



REPUBLIC OF ZAMBIA

REPORT

OF THE

COMMITTEE ON AGRICULTURE, LANDS AND NATURAL RESOURCES

FOR THE

FIFTH SESSION OF THE TWELFTH NATIONAL ASSEMBLY

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REPORT OF THE COMMITTEE ON AGRICULTURE, LANDS AND NATURAL RESOURCES FOR THE FIFTH SESSION OF THE TWELFTH NATIONAL ASSEMBLY

1.0 Membership of the Committee

The Committee consisted of Mr M J B Ng'onga, MP, (Chairperson); Mrs C M Mazoka, MP (Vice Chairperson); Mr M Mawere, MP; Mr S K Michelo, MP; Mr P C Mecha, MP; Dr M Imakando, MP; Mr D Mung'andu, MP; Mr B Hamusonde, MP; Mr O S Mutaba, MP and Mr J Chishala, MP.

The membership of the Committee changed following the death of Mr M J B Ng'onga, MP (Chairperson).

The Honourable Mr Speaker
National Assembly
Parliament Buildings
LUSAKA

Sir,

The Committee has the honour to present its Report for the Fifth Session of the Twelfth National Assembly.

2.0 Functions of the Committee

The functions of the Committee are set out in Standing Order No. 157 (2) of the National Assembly Standing Orders, 2016.

3.0 Meetings of the Committee

The Committee held fifteen meetings during the year under review to consider the topical issue.

4.0 Programme of Work

At its first meeting, held on Thursday, 28th September, 2020, the Committee resolved to undertake a study on the topical issue "*the Fishing Industry in Zambia: Opportunities and Challenges*". The Committee also resolved to consider the Action-Taken Report on its Report for the Fourth Session of the Twelfth National Assembly.

5.0 Procedure Adopted by the Committee

The Committee requested for written memoranda from various stakeholders on the topical issue under consideration and invited them to appear before it in order to make oral submissions and clarifications on issues arising from their submissions.

6.0 Arrangement of the Report

The Report is in two parts: Part I is the consideration of the topical issue. Part II is the consideration of outstanding issues from the Action-Taken Report on the Report of the Committee for the Fourth Session of the Twelfth National Assembly.

PART I

7.0 Consideration of Topical Issue - The Fishing Industry in Zambia: Opportunities and Challenges.

7.1 Background

Fisheries offered great potential for diversification, gainful employment and poverty reduction. The fisheries sub-sector also provided business opportunities in fisheries and related industries in the value chain. The fisheries sub-sector in Zambia was, however, underdeveloped and many natural water bodies had been overfished due to inadequate legislation, control and surveillance. This was exacerbated by climate induced effects that had reduced the yields of capture and had made Zambia continue being a net importer of fish.

The depletion of fish stocks affected the livelihoods of the populations which depended on the fishing value chain. It had also been noted that there were very few local fish farmers in the country. This scenario demanded increased investment in fish farming technologies, sustainable management of capture fisheries and strengthening fisheries training and research. Thus, the transformation of fisheries into a diversified, competitive and export-oriented sub-sector would require increased investment in water management and fisheries-related infrastructure, ICT, logistics, storage, cold chain and road infrastructure.

In light of the foregoing, the Committee resolved to carry out a study on the challenges and opportunities facing the development of the fisheries sub-sector in Zambia.

Objectives

The objectives of the study were to:

- i. assess the adequacy of the policy and legal framework governing the fisheries sub-sector;
- ii. ascertain the measures put in place for strengthening and monitoring the liberalisation of markets in fisheries;
- iii. ascertain the level of participation of indigenous Zambian fish farmers in the fisheries sub-sector;
- iv. ascertain the level of facilitation of private sector involvement in fisheries development;
- v. appreciate the strategies and mechanisms put in place for the prevention and control of pests and diseases, if any, affecting the fisheries subsector;
- vi. assess the adequacy of the market information systems in the fisheries value chain;
- vii. appreciate any other challenges facing the fisheries sector; and
- viii. make recommendations on the way forward.

7.2 Witnesses

Listed below are the witnesses who made submissions on the topic under consideration.

- i. Ministry of Finance;
- ii. Ministry of Agriculture;
- iii. Ministry of Fisheries and Livestock;

- iv. Ministry of National Development Planning;
- v. Ministry of General Education;
- vi. Citizens Economic Empowerment Commission;
- vii. Zambia Aquaculture Enterprise Development;
- viii. Natural Resources Development College;
- ix. House of Chiefs;
- x. Policy Monitoring Research Centre;
- xi. Indaba Agriculture Policy Research Institute;
- xii. African Development Bank;
- xiii. Disaster Management and Mitigation Unit – Office of the Vice President;
- xiv. University of Zambia – School of Agricultural Sciences;
- xv. Robert Kapasa Makasa University;
- xvi. National Institute for Scientific and Industrial Research (NISIR);
- xvii. Worldfish Centre;
- xviii. Yalelo Fisheries;
- xix. Capital Fisheries;
- xx. Palabana Fisheries;
- xxi. Mpende Fisheries;
- xxii. Tiger Feeds Limited;
- xxiii. Chikunto Fish Hatchery and Farm;
- xxiv. Aquaculture Development Association of Zambia;
- xxv. Zambia National Farmers Union;
- xxvi. Zambia Aquaculture Cooperative Society;
- xxvii. Consumer Unity and Trust Society; and
- xxviii. Members of the Public

7.3 Summary of Submissions by Stakeholders

The submissions made by the stakeholders on the subject under consideration by the Committee are summarised below.

The Committee was informed that the fisheries industry in Zambia was made up of capture fisheries and aquaculture, with capture fisheries producing the bulk of the country’s fish supply. The country’s current demand for fish, which stood at about 160, 000 metric tonnes, far outstripped the supply, which currently stood at about 120, 000 metric tonnes, making Zambia a net fish importer. This had caused the Zambian Government to respond by promoting sustainable capture fishing and intensive aquaculture.

The Committee was further informed that Zambia’s major water bodies for capture fisheries included Lakes Kariba, Mweru–Luapula, Mweru–Wantipa, Lusiwasi, Itzhi Tezhi, and Tanganyika. The major rivers included Kafue, Luangwa, Lukanga, Chambeshi, and Zambezi. Production from capture fisheries had remained stagnant for a long time due to overfishing and destructive fishing methods. Capture fisheries production in 2018 stood at 89,195 metric tonnes, marginally increasing from 76,396 in 2010. Aquaculture on the other hand, entailed cultivation, propagation or farming of fish, aquatic vegetation, or other living aquatic resources. Commonly grown species in Zambia were tilapia and catfish produced either through cage or pond production systems. Aquaculture production had experienced a

substantial increase in production from 5000 metric tonnes in 2006 to 38,480 metric tonnes in 2019 (Department of Fisheries, 2019).

The Committee was informed that the Ministry of Fisheries and Livestock, with support from the African Development Bank (AfDB), was implementing the Zambia Aquaculture Enterprise Development Project (ZAEDP). The development objective of the Project was to advance the aquaculture sub-sector as a viable and inclusive business opportunity, through enhanced production and productivity, in order to improve the livelihoods of beneficiaries along the aquaculture value chain. As such, and as part of the ZAEDP, the Department of Fisheries had established an Aquaculture Seed Fund (ASF), to which it had allocated USD 27 million. The objective of the ASF was to address the development constraints in the aquaculture sub-sector and contribute to economic growth, as well as to food and nutrition security in Zambia through a value chain development approach. Department of Fisheries appointed the Citizens Economic Empowerment Commission (CEEC) as its Fund Manager for the ASF. The ASF would facilitate the development of at least 2,924 micro, small and medium enterprises along the aquaculture value chain with at least 2,400 competitive smallholder fish producers in pond and cage culture, and at least 500 other value chain actors.

On the issue of fingerling production, the Committee was informed that private hatcheries were relatively new nodes in the Zambia aquaculture value chain and they were located mainly in Lusaka, Southern, Northern and Copperbelt provinces. In order to contribute to this node of the value chain, the Government had, through CEEC, supported the establishment of twelve commercial fish hatcheries. It was anticipated that this would stimulate growth in small-scale aquaculture and create a sustainable demand for fingerlings.

7.3.1 Adequacy of the Policy and Legal Framework

a. Policy Framework

The Committee was informed that the fisheries sector in Zambia did not have a standalone policy. The following were the policies currently available for governing the fishing industry in Zambia:

- i. Seventh National Development Plan (7NDP, 2017-2021): The 7NDP encompassed strategies for the development of the fisheries industry under the pillar on Economic Diversification and Job Creation.
- ii. Second National Agriculture Policy (SNAP, 2016-2020): The SNAP was the overarching policy that governed the development of the agriculture sector, which included the fisheries industry in Zambia.

However, the SNAP, which was the main policy encompassing the fisheries sector, also covered a number of other sub-sectors, including crop production and livestock. This tended to reduce emphasis on fisheries.

b. Legal Framework

With regard to the regulatory framework, the Committee was informed that the *Fisheries Act, No. 22 of 2011* was the principal Act of Parliament governing the fishing industry in Zambia. It was complemented by the Fisheries Regulations No. 24 of 2012. This Act provided for the promotion of sustainable development of fisheries and a precautionary approach in fisheries management, conservation and utilisation, and the regulation of commercial fishing and aquaculture. In addition, other Acts affected the fisheries sector such as the following listed hereunder.

- i. *The Environmental Management Act, No. 12 of 2011;*
- ii. *The Water Resources Management Act, No.21 of 2011;*
- iii. *Local Government Act, Chapter 281;*
- iv. *Biosafety Act, No. 10 of 2007;*
- v. *Public Health Act repealed by Act, No. 22 of 1995;*
- vi. *Zambezi River Authority Act, No. 17 of 1987;*
- vii. *Lands Act Chapter 184 of the Laws of Zambia;*
- viii. *ZAWA Act, No. 12 of 1998;*
- ix. *Animal Health Act, No. 27 of 2010;*
- x. *Cooperatives Act, No. 20 of 1998; and*
- xi. *The Plant Pests and Diseases Act, No. 13 of 1994.*

However, the multiplicity of Acts affecting the fishing industry was a source of concern as it was perceived to create a lot of confusion in implementation of the different pieces of legislation. For instance, the *Animal Health Act, No. 27 of 2010* and the *Fisheries Act, No.22 of 2011* both provided restrictions on the importation of fish which led to the confusion of the members of the public as regards which institution was responsible for the monitoring of fish imports.

The Committee was informed that, additionally, Zambia had signed a number of international and regional conventions, treaties, and protocols that were related to fisheries and aquaculture development. These included the Convention on Biological Diversity, the Food and Agriculture Organisation (FAO) Code of Conduct for Responsible Fisheries and Aquaculture, the SADC Protocol on Fisheries, the SADC Protocol on Shared Water Bodies, the SADC Treaty on Management of Water course Systems, the Ramsar Conventions, and the Convention on the Sustainable Management of Lake Tanganyika.

7.3.2 Measures for Strengthening and Monitoring the Liberalisation of Markets

The Committee was informed that some measures had been put in place for strengthening and monitoring the liberalisation of markets in the fisheries sub-sector. Some of these were as listed hereunder.

- i. There was formalisation of informal trading, thereby promoting the bulking of fish by small-scale farmers through cooperatives and then providing market facilitation.
- ii. There was market facilitation by linking of small scale fish producers to markets such as supermarkets and chain stores.

- iii. There was a fisheries value chain development where the Government had been promoting the fisheries value chain by bringing all the players together, including the refrigerated transporters, processors, small/large scale fish producers and the markets for the fish.
- iv. There was facilitation of investments in the sub-sector where the Government had been facilitating participation of indigenous Zambians through the aquaculture fund and both public and private hatcheries development.
- v. There was regulation of competition where the Government, through the Competition and Consumer Protection Commission (CCPC), regulated the fishing markets to ensure that markets were genuinely competitive. The Commission ensured that there were no barriers to entry of new players in the market and that there were no cartels being formed through formal mergers and deliberate attempts to distort markets by market players. The CCPC also conducted market surveillance to identify any anti-competitive behaviour or wrongdoing and acted swiftly to correct the situation to ensure that markets performed as intended.
- vi. There was international trade monitoring where the Government, through the Ministries of Fisheries and Livestock and Commerce, Trade and Industry, also monitored international trade in fish. This was being done by putting up fish import quotas of 60 per cent for SADC countries and 40 per cent for imports from Asia. The above system was meant to prevent dumping of fish which would stifle growth of the Zambian fish industry. Further, the Government had restricted importation of live fish.

7.3.3 Level of Participation of indigenous Zambian Fish Farmers

The Committee was informed that the level of participation of indigenous Zambians in the fisheries sub-sector had improved as they were now participating at all levels of the value chain. However, there was still a lot of room for improvement.

For example, the fish seed sector was slowly transitioning from being predominantly run by the Government to the private sector with indigenous Zambians participating well. With the funding made available through Zambia Aquaculture Enterprise Development Project (ZAEDP/CEEC), thirteen indigenous commercial hatcheries had been established to contribute to bridging the gap between the supply and demand for fingerlings. In 2018, Government hatcheries produced 843,490 fingerlings, which was 0.45 per cent contribution to the total fingerling production estimated at 196,295,240 (Department of Fisheries, 2019).

With regard to fish feed production, the Committee was informed that by 2017, eight fish feed mills had been established to supply domestically produced pelleted fish feed for commercial aquaculture. There had been no survey undertaken in the recent past to establish the exact production data in Zambia, but various key informants within the feed sector reported that domestic production of aquafeeds had reached around 30,000 metric tonnes in 2016. Currently, there were two biggest commercial producers: Skrettings, with a capacity of 100,000 metric tonnes per year and Aller-Aqua, with a capacity of 150,000 metric tonnes per year. It had been established that 60 per cent of the aquafeed produced was exported to the SADC region whilst the domestic market was serviced by 40 per cent of production. Further, fish feeds were relatively expensive, especially for small-scale producers because major fish feed ingredients were imported.

As regards the production of fingerlings, the Committee was informed that currently, there were very few producers of fingerlings and these did not produce enough fingerlings. Fingerlings producers were not widespread around the country but only located in a few areas. Most provincial centres and districts did not have fingerlings producers.

For the fish farming to grow in Zambia there was need to empower local entrepreneurs or local fish farmers to set up fingerlings production farms especially in districts that had potential for fish farming. In this way, it would be easier for anyone to venture into fish farming. Fingerlings were like seed and should therefore, be easily available for every fish farmer to access.

The Committee was informed that there was also need to look into the issue of the quality of fingerlings being supplied on the market. Some fish farmers had complained about fingerlings that took too long to grow to market size and fingerlings that had not been properly sexually reversed. In addition, the cost of fingerlings in some rural areas was quite high.

The Committee was informed that participation of indigenous Zambians in commercial fish production was low owing to high capital requirements, difficulty in land acquisition for commercial fish production, length and cost of Environmental Impact Assessments and Environmental Project Briefs. The participation of indigenous Zambians in the small-scale production was high due to the ease of access of land and water by small-scale producers.

7.3.4 Level of Facilitation of Private Sector involvement in Fisheries Development

The Committee was informed that the Government had put in place measures to promote private sector participation in fisheries development. Emphasis had been on empowering small-scale fish producers and small value chain players.

With regard to private sector involvement in fisheries development, the Committee was informed that the introduction of the *Niloticus* hybrid fish for commercial aquaculture production took place sometime in the early 1980's when Kafue Fisheries imported Nile tilapia into Zambia. However, local investors who wanted to acquire the *Niloticus* brood stock to set up commercial fish farms on the Zambian side of Lake Kariba and along Kafue River were denied access to this globally well renowned high value fish.

Globally, *Niloticus* was a well known early maturing hybrid fish suitable for commercial use with guaranteed quick economic returns. It had special qualities of hardiness, adaptability and high productivity. *Niloticus* was originally an indigenous African tilapia from Nile River which was taken to Israel, China and Asia where it had undergone more than fifty years of selective breeding to produce a well renowned hybrid fish for use in commercial aquaculture.

The Committee was informed that the reasons given for this restriction was the fear that the invasive and dangerous *Niloticus* tilapia escapees from farm earthen fish ponds would contaminate the capture fisheries water bodies. This restriction was seen as retrogressive and very frustrating to the upcoming aquapreneurs who had therefore, appealed to the

Department of Fisheries to rescind its decision to selectively restrict the farming of the *Niloticus Tilapia*. This issue had, however, not been resolved.

The following listed hereunder were the measures the Government had put in place to facilitate private sector involvement in fisheries development:

i. Establishing of Aquaculture Parks

The Government had prioritised the development of aquaculture parks to boost fish production and provide support to the growth of micro, small and medium enterprises in the fisheries industry. The aquaculture parks would be located in Kasempa, Rufunsa, Gwembe and Mungwi districts.

ii. Provision of Finance to Aquaculture Value Chain Players

The Government signed a US\$40 million loan from the African Development Bank for the Zambia Aquaculture Enterprise Development Project (ZAEDP) meant to provide financing to the aquaculture value chain players. Further, the Government had made available climate resilience funding to aquaculture value chain players through the Pilot Programme for Climate Resilience (PPCR) and the Transforming Landscapes for Resilience and Development Project (TRALARD) to a tune of US\$50.6 million and US\$100 million, respectively.

iii. Improvement of Extension Delivery

The Government had over the years employed more extension officers in fish camps to try and promote small-scale production of fish. In 2018, the Government employed 250 extension officers to improve delivery of extension services. This signalled a positive policy direction in the sector.

iv. Aquaculture Empowerment Funds

The Citizens Economic Empowerment Commission (CEEC) had identified aquaculture as one of the key industries for funding in the North Western, Northern, Luapula, Muchinga and Central Provinces. This was in addition to the funds provided for under the ZAEDP. Therefore, CEEC had targeted the development of the whole value chain from fingerlings to retailers.

The measures above were meant to promote indigenous private sector involvement in the fisheries development. Most interventions targeted the entire value chain, with emphasis on small-scale producers.

7.3.5 Adequacy of the Market Information Systems

With regard to the adequacy of the market information systems in the fisheries value chain, the Committee was informed that the market information systems were not adequate. Market information was predominantly provided by the Government although the private sector had gradually been participating.

The Government had been providing market information to farmers through e-Extension and camp extension officers. However, this had proved difficult to implement as camp extension

covered large areas as well as a high number of farmers, while the mobile platform was not accessible to all small-scale farmers. Additionally, market information passed on from farmers with phones may be subject to distortions and thus, unreliable. This implied that, at the moment, the market information system being provided by both the Government and the private sector was not adequate. There was need for the Government to incentivise the private sector to enter into the provision of market information since the private sector provided the service more efficiently compared to the Government.

7.3.6 Strategies and Mechanisms put in place for the Prevention and Control of Pests and Diseases

The Committee was informed that Zambia had experienced increased growth in aquaculture production which had subsequently resulted in an increase in the movement of live fish such as fingerlings. This had invariably increased the risk of transmission of fish diseases. Epizootic Ulcerative Syndrome (EUS) which was endemic in Zambezi River, particularly Western Province where it was first recorded, and bacterial infections were currently the major diseases of significance in Zambia.

The Committee was further informed that currently, only the large-scale commercial aquaculture facilities had robust biosecurity systems and measures in place. Small-scale fish farmers and artisanal fishers demonstrated little or no knowledge of the importance of aquatic biosecurity. This could pose a danger to aquaculture as diseases such as EUS that had traditionally affected fish in capture fisheries could easily be transferred to the farmed fish environment. In addition, lax biosecurity, or a total lack of it, raised the risk of emerging diseases such as Tilapia Lake Virus (TiLV) being introduced into the country. In this regard there was need to enhance disease surveillance.

The Committee was informed that to ensure a favourable disease status in the fishing industry, the Government had been undertaking the following measures:

- i. There was strengthened support to the Department of Veterinary Services where the Government had built regional laboratories/fisheries research centres that conducted research in diseases that affected fish and employed competent laboratory officers to enhance response to disease incidences.
- ii. There was strengthened enforcement of bio-security measures through disease surveillance. The Government, through the Department of Veterinary conducted systematic programmes of disease surveillance. This prevented serious outbreaks of disease, and thus prevented the introduction or inadvertent transfer of disease between water bodies and from aquaculture farms to other places. The *Fisheries Act* had put in place mechanisms for regulatory control to avoid the introduction of serious transmissible diseases into the country, to prevent transmission within the country, and to prevent and control diseases, if introduced. The Government was proactively looking to improve the legal framework so as to strengthen prevention of disease spread.
- iii. There was enhanced sensitisation and capacity building on fish diseases where the Government had increased awareness among small-scale farmers on the need for hygiene and sanitary measures for control of fish diseases; and the training of personnel

involved in the different aspects of fish health to ensure that they understood the diseases and were, in turn, able to handle any outbreaks.

7.3.7 Challenges facing the Fisheries Sub-sector

The Committee was informed that the challenges facing the fisheries sub-sector were as set out hereunder.

- i. There was weak enforcement of regulations due to inadequate human resource and equipment. The Department of Fisheries had challenges in enforcing the fisheries regulations, particularly pertaining to fish bans.
- ii. There was low productivity even though production had grown at a steady pace as this could be attributed to an increase in producers rather than increase in productivity. In this regard, aquaculture production increased from 10,291 metric tonnes in 2010 to 38,408 metric tonnes in 2019. The results of the 2018 fish-farming survey revealed a national productivity rate of 4.1 metric tonnes per hectare, which was below the recommended productivity rate of 6-8 metric tonnes per hectare. (Department of Fisheries, 2019).
- iii. There was inadequate storage capacity in the industry. The lack of storage affected the marketing of fresh fish among small-scale producers as most fishing areas were not connected to electricity, which made refrigeration expensive and out of reach to small-scale fish farmers. This in turn provided serious challenges to fish marketing for the artisanal aquaculture farmers, who incurred post-harvest losses.
- iv. Small-scale producers and fishermen often faced huge post-harvest losses due to a limited knowledge of the preservation techniques that would extend shelf-life. This had a negative impact on the income and nutrition of the majority who depended on fish.
- v. There was inadequate access to credit and finance as most small scale fish farmers had no collateral and land used for fish farming usually belonged to the chief (customary land). This made it difficult for small scale fish farmers to access cheaper credit. Further, the funding under the CEEC was targeted to four provinces through the Value Chain Development that CEEC was undertaking. This left fish farmers in the other six provinces without access to the affordable funding.
- vi. There was lack of consensus among the stakeholders on the introduction of the Niloticus Tilapia. Most fish farmers appreciated it as having accelerated growth and, therefore, good for commercial ventures whereas the Department of Fisheries viewed it as an invasive species which could harm the environment.
- vii. Climate change effects on the fishing industry were somewhat ignored despite the evidence showing the impacts on the sub-sector. For instance, there had been evidence that the Lake Bangweulu had been drying up slowly in the last few decades. According to the data obtained from the Department of Water Affairs and reported by the Department of Fisheries, the depth of the lake decreased by 0.66 meters between 1974 and 2011.
- viii. Fingerling availability was a challenge because, up until recently, fingerlings were only produced along the line of rail, which made the cost of fingerlings expensive for rural small scale fish farmers. With the funding of thirteen commercial hatcheries under CEEC, it was expected that fingerlings would be readily available. However,

this would be dependent on the efficiency of the indigenous hatcheries funded and their location in the province.

- ix. High cost of feed due to the lack of low-cost and readily available raw materials for fish feed production was another challenge. Feed producers had reported difficulty in sourcing micronutrients like vitamins and good quality fishmeal, leading to inconsistencies in finished aquafeeds. From the fish producers' perspective, feed represented their biggest production cost. Increasing feed capacity and quality was a crucial step in strengthening Zambia's aquaculture ventures.

7.3.8 Recommendations by Stakeholders

The Committee was informed that the policy and legal framework governing the fisheries industry was inadequate. Therefore, stakeholders recommended the development of a standalone fisheries policy which would articulate strategies for the development of the fisheries sub-sector. There was also need to formulate an aquaculture strategy that considered the uniqueness of aquaculture and how to develop its potential.

The stakeholders made the recommendations set out hereunder emanating from the above-stated challenges.

- i. There was need to strengthen enforcement of regulations through employment of appropriate personnel as well as acquisition of necessary equipment for the enforcement of regulations.
- ii. There was need to strengthen extension delivery by deploying aquaculture camp extension officers in areas identified as key for aquaculture production during the next deployment exercise. This would improve the productivity of small scale farmers. Capacity building should also be done to train camp extension officers in post-harvest handling so that they could train farmers on managing losses after harvest.
- iii. There was need to strengthen aquaculture cooperatives to facilitate reduction in the risk of offering credit as the small scale farmers would co-guarantee each other in case of default. Further, the cooperatives could easily be linked to commercial off-takers or be galvanised into one marketing cooperative that would have its own distribution channels. These channels could then be supported to penetrate regional markets.
- iv. There was need for enhanced research on the advantages and disadvantages of introducing the *Niloticus Tilapia* in the aquaculture subsector.
- v. There was need to create market linkages by strengthening support to value chain players to off-takers of the small scale farmers' produce. Further, arrangements should be made with chain stores to be able to procure from small scale farmers' cooperatives.
- vi. There was need to promote innovation and research in feed production. This would allow for sourcing of local materials to substitute expensive imported raw materials. This would in turn, make the cost of production low and allow the country's fish to be more competitive in the region.
- vii. There was need to enhance research on fingerling production to ensure that the country was able to satisfy demand. There was also need to reach a consensus on the introduction of the *Niloticus Tilapia* in all regions of the country.

- viii. There was need to facilitate increased capacity for storage through establishment of cold storage facilities for aggregation of small-scale fishers.
- ix. There was need to strengthen climate change adaptation in order to continue protecting wetlands as well as river basins and reduce the adverse impacts of anthropogenic actions on the fisheries industry.

The Committee was informed that the fisheries sector in Zambia had the capacity to meet the country's demand for fish and earn the country the much needed foreign exchange if the challenges it was currently facing were addressed. It was, therefore, imperative that coordination issues in the fisheries sector were addressed, market information systems were strengthened and value chains developed.

7.5 Committee's Observations and Recommendations

After detailed analysis of the written memoranda and careful consideration of oral submissions from the stakeholders, the Committee makes the observations and recommendations set out hereunder.

a. Policy Framework

The Committee observes that there is lack of a comprehensive National Fisheries Policy, which is an essential pre-requisite to effectively address the sector concerns.

In this regard, the Committee recommends that the Government should expedite the formulation of a standalone fisheries and aquaculture policy which will prescribe the institutional arrangements for the management of the fisheries sector.

b. Legal Framework

The Committee notes that there are overlaps in some of the laws which provide for restrictions on the importation of fish such as the *Fisheries Act, No.22 of 2011* and the *Animal Health Act, No. 27 of 2010*. This might lead to confusion concerning which institution was responsible for monitoring of fish imports, thereby hampering implementation of the provisions.

In light of this, the Committee recommends that a review and harmonisation of the various laws in the fisheries sector be conducted. This calls for collaboration among the various stakeholder institutions that are involved in the regulation of fish imports.

i. Restriction of Farming of Niloticus Breed of Fish

The Committee observes that the introduction of the Niloticus Tilapia in the Zambian fisheries and aquaculture sub-sector has been a contentious issue among the stakeholders in the fishing industry as it has not been properly researched.

In this regard, the Committee recommends that research be conducted on the effects of introducing the Niloticus Tilapia, especially in controlled environments such as the aquaculture sector where ponds and dams are used.

c. Inadequate Enforcement Mechanisms

The Committee observes that there are inadequate enforcement mechanisms. This is more pronounced especially in the capture fisheries especially when enforcing the fisheries regulations particularly pertaining to fish bans. This has led to the depletion of most indigenous fish species in the rivers and lakes as there is no time allowed for stocking and restocking of the fish.

In light of this, the Committee recommends that the Government should employ adequate manpower for monitoring capture fisheries and provide necessary equipment for enforcement of regulations.

d. Ban on imports of fish

The Committee notes that Zambia has a deficit in the current supply of fish with demand standing at about 160, 000 metric tonnes, far outstripping the supply at about 120, 000 metric tonnes. This deficit makes Zambia a net fish importer. In light of this, the Committee does not understand the rationale for Government's imposition of a ban on the imports of fish.

In this regard, the Committee recommends that the ban on fish imports should be lifted to ensure that the fish deficit is offset by the imported fish. This, notwithstanding, the Government should also ensure that the sector is adequately funded to improve on local production rather than relying on fish imports in the long term.

e. Weak and/or lack of cross-sector collaboration

The Committee observes that weak and/or lack of cross-sector collaboration poses a serious risk as developments in the other sectors especially water development, forestry management and urban development have strong influence on the development of the fisheries sector.

In this regard, the Committee recommends that the Government should develop a clear mechanism for multi-stakeholder engagement to create synergies in the development of the sector and also to facilitate cross-sector collaboration, especially with ministries that have an influence on the growth of the fisheries sector.

f. Strengthening of Research and Development

The Committee notes that most research conducted does not take a multi-disciplinary approach. This has left many facets of fisheries and aquaculture sector undeveloped.

In light of this, the Committee recommends that research institutions should be funded to expand the scope of research to cover other neglected thematic areas such as promotion of use of local fish feed in aquaculture and commercial utilisation of other fish species in both fisheries and aquaculture.

h. Fingerlings Supply, Finance Availability and Supply of Quality Fish Feed

The Committee observes that the major challenges affecting the aquaculture sub-sector were the limited supply of quality fingerlings, non-availability of finances and non-availability of affordable and quality fish feed.

In this regard, the Committee urges the Government to ensure that it creates an enabling environment, leverages more private sector finance to the sector and supports and promotes reliable fingerling and fish feed producers.

PART II

8.0 Consideration of the Action-Taken Report on the Report of the Committee on Agriculture, Lands and Natural Resources for the Fourth Session of the Twelfth National Assembly

i. Lack of a comprehensive legal framework for an integrated climate change response.

The Committee had observed that despite the country having some pieces of legislation dealing with various aspects of climate change, there was no standalone piece of legislation dealing with climate change holistically. This did not conform to the National Policy on Climate Change which had provided for a legal framework for coordinating climate change programmes and was not appropriate for an integrated climate change response.

The Committee, had therefore, urged the Government to expedite the process of drafting appropriate legislation on climate change, which would domesticate the Paris Agreement and other United Nations Framework Convention on Climate Change (UNFCCC) guidelines.

Executive's Response

The Committee was informed that the Government had agreed to the recommendation and stated that following the approval of the National Policy on Climate Change (NPCC), the Ministry of Lands and Natural Resources had proceeded to formulate the Climate Change Bill. The Bill would provide a legal framework for the National Policy on Climate Change of 2016, it would provide for the domestication of the United Nations Framework Convention on Climate Change (UNFCCC) and the Paris Agreement. The Committee was informed that the Bill would support resource mobilisation initiatives and promote effective coordination and implementation of climate change programmes in the country. The layman's draft Bill was ready by December, 2020 and was awaiting clearance by the Council of Ministers to be sent to Ministry of Justice.

Committee's Observations and Recommendations

The Committee takes note of the response and awaits an update on the progress made on the Bill.

ii. Inadequate allocation of resources towards climate change mitigation and adaptation interventions.

The Committee had expressed concern that there were inadequate resources allocated to climate change in the national budget as most of the financing was reliant on donor and cooperating partners' funding avenues. This was unacceptable as conditions or requirements attached to accessing this funding by cooperating partners made it difficult for interested industry players to access the funds.

The Committee had therefore, recommended that the Government should allocate adequate resources in the national budget for climate change and ensure timely disbursement of such resources in order to put in place more sustainable interventions.

Executive's Response

The Committee was informed that the Government had agreed with the recommendation and stated that efforts would be made in the 2021 budget to track the resource allocation in the national budget for climate change in order to support climate change mitigation and adaptation programmes and projects. The Executive had stated that the Ministry would continue to engage the Ministry of Finance on the timely disbursement of climate change resources as doing so would promote effective coordination and implementation of climate change programmes.

Committee's Observations and Recommendations

The Committee takes note of the response and requests a progress report on the disbursement of climate change resources.

iii. Lack of Budget Tracking Tool for Climate Financing

The Committee had observed that there was no budget tracking tool for climate financing to inform the exact amount allocated and disbursed to climate change through the national budget. The tool was necessary to guide investment decisions and aid coordination of Zambia's climate change response. It was, therefore, not acceptable that the country did not have such a tool in place.

The Committee, had therefore, strongly urged the Government to expedite the preparation of the budget tracking tool in order to ensure that investment decisions in the climate change response were tracked and well-coordinated.

Executive's Response

The Committee was informed through the Action-Taken Report, that the Ministry had acknowledged the Committee's recommendation to expedite the preparation of a budget tracking tool to climate financing. To this effect, efforts had been made to identify programmes and activities undertaken by key sectors, specifically for improving the climate change response, to ensure that investment decisions in the climate change response were tracked and well-coordinated.

The Committee was further informed that the Ministry of National Development Planning, through the Pilot Programme for Climate Resilience Project, undertook a detailed analysis of the national budget and actual expenditure towards climate change activities for the period 2016 - 2018. This was to aid with the transition to the budget tracking tool for climate financing.

Committee's Observations and Recommendations

The Committee takes note of the response and awaits an update on the preparation of the budget tracking tool.

8.1 Consideration of the Action-Taken Report on the Report of the Committee on Agriculture, Lands and Natural Resources for the Third Session of the Twelfth National Assembly

i. Uncoordinated Land Use Planning

The Executive had acknowledged that it had participated in the development of the policy on urban and regional planning by the Ministry of Local Government. The policy was expected to enhance collaboration on integrated land use planning. Further, the Ministry had been working with the Ministry of Tourism and Arts, Ministry of Chiefs and Traditional Affairs, Ministry of Community Development and Social Welfare and Ministry of Local Government, in implementing joint programmes aimed at integrated land use planning in selected parts of the country.

The Committee had noted the response and requested for a progress report on the development of the policy on urban and regional planning.

Executive's Response

The Committee was informed through the Action-Taken Report that the Government had agreed with the recommendation and stated that it had engaged the Ministry of Local Government as that Ministry was the custodian of planning in the country which was developing a policy on urbanisation. The policy sought to promote integrated development planning. Once this policy was in place, the country would be assured of economic development as well as sustainable use of biodiversity.

Committee's Observations and Recommendation

The Committee takes note of the response and awaits an update on the formulation of the policy.

ii. Limited Support for Reforestation and Afforestation

The Committee was informed that the Ministry was in the process of seeking cabinet approval to operationalise the Forestry Development Fund. A Cabinet memorandum had since been prepared.

The Committee had noted the response and requested a progress report on the operationalisation of the Forestry Development Fund.

Executive's Response

The Committee was informed through the Action-Taken Report that the operationalisation of the Forestry Development Fund (FDF) was under way and that the Ministry was exploring modalities on how to operationalise the Fund given the new guidelines in the *Public Finance Act, No. 1 of 2018*.

Committee's Observations and Recommendations

The Committee takes note of the response and awaits an update on the operationalisation of the Forestry Development Fund.

iii. Inadequate Regulation of Mukula Trade

The Committee was informed that the Ministry had prepared a memorandum for Cabinet's consideration and approval to declare Mukula as protected flora in order to regulate its harvesting and trading. Further, the Ministry was making consultations with other ministries and government agencies regarding the establishment of a public auction mechanism for timber so as to enable the Government collect optimal revenue from the sale of the Mukula tree.

The Committee had noted the response and had requested a progress report on the proposal to declare Mukula as protected flora and also the establishment of a public auction mechanism for timber.

Executive's Response

The Committee was informed that Cabinet, at its 22nd (Special) Meeting held on 4th December, 2019, accepted the recommendation by the Minister of Lands and Natural Resources that it should approve the declaration of *Pterocarpus tinctorius* synonym *Pterocarpus crysothrix* (Mukula) as protected flora in the entire Republic. Consequently, the Ministry formulated a draft Statutory Instrument to declare Mukula as protected flora under Section 47 of the *Forests Act No. 4 of 2015*.

The Committee was informed that the Ministry was working on the operationalisation of the issuance of timber export permits on the Zambia Electronic Single Window System in collaboration with the Zambia Revenue Authority (ZRA).

The Committee was further informed that the Ministry was also developing the timber traceability system which would track the movement of timber from concession areas through to the market, thereby reducing on the illegal trade in timber in the country.

Further, the Committee was informed that, with regard to the establishment of a public auction mechanism for timber, the Ministry had included a mechanism for trading in Mukula in the Statutory Instrument for the declaration of Mukula as protected flora. This would be regulated through the involvement of community forest management groups or cooperatives and a special purpose vehicle (SPV).

Committee's Observations and Recommendations

The Committee takes note of the response and requests a progress report on the finalisation of the statutory instrument to declare Mukula as protected flora.

iv. Inadequate Funding to the Forestry Research Unit

a. The Committee was informed that the Ministry had agreed that funding for forestry research activities had not been adequate. However, the proposal to decentralise the Forestry Research Unit would require the engagement of the Public Service Management Division to restructure the Forestry Department.

The Committee had noted the response and had called for the expeditious restructuring of the Forestry Department. The Committee had awaited a progress report on this matter.

Executive's Response

The Committee was informed that the Government had agreed with its recommendation and stated that a recommendation to restructure the Forestry Department was before Cabinet awaiting approval.

Committee's Observations and Recommendations

The Committee takes note of the response and awaits an update on the restructuring of the Forestry Department.

b. The Committee had further recommended that the Forestry Research Unit should be encouraged to enter into a Memorandum of Understanding with the Zambia Forestry and Forest Industries Corporation Limited (ZAFFICO) so that the Unit could conduct all research on behalf of ZAFFICO instead of ZAFFICO employing their own researchers and ZAFFICO would in turn commit a certain percentage of funds to the Unit to pay for the service. This would also require that the Unit be decentralised.

The Committee was informed that the Ministry supported the recommendation and would engage ZAFFICO on the possibility of having a Memorandum of Understanding with the Forestry Department to support research activities.

The Committee had noted the response and sought a progress report on the ministry's engagement with ZAFFICO regarding the Memorandum of Understanding.

Executive's Response

The Committee was informed that the Ministry supported the recommendation and stated that it had engaged the Industrial Development Corporation (IDC) to facilitate the process of engaging ZAFFICO. A draft Memorandum of Understanding had been developed. Consultations on the MoU were on-going.

Committee's Observations and Recommendations

The Committee takes note of the response and awaits an update on the finalisation of the Memorandum of Understanding between ZAFFICO and the Forestry Department.

v. Procurement of Vehicles for Forestry Department

The Committee was informed through the Action-Taken Report that authority to procure motor vehicles for the Forestry Department had been granted by the Plant, Vehicle and Equipment Committee (PVEC) at Cabinet Office. However, due to austerity measures for fiscal consolidation, the Ministry of Finance did not release the funds required to purchase the vehicles.

Committee's Observations and Recommendations

The Committee takes note of the response and requests a progress report on the purchase of the vehicles.

vi. Review of the Forests Act to Provide for Stiffer Penalties

The Executive had responded that the Ministry supported the recommendation and commenced the process of amending the *Forests Act, No. 4 of 2015* to provide stiffer penalties in order to discourage would be offenders.

The Committee had noted the response and sought a progress report on the amendment of the *Forests Act, No. 4 of 2015*.

Executive's Response

The Committee was informed through the Action-Taken Report that the Government supported the recommendation and had started the process but focused on strengthening the punitive measures in the Act. The process was ongoing and the Ministry was still making consultations with relevant stakeholders.

Committee's Observations and Recommendations

The Committee takes note of the response and seeks an update on the review of the *Forests Act, No. 4 of 2015*.

8.2 Consideration of the Action-Taken Report on the Report of the Committee on Agriculture, Lands and Natural Resources for the Third Session of the Twelfth National Assembly

Unregulated Charcoal Burning

Executive's Response

The Committee was informed that the Government had agreed with the recommendation and had stated that the Ministry, through the Forestry Department, had been conducting consultations to put in place a Statutory Instrument that would regulate the production and trade in charcoal. Draft regulations had since been developed and would soon be submitted to the Ministry of Justice for consideration and approval.

The Committee had noted the response and sought a progress report on the promulgation of the Statutory Instrument that would regulate the production and trade in charcoal.

Executive's Response

The Committee was informed that the Government agreed with the recommendation and stated that the Ministry, through the Forestry Department and with the support of some cooperating partners, had developed a draft Statutory Instrument to regulate the production and trade of charcoal. However, the finalisation of consultations through a National Charcoal Indaba could not be held due to the COVID-19 Pandemic. The Committee was informed that consultations were critical as this was a requirement by the Business Review Regulatory Agency (BRRA) for any new regulations that would impact the business environment. The Ministry would explore modalities to expedite the finalisation of the draft Statutory Instrument.

Committee's Observations and Recommendations

The Committee takes note of the response and awaits a progress report on the finalisation of the Statutory Instrument.

8.3 Consideration of the Action-Taken Report on the Report of the Committee on Agriculture, Lands and Natural Resources for the Second Session of the Twelfth National Assembly

i. Livestock Breeding Policy

The Committee was informed that the Ministry of Fisheries and Livestock completed consultations with stakeholders and held a workshop in June, 2019 to finalise the Livestock Development Policy. A draft policy had been produced and was submitted to Cabinet by the end of the third quarter of 2019. This was approved and was now awaiting printing of final document.

The Committee had noted the response and sought a progress report on the matter.

Executive's Response

The Committee was informed that the Government had submitted the draft National Livestock Development Policy (NLDP) and its Implementation Plan to the Policy Analysis and Coordination (PAC) Division of Cabinet. The document had been circulated on the e-cabinet platform and the comments from line ministries had been consolidated. The Cabinet Memorandum had since been submitted to PAC for consideration by Cabinet.

Committee's Observations and Recommendations

The Committee takes note of the response and seeks an update on what happened to the document which had been approved for printing and whether the new document being considered contains the Livestock Breeding Policy.

8.4 Consideration of Outstanding Issues from the Action-Taken Report on the Report of the Committee on Agriculture for the Fourth Session of the Eleventh National Assembly

i. Revision of the Fisheries Regulations

The Committee was informed that the Ministry of Fisheries and Livestock had completed drafting the Aquaculture Regulations and was mobilising funds to conduct stakeholder consultations in all provinces. With regard to the Statutory Instrument on regulation of kapenta fishing, the Ministry had finalised the Statutory Instrument and was in the process of submitting it to Ministry of Justice for legal opinion.

The Committee had noted that the issue of formulating the aquaculture regulations had been outstanding for a long time, and therefore, urged the Executive to treat the matter with the seriousness it deserved and expedite the process of finalising the document and submitting it to Ministry of Justice.

Executive's Response

The Committee was informed through the Action-Taken Report that Statutory Instrument No. 84 of 2019 on the amendment and regulation of fishing licence fees was enacted on 23rd December, 2019. Through this piece of legislation, commercial fishing of kapenta in Itezhi-tezhi had commenced. Currently, there were fifty fishing associations that were actively involved in fishing.

The Committee was further informed that the draft Aquaculture Regulations had been finalised and submitted to the Ministry of Justice for legal counsel before being enacted into law.

Committee's Observations and Recommendations

The Committee notes the response and awaits a progress report on the finalisation of the draft aquaculture regulations.

8.5 Consideration of Outstanding Issues from the Action-Taken Report on the Report of the Committee on Agriculture for the Third Session of the Eleventh National Assembly

i. Regulation of Non-Traditional Crops and Related Legislation

The Committee had noted the response and had awaited a progress report on the finalisation of the revision of the *Fertiliser and Feeds Act, No. 13 of 1994*, the *Food Reserve Act, No. 20 of 2005* and the *Plant Variety and Seeds Act, Chapter 236 of the Laws of Zambia*.

Executive's Response

The Committee was informed through the Action-Taken Report as outlined below.

- a. *The Fertiliser and Feeds Act, No. 13 of 1994* – The Ministry was still undertaking consultations on the proposed changes to the legislation. The process of consultations had been derailed due to the outbreak of COVID-19.
- b. *The Food Reserve Act, No. 20 of 2005* - The Food Reserve Bill had been presented to Parliament. The Bill was scrutinised by the Committee on Agriculture, Lands and Natural Resources and had since been enacted.
- c. *The Plant Variety and Seeds Act, Chapter 236 of the Laws of Zambia* - the Ministry was still undertaking consultations on the proposed changes to the legislation. The process of consultations had been derailed due to the outbreak of COVID-19.

Committee's Observations and Recommendations

The Committee takes note of the response and awaits a progress report on the two remaining Acts.

ii. Revision of the *Tobacco Act, Chapter 237 of the Laws of Zambia*

The Committee was informed that consultations on the *Tobacco Act, Chapter 237 of the Laws of Zambia* were still on-going in order to build consensus among the stakeholders. The

stakeholders agreed that the consultations on the issues on the Act and the tobacco industry be extended. This decision was arrived at following some discontentment that arose in the 2018 tobacco marketing season with regard to the existing legislation, particularly with regard to marketing floors and associated fees. The stakeholders resolved that there was need to ensure that these issues were taken into consideration during the review process. The Ministry hoped to complete the consultations with the stakeholders and preparation of the Regulatory Impact Assessment in 2020.

The Committee had noted the response and had awaited a progress report on the matter.

Executive's Response

The Committee was informed that on 10th March, 2020, Cabinet gave authority in principle for the repeal and replacement of the *Tobacco Act, Chapter 237* and the *Tobacco Levy Act, Chapter 238 of the Laws of Zambia*. Given this formal approval, the Ministry and the Tobacco Board of Zambia had begun the process of reviewing the legislation. To date, the following activities had been undertaken:

- i. A technical committee to review the legislation had been constituted; and
- ii. A letter had been written to the Business Regulatory Review Agency informing the Agency of the process being undertaken.

The Committee was informed that the process to begin the review of the *Tobacco Act* had been delayed due to the outbreak of COVID-19 in the country.

Committee's Observations and Recommendations

The Committee takes note of the response and awaits a progress report on the review of the *Tobacco Act*.

iii. Regional Laboratory Construction

The Committee was informed that all the land where the regional laboratories were constructed was not on title and the Ministry of Fisheries and Livestock was in the process of acquiring title for all the six regional laboratories. So far, the Ministry had engaged the Ministry of Lands and Natural Resources on the matter and consultations were ongoing.

The Committee had noted the response and had awaited a progress report on the acquisition of certificates of title for the regional laboratories.

Executive's Response

The Committee was informed through the Action-Taken Report that the Ministry of Lands and Natural Resources (MLNR) through the office of the Surveyor General, was engaged and requested to prepare the budget to enable them carry out surveys and prepare survey diagrams for the infrastructure as an initial stage to land titling. The budget was still being awaited. The exercise would have to be funded by the Ministry of Fisheries and Livestock as MLNR had no budget line to support this activity.

Committee's Observations and Recommendations

The Committee takes note of the response and requests a progress report on the issuance of the certificates of title for the regional laboratories.

9.0 Conclusion

It is important to note that there is generally a lack of reliable data to guide policy development and management responses to the opportunities and challenges in the fisheries sector. Some of the challenges the sector faces include lack of coordination due to lack of a standalone fisheries and aquaculture policy and poor market access by small scale fishers. In order to harness the sector's potential contribution to economic growth, the fisheries sector must be accorded the attention it deserves through the provision of adequate financial resources. There is therefore, need to establish sustainable financing mechanisms through the establishment of a Fisheries Development Fund as provided for in the *Fisheries Act, No. 22 of 2011*. Further, there is need to develop concrete policy guidelines for the development of the fisheries sector by having a standalone policy for fisheries and aquaculture.

Finally, the Committee is grateful to you, Mr Speaker for the guidance rendered to it during the Session. The Committee is also grateful to the Office of the Clerk of the National Assembly and her staff for the support rendered to it throughout the Session. The Committee is further indebted to all the stakeholders who submitted memoranda and appeared before it.

Dr M Imakando, MP
ACTING CHAIRPERSON

March 2021
LUSAKA

APPENDIX I - List of National Assembly Officials

Ms C Musonda, Principal Clerk of Committees
Mr F Nabulyato, Deputy Principal Clerk of Committees (SC)
Mrs C K Mumba, Senior Committee Clerk (FC)
Mrs M K Siwo, Committee Clerk
Ms R Nambule, Typist
Mr M Chikome, Committee Assistant
Mr D Lupiya, Committee Assistant
Mr M Kantumoya, Parliamentary Messenger