production, productivity, and competitiveness of Zimbabwean agriculture. The aim of the ZAIP is to implement the CAPF in the agriculture sector and coordinate public, private, and development partner investments to achieve the objectives of the CAPF (2012-32), FNSP (2012), and ZIMASSET (2013–18). The CAPF has not yet been formally adopted by government, however, and the accompanying strategies are in need of development. The current policy framework, the Zimbabwe Agriculture Policy Framework (1995-2020), was formulated in 1994.

The ZAIP was officially launched by Zimbabwe's Minister of Agriculture, Mechanisation and Irrigation Development, Dr. Joseph Made, in July 2013 following stakeholder consultation and development over a period of years. The plan will be implemented over a five-year period, from 2013 to 2018. The overall objective of the ZAIP is "to facilitate sustainable increase in production, productivity and competitiveness of Zimbabwean agriculture that focuses on client and consumer needs through building capacity of farmers and institutions, improving the quantity and quality of public, private and development partner investment and policy alignment".

1.1.2. Objectives of the Joint Sector Review Assessment

The main objective of the 2016 Zimbabwean agriculture sector JSR is to produce a robust analytical and well-informed report on the effectiveness of policies and institutions within the agriculture sector, as well as the extent to which objectives are being achieved. The three specific objectives are as follows:

- Evaluate the policy and institutional environment of Zimbabwe's agriculture and its national food security investment plans;
- Examine the progress made toward achieving their key target outcomes and create a baseline for future reviews; and
- Assess the effectiveness of existing processes to adequately carry out a comprehensive and robust review in the future, as well as identify actions to remedy potential weaknesses.

The focus of this JSR is to establish partnerships and mechanisms for joint sector planning, M&E. It is not intended to provide a comprehensive analysis of sector performance, given the limited time, scope, and coverage; rather, it is for future JSRs to provide more details and have greater depth and coverage.

1.2. Analytical Approaches

Zimbabwe's 2016 agricultural JSR process relied primarily on an extensive literature review of the country's main development strategy frameworks, including key agriculture sector policies such as the FNSP, national Climate Change Response Strategy, ZIMASSET; CAPF (2015-35); ZAIP; CAADP Compact; and the capacity needs assessment report of the Regional Strategic Analysis and Knowledge Support System (ReSAKSS), among others. As well as a literature review, other documents of importance from within the region and elsewhere were consulted with the aim of learning lessons. Stakeholders considered to have the most knowledge of the sector were engaged, including government officials, Cooperating Partners, the private sector; CSOs, and representatives of farmers' organizations. Stakeholder consultations were held through semi-structured interviews, Key Informant Interviews, focus group discussions, and special meetings.

1.3. Study Limitations

A number of limitations was encountered in conducting this JSR despite efforts to gather as much information as possible for a credible and reliable report. Limitations include lack of data availability, especially with regard to some ZAIP indicators. Although based on the assumption that the data would be readily available from MAMID sources, it was found during the data gathering and collating process that either the data were not being collected as per the ZAIP or they were not available altogether. To fill some of the data gaps, and in the absence of indicators for the subnational level, information at the national level was obtained from other sources such as secondary international databases. The operationalization of MAMID's M&E system is critical to overcome such data challenges. A further limitation was that due to time constraints, consultations with stakeholders were limited to those who are important at the national level and were at the exclusion of those in the provinces, the latter of which would have been ideal. Not all stakeholders could be reached for interviews due to other commitments and the limited time allocated for the process.

1.4. Report Structure

This report presents findings from the JSR technical assessment process in Zimbabwe that tracks agriculture sector development progress as it relates to policies. Specifically, the assessment evaluates the policy and institutional environment for the ZAIP, and examines progress made in achieving outcomes. It creates a baseline understanding for future reviews. It also assesses the effectiveness of existing processes for the JSR and identifies actions to address weaknesses. Chapter 2 of the report examines the status and quality of the JSR in the context of Zimbabwe. A description of the preparation stage is made and the roles of participants are presented. A discussion examines the decisions and commitments that arise in the JSR, as well the principal gaps. Chapter 3 discusses the policy setting in which the ZAIP is implemented. It outlines existing and emerging policies within and outside of the agriculture sector that affect program implementation, existing gaps, and adjustments that are required to improve performance. Chapter 4 analyzes the key institutions involved in ZAIP implementation and various cooperation agreements. It provides an account of the alignment of the institutional architecture to program needs and the required changes to be made. Chapter 5 reviews financial and nonfinancial commitments made by the various stakeholders in the CAADP Compact and ZAIP within the limits of how the agriculture sector has been funded over the years. Chapter 6 includes a presentation of a benchmark for assessing the progress of agriculture sector performance. The report concludes with a summary of key findings and recommendations to improve the JSR process in Chapter 7.

2. STATUS AND QUALITY OF THE JOINT SECTOR PROCESS IN ZIMBABWE

2.1. Introduction

This chapter discusses the JSR in the context of Zimbabwe, taking into account the challenges that need to be addressed to improve the quality of the process. The section also discusses the review process and the approach taken. The review identifies the main gaps in the JSR process and the actions required to improve it. Finally, an action plan to bridge the gaps is presented in an effort to achieve best practices.

2.2. Agriculture Sector Review Process

No comprehensive JSR of Zimbabwe's agriculture sector has been previously undertaken until now. Based on the ZAIP, the country carried out stocktaking and a gap analysis in 2009, 2012, and 2015, with the objective of establishing baseline information on the sector's structure, performance, potential funding needs, and challenges, among others. In addition, provincial stakeholder awareness campaigns were held in 2009, 2012, 2014, and 2015 to update stakeholders on the status of Zimbabwe's CAADP implementation.

The planning, formulation, and implementation of the ZAIP involved a number of stakeholders and it required joint programming through an independent ZAIP Secretariat which was established, with clear reporting system and a structure for regulatory oversight and governance, led and facilitated by the MAMID. With the signing the CAADP Compact, stakeholders are compelled to align programs and funding with ZAIP priorities. Furthermore, the MAMID is considering establishing Thematic Working Groups (TWG) in line with the CAADP to analyze, prioritize, and address constraints and identify opportunities in the agriculture sector. In order to ensure continuous involvement, private sector representatives will be encouraged to chair the TWGs, convened by directors from sector ministries.

Various donors and international development organizations have undertaken independent reviews, including that which was funded by USAID under contract of the MAMID, relating to agriculture sector policies, strategies and institutional structures. Although the studies are comprehensive and apply a variety of methodologies for the collection of quantitative and qualitative data, they are nevertheless primarily based on national stakeholder consultations at the exclusion of provincial, district and household coverage. The studies cover the subsectors/topics such as livestock, genetically modified varieties of crops; maize production and marketing, irrigation, and land tenure and marketability in Zimbabwe.

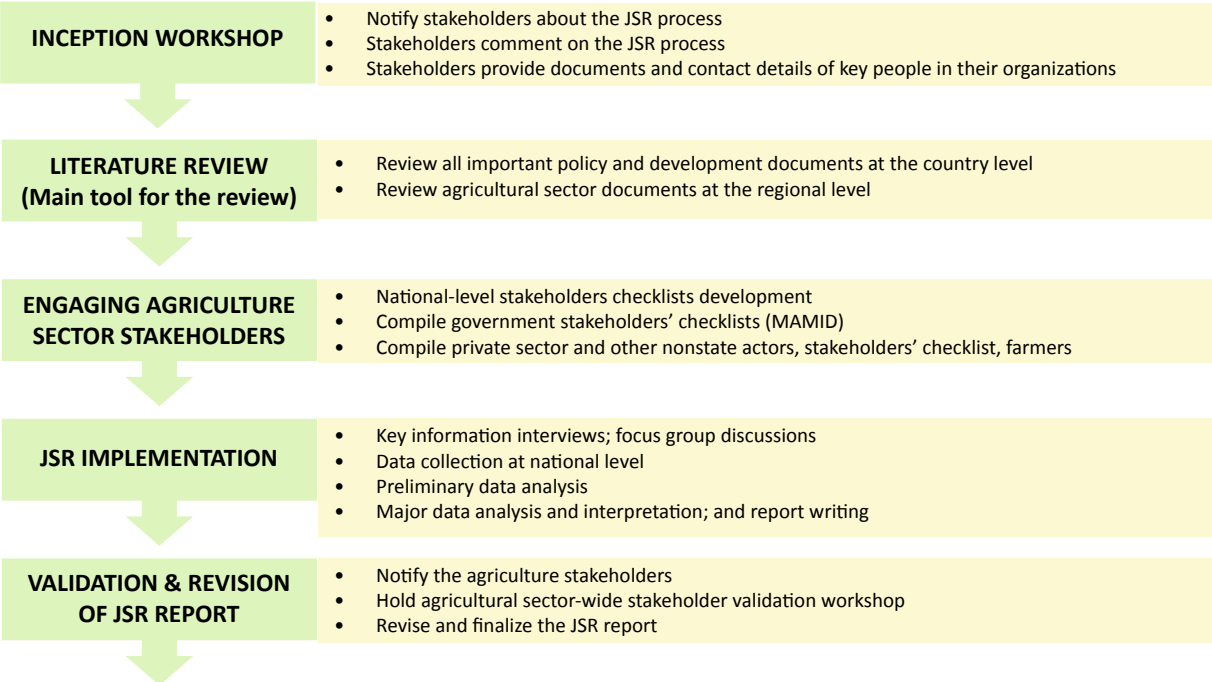
In general, gaps lie between policy formulation and implementation, especially in terms of the agriculture sector. Some of the review findings are indicated in Table 2.1

TABLE 2.1: FINDINGS AND RECOMMENDATIONS OF UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT REVIEWS ON ZIMBABWE’S AGRICULTURE SECTOR POLICIES, STRATEGIES, AND INSTITUTIONAL STRUCTURES

Subsector or Topic	Major Findings	Recommendations
Livestock	The Comprehensive Agricultural Policy Framework and Zimbabwe Agriculture Investment Plan do not sufficiently cover the livestock sector Growth of small livestock species is being hampered by a lack of policy alignment between the Ministry of Agriculture, Mechanisation and Irrigation Development and the Ministry of the Environment, Water and Climate, especially in relation to fish and quail farming	Cooperation and harmonization of policies between relevant ministries dealing with the same product/produce should take place
Genetically modified organisms (GMO)	Government policy rejects the use of GMO in the agricultural production, although it is present as a result of imported GMO animal and plant products. This results in the displacement of local products	Reconsideration by the GoZ of its GMO position, based on sound scientific analysis
Land tenure and land marketability	Lack of a robust tenure regime with appropriate registration procedures for the right of new farmers has created inefficiencies and insecurity as a result of numerous conditions and restrictions attached to agricultural land	National land policy is required to comprehensively address all land tenure issues

2.3. Joint Sector Review Approach

FIGURE 2.1: APPROACH FOLLOWED IN CONDUCTING THE ZIMBABWEAN JOINT SECTOR REVIEW.



The implementation of the JSR is coordinated by the MAMID, with technical support from the ReSAKSS-SA. Due to budget limitations, however, the process was not as rigorous as it should have been, and support from ReSAKSS-SA was scanty.

2.4. Key Questions, Areas, and Sectors covered by Joint Sector Review Processes

This initial JSR assessment in Zimbabwe was guided by JSR guidelines developed by the African Union and the NEPAD. Specifically, the JSR focuses on:

- Policy and institutional reviews
- Reviews of key financial and nonfinancial commitments
- Review of the agriculture sector performance.

Policy and institutional reviews focused on the coherence, consistency, and adequacy of the policy mix and institutional framework to ensure a successful ZAIP implementation. The second component centered on an assessment of the progress made to meet the commitments of state and nonstate actors, financial and otherwise. Specifically, an examination was made of budgetary allocations and investments, as well as the financial support and organizational commitments made by governments, donors, and other nonstate actors. The third component concentrated on reviewing Zimbabwe's agriculture performance, the relevant sector, and related subsectors, including key agriculture sector targets such as growth, productivity, and other major results defined in the ZAIP and other policy and program documents.

2.5. Main Gaps in the Joint Sector Review Process

The JSR process in Zimbabwe is coordinated by the MAMID to ensure a continuous assessment of ZAIP performance. Despite commendable progress in the quality of the JSR, gaps nevertheless remain. Resources have been made available only to undertake the review at the national level, at the exclusion of districts and households which should feed data into the national system. This is due to the fact that the capacity for M&E is weak at the national level, and there are few supporting mechanisms to link the system to those of provinces and districts. The capacity to gather and synthesize indicators at the district level, in general, is inefficient.

Furthermore, unlike in the past, there is a lack of adequate mechanisms to enable the gathering and collating of data or the sharing of information between the MAMID and other actors (i.e., government ministries, international development organizations, the private sector, and NGOs), thus weakening the quality of data for the JSR. Agriculture sector reports have mainly focused on MAMID activities, while those of stakeholders go underreported. This has proved a major challenge, given that MAMID software is not compatible with the hardware of other ministries, including the Ministry of Lands and Rural Resettlement and the Ministry of Environment, Water and Climate.

Although the potential role of other players, such as donors and the private sector, is recognized in the CAADP, ZAIP, and other policy documents, they do not take an active role in policy making, review, and implementation. For instance, while the ZAIP calls for the formation of Thematic Working Groups, to be chaired by the private sector, there are none yet in place. This will potentially lead to sector underperformance due to the limited number or absence of support mechanisms to foster growth.

The following will strengthen future JSR reports:

- Allocate adequate time and resources to include provinces, districts, and households in the review process, in order to execute a comprehensive JSR report.
- Improve the report so that it includes a review of key agriculture sector player performance. Since sector performance in Zimbabwe is influenced by more than one ministry, the MAMID should actively work in conjunction with other ministries, such as the Ministry of Lands and Rural Resettlement and the Ministry of Environment, Water and Climate to ensure that the report takes into account the entire agriculture sector.
- Actively take part in the review process on the part of the donor community and private sector through the operationalization of the ZAIP management, as well as the establishment of the Thematic Working Groups and relevant structures. Mechanisms and systems should enable these actors to participate and support policy making, in turn, creating an enabling environment for the private sector to take part in ZAIP implementation.
- Strengthen the content analysis of the report by incorporating other processes at the subnational level.
- Strengthen the analytical capacity of the MAMID by forming a critical mass of qualified staff to address the issues and knowledge gaps in the sector.

2.6. Action Plan to Bridge the Gaps and Achieve Best Practices in Implementing the Joint Sector Review Process

JSRs are a key to supporting mutual accountability and effective implementation of the CAADP Results Framework, in addition to being a part of the intragovernmental review process. By institutionalizing it, it will enable stakeholders to collectively review the effectiveness of policies and institutions in the agriculture sector. As an M&E tool, it is able to assess the achievement of objectives. Table 2.2 summarizes the key actions recommended to bridge the gaps in the JSR process and the capacity of Zimbabwe to implement them.

TABLE 2.2: KEY ACTIONS RECOMMENDED TO BRIDGE THE GAPS IN THE JOINT SECTOR REVIEW PROCESS AND ZIMBABWE’S READINESS TO IMPLEMENT THEM

N°	Steps In Establishing and Operating a Joint Sector Review	Purpose/Objective/Activities	Country Status	Value Addition/ Required Actions for Improvement/ Responsibility
1	Establish a Joint Sector Review (JSR) Steering Committee (SC)	SC provides strategic direction for the establishment and operation of the JSR. It is usually made up of two co-chairs from the Ministry of Agriculture, Mechanisation and Irrigation Development and a leading donor agency, together with three to our other representatives from key stakeholder groups	Yet to be established	JSR Committee should be put in place and meetings should be regular

N°	Steps In Establishing and Operating a Joint Sector Review	Purpose/Objective/Activities	Country Status	Value Addition/ Required Actions for Improvement/ Responsibility
2	Establish a JSR Secretariat	Secretariat coordinates activities and operations of the JSR and its SC. It can include core staff from the Planning and M&E Unit of the Ministry of Agriculture, Mechanisation and Irrigation Development	Effectuated, although understaffed	Further capacity building required
3	Develop Terms of Reference (ToR) for the JSR	ToR to lay out JSR objectives; roles of state and nonstate stakeholders and those of the SC and Secretariat; operating principles, structure, and frequency of JSR meetings; follow up; implementation of actions; among others ToR may also be required for consultants hired to conduct JSR studies	Developed	
4	Mobilize resources	Mobilize human and financial resources to support JSR operations	Effectuated, although resources are limited	For future JSR, adequate funds required
5	SC/Secretariat invites a broad and inclusive group of state and nonstate actors/stakeholders to participate, with clear objectives, expected outcomes, and roles	A key aspect of the JSR is to allow for a broad group of state and nonstate stakeholders to influence overall policy making and priorities by assessing how well they have implemented their commitments per the CAADP Compact, NAIP, and relevant cooperation agreements (e.g., New Alliance for Food Security and Nutrition)	Effectuated	A broader selection of participants should be included, especially from the private sector
6	Assess existing agricultural policy dialogue, review processes, data quality, and analytical capacities	An assessment of existing agricultural policy dialogue and review processes; data quality; analytical capacities, tools, and networks; and existing knowledge systems to identify gaps. Recommend ways to fill gaps and enhance capacities, tools, and processes	Effectuated, although some data is not available	Use wide source for data
7	Commission JSR Studies*	Consultants may need to be hired and supervised by the SC to conduct JSR studies. Consultants can be from think tanks, academia, or the private sector and should work closely with staff from the Planning Unit and the JSR SC and Secretariat.	Effectuated, although Regional Strategic Analysis and Knowledge Support System not yet physically present due to limited funds	Adequate financial resources to be made available
8	Establish JSR Review Team*	Team made up of multistakeholders (state and nonstate) with technical expertise to review and comment on various JSR studies and reports and ensure output of reviews are implemented.	Effectuated, although inadequate funds limit the capacity of actors	Adequate funding should be made available



N°	Steps In Establishing and Operating a Joint Sector Review	Purpose/Objective/Activities	Country Status	Value Addition/ Required Actions for Improvement/ Responsibility
9	Prepare JSR Report*	JSR Report to include high-quality data and analysis, as well as transparency and inclusive stakeholder participation so that it is mutually effective.	Effectuated	
10	Conduct JSR Meeting*	Organize a one-to-three-day meeting in various formats (e.g., plenary, small groups, field visit) at the national and subnational levels to allow stakeholders to discuss/verify evidence and recommendations presented in JSR Report. The process should identify sector priorities and policies, and specific stakeholder action. These should be captured in a JSR Aide Memoire.	Effectuated, although meeting was limited to a day due to limited funds	
11	Follow up on JSR Meeting Actions	Closely monitor and ensure implementation of those JSR meeting recommendations and decisions embodied in the JSR Aide Memoire. Groups to meet more regularly (e.g., Agriculture Sector Working Group to assist in follow up and monitoring). Monitoring to form the basis of the following JSR cycle.	To be done	
12	Share JSR experience with other countries	As many countries are in the process of creating their JSRs, it is essential to share lessons learned, best practices, and experiences to further strengthen these reports. Forums, such as the CAADP Partnership Platform and Annual Conference of the Regional Strategic Analysis and Knowledge Support System provide opportunities to do this.	To be effectuated	

TABLE 2.3: SUMMARY OF KEY DECISIONS AND PROGRESS ON COMMITMENTS FROM OTHER JOINT SECTOR REVIEW PROCESSES AND THE RESPONSIBLE ACTORS

Key Decisions and Commitments	Responsibility	Deadline for Implementation	Progress Rating
Hold JSR Committee meetings	MAMID	Every month	
Establish a JSR Secretariat	MAMID	December 2016	
Donor community to actively take part in ZAIP process	MAMID	February 2017	
Private sector to actively take part in ZAIP process	MAMID	February 2017	
Follow up on JSR meeting actions	JSR Steering Committee	January 2017	
Share JSR experience with other countries	MAMID	June 2017	

Source: Author's construction

Key:

	Partly done, needs improvement
	Not yet effected; requires doing

2.7. Summary

This comprehensive JSR report constitutes the first in Zimbabwe, the process of which is coordinated by the MAMID, with the participation of stakeholders to enable a straightforward review of the ZAIP. While there has been some progress with the JSR, it was limited due to inadequate funding. The Secretariat, established by the MAMID, is currently understaffed and more needs to be done to obtain resources for future JSRs and to ensure that the Secretariat is adequately staffed and trained.

3. POLICY REVIEW

3.1. Introduction

Zimbabwe is a signatory to various national, regional and international agreements and frameworks that focus on agriculture. Agriculture sector and its subsector policies are informed by the ZIMASSET (2013-18), CAADP Compact, ZAIP (2013-18) and other national, regional, and international development frameworks.

Zimbabwe's agricultural landscape has experienced various structural transitions since the country's independence. The current agricultural policy framework (ZAPF 1995-2020) was developed in 1994 and requires improvement, given fast-changing socioeconomic conditions (ZEPARU, 2012). A new framework, CAPF (2015-35), is currently under review and awaiting approval by the Cabinet., although a number of key policy developments have taken place since 2000 at the national, sectoral and subsectoral levels.

This chapter provides a review of those policies currently being implemented in Zimbabwe's agriculture sector. A discussion will also be made of the policies for the sector's policy alignment, and execution.

3.2. Inventory of Existing and Emerging Policies

3.2.1. National

Zimbabwe's Agenda for Sustainable Socioeconomic Transformation

The ZIMASSET is a cluster-based, economic blue print of four pillars that includes the FNSP; Social Services and Poverty Eradication; Infrastructure and Utilities; and Value Addition and Beneficiation. Each cluster incorporates policies, strategies, and an M&E framework that conforms to the GoZ's results-based management system. Emphasis rests on value chain development, private sector investment, infrastructure development, joint ventures, and private-public sector partnerships, all of which represent the building blocks for private sector-led agriculture development strategy and the departure from state-led initiatives at a time when GoZ resources are overstretched.

The ZIMASSET has a ten-point plan and focuses on the following:

- Revitalize agriculture and the agroprocessing value chain;
- Advance beneficiation and/or value addition to agricultural and mining resources;
- Focus on infrastructure development, particularly in relation to the key subsectors of energy, water, transport, and information communications technology;
- Unlock the potential of small- to medium-size enterprises;
- Encourage private sector investment;
- Restore and building confidence and stability in the financial services sector;
- Foster joint ventures and public-private partnerships to boost the role and performance of state-owned companies;

- Modernize labor laws;
- Pursue anticorruption initiatives; and
- Implement special economic zones to strengthen foreign direct investment.

This economic development framework, however, has failed to attract significant international funding and has done little to contribute to desperately needed economic growth to improve the livelihoods of Zimbabwe's citizens.

Food and Nutrition Security Policy

The goal of the FNSP is to promote and ensure adequate food and nutrition security for all in Zimbabwe, particularly the most vulnerable. It is in line with cultural norms and values, and seeks to rebuild and maintain the dignity of families. The key pillars of the FNSP include commitments to Policy Analysis and Advice; Agriculture and Food Security; Social Assistance and Social Protection; Food Safety and Standards; Nutrition Security; and FNSP Information, as well as the Enhancement and Strengthening of National Capacity for the FNSP. Implementation of the framework is led by the Office of the President and Cabinet and the coordination mechanism ensures that all structures on food and nutrition include the ward level. The FNSP Cabinet Committee, chaired by the Vice-President, reports to the Cabinet and manages the Working Party of Permanent Secretaries, which is chaired by the Deputy Chief Secretary and includes 17 ministries. Below the Working Party is the Food and Nutrition Council, which coordinates the Zimbabwe Vulnerability Assessment Committee and the FNSP Advisory Group. These bodies are composed of government officials, NGOs, and international development organizations. Below is the National Food and Nutrition Security Committees with structures at the provincial (Provincial Food and Nutrition Security Committees, district (District Food and Nutrition Security Committees), and ward (Ward Food and Nutrition Security Committees) levels. The subnational structures interact with development committees in the provinces and districts to ensure implementation of the food and nutrition security matrix.

Implementation of this policy is supported by the National Nutrition Strategy (2014-18), with its main objective the formation of Commitment V of the FNSP. This FNSP commitment states that the GOZ is to ensure nutrition security for all through the evidence-based nutrition interventions that are integrated within a broad public health framework, including health services, water, and sanitation.

3.2.2. Sector Policies

Zimbabwe Comprehensive Agriculture Policy Framework, 2015-35

The CAPF succeeds the ZAPF (1995-2020) and will take into consideration the CAADP when establishing an agricultural framework in line with that of the ZIMASSET, as well as take into account the socio-economic crisis currently experienced by the agriculture sector. The policy, still awaiting ratification by the GoZ, was designed with stakeholder consultations that included the central government, development partners, Cooperating Partners, the private sector, academia, and civil society. Consultations took place at all levels, from national to ward. Issues addressed include crop and livestock production, marketing, and trade, with a focus on the following key supporting areas in agriculture to drive development and growth:

- Water management
- Environment
- Financing
- Input supply
- Trade and marketing services
- Research and development
- Agricultural extension
- Education and training
- Mechanization and irrigation development
- Legislative and regulatory framework.

Specific objectives of agriculture sector policy are to:

- Assure national and household food and nutrition security;
- Ensure that the existing agricultural resource base is maintained and improved.
- Generate income and employment to feasible optimum levels;
- Increase the contribution of agriculture to gross domestic product (GDP).
- Contribute to sustainable industrial development through the provision of home-grown agricultural raw materials; and
- Expand significantly the sector's contribution to the national balance of payments.

Zimbabwe Agriculture Investment Plan

The ZAIP was developed through multistakeholder participatory and consultative processes, involving various stakeholders including central government, development partners, Cooperating Partners, the private sector, academia, and civil society. The investment plan conforms to the principles of the national policy framework and its long-term ZIMASSET objectives. The ZAIP emphasizes the efforts of the GoZ to meet those objectives of the CAADP. The ZAIP was ratified on July 18, 2013, at a multistakeholder workshop held in Harare.

The strategic goal of the ZAIP is to sustainably increase Zimbabwe's agricultural production and productivity; the competitiveness of agriculture through building the capacity of farmers and agroprocessing industries; and improve the quantity and quality of public, private, and development partner investment; and improve policy alignment. The ZAIP aims to achieve the objectives of the CAADP; ZIMASSET, and CAPF. It is aligned to CAADP principles that include agriculture investment to promote economic growth and development, broad-based stakeholder participation, consultations, accountability, and coordination. The investment plan's business model is premised on the GoZ to allocate 10 percent of

the national budget toward agriculture to leverage private sector investment to sustain an agriculture growth rate of 6 percent per annum. A business meeting is planned for late 2016.

The ZAIP aims to mobilize, coordinate, and direct public and private sector financial resources into GoZ agriculture priorities. It has four key actions that are aligned to overall objectives:

- Increase production and productivity through improved management and sustainable use of land, water, forestry, and wildlife resources;
- Increase the participation of farmers in local and export markets by developing an efficient agricultural marketing system and creating an enabling environment for competition in agricultural production, local and foreign direct investment, and trade;
- Ensure food and nutrition security by facilitating a cohesive multisectoral agricultural response; and
- Improve gender-sensitive agricultural research, technology, and adoption.

The challenges of the CAADP in Zimbabwe include:

- Lack of provincial and district CAADP coordination structures, thus hampering the flow of information to and from the grassroots level;
- Lack of resources by the CAADP focal office to carry out coordination activities;
- Limited technical expertise in M&E by the focal office;
- Limited resources at district and provincial offices to carry out CAADP activities; and
- Limited knowledge of the CAADP by stakeholders.

3.2.3. Subsector Policies

There are various subsector policies that are either in the process of being developed or are under review. Some of these are fragmented and may require realignment to achieve the overall objectives of agriculture sector development. Moreover, some subsector policies (e.g., fish farming, quail birds) fall under the mandate of different ministries, with some disagreements emanating in terms of the framework guidance. Frameworks should be harmonized and conflicts avoided so that agricultural production objectives are met.

Draft National Livestock Development Policy

The overall goal of the draft National Livestock Development Policy—yet to be ratified by the GoZ—aims to achieve economic growth and social development through transformation of the livestock sector. Objectives are to:

- Enhance efficiencies along the livestock value chain;
- Secure livestock resources against natural and man-made disasters;
- Promote sustainable livestock production in balance with nature;
- Ensure the equitable access of livestock players along value chains.
- Protect consumers against the biological, moral, and ethical risks that arise from livestock development.

Draft Agriculture Mechanisation and Irrigation Development Policy

The overall objective of the Draft Agriculture Mechanisation and Irrigation Development Policy is to ensure the provision of appropriate agricultural mechanization and irrigation services and to improve agricultural land and water productivity. This policy is not yet ratified by the GoZ. Objectives are to:

- Increase agricultural production and productivity on farms and irrigation schemes;
- Provide guidelines and models for sustainable mechanization and irrigation development;
- Increase farmers' access to appropriate mechanization and irrigation technologies;
- Improve sustainability of land and water management;
- Provide a framework for research, technology development, and transfer.
- Provide a legal and institutional basis for guaranteed security and safety of irrigation infrastructure and mechanization equipment;
- Provide the basis for resource mobilization for mechanization and irrigation development and management;
- Ensure a well-coordinated mechanization and irrigation sector; and
- Improve market access of agriculture produce from farms and irrigation schemes.

National Contract Farming Strategic Framework

The goal of the National Contract Farming Strategic Framework is to increase the productivity, production, and marketing of selected commodities, as well as to contribute to the creation of jobs the furthering of economic development. The purpose of the framework is to facilitate consistent, regulated, enforceable, and mutually beneficial contract farming arrangements between contractors/buyers and farmers.

The framework seeks to guide the contract farming activities of relevant government ministries and departments, state marketing and industry boards, farmers, contractors/buyers, agribusiness firms, processors, commodity associations, farmers' unions, public and private extension services, input suppliers, financial institutions, and NGOs and donor agencies, among others. A success of the contract farming framework is exemplified by the production of tobacco, whereby there is evidence that the resources and participation of the private sector have created an enabling environment for the effective performance of smallholders.

Zimbabwe National Climate Change Response Strategy

The National Climate Change Response Strategy provides a framework for a comprehensive, strategic approach to climate change adaptation, mitigation, technology, financing, public education, and awareness. It will inform the GoZ on how to strengthen climate and disaster risk management policy. The goal of the strategy is to mainstream climate change adaptation and mitigation strategies in economic and social development nationally and sectorally through multistakeholder engagement.

Strategic objectives of the strategy are to mainstream climate change into the key sectors of the economy; promote resource use efficiency and less carbon intense pathways in all economic activities; develop a climate change resilient energy infrastructure that is not carbon intense; develop climate proofed and environmentally sustainable transport systems that are less carbon intense; promote sustainable development, management, and utilization of water resources under changing climatic conditions; promote sustainable land-use systems that enhance agricultural production; ensure food security and maintain ecosystem integrity; develop Nationally Appropriate Mitigation Actions toward low carbon development strategies; address climate change through evidence-based research, technology development, and transfer; promote and protect health under a changing climate; and develop an effective climate change communication information management and communication system to facilitate access by stakeholder groups. The strategy further intends to strengthen and mainstream climate change in education curricula; mainstream gender, children, youth, people with HIV and AIDS, and other vulnerable groups into climate change interventions; and develop and maintain an appropriate climate governance framework and the institutional mechanisms to coordinate climate change responses.

International and Regional Agreements

Zimbabwe benefits from agreements with international and regional partners by being able to access markets, gain financial and technical support to implement projects and programs; improve agriculture sector governance; gain effective interagency cooperation and regional collaboration; ensure sustainable management of resources; and improve investment. Zimbabwe, together with other countries in the region, is a member of COMESA, the East African Community, and the Southern African Development Community, which have agreed to establish a grand Tripartite Free Trade Area to enhance member market access. Zimbabwe continues to be actively involved in such agreements and processes.

3.3. Development of the Comprehensive Agriculture Policy Framework (2015-35) and the Zimbabwe Agricultural Investment Plan (2013-18)

Following a Cabinet directive in 2011 to review the ZAPF (1995-2020), the CAPF (2015-35) was created by the MAMID and awaits approval by Cabinet. The policy review takes into consideration those changes that have taken effect since 2000. It is worth noting that in the absence of policy approval, various aspects of the policy already have taken place in the sector. The CAPF is aligned to the ZIMASSET blue print.

Although the CAPF is yet to be approved by the Cabinet, its priority activities already are being addressed. The CAPF is critical in creating a self-sufficient and food-surplus economy so that Zimbabwe is once again the “bread basket of Africa” for food and nutrition security. The ZIMASSET projects that agriculture will grow from 8 percent in 2017 to 12.5 percent in 2018. The key Food and Nutrition Security cluster areas include crop production and marketing, livestock production and development, infrastructure development, environmental management, protection and conservation, nutrition, policy and legislation.

3.4. Policy Alignment to the Zimbabwe Agricultural Investment Plan

The CAPF, once adopted, will represent a shift from a project to a programmatic and sector-wide approach. It will work in parallel to the ZIMASSET framework, while recognizing the stakeholders involved in agriculture-related development. While its framework is aligned to strategic policy documents that include the Millennium Development Goals of the United Nations and the CAADP Compact, the CAPF will require timely revisions to keep abreast of socioeconomic developments.

The CAPF will align with the broader goals laid out in the ZIMASSET, while it attempts to prioritize activities for the future vision of agriculture. In addition, the ongoing review of individual policies within the sector will promote the alignment of agriculture policy with the national investment plan. The CAPF was developed based on the CAADP framework in comparison with previous agriculture policies, as evidenced by improved participation, ownership, use of evidence, and policy alignment.

It is essential to ensure that subsector policies are aligned to those of the agriculture sector. For example, in terms of Zimbabwe's livestock production, livestock is now recognized as significant to agriculture development and, as such, a separate post for Deputy Minister has been created in the MAMID to oversee livestock, with emphasis placed on intensification and diversification (Sukume, 2016), as well as to ensure that the development of a livestock value chain policy involves relevant stakeholders. Nevertheless, various regulatory constraints pose a threat to the achievement of policy objectives, such as those relating to local production and importation; a comprehensive and operational identification and traceability system for cattle; and value added tax, among others. The new policy framework is yet to be adopted by the GoZ, and related strategies are not sufficiently developed to facilitate policy implementation.

Land access and use play critical roles in agriculture and the achievement of ZAIP goals. Of the country's 39.6 million hectares, currently there are several land tenure regimes in operation since inception of the Fast Track Land Resettlement Programme. These include the new A1 land permit covering new A1, old resettlement (24 percent), customary tenure (41 percent), freehold, and leaseholds incorporating large and small commercial farms; new A2 land lease permits; conservancies (16 percent); private rights and public land incorporating urban (0.3 percent); unalienated state-owned land incorporating forest and national parks (17 percent); and unalienated land (2 percent) (Nyoni 2016). These tenure regimes imply various rights in terms of use, transfer, exclusion and enforcement.

The A1 permit system and the customary tenure regimes limit the marketability of land, since they only allow the transfer of land as a family inheritance. The A2 farmers possess the land after given offer letters which currently limits their ability to secure loan since they cannot use the land as collateral. The GoZ had promised more than 15 years ago to revise the A2 and A1 permits, with offers of 99-year leases. This has neither yet taken place nor is there any indication when it will. There is also doubt cast over the use of a 99-year lease as collateral, since banks have secondary requirements for access to loans that are not covered by the A2 permit. Furthermore, there are uncertainties that surround the completion of the Fast Track Land Resettlement Programme, given that land market development is challenged by the continued and sporadic occupation of land (Nyoni, 2016). Given the inefficiencies and the lack of access to training and financial resources, the tenure system for new farmers is weak and has resulted in severe underutilization of land.

3.5. Policy Alignment Challenges

The main challenges in the overarching agricultural policy framework include:

- Use of outdated policies: Despite the CAPF having been developed to replace the ZAPF (1995-2020), the former is yet to be approved by Cabinet since 2012. The ZAPF is now mostly irrelevant to the agriculture sector. It is essential that agricultural policies frequently be reviewed and updated to ensure that they remain relevant and address current issues.
- Slow progress in the approval of agricultural policies: The CAPF (2012-32) still awaits Cabinet approval since it was finalized three years ago. The agriculture sector remains politically sensitive and policy decisions often are protracted, affecting much needed progress.
- Lack of financial resources: Implementation of agricultural policy programs in Zimbabwe is constrained by a limited budget. Despite efforts to develop and implement agricultural policy programs, without the financial resources, some will never be implemented.
- Difficulties in having comprehensive stakeholder engagements: It is essential to improve stakeholder engagement in policy planning, implementation, and evaluation. The agricultural policy framework considerably top down, with more bottom-up processes required to inform policy. The lack of financial resources has also resulted in limited stakeholder engagement.
- Adhoc policy formulation and implementation in lieu of evidence-based policy processes: There is a need to increase the use of evidence-based knowledge systems in policy making which are currently limited in Zimbabwe.

3.6. Agricultural Policy, Planning, Execution, and Monitoring

Agriculture stakeholder consultations and collaboration are a critical to enhancing policy planning and execution. It is essential that the planning and execution phases are based on evidence, knowledge, and the engagement of all agriculture sector stakeholders. The challenge, however, is the insufficient time allotted to announcements and directives that seek to fully engage agriculture stakeholders. The consultative process of agriculture policy making takes place at meetings and platforms that include committees coordinated by the Ministry Agriculture, Mechanisation and Irrigation Development.

The operationalization of policy is built on developing specific, realistic, and targeted agriculture subsectoral policy strategies that are underpinned by CAPF objectives. These will guide the short-, medium-, and long-term targets.

It is important that a comprehensive M&E system exists to determine whether the program/intervention will achieve objectives and goals. The CAADP Compact was signed in 2013 and outlines key agreements on policy, strategy, priority areas, investment plans, and levels for comprehensive development of the agriculture sector. The document provides the general framework for implementing the agenda under CAADP principles, including broad stakeholder consultations and participation, accountability, and coordination. The major actors in policy execution include government ministries, departments, parastatals, agroprocessing companies, seed houses, machinery and equipment companies, researchers, academia, CSOs, and agencies of the United Nations System, among others.

The major challenges that hamper agricultural policy planning and execution are:

- Inadequate financial and technical capacity and resources to adequately engage relevant agriculture sector actors during policy making;
- Absence of an agriculture sector knowledge management system to provide evidence-based support in agricultural policy planning and execution.
- Weak integrated M&E system for government ministries and the agriculture sector;
- Inadequate M&E and agricultural information management systems; and
- Unclear institutional arrangements to support policy implementation, leading to poor policy execution.

It is essential to harmonize the planning, monitoring, evaluation, and execution of sector projects with programs. Currently, with the aid of COMESA, progress is ongoing in developing ZAIP M&E indicators and system, as well as the ReSAKSS node. The Zimbabwe Strategic Analysis and Knowledge Support System platform and ZAIP implementation and coordination framework will be launched prior to the end of 2016. The major functions of the ZAIP implementation and coordination mechanism are for its execution, mobilization of investment finance, capacity development, policy engagement, performance management, and impact strengthening.

3.7. Monitoring and Evaluation Challenges

The development of an agriculture sector M&E system that is effective and participatory will provide input into the national monitoring structure, and will enable the measurement of activity progress and achievement. Overall M&E will strengthen existing systems to monitor performance and ZAIP and CAPF outcomes. Indicators should be embedded in programs and projects so that ZAIP inputs, outputs, and outcomes are tracked. The ZAIP M&E system should provide focus and direction to line ministries, the private sector, farmers' unions, NGOs, and can be a means to feed data into a sector-wide system that follows all agricultural activities. The system should be able to address constraints that arise at the implementation stage of various projects and programs. It is also critical that transparency and accountability of investment channeled through the framework be ensured and that it adheres to the CAADP Compact, whereby stakeholders have committed to agricultural investment.






While the agriculture sector is challenged by the lack of an M&E system to adequately track progress and performance, there are various ways in which to obtain data from stakeholders, including the Zimbabwe National Statistics Agency. The challenges in the absence of an efficient system are:

- M&E frameworks are fragmented due to the various independent databases that have been created in response to various programs;
- There are no standard M&E indicators for the sector and they differ between ministries;
- At the provincial and district levels, there are no robust M&E structures to support the national level structure; and
- There is an absence of technical expertise.

3.8. Summary of Policy Dimensions in Zimbabwe Agriculture Sector



The table below summarizes the ratings of policy dimensions in Zimbabwe. There has been a commitment in policy making with consultations to be carried out with major stakeholders. In need of improvement is a M&E system for policy execution.

TABLE 3.1: ZIMBABWE: SUMMARY OF POLICY DIMENSION RATINGS

Quality of policy formulation	
Consistency of policy mix	
Alignment of Zimbabwe Agriculture Investment Plan to agriculture policies	
Agricultural policy, planning, execution, and monitoring	
Monitoring and evaluation	

Source: Author’s construction

Key:

-  **Green** High commitment has been made
-  **Amber** Moderate commitment has been made and attention is required

4. INSTITUTIONAL REVIEW

4.1. Introduction

Agricultural institutions are essential to achieve of agricultural and rural development goals. Institutions that are weak will increase the transaction costs associated with agricultural policy making and implementation. Following the review of policies that guide the agriculture sector, this section reviews the institutional landscape of Zimbabwe's agriculture sector in light of the CAADP. It will focus on the ZAIP, with a review of GoZ institutional collaboration and development partner coordination; participation of nonstate actors in agricultural policy and program development and implementation; institutional alignment with the ZAIP and the challenges; and institutional implementation capacity.

4.2. Institutional Landscape of the Zimbabwe Agriculture Investment Plan

The various stakeholder groups engaged in policy making and implementation of the ZAIP include economic related ministries, farmers' groups, agroprocessors, financial institutions, agro-input providers, academia, researchers, traders, and development partners (Table 4.1). Basically, the broad-based institutions involved in are mainly state institutions and nonstate actors, led by the MAMID. The fundamental principle governing the collaboration of these institutions for CAADP support is subsidiarity (NEPAD 2009). In order to implement the plan successfully, stakeholders should view themselves as a team with diverse and effective strengths.

The overall implementation of the ZAIP falls under the responsibility of the MAMID, which also convenes sector reviews and technical meetings. The MAMID aims to create an enabling environment for sustainable agriculture development, as well as for the private sector, in its pursuit of economic growth (COMESA 2015).

As previously mentioned, the ZAIP was developed with multistakeholder participation and consultative processes, taking into account the views of stakeholders, and in line with CAADP principles of inclusivity. Implementation of the ZAIP should involve, therefore, the same stakeholders. Despite MAMID's efforts to attract representation from other ministries and units, participation to CAADP-related meetings has been poor, with attendance by at least one organization within each category being noted, at the exception of financial institutions.

TABLE 4.1: ZIMBABWE: KEY INSTITUTIONS INVOLVED IN THE FORMULATION AND IMPLEMENTATION OF THE AGRICULTURE INVESTMENT PLAN

Category of Institution	Institution
Government	<ol style="list-style-type: none"> 1. Ministry of Agriculture, Mechanisation and Irrigation Development 2. Ministry of Finance and Economic Development 3. Ministry of Lands and Rural Resettlement 4. Ministry of Industry and Commerce 5. Ministry of Environment, Water and Climate 6. Ministry of Youth, Indigenisation and Economic Empowerment 7. Ministry of Women, Gender and Community Development 8. Food and Nutrition Council
Farmer/community-based organizations	<ol style="list-style-type: none"> 1. Zimbabwe Farmers' Union 2. Zimbabwe National Farmers' Union 3. Zimbabwe Commercial Farmers' Union
Financial institutions	<ol style="list-style-type: none"> 1. Agribank
Private sector	<ol style="list-style-type: none"> 1. Confederation of Zimbabwe Industries 2. Zimbabwe Seed Traders Association 3. Zimbabwe National Chamber of Commerce 4. Bankers Association of Zimbabwe 5. Insurance and Pensions Commission
Nongovernmental organizations	<ol style="list-style-type: none"> 1. Caritas Zimbabwe 2. Women in Agriculture
Cooperating Partners	<ol style="list-style-type: none"> 1. Food and Agriculture Organization of the United Nations 2. World Bank 3. Common Market for Eastern and Southern Africa 4. European Union

Source: Ministry of Agriculture, Mechanisation and Irrigation Development.

4.2.1 Stakeholder Roles

The development of the ZAIP was possible through a multistakeholder participatory and consultative process that reflects the views of stakeholders. Its implementation should involve the same stakeholders, the roles of which are discussed in Table 4.2.

TABLE 4.2: ZIMBABWE: ROLES OF KEY AGRICULTURE ACTORS INVOLVED IN THE AGRICULTURE POLICY PROCESS

Institutions		Roles
Government Institutions		
1	Ministry of Agriculture, Mechanisation and Irrigation	Responsible for formulation, review, monitoring, and evaluating agricultural policy in consultation with key agriculture actors
2	Ministry of Finance and Economic Development	Formulates and coordinates macroeconomic policies, while effectively mobilizing and allocating funds and managing financial public resources
3	Ministry of Industry and Commerce	Coordinates agricultural industry through industrial and trade policies, in collaboration with the Ministry of Agriculture, Mechanisation and Irrigation Development.
4	Food and Nutrition Security Taskforce	Falls under the Office of the President and focuses on and coordinates issues in relation to food and nutrition security. It acts as an advisory board and is a contributing decision maker of major agricultural policies.
5	Parliament	Its role is to review and legislate the policies and actions of the Executive Office. It holds the Executive to account for his/her actions and acts a forum for democratic participation by members of civil society.
6	Agribank	Provides agriculture finance, retail banking, treasury and corporate banking services
Nongovernmental Organizations		
7	Caritas Zimbabwe	A Catholic organization that provides assistance to vulnerable and nonvulnerable groups in the agriculture sector
Private Sector Institutions		
8	Zimbabwe Farmers' Union	An active farmers' organization that represents the interests of smallholder farmers
9	Seed Traders Association	An association for seed companies registered in Zimbabwe that produce, process, and distribute seed. It promotes the interests of seed enterprises.
10	Confederation of Zimbabwe Industries	

Institutions		Roles
Research and Academic Institutions		
11	Agriculture Research Council	A parastatal that plays a principal role in research and is a node of the Food, Agriculture and Natural Resources Policy Analysis Network in Zimbabwe
12	University of Zimbabwe, Faculty of Agriculture and Extension	Provides high-quality training, research, and outreach activities to the agriculture and natural resource sector
Donors and Development Partner Institutions		
13	Food and Agriculture Organization of the United Nations	Plays a coordinating role among other actors engaged in agriculture relief projects in Zimbabwe to ensure a harmonized approach and effective use of resources
14	The World Bank	Implements programs that focus on fostering economic development so as to significantly reduce hunger and poverty
15	Multi-Donor Trust Fund	Provides support in the implementation of programs in Zimbabwe, especially in relation to the CAADP process in Zimbabwe. This group includes the donors and development partners operating in Zimbabwe

Source: ReSAKSS (2016).

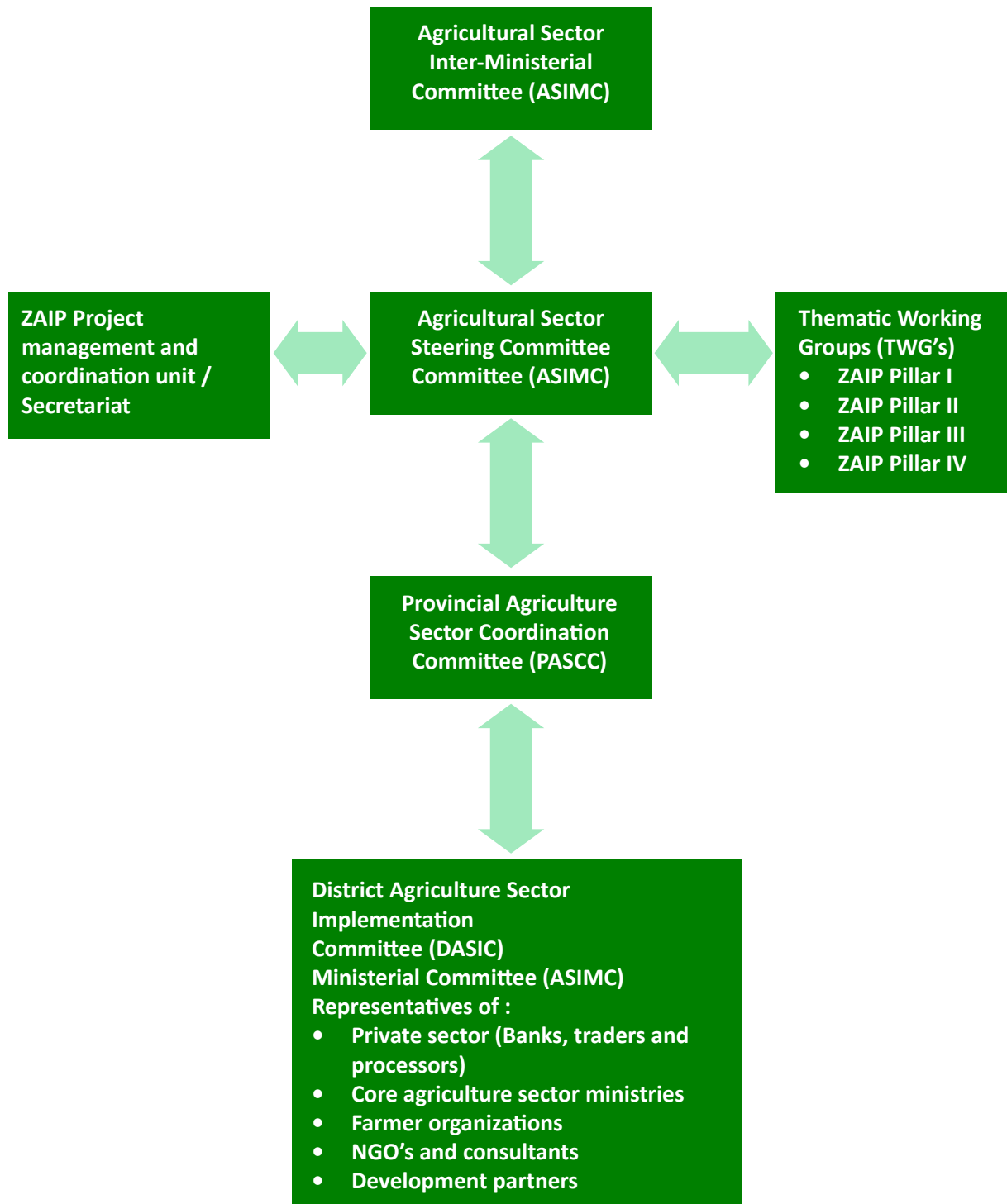
4.3. Coordination

Within the CAADP context, the role of government has been to drive in-country priority setting by convening and ensuring public and sector in the process. The overall aim is to create an enabling environment for the private sector in the drive for ZAIP implementation. To achieve this, close collaboration and coordination by relevant ministries and institutions is essential.

The success of the ZAIP relies on the relationships between the various stakeholders in the agriculture sector. Synergies and linkages within government and with the private sector that constitutes agribusiness and farmers, as well as with development partners are critical to the process. The MAMID applies the ZIMASSET Food and Nutrition Security Cluster to engage stakeholders on agriculture sector issues, and it reports the progress of cluster activities. The Food and Nutrition Security pillar guides the agriculture development program implementation. The proposed ZAIP coordination structure is depicted in Figure 4.1.

The proposed ZAIP implementation structure does omit ward level where development takes place and where farmers are based, although farmers' organizations are represented in the district structure.

FIGURE 4.1: ZIMBABWE: PROPOSED COORDINATION STRUCTURE OF AGRICULTURE INVESTMENT PLAN



Source: Zimbabwe Agriculture Investment Plan.

4.3.1. Coordination within Government Institutions

Coordination of the agriculture sector within GoZ institutions is the responsibility of the MAMID as previously mentioned. At the Cabinet level, the Cabinet Committee on Food and Nutrition Security is headed by the Vice-President who spearheads coordination activities and reports to the Cabinet. Coordination within government has not been a challenge in the presence of relevant institutional structures, with government stakeholders meeting almost every month. There is deep concern, however, that while senior officials are expected to attend, junior officers are sent instead—a common occurrence across all government agencies.

At the provincial level, agricultural and other government activities are carried out by the Provincial Administrator's Office, and ministries are represented. While meetings are supposed to be held on a weekly basis, it was not ascertained whether this applies to all provinces.

In terms of the CAADP, the ZAIP proposes joint programming through an independent ZAIP Secretariat with a clear reporting system, including oversight and governance mechanisms, to be headed by the MAMID. Following the signing of the Zimbabwe CAADP Compact, stakeholders are expected to realign their programs and funding with ZAIP priorities, according to CAADP principles.

The ZAIP proposes to establish the Agriculture Sector Inter-Ministerial Committee (ASIMC) for CAADP decision-making and the review of progress, as shown in Figure 4.1. It will be responsible¹ for:

- Sector policy deliberations and direction, and the coordination and harmonization of program implementation to ensure alignment to national policies and strategic programs, such as the ZIMASSET and the Ten Point Plan;
- Ensuring that ZAIP investment programs are aligned with sector policies;
- Mapping out of solutions to structural, institutional, and other challenges that should be addressed to minimize the implementation derailment;
- Reviewing mechanisms that foster enhanced stakeholder participation in the implementation process;
- Providing a forum for a sector-wide approach to planning and budgeting for the agriculture sector; and
- Mobilizing funds and other resources to enable the delivery of its programs.

Examination of the proposed structure does not indicate how these responsibilities link to systems already in place, especially at the Cabinet level where responsibility lies over decision-making. It must also be noted that at this level, there is no representation from nonstate actors to contribute their views.

At a technical level, there will be an Agriculture Sector Steering Committee (ASSC) composed of the Permanent Secretaries of key ministries and senior representatives from selected organizations, including TWGs chairpersons, Confederation of Zimbabwe Industries, farmers' organizations, NGOs,

¹Adopted from the ZAIP.

development partners, Bankers Association of Zimbabwe, Zimbabwe Council for Higher Education, and Zimbabwe National Chamber of Commerce. It is recommended that the MAMID Permanent Secretary chair the ASSC.

The ASSC will report to the ASMIC and will be responsible for interpreting Government policy, presenting ZAIP implementation progress reports, and providing input to guide the interministerial committee. In addition, the ASSC will facilitate the prioritization and fast tracking of high-impact intervention areas, work with the TWGs to spearhead policy reform, and provide linkages and collaboration among sector stakeholders as necessary. It will create an forum for sector-wide consultation from grassroots to the national level and will promote increased participation of the private sector. The ASSC will also be responsible for organizing the quarterly meetings of the ASIMC to review ZAIP progress reports and recommendations to enhance decision-making and implementation.

The ASSC shall focus on:

- Interpreting the policy formulated by the Cabinet and ASIMC;
- Providing professional advice to ASIMC;
- Coordinating ZAIP implementation;
- Coordinating the M&E function;
- Formulating draft policies for consideration by ASIMC following input from the TWG and Provincial Agriculture Sector Coordination Committee (PASCC).
- Providing guidance to the PASCC.

In order to ensure follow up of the above, as well as sector representation, it is recommended that ASSC establish a Secretariat in the MAMID that consists of staff seconded from core agriculture sector ministries and selected stakeholders. Coordination at the technical level will embrace CAADP principles of inclusion and represent nonstate actors. It is unclear, however, how the Secretariat will be staffed, especially with regard to some officers being seconded from other ministries.

An essential institution in this context is Zimbabwe's Parliament, which performs executive oversight of government policies, programs, and expenditure plans through a number of activities, including providing inputs into, approving, and monitoring the national budget. Parliament, through its Portfolio and Thematic Committees, monitors government policies and programs to ensure efficient use of national resources (Zvoma 2010). In addition, individual members are able to raise questions or move motions that relate to government policies and programs.

The Parliament's Portfolio and Thematic Committees are designated to examine the expenditure, administration, and policies of government departments and other matters that may fall within its jurisdiction. Currently, the National Assembly has 11 full operational portfolio committees,² the main one of which is the Portfolio Committee on Lands, Agriculture, Mechanisation and Irrigation, is responsible for Zimbabwe's CAADP process. Other committees play a part in the process and these are:

²See <http://www.parlzim.gov.zw/about-parliament/committee-system/types-of-committees>.

1. Public Accounts
2. Finance and Economic Planning
3. Industry and Commerce
4. Environment, Water, Tourism and Hospitality Industry
5. Public Service, Labor and Social Welfare
6. Youth, Indigenization and Economic Empowerment
7. Local Government, Rural and Urban Development.

Given the principles that guide the CAADP process, it is necessary for the Parliamentary Portfolio Committees to be informed during the early stages of ZAIP development, although it is unclear which. To date, the main agriculture-related committee has not been briefed about the CAADP program.

4.3.2. Coordination among Development Partners

Coordination among development partners is well defined and has been functioning to expectation. The Zimbabwe United Nations Development Assistance Framework guides the activities of United Nations organizations and how they engage with the GoZ. FAO, as the lead agency in agriculture, plays an active role and assists the MAMID in its coordination of the sector. Other development partners, such as the World Bank, EU, USAID and UK Aid Direct collaborate through the National Agriculture Sector Steering Committee and a number of thematic working groups (e.g. livestock and irrigation). With regard to food and nutrition issues, the coordination function is the responsibility of the Food and Nutrition Council under the Office of the President and Cabinet with the the MAMID and the Ministry of Health. Development partners are present at the Advisory Group of the Food and Nutrition Council and its subcommittees. EU coordination also takes place through regular meetings and during collaborative monitoring (EU 2014).

4.3.3. Coordination among Subnational Actors

The ZAIP proposes the establishment of the PASCC and the District Agriculture Sector Implementation Committee at provincial and district levels, respectively.

The PASCCs will be involved in:

- Information dissemination to the districts
- Collating data from the districts for submission to ASSC and TWG
- Monitoring program implementation and performance.

Composition of the PASCC will include senior provincial representatives of core agriculture sector ministries, the private sector, farmers' organizations, NGOs, and District Chairpersons. Members of PASCCs will elect the Chairperson from the private sector, an NGO, or government to preside over quarterly meetings.

The District Agriculture Sector Implementation Committee will oversee coordination of ZAIP implementation with the following functions:

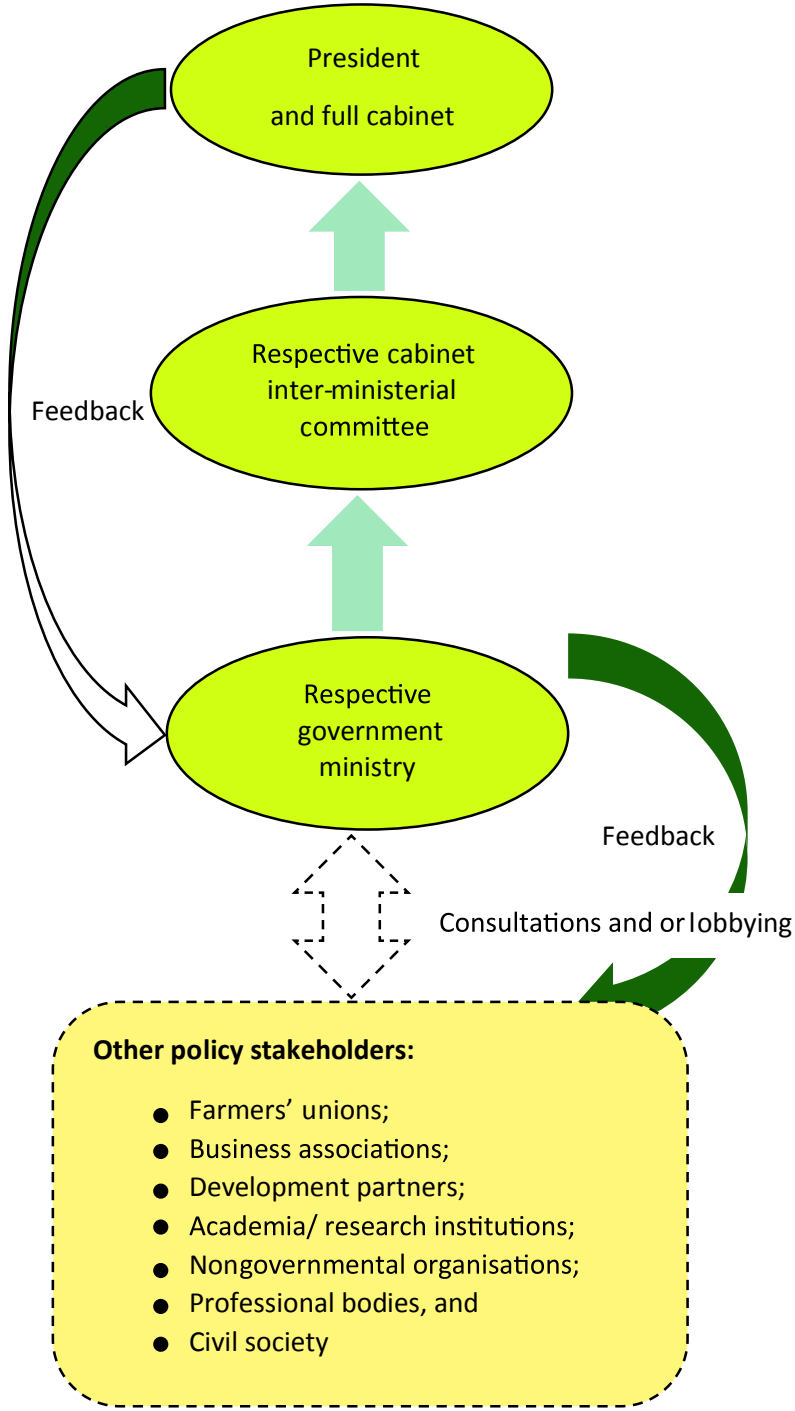
- Work with key stakeholders to develop joint work plans;
- Coordinate implementation at the district level;
- Contribute to implementation M&E;
- Identify the challenges and strengths of implementation and make recommendations for improvement;
- Submit periodic implementation progress reports to the PASCC; and
- Promote effective communication channels between key stakeholders

While there are some coordination mechanisms in place, as well as a forum at the provincial and district levels, their effectiveness is questioned, based on the lack of resources to mobilize the plan. Officers at those levels have had to rely on the benevolence of nonstate transport and other logistical actors. There is need to establish a well-staffed and dedicated coordination unit that will facilitate the planning, implementation, and M&E of ZAIP activities within the GoZ and with nonstate actors.

4.4. Participation by Nonstate Actors in Policy and Program Development

Public policy development in Zimbabwe follows a general pattern. Once the need for a policy is agreed on, the relevant ministry initiates the consultative process with a draft policy that usually identifies sector challenges. The draft is then submitted to the Cabinet Inter-Ministerial Committee for discussion and review, followed by submission to the full Cabinet for approval. Upon approval of the draft, the policy is launched by the Cabinet, as the highest policy authority. Figure 4.1 provides an illustration of the process.

FIGURE 4.2: ZIMBABWE: POLICY FORMULATION PROCESS



Source: Adapted from Zeparu (2012).

With regard to policies and programs that relate to agriculture, the Food and Nutrition Security Cabinet Committee reviews the drafts prior to recommending approval by the full Cabinet. In instances of legislation, the Cabinet Committee on Legislation proposes approval of the draft legislation to Cabinet. The former committee is chaired by the Minister of Justice, Legal, and Parliamentary Affairs.

ZAIP implementation involves various stakeholders, with programming taking place through an independent ZAIP Secretariat with a clear reporting system and an oversight and governance structure, headed and facilitated by the MAMID. Once the ZAIP Compact is signed, stakeholders are required to realign their programs and funding in line with ZAIP priorities. TWGs are then established to analyze, prioritize, and address constraints and opportunities in the agriculture sector. To ensure continuous involvement, private sector representatives are encouraged to chair the TWGs convened by the directors of sector ministries.

The speed in which implementation has taken place has depended primarily on major over minor objectives. This has delayed the achievement of CAADP targets.

4.6. ZAIP Alignment with Institutional Landscape and the Gaps

While the number of institutions involved in the successful implementation of the ZAIP is considered sufficient, their active participation is essential, particularly in the presence of those that have a decision-making role. While coordination at the intra-institutional level may be strong, it requires strengthening at the institutional level in order to achieve ZAIP objectives.

The proposed new structures at the national and subnational levels should be compatible with existing structures. It is also essential that they are well promoted so as to reduce stakeholder resistance. An adequately staffed coordination unit that is committed will enable the efficient planning, implementation, and M&E of ZAIP activities within the government and between nonstate actors.

4.7. Institutional Implementation Capacity







There is evidence that there is a shortfall of capacity within the MAMID to effectively carry out ZAIP implementation within the CAADP context, given that the policy framework continues in draft form since 2013. During stakeholder consultations, the MAMID has relied on development partners to fund the various workshops and some technical support.

A capacity needs assessment of the ministry, carried out by ReSAKSS, recommends capacity building. Knowledge management and human resources need strengthening and financial resources should be improved.

4.8. Summary

The institutional framework of the ZAIP requires strengthening to ensure improved communication between and the participation of all stakeholders to achieve CAADP requirements. Key decision-making institutions should be kept abreast of CAADP implementation progress, as should the Parliamentary Portfolio Committees that are key to the agriculture sector. Table 4.2 provides a rating of Zimbabwe's agriculture sector coordination.

TABLE 4.3: ZIMBABWE: RATING OF AGRICULTURE SECTOR COORDINATION

Performance Indicators	Traffic Light Rating
Coordination within government entities	
Coordination among development partners	
Coordination among subnational stakeholders	
Participation by nonstate stakeholders involved in policy and program formulation	
Alignment of the Zimbabwe Agriculture Investment Plan with the institutional landscape	
Implementation capacity of institutions	

Source: Author, based on above assessment.

Note: Red = Poor/Does not exist; Amber = Progress made; Green = Good/Exists.

5. REVIEW OF KEY FINANCIAL AND NONFINANCIAL COMMITMENTS

5.1. Introduction

Despite the pledge of support for ZAIP implementation from the GoZ, its development partners, the private sector, CSOs, and farmers' organizations through the signing of the Zimbabwe CAADP Compact on November 22, 2013—and despite prior evidence of this—the decade-long economic depression has posed a significant challenge. This section reviews the financial and nonfinancial commitments of parties in their effort to boost growth in the agriculture sector. With commitments that include budgetary allocation; financial support, capacity building; investment and equipment; and organizational responsibilities, the principle of institutional partnerships and alliances is a key to ensuring that the agriculture sector becomes the pillar of the economy. The honoring by the GoZ of its financial obligations and the creation of an enabling environment will be exemplary to the partners of the CAADP agenda. To achieve ZAIP objectives, it is essential that there are strong alliances between partners and farmers to not only contribute to an increase in agriculture production and productivity, but also to compete in high-value domestic and export markets.

5.2. Key Government Financial and Nonfinancial Commitments

5.2.1. Government Budget and Other Financial Commitments

Although the CAADP High-Level Business Meeting is yet to be held to launch the ZAIP implementation phase, the GoZ is moving on with the plan through the food, nutrition, and value addition clusters of the ZIMASSET. In addition to the 10 percent budget allocation to agriculture based on the Maputo Declaration of 2003 and as per the Zimbabwe CAADP Compact, the GoZ commits to creating an enabling economic environment and to working with agriculture sector stakeholders by aligning its policies and reforming agricultural institutions. This is in line with the CAADP framework to transform the agriculture sector and enhance economic and social development, as well as to develop the private sector, support an active state, promote trade openness, and ensure macroeconomic stability to improve the competitiveness of the sector. Furthermore, the GoZ highlights the CAADP as key to implementing the ZIMASSET 2013-18.

Since the start of the multicurrency system, the GoZ's support to agriculture has been significant, above the 10 percent of national budget minimum threshold. In 2009 and 2010, allocations to the agriculture sector were 25 percent and 20 percent of the national budget, respectively, despite a period of tight national budgets. This led to considerable growth of the agriculture sector, at 33 percent and 9.6 percent annual agriculture GDP growth in 2010 and 2011, respectively, in excess of the 6 percent minimum annual growth threshold (ZAIP 2013-17), and giving weight to the 10 percent minimum budget allocation to agriculture. As the economy subsequently grew in the ensuing years, however, no proportionate absolute increase was allocated to the sector. As a result, the country has fallen short of its CAADP budgetary allocation, dropping to the current level of below 5 percent. Table 5.1 highlights the trend in government expenditure to the agriculture sector since 2009.

TABLE 5.1: ZIMBABWE: GOVERNMENT SUPPORT TO AGRICULTURE, 2009-2015

Year	National Budget (US\$ million)	Allocation to Agriculture (US\$ million)	Percentage Share for Agriculture
2009	1,391	343	25
2010	2,250	448	20
2011	2,750	122	4
2012	4,000	337	8
2013	3,860	147	4
2014	4,742	391	8
2015	4,340	174	4
2016	4,434	145	3

Source: 2016 stocktaking update of Zimbabwe's Comprehensive Africa Agriculture Development Programme.

Since 2013, the amount allocated to agriculture is US\$858, 966,000, amounting to 19 percent of the total ZAIP budget of US\$4.6 billion—an average of approximately 5 percent a year and a shortfall of 5 percent gap to meet the CAADP threshold. Of the total amount allocated since 2013, only 49 percent has been allocated to capital expenditure, reflecting stiff competition between value creation in the sector and recurrent expenditure. If the current downturn in the economy persists, the declining allocation to the sector will stifle meaningful developmental investment by the GoZ. Agriculture offers a significant opportunity for government to drive economic growth, and thus it is essential for the GoZ to address constraints in the sector and adheres to funding obligations with the aim of leveraging sustainable agriculture and economic growth.

TABLE 5.2: ZIMBABWE: GOVERNMENT FINANCIAL COMMITMENTS AND EXPENDITURES

Thematic Investment Area or Subarea	Cumulative Commitment (2013-15)	Cumulative Expenditure (2013-15)	Expenditure (in percent)
Agricultural research services	40,990,000	27,871,648	68
Agricultural technical and extension services	103,496,000	76,954,545	74
Veterinary services	62,161,000	41,588,143	67
Tsetse control services	13,022,000	7,738,702	59
Agricultural engineering and mechanization	14,443,000	9,349,401	65
Irrigation development	41,300,000	16,765,486	41
Livestock production and development	17,695,000	13,069,043	74

Source: Ministry of Finance and Economic Development; and Budget Statements (2013, 2015, and 2016).

Table 5.2 shows that the item, agricultural technical and extension services, consumes the bulk of the budget allocation. It is therefore prudent to ensure that extension products and outputs are aligned with the ZAIP priorities so as to unleash growth and development in the agriculture sector. The bulk of the ZAIP budget, currently amounting to 58.13 percent, has been allocated to the marketing of systems development to enhance farmers' participation (intermediate result Area 2 of ZAIP). With tailor made technical and extension services milestones under this result area will be achievable.

Apart from the key agriculture subsectors, the GoZ has targeted specific support programs for various farmer groups, especially vulnerable smallholders. Table 5.3 highlights the support programs that the GoZ has created from 2010 to 2016, most of which are input schemes. Nevertheless, it is essential that programs are designed with the aim of sustainability and market orientation, in order to incentivize productivity and self-resilience by beneficiaries.

TABLE 5.3: ZIMBABWE: FUNDING TO SPECIFIC PROGRAMMES BY GOVERNMENT

Year	Program	Amount Allocated (US\$ millions)
2010	Presidential Well-Wishers Agricultural Inputs Scheme	33
2010	Presidential Input Scheme	32.4
2011	Government Agricultural Input Facility (targeting vulnerable smallholders, small-scale farmers)	45.4
2011	Input scheme for maize and sorghum seed and fertilizer	30
2011	Government and Agribank livestock development program	5
2012	Presidential Well Scheme	27
2012	Government input support scheme	10.3
2012	Government free inputs for the vulnerable	5
2012	Government supplementary feeds and vaccines	3
2013	Summer cropping program	145.33
2014	Government financial support	252
2015	Government cotton inputs support	25.3
TOTAL		613.73

Source: Ministry of Agriculture, Mechanisation and Irrigation Development

5.2.2. Capacity Development Commitments by Public Sector

The Zimbabwe CAADP Compact and draft CAPF note that the GoZ is committed to institutional and capacity development. Some of the key priorities of the CAPF are:

- capacity development of farmer groups to enable them to meet the demands of domestic and international markets;
- policy and institutional reforms to create an enabling environment for farmers and private sector actors; and
- increased investment in key areas such as agriculture infrastructure, extension, research, and technology development.

Given that land is key to agriculture, the GoZ has commissioned studies to assist the development of land policy. The aim is to ensure land regains its status as collateral security and aids producers to access the finance they need.

5.3. Commitments by Nonstate Actors

According to the Zimbabwe CAADP Compact, while nonstate actors, such as the private sector, farmers, and CSOs, have made no financial commitments, they are nevertheless committed to ZAIP objectives. Farmers and the private sector will attempt to partner with the public sector to establish enterprises and initiatives of measurable impact in reducing Zimbabwe’s poverty and increasing its economic growth.

Despite the lack of financial pledges, it is the private sector that has steered agricultural production by way of creating linkages with farmers. The role of the private sector is evidenced from the figures relating to contract farming, especially in relation to cotton and tobacco production. In 2012, 13 companies contracted tobacco farmers, representing 46,000 hectares (Table 5.4).

TABLE 5.4: ZIMBABWE: PRIVATE SECTOR ACTIVITIES IN CONTRACT FARMING

Year	Contribution
2012	<ul style="list-style-type: none"> • 13 companies contracted farmers to grow tobacco, representing 46,000 hectares • 15 companies contracted 184,857 farmers
2014	<ul style="list-style-type: none"> • 16 companies contracted tobacco farmers, representing 72,756 hectares • 201,678 hectares of cotton were supported by contract farming • 8,000 hectares of soybeans were supported by contract farming
2015	<ul style="list-style-type: none"> • 255,000 hectares of cotton were supported by contract farming

Source: Ministry of Agriculture, Mechanisation and Irrigation Development.

In one year, the role of financial institutions has slightly improved. In 2012, Agribank contributed US\$15 million to 770 maize farmers under its Commercial Credit Facility. Table 5.5 includes the various financing facilities of financial institutions in 2012.

TABLE 5.5: ZIMBABWE: BANK FACILITIES, 2012

Bank	Amount (US\$ millions)
CBZ Bank Ltd.	20
Agriculture Market Authority Bills	25
Grain Marketing Board and Agribank	5
Agribank and Industrial Development Corporation	10
Other Banks	140

Source: Update Survey of the Comprehensive Africa Agriculture Development Programme, 2016.

In 2013, the banking sector indicated plans to inject US\$512 million in various food and nonfood crops, as did value chain actors. In 2014, the banking sector generated US\$1.093 billion for farmers to access working capital under various credit schemes.

For the 2015 agriculture season, the Bankers Association of Zimbabwe and the banking sector, under the Reserve Bank of Zimbabwe, set aside approximately US\$1 billion to finance the production of crops and livestock. The commodity breakdown of targeted crops is shown in Table 5.6, with US\$944.5 million distributed as follows:

TABLE 5.6 : ZIMBABWE: TARGET CROP LENDING BY THE BANKING SECTOR

Crop	Amount (US\$ millions)
Tobacco	598.1
Maize	80.5
Soyabean	25.0
Cotton	34.5
Livestock including poultry	60.1
Others	46.3

Source: Update Survey of the Comprehensive Africa Agriculture Development Programme, 2016

CSOs initially did not commit to the Compact and ZAIP, although they subsequently have indicated a readiness to do so. Some of the CSOs have undertaken various agricultural projects in terms of the ZAIP and continue to do so, albeit with no financial support.

5.4. Commitments by Development Partners

5.4.1. Nonfinancial Commitments of Development Partners

Development partners have endorsed the CAADP in its aim to fight poverty and improve livelihoods. As party to the CAADP Compact, they have pledged to align their support to Zimbabwe's agriculture sector and to scale up assistance to contribute to the investment costs of CAADP Agenda programs. Development programs aim to:

- improve food, nutrition, and income security among smallholder farmers;
- empower farmers by building resilient production systems to increase agricultural production and productivity through market linkages and access to microfinance; and
- improve the nutrition status of beneficiary households.

Assistance by developing partners will be in the following categories:

- policy assistance
- agricultural research activities
- livestock projects
- irrigation projects
- marketing projects
- smallholder rural development and drought mitigation projects.

5.4.2. Inventory of Each Development Partner's Financial Commitments

The EU, FAO, and USAID have continued unwavering support of Zimbabwe's agriculture sector through various programs, while others, such as COMESA have committed to Zimbabwe's CAADP program by mobilizing international and regional political, financial, and technical support. Financial commitments of development partners are aimed to assist in policy making and agricultural research, as well as projects relating to livestock, irrigation, marketing, smallholder rural development, and drought mitigation. Table 5.7 lists the projects launched since 2009 to date.

TABLE 5.7: DEVELOPMENT PARTNERS ASSISTANCE PROGRAMS, 2009 TO DATE

Project	Implementation Period	Budget (US\$ millions)	Status	Financial
Policy Assistance				
Zimbabwe Agricultural Competitiveness Programme (ZIMACP)	2010-15	15.0	Complete	USAID
Food and Agriculture Organization of the United Nations (FAO): Support implementation of Food and Nutrition Policy through the strengthening and Food Nutrition Council	2013-2016	0.65	On-going	EU
Agricultural Research and Extension				
Promote integrated cassava production, processing, and utilization for increased food security and income generation	2009-10	0.35	Not yet Commenced	FAO
Rehabilitation of Extension Systems in Zimbabwe	2011		Closed	EU
Technical assistance in agronomy, conservation agriculture, market linkages and business skills development	2009 - 2011	20.01	Closed	USAID
CIRAD and the Tropical Resource Ecology Programme of the University of Zimbabwe: Dream Project	2014 - 201	2.0	Completed	EU
GIZ/Sustainable Agriculture Technology: Zimbabwe Extension Support and Training (ZEST)	2013 - 2016	3.2	Completed	EU
TechnoServe: research and develop strategies to improve food security and nutrition	2013 - 2016	0.9	Completed	EU
Zimbabwe Farmers'/Commercial Farmers Union: Strengthening service delivery	2013-15	1.9	Completed	EU
Seeds and Markets Project (SAMP)	2013-17	1.75	On-going	SDC
Livestock Sector				
Land O' Lakes: assist small scale farmers in dairy small ruminant (goats) subsectors, as well as improve animal traction efficiencies	2010-12	2.0	Closed	USAID
Feed the Future Zimbabwe Livestock Program (FTFZ-LD)	2015-20	11.99	Completed	USAID
CARE/Sapphire Plan: integrated soil-water conservation and livestock management in the Runde Catchment Area	2012-16	1.0	Completed	EU

Project	Implementation Period	Budget (US\$ millions)	Status	Financial
Livestock Sector				
FAO: Smallholder Irrigation Support Programme	2013-17	7.8	Completed	EU
Sustainable Agriculture Technology/Zimbabwe Wildlife Veterinary Trust Wilderness and Livelihood Development Programme (WILD)	2013-17	3.0	Completed	EU
Irrigation Sector				
FAO: Smallholder Irrigation Support Programme	2013-17	7.8	On-going	EU
Swiss Agency for Development and Cooperation/ FAO: smallholder irrigation schemes	2013-17	6.3	On-going	EU
Market Development				
Agricultural market surveys for major commodities	2010-15		Completed	USAID
Zimbabwe Agricultural Income and Employment Development (ZIMAIED)	2010-15	35.0	Completed	USAID
Technoserve: support outgrower models, strengthen producer associations and technical assistance in conservation agriculture and market linkages	2010-12	2.0	Completed	USAID
International Relief and Development: agro-dealer strengthening program	2010-12	2.0	Completed	AUSAID
Africa Enterprise Challenge Fund (AECF)	2009-11			
Loan guarantee programme	2015-22	58.635	On-going	USAID/DFID/SIDA
Welthungerhilfe/Agricultural Partnerships Trust: Sustainable Intensification of Market Based Agriculture (SIMBA)	2013-17	4.9	On-going	EU
Netherlands Development Organisation: Rural Agriculture Revitalisation Programme— Commercialising Smallholder Agriculture	2013-18	19.0	On-going	DANIDA

Source: Update Survey of the Comprehensive Africa Agriculture Development Programme, 2016

5.5. Summary


Although the implementation phase of the Zimbabwe Agricultural Investment Plan (ZAIP) is yet to be officially launched, it has begun under the ambit of other national development frameworks, particularly the ZIMASSET. Having signed the CAADP Compact, the GoZ has not only committed to a 10 percent agriculture budget allocation; it also has promised to create an enabling economic environment and to work with agriculture sector stakeholders, ensuring that policies are aligned and agricultural institutions are reformed. With regard to the bankrolling of agricultural projects, according to the CAADP, the GoZ continues to fall short of its financial obligations. Significant strides were made in the early years of the multicurrency system, with allocations hovering close to 10 percent and even surpassing the mark in 2009 and 2010. The latest budget allocations in 2014 and 2015, however, show evidence of a downturn in agriculture funding. Despite the challenges to meet financial commitments, the GoZ has stepped up efforts to improve support for policies and activities in favor of ZAIP implementation by commissioning studies on land tenure; ongoing irrigation, agricultural extension, and forestry policy development; and a strategy for foot and mouth disease. Some of these will provide material for the ZAIP High Level Business meeting and will enhance some ZAIP projects.

Development Partners have held true to their commitments, as evidenced by the increase in funding compared to that prior to 2009, which primarily represented humanitarian aid. Most assistance targets policy making and agricultural research, as well as projects relating to livestock, irrigation, marketing, smallholder rural development, and drought mitigation.

The private sector continues to play its part by scaling up contract farming and participating in public-private partnerships. A key partnership has been developed with the Agricultural and Rural Development Authority.

Harnessing the efforts by the various players will go a long way toward ZAIP implementation. Recent trends as a result of the various agriculture development players in the public and private sectors demonstrate an encouraging synopsis. This calls for sustained improvement of enabling environment for businesses with a view to unleashing value in the agriculture sector for the benefit of Zimbabwe’s economy. Table 5.8 summarizes the ratings in relation to the honoring of commitments by the various agriculture sector stakeholders.

TABLE 5.8: ZIMBABWE: RATINGS RELATING TO THE HONORING OF COMMITMENTS BY VARIOUS STAKEHOLDERS

Area of Commitment	Traffic Light Rating
Government: financial commitments	
Government: nonfinancial commitments	
Nonstate actors: financial/nonfinancial commitments	
Development partners: financial commitments	
Development partners: nonfinancial commitments	

Key: Amber: Not adequate, needs improvement

6. AGRICULTURE SECTOR PERFORMANCE

6.1. Introduction

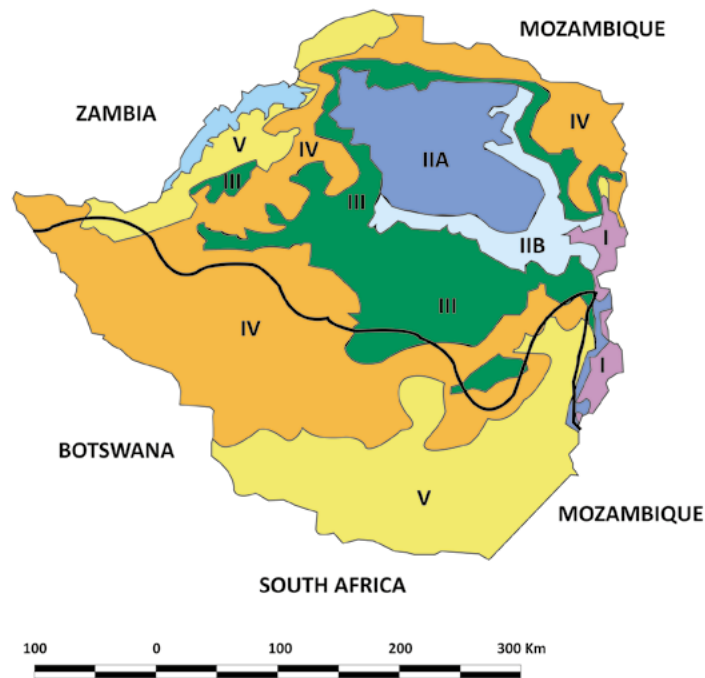
This section presents a performance assessment of Zimbabwe's agriculture sector. Data of selected indicators were gathered from various sources such as the ReSAKSS database, World Bank Development Indicators, FAOSTAT, Global Hunger Index, and the MAMID. Priority indicators in this section include those of the CAADP relating to share of agriculture sector expenditure to total national budget; national, agriculture, and per income GDP growth rates per annum; cereal productivity; proportion of area equipped with irrigation equipment; land and labor productivity; agricultural trade performance; and cereal productivity per capita. The section also includes a subsector analysis of the performance of the crops, livestock and fisheries sectors. Where CAADP and Regional Indicative Strategic Development Plan (RISDP) targets are available, the traffic rating system has been applied to assess the performance or progress of indicator achievement.

6.2. Structure of the Zimbabwean Agriculture Sector

The agriculture sector in Zimbabwe remains one of the key sectors of the economy and it contributes between 15 percent and 18 percent of GDP, with more than 40 percent of national export earnings; 60 percent of raw materials to agro-industries; and agriculture-related employment supporting approximately one-third of the formal labor force (Government of Zimbabwe, 2015). The performance of the agriculture sector is critical for the livelihoods and welfare of the majority of the country's population and the overall development of the national economy (Government of Zimbabwe, 2015).

Agricultural production in Zimbabwe takes place in five main agroecological regions—also referred to as natural regions (Figure 6.1). Natural regions are characterized by differences in rainfall regimes, quality of soil and vegetation types, and other factors. Overall, Natural Region 1 has the highest agricultural potential, with a potential decline in Natural Region V (FAO, 2006; Vincent and Thomas, 1961). These agroecological zones present diverse conditions for a variety of crops and livestock activities. Overall, more than 23 food and cash crops are produced across the country. The main food crops are maize, sorghum, pearl millet, finger millet, ground nuts, wheat, cow peas, bambara nuts, and sweet potatoes, with and the main cash crops as tobacco, cotton, tea, coffee, sugarcane, soybean, sunflower, and horticultural products (Government of Zimbabwe, 2015). The country also produces diverse livestock including cattle, dairy, poultry, pigs, goats, and sheep (Government of Zimbabwe, 2015).

FIGURE 6.1: ZIMBABWE'S NATURAL REGIONS



Source: Vincent and Thomas (1961), cited in FAO (2006).

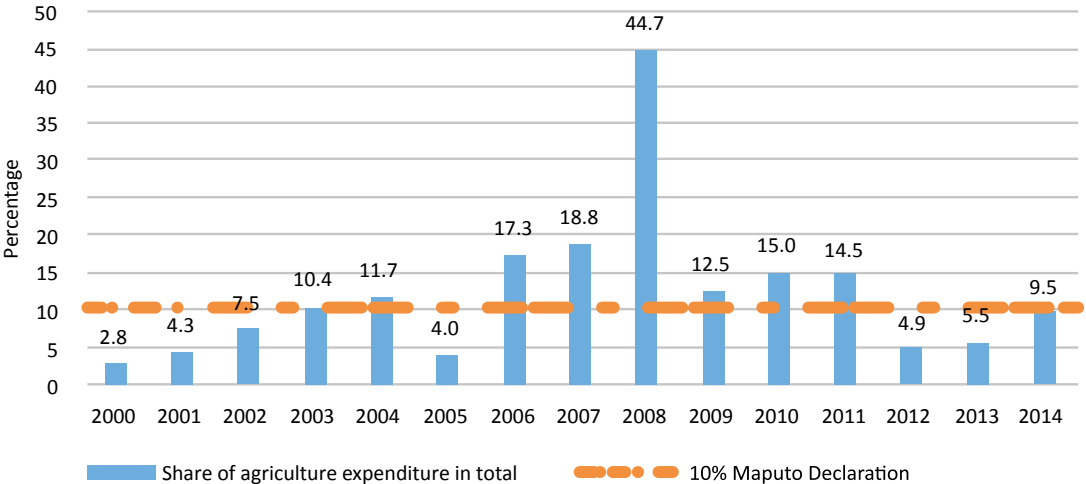
6.3. Performance of the Agriculture Sector

6.3.1. CAADP Targets for Agriculture Development

Figure 6.2 shows the share of agricultural sector expenditure in the total government expenditure. The analysis indicates that between 2000 and 2004, the share of public agriculture expenditure increased from 2.8 percent to 11.7 percent. A decline to 4 percent in 2005 was followed with a steep increase to 44.7 percent in 2008. Since the adoption of a multicurrency system in 2009, the share of public agriculture expenditure was above the 10 percent CAADP target for three consecutive years (2009–11). Despite declining to 4.9 percent in 2012, the share increased to 9.5 percent in 2014.

Overall, the results indicate the commitment by the GoZ to allocate resources for investments in agriculture as the engine for economic growth and transformation in the country. It is important to note that the years between 2000 and 2008 were characterized with a turbulent macroeconomic environment. The situation improved with the adoption of the multicurrency system during the Government of National Unity. Recent macroeconomic challenges and political unrest, however, are straining the economy further, making it difficult for adequate resources to be allocated to sectors such as agriculture. The rating of progress of this indicator, based on the traffic color rating, is **AMBER**.

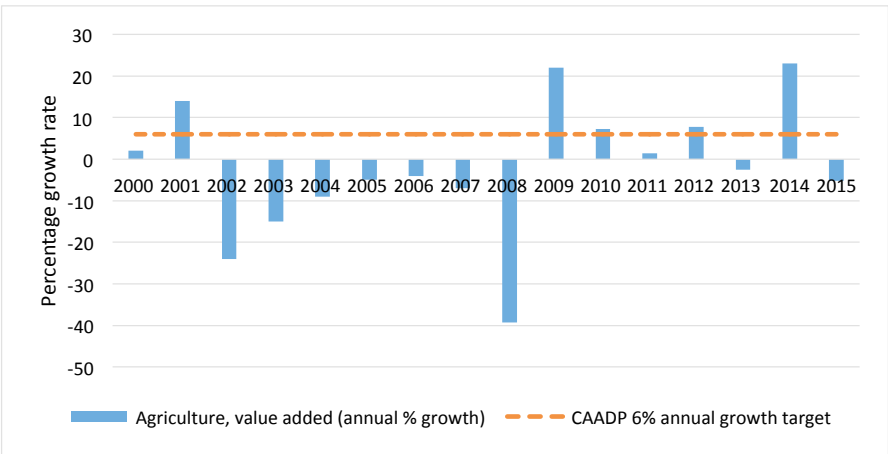
FIGURE 6.2: ZIMBABWE: SHARE OF GOVERNMENT AGRICULTURE EXPENDITURE IN TOTAL GOVERNMENT EXPENDITURE (SGAE), 2000–2014



Source: ReSAKSS (2015).

Figure 6.3 presents the agriculture GDP annual growth rate for Zimbabwe for the period 2000–14. Despite considerable investment in the sector, as indicated by share of government expenditure in agriculture discussed above, the sector experienced negative annual growth rates between 2002 and 2008. This might indicate that there is need to reflect further on where most of these resources are actually flowing within the sector. The quality of public expenditure in the sector becomes a critical concern to ensure that there is appropriate prioritization of expenditure in areas that facilitate improved performance of the sector. During this period, the country has faced economic sanctions following the implementation of the Fast Track Land Resettlement Programme. In addition, unfavorable climatic conditions in most parts of the country in the same period and other factors have further worsened the sector’s performance. Despite the negative annual growth rates in most parts over the past 15 years, the sector reported annual growth rates above the 6 percent CAADP target in 2009, 2010, 2012 and 2014. These results indicate the potential of the agriculture sector to perform beyond current levels if appropriate investments are implemented, together with an enabling macroeconomic and policy environment. The rating of progress of these indicators, based on the traffic color rating, is **RED**.

FIGURE 6.3: ZIMBABWE: AGRICULTURAL GROSS DOMESTIC PRODUCT ANNUAL GROWTH RATE, 2000–2014

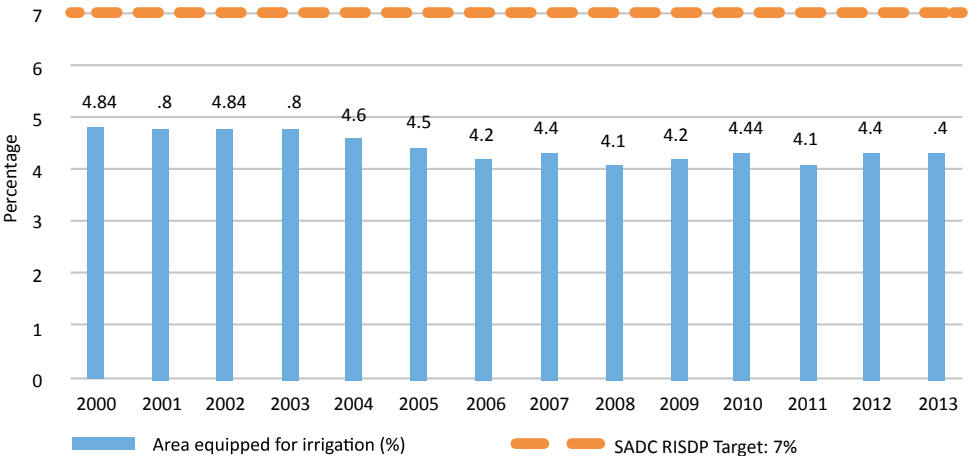


Source: World Bank (2016).

Note: CAADP = Comprehensive Africa Agriculture Development Programme

Figure 6.4 shows the proportion of arable land that is equipped with irrigation equipment in Zimbabwe. Members of the Southern African Development Community have agreed in the regional RISDP to double area under irrigation from 3.5 percent to 7 percent. The proportion of arable land area with irrigation equipment shows a slight decline from 4.8 percent in 2000 to 4.4 percent in 2013. This demonstrates that the country has not managed to increase the area of arable land under irrigation to the regional set target of 7 percent. Most of the agricultural activities in the country remain rainfed and the recent experiences in unfavorable agroclimatic conditions in the country means that most of the production activities suffer heavily if no investment in adaptation measures is made. Investment in irrigation offers one potential adaptation measure to a period of harsh agroclimatic conditions for farmers, and government investment for the country is essential. The rating of this indicator is **RED**.

FIGURE 6.4: ZIMBABWE: PERCENTAGE OF ARABLE LAND WITH IRRIGATION EQUIPMENT, 2000–2013



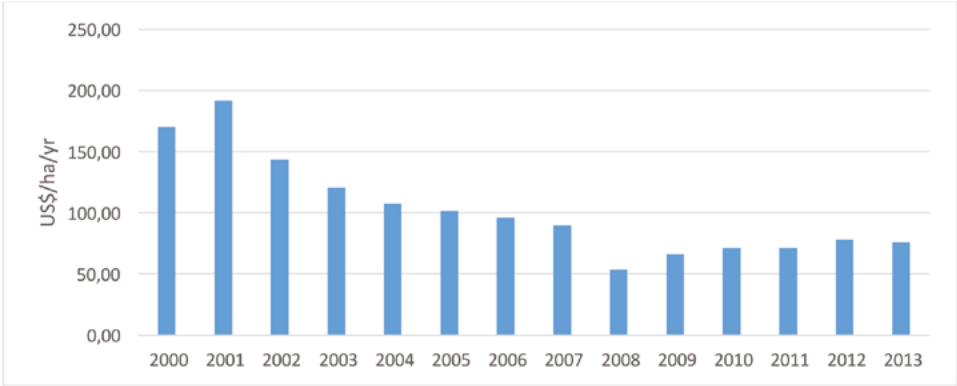
Source: FAOSTAT (2016).

Notes: SADC = Southern African Development Community; RISDP = Regional Indicative Strategic Development Plan.

6.3.2. Land and Labor Productivity

The analysis of agricultural land productivity, based on constant 2010 U.S. dollars, for 2000 to 2013 is presented in Figure 6.5. From 2001 and 2008, the analysis indicates that the country experienced declining agricultural land productivity. Various factors may have contributed to these findings, including economic sanctions imposed on the country following implementation of the Fast Track Land Resettlement Programme; inadequate financial support to the agriculture sector; underutilization of agricultural land; droughts and changing agroecological conditions; among others. The interaction of these factors and the tough macroeconomic environment experienced in the country leading to the Government of National Unity may have contributed significantly to affecting agricultural land productivity, as the performance of the sector has declined over these years. Since the adoption of the multi-currency system, however, the macroeconomic environment has stabilized and the agriculture sector experienced some improvements in production that also translate into slight increases in agricultural land productivity, although it was lower than 2007 levels. Recent macroeconomic cash challenges facing the country are likely to affect government efforts to increase investment in the agriculture sector. Assessment of this indicator, using the traffic light signals, would be **RED**.

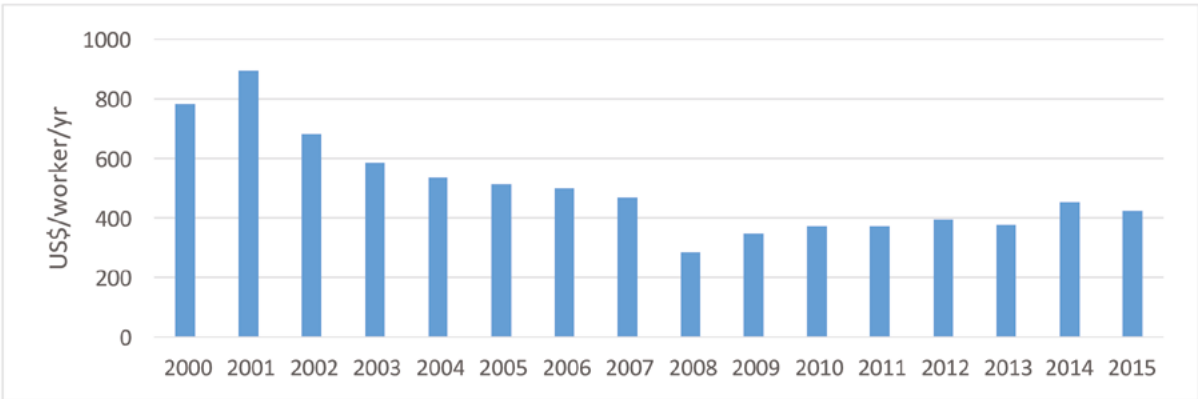
FIGURE 6.5: ZIMBABWE: AGRICULTURAL LAND PRODUCTIVITY, 2000-2013
(in constant 2010 U.S. dollars)



Source: Author; calculations based on data from FAOSTAT (2016) and World Bank (2016).
Notes: ha = hectare; yr = year.

Figure 6.6 presents the agriculture value added per worker, based on constant 2010 U.S. dollars, for Zimbabwe between 2000 and 2015. Similar to agricultural land productivity, agriculture value added per worker also experienced substantial declines between 2001 and 2008 and slightly increased between 2009 and 2015. The recent increase, however, could not match the 2007 levels. Similar explanations on factors that affected the agricultural land productivity also apply for the agriculture value added per worker indicator. Overall, the country still requires substantial efforts to invest resources directed on enhancing agricultural activities if the transformation and growth goals of the country and the CAADP are to be realized. Assessment of this indicator, using the traffic light signals, would be **RED**.

FIGURE 6.6: ZIMBABWE: AGRICULTURE VALUE ADDED PER WORKER: 2000-2015
(in constant 2010 U.S. dollars)

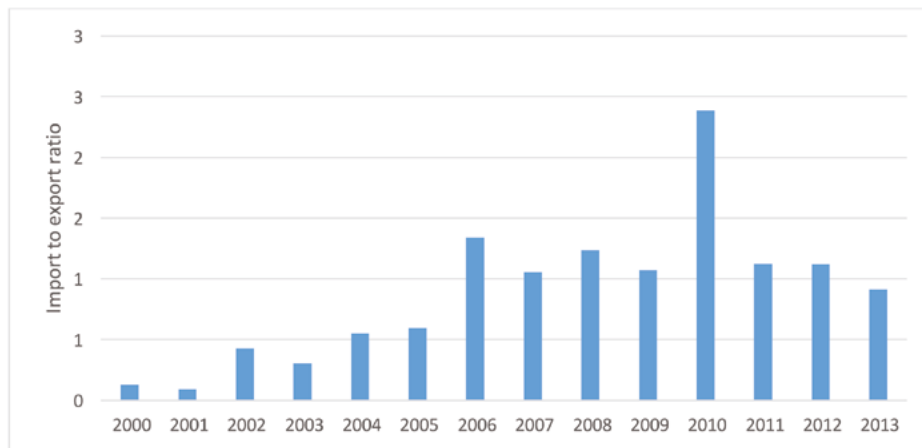


Source: Author; calculations based on World Bank (2016).

6.3.3. Agricultural Trade Performance

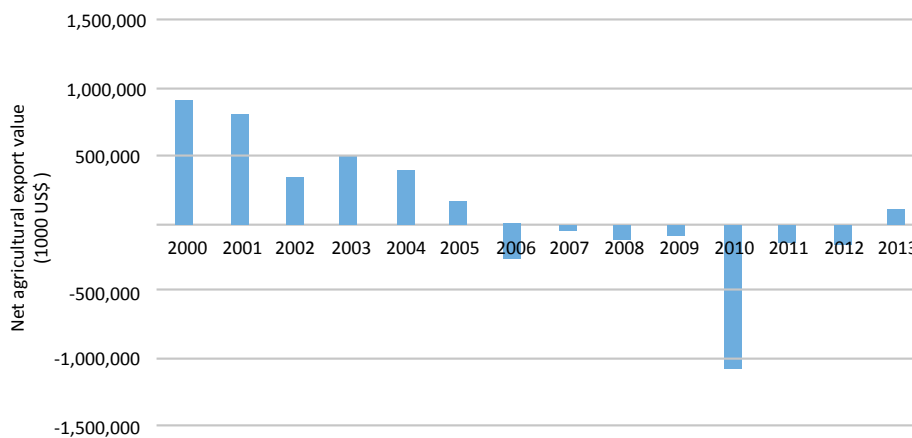
Figure 6.7 shows the agriculture imports to exports ratio in Zimbabwe for the period 2000 to 2013 and Figure 6.8, the net agriculture export values for the same period. The agriculture imports to exports ratio indicates that the country has increasingly imported more than it was exporting for the period under analysis. The level of imports substantially increased over exports between 2002 and 2010. This has slightly reversed between 2011 and 2013, although import levels are still higher than exports. Analysis of the net agriculture export values (Figure 6.8) indicates that the country has been a net importer of agricultural products between 2006 and 2012, with 2013 indicating some improvements, albeit small. Overall, given the potential of the country in agricultural production, the effects of the economic sanctions and the macroeconomic and political challenges experienced have taken a toll on the agriculture sector, as discussed under the land and labor productivity section above. There is need for substantial efforts to invest in productivity-enhancing activities to increase productivity levels and overall sector performance to meet national developmental goals and priorities. The rating of these indicators is **RED**.

FIGURE 6.7: ZIMBABWE: AGRICULTURE IMPORTS TO EXPORTS RATIO: 2000-2013



Source: Author; calculations based on data from FAOSTAT (2016).

FIGURE 6.8 : ZIMBABWE: NET AGRICULTURAL EXPORT VALUE, 2000-2013



Source: Author; calculations based on data from FAOSTAT (2016).

6.3.4. Development Results

The composition of Zimbabwe’s GDP is presented in Table 6.1 for the years 2010 and 2014. The agriculture sector is second to Wholesale and Retail Trade, Repair of Vehicles, Household Goods, and Restaurants and Hotels in its contribution to national GDP. As indicated above, the agriculture sector remains one of the key sectors of the economy and contributes between 15 and 18 percent of GDP; more than 40 percent of national export earnings; provides 60 percent of raw materials to agro-industries in the country; and provides agriculture-related employment to approximately a third of the formal labor force (Government of Zimbabwe, 2015). Other key sectors are manufacturing; transport, storage, and communication; finance, real estate, and business services; and mining and quarrying. Again, the agriculture sector is pivotal to the economic growth and development of the country and there is need to further entrench the national and Malabo resolutions to revive the performance of the agriculture sector as an engine for transformation and development.

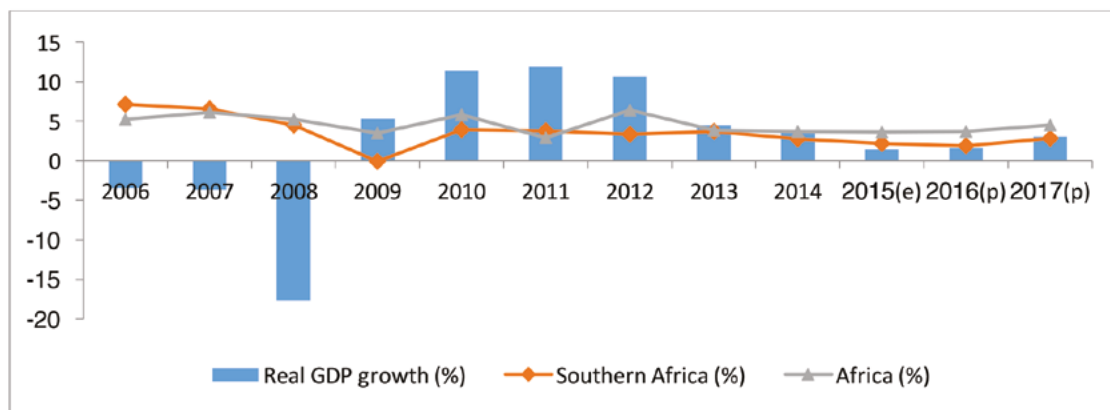
TABLE 6.1: ZIMBABWE: GROSS DOMESTIC PRODUCT (GDP) BY SECTOR
(percentage of GDP at current prices)

	2010	2014
Agriculture, forestry, fishing and hunting	14.5	14.0
Mining and quarrying	10.1	9.5
Manufacturing	13.9	11.9
Electricity, gas, and water	4.5	4.5
Construction	2.3	3.5
Wholesale and retail trade, Repair of vehicles, Household goods, Restaurants and hotels	17.3	15.8
Transport, storage, and communication	14.3	12.1
Finance, real estate and business services	8.9	11.9
Public administration and defense	3.7	3.6
Other services	10.5	13.1
Gross domestic product at basic prices / factor cost	100.0	100.0

Source: African Development Bank, Organisation for Economic Co-operation and Development, and United Nations Development Programme (2016).

The real GDP growth rate is presented in Figure 6.9. Before the Government of National Unity and the adoption of the multicurrency system, the country was experiencing hyperinflation conditions and negative real GDP growth rates. The country recorded substantial increases in real GDP growth between 2009 and 2012. The trend, however, has shown a decline in the real GDP growth rate in recent years (2013-15), recording a low of 1.5 percent in 2015. The shrinking real GDP growth rate could be linked to current macroeconomic challenges experienced in the country. The GoZ needs to place more effort in ensuring a an enabling macroeconomic environment for various economic activities to stimulate performance of the various sectors and overall economic performance.

FIGURE 6.9: ZIMBABWE: GROWTH OF ANNUAL GROSS DOMESTIC PRODUCT, 2006–2017



Source: African Development Bank, Organisation for Economic Co-operation and Development, and United Nations Development Programme (2016).

Table 6.2 presents a summary of the macroeconomic indicators of development for Zimbabwe. Real GDP growth and real GDP per capita growth between 2014 and 2015 have been decreasing and the current account is negative. The country is also experiencing deflation. Overall, macroeconomic development indicators point to a constrained economic environment. These conditions are not favorable for promoting investment in various sectors of the economy, and it is essential that the government act to stabilize the macroeconomic environment. In addition, these conditions also affect potential investment opportunities that could have been implemented to advance agriculture sector transformation and growth in line with national developmental goals and the Malabo Declaration.

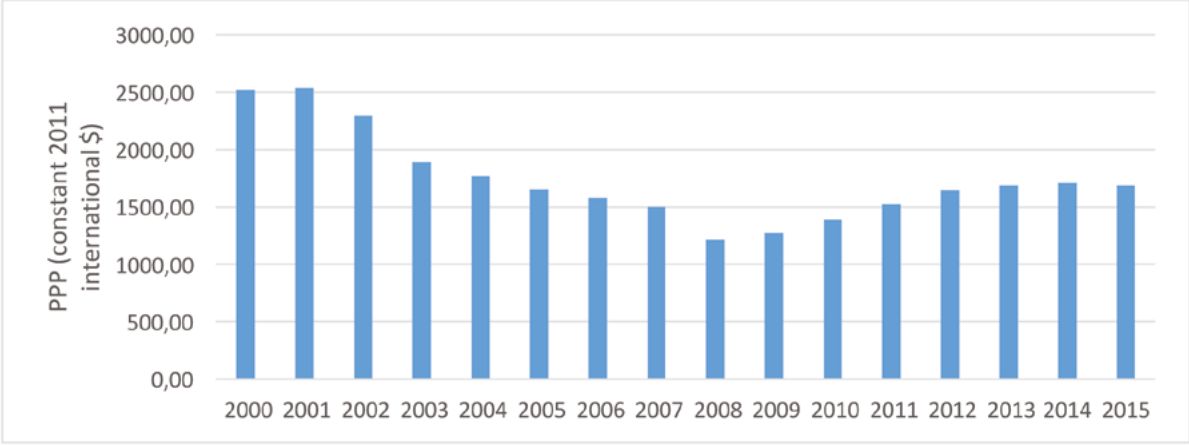
TABLE 6.2: ZIMBABWE: MACROECONOMIC DEVELOPMENTS

	2014	2015 (e)	2016 (p)	2017 (p)
Real gross domestic product (GDP) growth	3.8	1.5	1,6	3.1
Real GDP per capita growth	1.5	-0.9	-0.4	0.8
Consumer price index inflation	-0.2	-2.0	-1.3	-0.7
Budget balance percent GDP	-1.9	-1.6	-1.5	-1.2
Current account percent GDP	-23.2	-21.4	-19.8	-18.7

Source: African Development Bank, Organisation for Economic Co-operation and Development, and United Nations Development Programme (2016).

Per capita GDP is shown in Figure 6.10. On the one hand, the trends show a decrease from 2001 to 2008 and a steady rise from 2009 to 2014, as well as a slight decrease in 2015. As discussed above, the stringent macroeconomic conditions experienced in the past decade leading up to 2008 contributed to the declining trends in per capita GDP experienced during this period. On the other hand, macroeconomic stabilization following the Government of National Unity underscores the importance of economic and political stability in promoting economic growth and development. The rating of this indicator is **AMBER**.

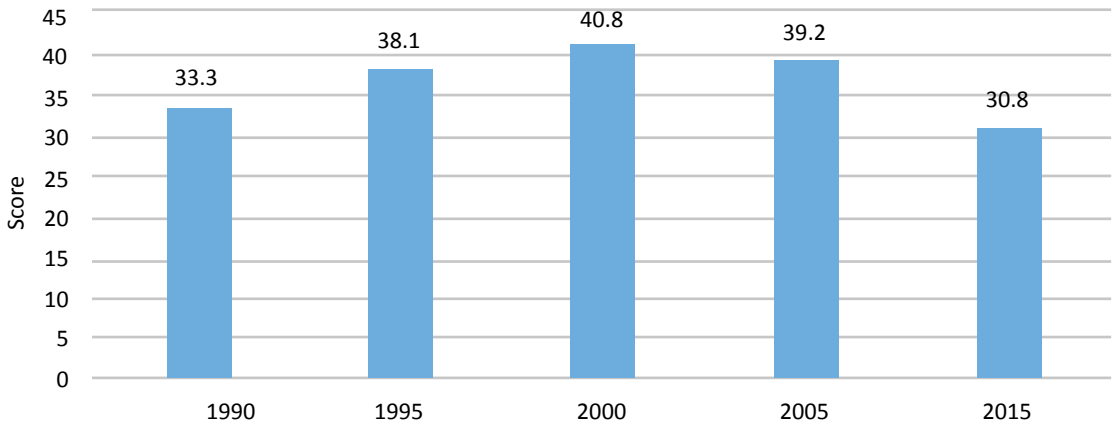
FIGURE 6.10: ZIMBABWE: PER CAPITA GROSS DOMESTIC PRODUCT, PURCHASE POWER PARITY, 2000-2015
(in constant 2011 international dollars)



Source: World Bank (2016).

The Global Hunger Index scores for Zimbabwe are presented in Figure 6.11, drawn from the International Food Policy Research Institute (IFPRI, WHH, and Concern Worldwide, 2015). The Global Hunger Index for Zimbabwe gradually increased from 33 percent in 1990 to 41 percent in 2000 and decreased to 31 percent in 2015. The percentage of people facing hunger in 2015 at 31 percent is still very high compared to other countries in the region, especially in view of the agricultural potential of Zimbabwe to produce its own food and for export markets. Efforts to improve the agriculture sector performance are critical to the livelihoods of the majority of the people who rely on Zimbabwe’s agriculture. The rating of this indicator is **RED**.

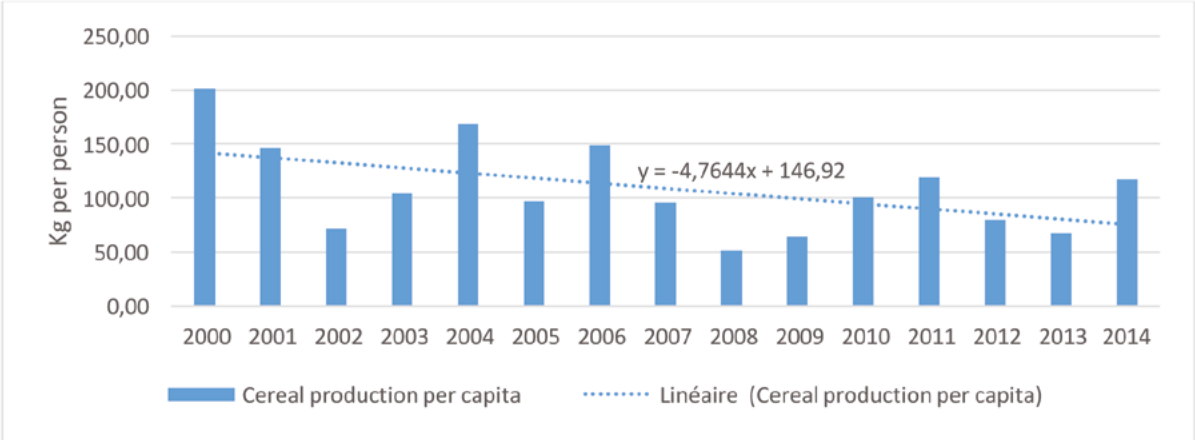
FIGURE 6.11: ZIMBABWE: GLOBAL HUNGER INDEX SCORE



Source: IFPRI, WHH, and Concern Worldwide (2015).

Zimbabwe’s per capita cereal production is shown in Table 6.12. Adding a trend line indicates that the per capita cereal production has been declining, in general, also corresponding to the agriculture sector performance discussed above. Cereal production levels have improved in recent years, although they are still below the agricultural potential for the country. Adding a trend line to the graph demonstrates that the country’s per capita cereal production has been decreasing over the years. The rating of the performance of this indicator is **AMBER**.

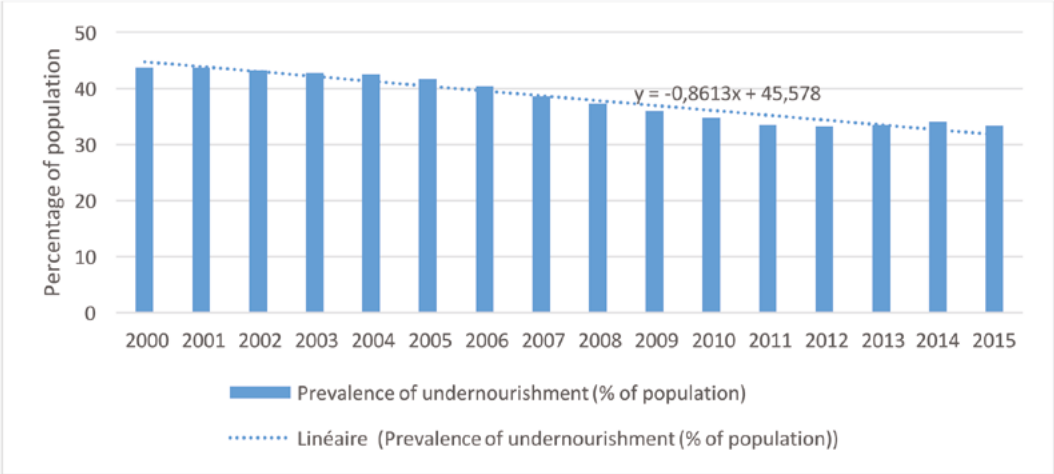
FIGURE 6.12: ZIMBABWE: CEREAL PRODUCTION PER CAPITA, 2000-2014



Source: Author; calculation based on data from World Bank (2016).
 Note: Kg = kilogram

Figure 6.13 shows the prevalence of undernourishment in Zimbabwe between 2000 and 2015. Overall, it has declined from 44 percent in 2000 to 33 percent in 2015, reflecting an 11 percent decrease over 15 years. The rating of the performance of this indicator is **AMBER**.

FIGURE 6.13: ZIMBABWE: PREVALENCE OF UNDERNOURISHMENT IN ZIMBABWE, 2000-2015



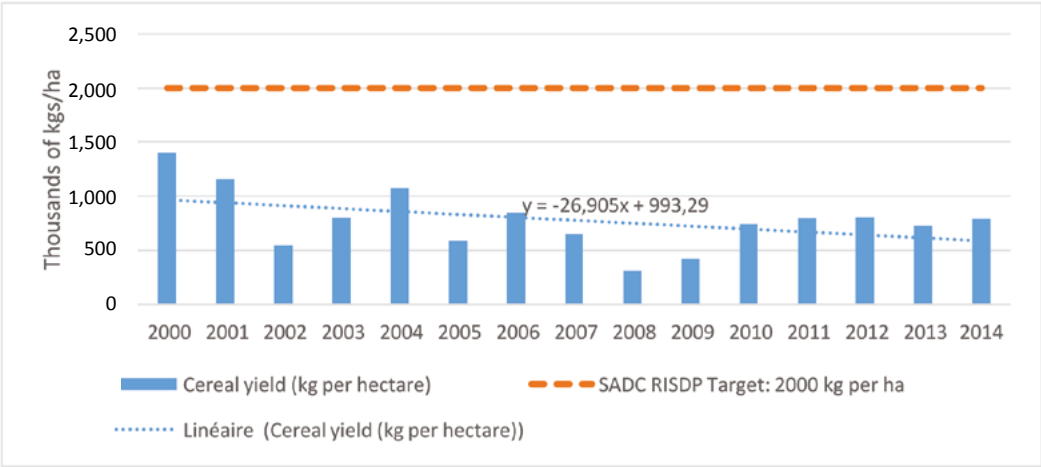
Source: World Bank (2016).

6.4. Analysis of Subsector Performance

6.4.1. Crops

The cereal yield per hectare for the period 2000–14 is presented in Figure 6.14. The linear trend line shows that cereal productivity in the country has declined between 2000 and 2014. Despite improvements from 2010 to 2014, the levels are still far below 2000 cereal productivity levels. Furthermore, cereal productivity levels in Zimbabwe are far less than the regional RISDP target of at least 2000 kilograms per hectare for cereals. Substantial improvements in productivity-enhancing investments are required in the country to increase cereal and overall productivity of the agriculture sector. The rating of the performance of this indicator is RED.

FIGURE 6.14: ZIMBABWE: CEREAL YIELD, 2000-2014
(kilograms per hectare)

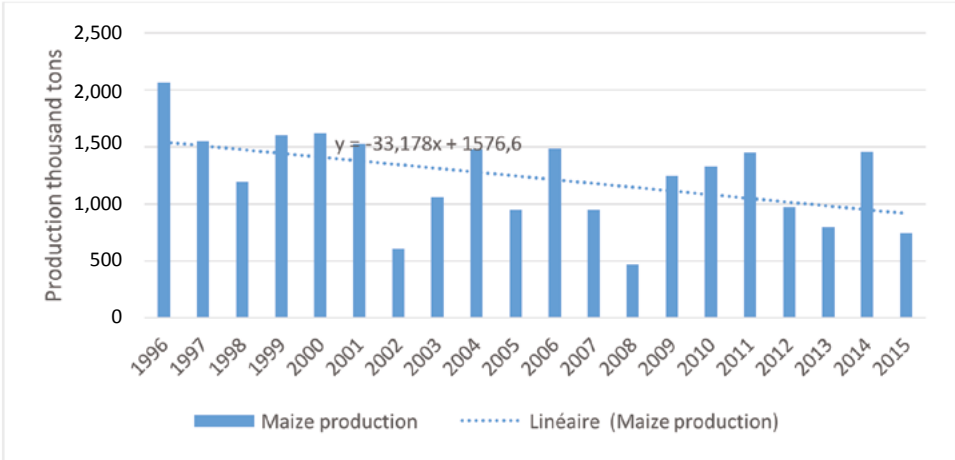


Source: World Bank (2016).

Notes: Kg = kilogram; ha = hectare; SADC = Southern African Development Community; RISDP = Regional Indicative Strategic Development Plan.

The production of major food security crops in Zimbabwe is presented in this subsection. Figure 6.15 shows the production trends of maize, the main staple food crop in the country. The results indicate a declining trend of maize production over the years, with substantial low production recorded in 2002 and 2008. The maize subsector showed improvements between 2009 and 2011, followed by another sharp decline between 2012 and 2013. Although 2014 recorded increases of maize production, the trend declined again in 2015. Overall, the maize subsector is yet to improve to regain 1996 production levels. The country is currently a net importer of maize, despite having been an exporter. This implies that substantial efforts are required to improve local maize production to meet national maize requirements and exports to other countries in the region.

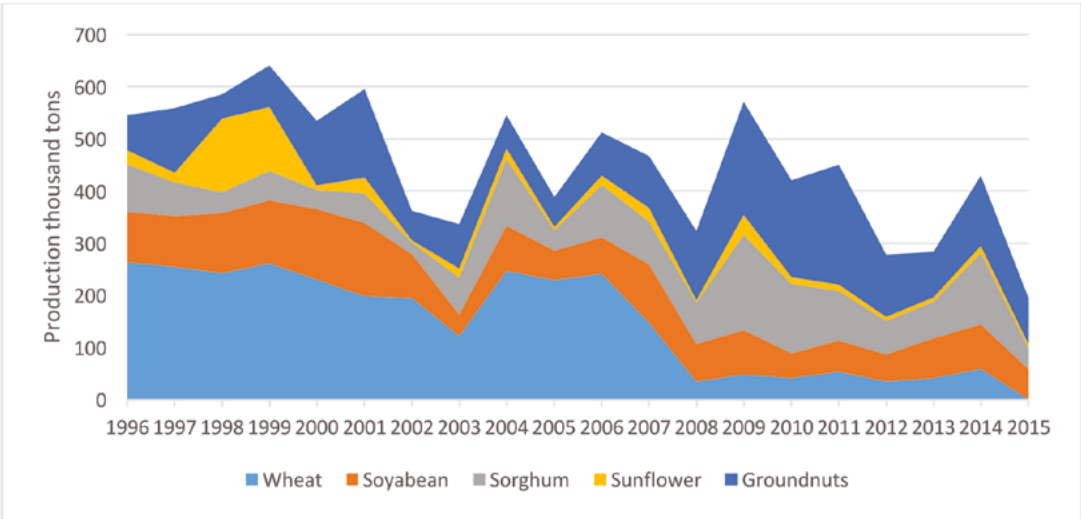
FIGURE 6.15: ZIMBABWE: MAIZE PRODUCTION, 1996-2015



Source: Government of Zimbabwe (2015).

Production trends of other major food security crops in the country are presented in Figure 6.16. The other main crops include wheat, soybean, sorghum, sunflower, and groundnuts. Similar to maize production, main crops recorded substantial declines in production levels in 2002 and 2008. In addition, other trends show that these crops also have been experiencing declines in production levels over the years. Furthermore, improvements in production from 2009 have not been sustained in recent years, indicating the essentiality for more productivity-enhancing investments in the agriculture sector to support local production to meet national requirements of main food crops.

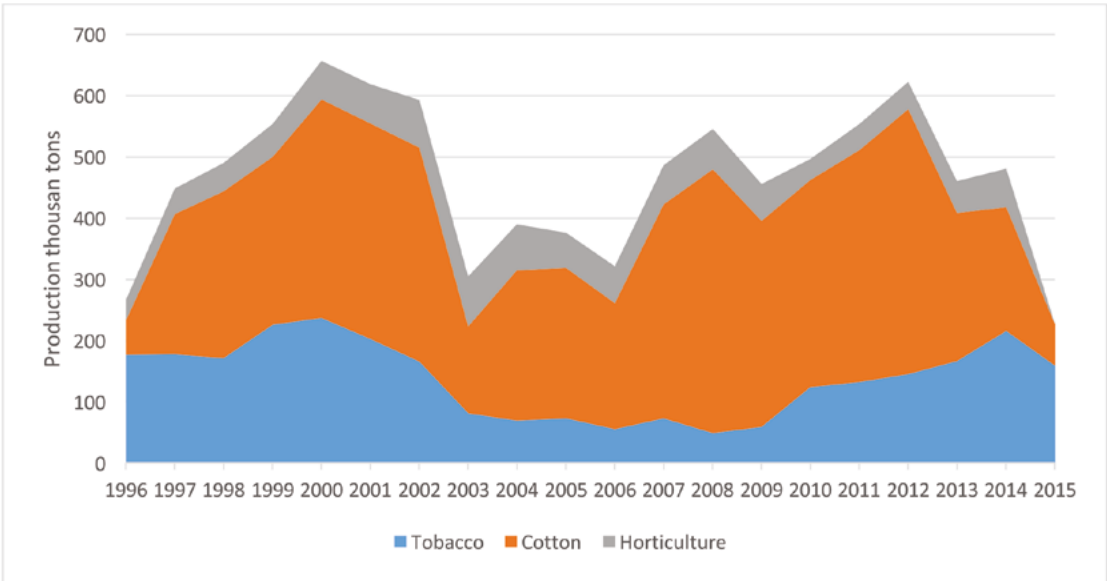
FIGURE 6.16: ZIMBABWE: PRODUCTION OF OTHER MAJOR FOOD SECURITY CROPS BETWEEN 1996 AND 2015



Source: Government of Zimbabwe (2015).

Figure 6.17 presents production trends of main export crops in Zimbabwe (tobacco, cotton, and horticulture). Production trends of main export crops indicate a rising trend before 2000, followed by a sharp decline until 2003. Production of these crops may have been affected by the Fast Track Land Resettlement Programme, which resulted in some farming operations on previously white-owned, commercial farms being disrupted. The production trends show that there was a positive increase in production of these crops from 2006, followed by a small decline in 2009 and another rise until 2011. The past two seasons reflect a disturbing sharp decline in the production of all major export crops. This directly affects export earnings from agricultural activities, as well as employment activities in other value chains linked to the production of these crops.

FIGURE 6.17: ZIMBABWE: PRODUCTION OF MAJOR EXPORT CROPS, 1996-2015

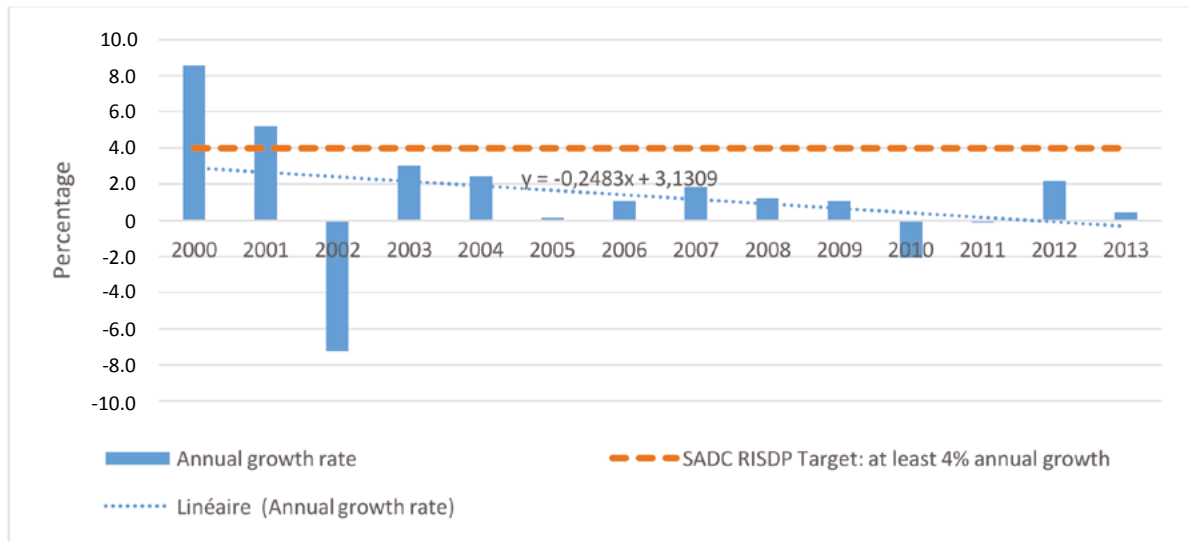


Source: Government of Zimbabwe (2015).

6.4.2. Livestock

Figure 6.18 shows the annual growth rate of livestock production for Zimbabwe between 2000 and 2013. Similar to cereal, it has declined over the years, as indicated by the trend line. While the livestock subsector experienced epic negative growth rates in 2002 and 2010, other years recorded positive annual growth. Levels have remained substantially lower than the regional RISDP target of at least 4 percent annual growth. The rating of the performance of this indicator is **RED**.

FIGURE 6.18: ZIMBABWE: LIVESTOCK PRODUCTION INDEX—ANNUAL GROWTH RATE, 2000-2013
(2004-06 = 100)

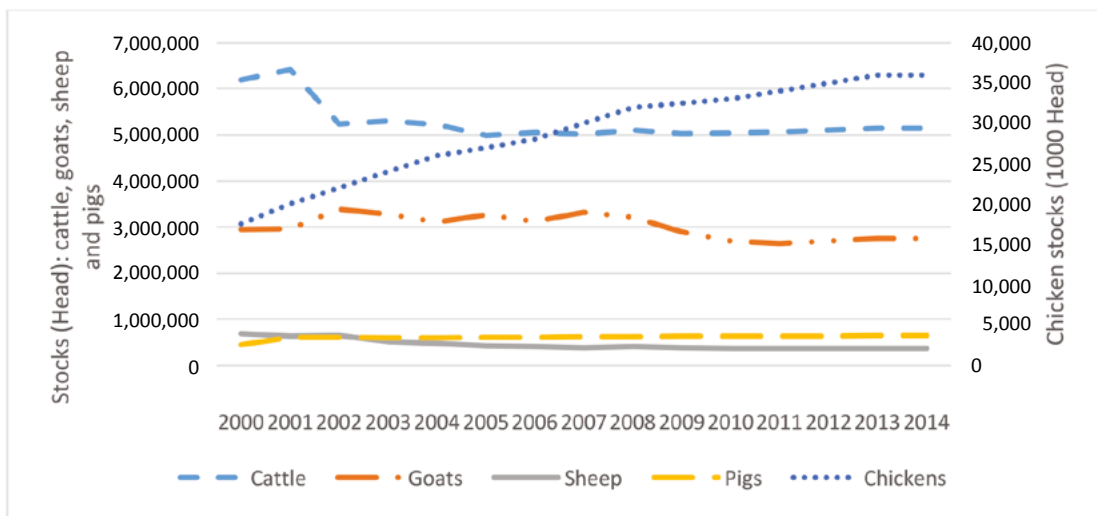


Source: World Bank (2016).

Notes: SADC = Southern African Development Community; RISDP = Regional Indicative Strategic Development Plan

Figure 6.19 shows trends in stocks of main livestock categories produced in Zimbabwe for the period 2000–14. These include cattle, goats, sheep, pigs, and poultry. The main livestock type produced is cattle for beef and dairy. Trends for cattle production indicate that stocks have been fairly constant from 2005 to 2014. Stock levels of goat production slightly declined over the years, while sheep and pig stock levels also have been fairly constant. Poultry shows a very different trend, with a gradual increase over the years between 2000 and 2014.

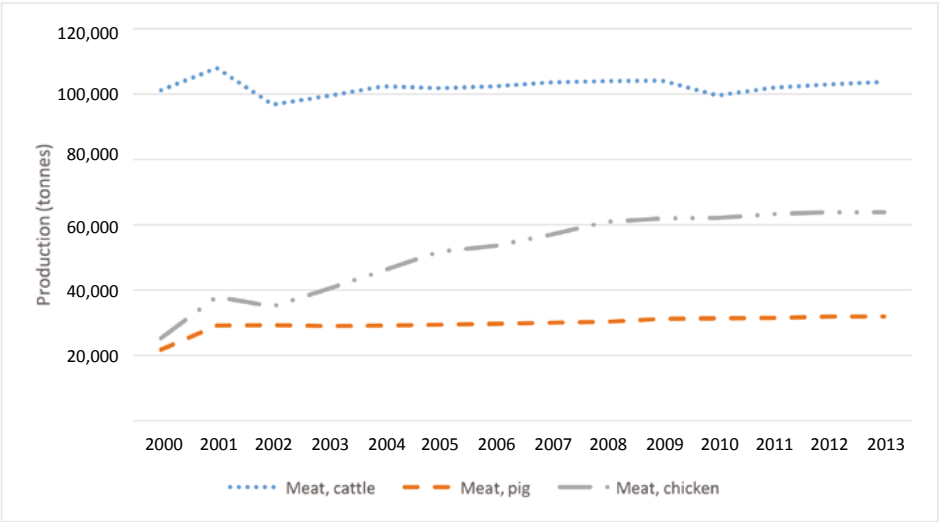
FIGURE 6.19: ZIMBABWE: TRENDS IN STOCKS OF MAIN LIVESTOCK PRODUCED, 2000–2014



Source: FAOSTAT (2016).

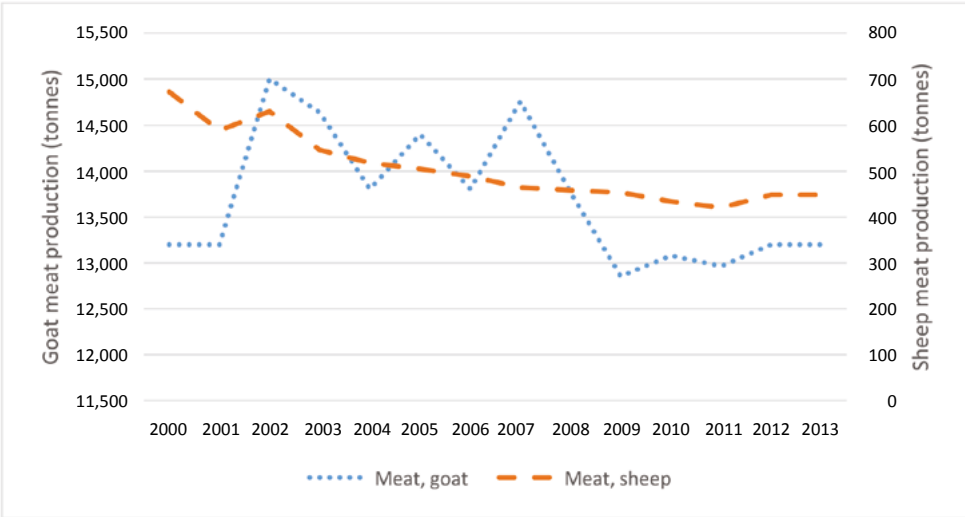
Figure 6.20 and Figure 6.21 present meat production from the main livestock produced in Zimbabwe. Most of the livestock products are consumed locally, and less than 10 percent is exported (GoZ, 2015). Similar to stock level trends, cattle and pig meat production recorded marginal increases over the years (Figure 6.20). Chicken meat, however, has been increasing over the years, although that increase declined from 2009 to 2014. Goat and sheep meat (Figure 6.21) show a declining trend, with goat meat production having been more variable.

FIGURE 6.20: ZIMBABWE: CATTLE, PIG, AND CHICKEN MEAT PRODUCTION, 2000-2013



Source: FAOSTAT (2016).

FIGURE 6.21: ZIMBABWE: GOAT AND SHEEP MEAT PRODUCTION, 2000-2013

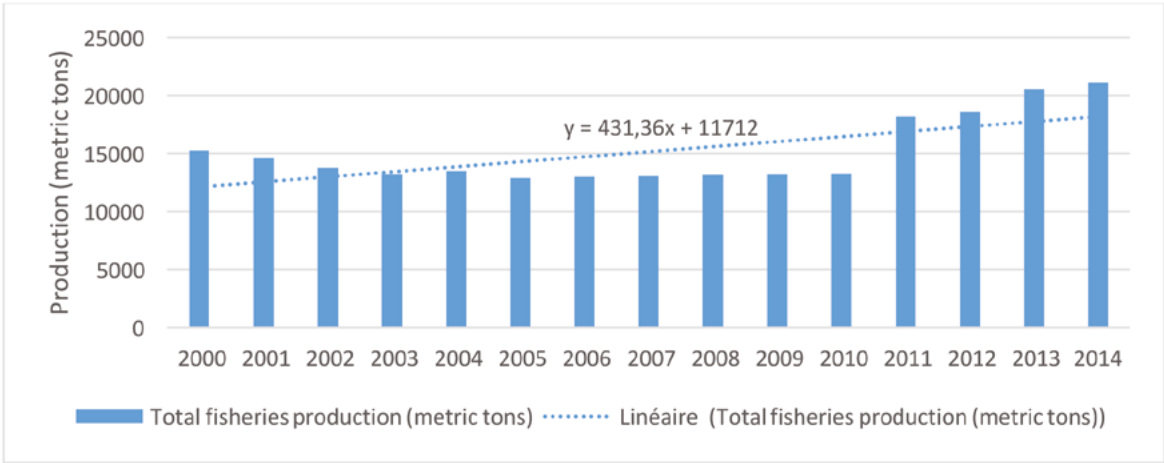


Source: FAOSTAT (2016).

6.4.3. Fisheries

Figure 6.22 shows total fisheries production in Zimbabwe between 2000 and 2014. Despite marginal declines in most periods of the last decade, total fisheries production has moderately increased from 2011 to 2014. The overall trend analysis indicates a rising trend in total fisheries production in the period of analysis. The rating of the performance of this indicator is **AMBER**.

FIGURE 6.22: ZIMBABWE: TOTAL FISHERIES PRODUCTION, 2000-2014

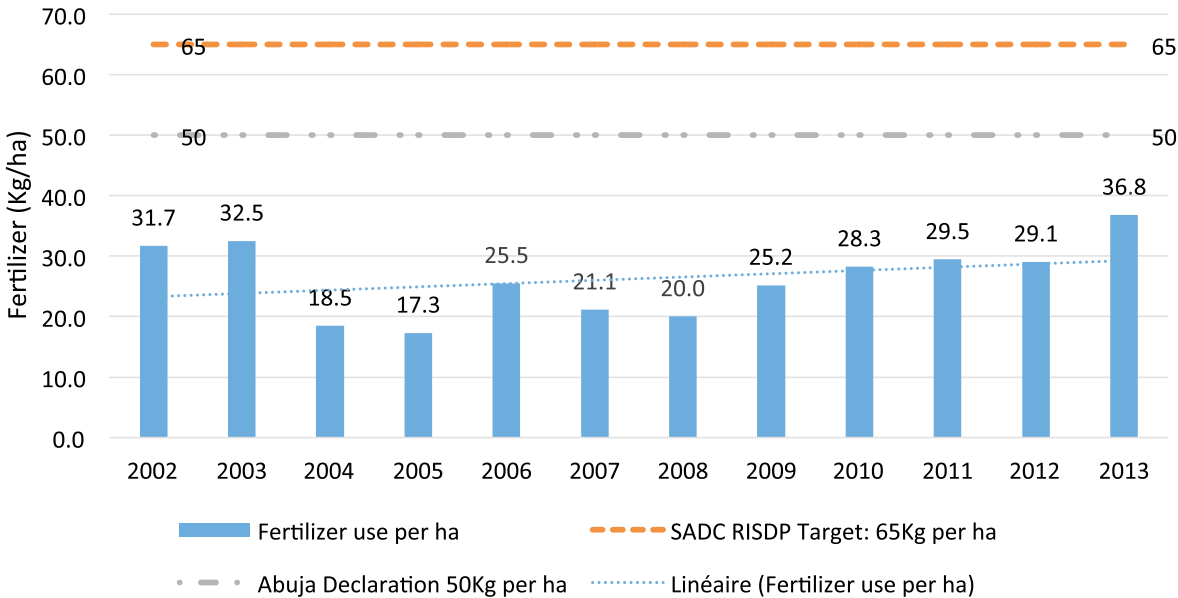


Source: World Bank (2016).

6.5. Cross-Cutting Issues

Figure 6.23 presents fertilizer consumption (kilogram per hectare of arable land) in Zimbabwe. The fertilizer consumption levels for the country show an overall marginal increase from 19 percent in 2004 to 37 percent in 2013. Despite recent increases, especially from 2009 to 2013, current fertilizer consumption levels fall below the Abuja Declaration target of at least 50 kilograms per hectare and the regional RISDP target of 65 kilograms per hectare. The results suggest that the country has yet to increase investments in fertilizer application, together with other productivity-enhancing technologies to improve the performance of the agriculture sector. The performance rating of this indicator is **RED**.

FIGURE 6.23: ZIMBABWE: FERTILIZER CONSUMPTION



Source: FAOSTAT (2016)

6.6. Summary








The analysis of the agriculture sector was presented in this chapter, with data having been drawn from various sources. The assessment of the CAADP indicators of share of government expenditure in total national expenditure show that despite efforts to increase public expenditure in the agriculture sector, an assessment of the quality of the expenditure is critical to ensure that performance-enhancing areas of the sector are prioritized in budget execution. Also critical are a macroeconomic and policy environment that is conducive to attracting investment resources in the agriculture sector and the economy as a whole. A review of the annual agriculture GDP growth rate target indicates that the country is currently underperforming in both areas.

The indicators of land and labor productivity reflect that the performance of the sector in these areas has worsened over the years, and some of the factors presented for the expenditure and agriculture GDP growth indicators apply to these productivity indicators. The poor performance of the agriculture sector is also reflected in the net agriculture export values and import-to-export ratio. Overall Zimbabwe has become a net importer of agricultural products, despite its potential to return to the status of breadbasket of the region. An assessment of the developmental impacts also shows that the country has substantially underperformed in various aspects such as per capita GDP, per capita cereal production, real GDP growth, current account, among other indicators. In general, the agriculture sector in Zimbabwe is underperforming across various indicators and priority areas that require attention from the GoZ. Efforts to drive transformation and growth for shared prosperity and improved livelihoods include:

- addressing uncertainty for investments in the macroeconomic and policy areas of the agriculture sector;
- focusing on ensuring the quality of agriculture investments through expenditures that target priority productivity-enhancing areas; and
- ensuring that underperforming areas of the sector attract investments that will address challenges and improve performance.

Table 6.3 summarizes the rating of the agriculture sector in Zimbabwe

TABLE 6.3: ZIMBABWE: SUMMARY RATING OF AGRICULTURE SECTOR PERFORMANCE

Performance Indicators	Traffic Light Rating
Agricultural budget as percentage of the total budget	 Amber
Growth in agricultural gross domestic product (GDP)	 Red
Percentage of arable land equipped with irrigation	 Red
Agricultural land productivity	 Red
Labor productivity	 Red
Agricultural trade performance	 Red
Per capita GDP	 Amber
Livestock production (annual growth)	 Amber
Global Hunger Index score	 Red
Per capita cereal production	 Amber
Prevalence of undernourishment	 Amber
Cereal yields per hectare	 Red
Livestock production index annual growth rate	 Red
Total fisheries production	 Amber
Fertilizer consumption per hectare	 Red

Source: Author, based on analysis.

Note: Red = Poor/Does not exist; Amber = Progress made; Green = Good/Exists

7. CONCLUSIONS, LESSONS LEARNED, AND RECOMMENDATIONS

The CAADP encourages the use of evidence-based agricultural policy planning and implementation processes through peer review, dialogue, benchmarking, and the adoption of best practices so as to strengthen mutual accountability for actions and results utilized in the implementation of agriculture sector policy. The JSR is a tool that ensures that there is mutual accountability at the country level for policy action by state and nonstate players.

Zimbabwe has major policies in place to guide economic and agricultural growth; however, these frameworks have been severely affected by underfunding, providing little to economic and agricultural growth. Major challenges that exist in the planning, implementation, and review of agricultural policy include the application of outdated policies; slow approval process of policies; ambiguous institutional arrangements that should support the implementation of policies, leading to their inefficient execution; lack of financial resources; challenges of holding comprehensive stakeholder engagements; and ad hoc policy formulation and implementation in lieu of applying evidence-based policy processes.

Zimbabwe faces macroeconomic challenges and political unrest, both of which damage the economy and make it onerous to allocate adequate resources to the agriculture sector. All of the country's main crops and livestock have substantially declined in production, leading to Zimbabwe increasingly having to import more than it exports. Land and labor productivity also continue to decline.

Recommendations from the above assessment include the following:

- Establish a coordination unit within the public sector to effectively coordinate plan, implement, and monitor ZAIP activities and collaborate with nonstate actors; this should be accompanied by clear M&E frameworks that are supported by appropriate capacity building resources. A robust M&E system is critical to the success of ZAIP implementation.
- Strengthen information gathering, collation, and knowledge sharing mechanisms to ensure adequate coverage of state and nonstate issues in the JSR. Coordination within government institutions must be improved at the national and subnational levels. An ineffective and uncoordinated information flow from agricultural stakeholders will only restrict the ability of the M&E team to monitor progress.
- Ensure that nonstate actors in Zimbabwe are involved in the planning, implementation, and M&E of agricultural policies and programs. The active involvement of the private sector in the agriculture sector must be promoted in order to stimulate the private sector's contribution to agricultural growth. As such, accountability and ownership within the agriculture sector will improve as required by CAADP processes.
- Align policies and programs to the ZAIP. Identify those that are not and set a clear deadline by which they should be aligned. Ensure that there is an adequate policy mix to steer agricultural growth and put in place the necessary structures to facilitate ZAIP implementation at the national and subnational levels.
- Mobilize adequate financial and nonfinancial resources to achieve agriculture development objectives. The public and private sectors, as well as international development organizations should support the agriculture sector by providing adequate resources.
- Commit to improving support and establishing an enabling environment to foster the increase and sustainability of agriculture. Private sector engagement and collaboration with international development partners should be prioritized to assist in the revival of the agriculture sector.

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APPENDIX A: ZIMBABWE: STRENGTHENING MUTUAL ACCOUNTABILITY THROUGH AGRICULTURE JOINT SECTOR REVIEWS: THE 2016 PROCESS

TABLE A.1: SUMMARY OF STAKEHOLDER VIEWS ON KEY ASPECTS OF THE JOINT SECTOR REVIEW PROCESS

N°	Joint Sector Review: Building Blocks	Purpose/Tasks: Best Practices	What is the current practice in the country?	How does the current practice differ from best practice?	What actions are needed to achieve best practice?
1	Establish a Joint Sector Review (JSR) Steering Committee (SC).	SC provides strategic direction for the establishment and operation of the JSR. It is usually chaired by the Ministry of Agriculture, Mechanisation and Irrigation Development (MAMID) and includes, as members, leading donors and three to four other representatives of key stakeholder groups.	No JSR processes	Weak coordination	Put in place a JSR committee
2	Establish a JSR Secretariat	Secretariat coordinates activities and operations of the JSR and SC. It can be made up of core staff from MAMID's Planning & M&E Units.	Done	Understaffed	Adequate staff and training
3	Develop terms of reference (ToR) for the JSR.	ToRs should lay out JSR objectives, state and nonstate stakeholders and their roles, roles of the SC and Secretariat, operating principles, structure and frequency of JSR meetings, follow up and implementation of actions, among others. ToRs may also need to be developed for consultants hired to conduct JSR studies.	Done	Done well	
4	Mobilize resources	Human and financial resources need to be mobilized to support JSR operations	Done	Inadequate resources	Mobilize sufficient resources

N°	Joint Sector Review: Building Blocks	Purpose/Tasks: Best Practices	What is the current practice in the country?	How does the current practice differ from best practice?	What actions are needed to achieve best practice?
5	Have SC/Secretariat invite a broad and inclusive group of state and nonstate actors/ stakeholders to participate in the JSR (with clear objectives, expected outcomes, and roles of different actors)	A key aspect of the JSR is that it allows a broad group of state and nonstate stakeholders to influence overall policy making and established the priorities of the sector by assessing how well commitments have been implemented, as stipulated in the CAADP Compact, national agriculture and food security investment plans, and related cooperation agreements, such that of the New Alliance for Food Security and Nutrition	Done	Limited participation from the donor and private sector	Ensure wide participation of private sector and donors
6	Assess existing agricultural policy dialogue and review processes, together with data quality and analytical capacities	An assessment of existing agricultural policy dialogue and review processes; data quality and analytical capacities; and tools and networks, as well as existing knowledge systems is key to identifying gaps and developing ways to fill these gaps and enhance capacities, tools, and processes through the JSR	Ad hoc; not coordinated	Some policies not aligned	Align policies and mobilize resources
7	Commission JSR studies	Consultants may need to be hired and supervised by the SC to conduct JSR studies. Consultants may come from think tanks, academia, or the private sector. They should work closely with staff from the MAMID's Planning Unit, the JSR SC, and Secretariat.	Commenced	Inadequately funded	Implement JSR regularly
8	Establish a JSR Team	A team composed of a multistakeholder group (state and nonstate actors) with technical expertise should review and comment on various JSR studies and reports and ensure outputs of reviews are implemented.	Group members are inadequate	Substandard	Encourage participation of donors and private sector

N°	Joint Sector Review: Building Blocks	Purpose/Tasks: Best Practices	What is the current practice in the country?	How does the current practice differ from best practice?	What actions are needed to achieve best practice?
9	Prepare a JSR report	A report should be prepared, based on relevant, high-quality studies and reports on JSR content areas. To be a mutually effective accountability process, the JSR report should be based on high-quality data and analyses, as well as transparency and inclusive stakeholder participation	Done, although time-sensitive and indepth data collection and analyses are slight	Report did not capture indepth information	Provide adequate time and resources
10	Conduct a JSR meeting	A one-to-two-day meeting to be held, with various formats (plenary, small groups, field visit) will allow stakeholders to discuss and verify evidence-based data and recommendations presented in the JSR report. This can be done at the national and subnational levels. The process should assist in identifying sector priorities and policies, as well as specific activities to take place by the various stakeholders. These would be captured in a JSR Aide Memoire.	Done	Inadequate representation from some stakeholders	Encourage adequate participation of donors and private sector
11	Follow up on JSR meeting actions	The implementation of recommendations and decisions of the JSR meeting (embodied in the JSR Aide Memoire) should be closely monitored. Groups that meet more regularly, such as the Agriculture Sector Working Group, should help with follow up and monitoring. Monitoring forms the basis of the following JSR cycle	Upcoming	Yet to be tested	Meeting actions will now be pursued by JSR Secretariat
12	Share JSR experience with other countries	As many countries are in the process of setting up a JSR, it is essential to share lessons learned, best practices, and experiences to further strengthen country JSRs. Such forums as the Partnership Programme of the Comprehensive Africa Agriculture Development Programme and the annual conference of the Regional Strategic Analysis and Knowledge Support System provide opportunities to do so.	Upcoming	Yet to be tested	Broad participation should take place

TABLE A.2: LIST OF KEY PEOPLE MET WITH

Stakeholder Group/Organization	Key Informations	Position
Ministry of Agriculture, Mechanisation and Irrigation Development	Roy Manongwa	Economist
Department of Irrigation	Soneni Nyamangara	Acting Deputy Director
Caritas Zimbabwe	Marius Zibgwi	In-Country Coordinator
Ministry of Agriculture, Mechanisation and Irrigation Development	T. Chimbadzwa	Economist
Ministry of Agriculture, Mechanisation and Irrigation Development	M. Kimu	Principal Economist
Zimbabwe National Statistics	B. Kaseke	Manager
Ministry of Industry and Commerce	C. Makwindi	Principal Economist
Ministry of Agriculture, Mechanisation and Irrigation Development	Gamuchirai Musamadya	Principal Economist
Ministry of Agriculture, Mechanisation and Irrigation Development	Nyasha.C.Musakaruka	Assistant economist
Ministry of Agriculture, Mechanisation and Irrigation Development	Melody.R.Chatiza	Junior economist
Ministry of Agriculture, Mechanisation and Irrigation Development	Takudzwa Chimbadzwa	Economist
Division/livestock	Accadius Tigere	Head
Ministry of Finance and Economic Development	Krispen mashange	Deputy Director
University of Zimbabwe	Terera katema	Acting Chairperson
Department of Livestock and Veterinary Services	Dr.U.Ushewokunze-Obatoh	Principal Director
Ministry of Environment, Water and Climate	Forward Mupepe	Engineer
Agricultural Research Council	Clemence Mapika	Crops director
Ministry of Macroeconomic Planning	Kuda Chiguma	Economist
Ministry of Agriculture, Mechanisation and Irrigation Development	Moffat Nyamangara	Director
Ministry of Agriculture, Mechanisation and Irrigation Development	Clemence Bwenje	Director

TABLE A.3: STAKEHOLDERS WITH WHOM DISCUSSIONS TOOK PLACE

Stakeholder Group/Organization	Number Present at Meeting
European Union	2
Ministry of Agriculture, Mechanisation and Irrigation Development	5
Department of Agricultural Economics and Extension, University of Zimbabwe	6
Food and Agriculture Organization of the United Nations	3
Ministry of Finance and Economic Development	2
Department of Agricultural Technical and Extension Services	4
Chinhoyi University of Technology	2
Midlands State University	2
Seed Co Ltd.	2
Total	28

