

Five Years of the CARD Initiative —History, Achievements, and Further Challenges—

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The Coalition for African Rice Development initiative, or CARD, starting in 2008 at the 4th TICAD meeting, was launched jointly by the Alliance for Green Revolution in Africa (AGRA) and JICA. It is a partnership of African rice producing countries and development partners, with a shared target to double rice production in Sub Sahara Africa in 10 years.

This briefing note, written for the occasion of CARD's 5th anniversary at TICAD V, attempts to provide a short description of its history, its unique characteristics, achievements to date, and challenges ahead in the second half of the lifetime of the initiative.

BACKGROUND

How it was conceived

The idea of the initiative was conceived at a time when some signs of change in world food price trends were identified in late 2007, months before most food security-related actions were taken by development partners. The idea was initially discussed between Mr. Kenzo Oshima, then Senior Vice President of JICA, and Mr. Kofi Anan, former Secretary General of UN and then chairperson of the board of AGRA. The discussion was about a possible coordinated response by development partners to strengthen food security and to reduce poverty in Africa. The meeting was held at Mr. Kofi Anan's residence in Accra, Ghana, in December 2007, half a year prior to the Toyako G8 summit and TICAD IV meeting both scheduled for the middle of 2008.

Based on the agreement between Oshima and Anan, and with

consultation with The New Partnership for Africa's Development (NEPAD), JICA embarked on organizing a series of preparatory meetings participated in by experts from academia and development circles, where they analyzed the food demand-supply trends and discussed tangible options available for Sub Sahara Africa (SSA) as joint actions among like-minded partners.

Why Rice?

Experts recognized that rice development in Africa had not yet been sufficiently explored and its potential could be tapped by appropriately empowering producers and other stakeholders and by linking them up to the market. While regional production of other important staple crops such as maize, sorghum and cassava has increased steadily, matching the volume of local consumption, rice and wheat have shown a different pattern in supply-demand trend for the last few decades and the gap between production and consumption has been growing (Figure 1 a, b). Productivity of rice in SSA has been stagnating for a long time, in sharp contrast to Asia where the advancement of technologies enabled steady productivity improvement in the region (Figure 2 a, b). In addition, lessons of the Green Revolution in Asia and other regions told us that investment in infrastructure and capacity building of stakeholders, both public and private, along with the value chain of major staple crops made it possible to improve productivity and strengthen links between production and the market. These developments have not taken place in Africa.

Fig. 1-a Demand-Supply Balance of Maize in SSA



Fig. 1-b Demand-Supply Balance of Rice in SSA

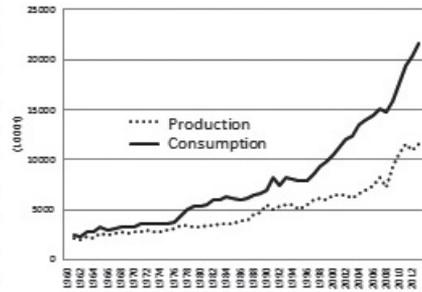


Fig. 2-a Trend of Cropping Area and Yield of Rice in Asia

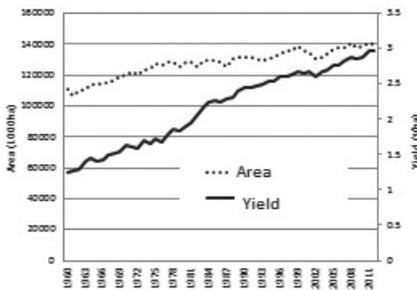
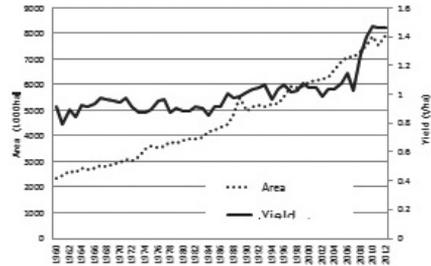


Fig. 2-b Trend of Cropping Area and Yield of Rice in SSA



JICA acknowledged the recommendation of the group of experts, and they jointly started the preliminary work of formulating the initiative, which focused on rice, one of the few commodities whose consumption-production gap in many countries in SSA has been widening, and a favorable environment for cropping was confirmed to exist widely across the region. It was a decision taken while many African countries were spending a large part of their foreign reserves on importing rice to meet increasing consumption demands in their countries. The supply gap as a percentage of whole rice consumption amounted to as high as 40% on average and even higher in some countries, with an inflated unit price in the global market since 2008.

Rice, as an entry point to revitalize agriculture

It must be noted, however, that initially, the idea of CARD focusing on a single commodity was not necessarily a comfortable one for some development partners. It was particularly so for multilateral development banks (MDBs) such as the World Bank and the African Development Bank, where the focus on a single commodity was perceived as unusual given their common business model geared to sector-wide programs and financing; their client governments usually looked for comprehensive approaches rather than ones focused on specified commodities.

With extensive discussion, however, partners found common ground by noting that rice development has been economically and politically, and in several cases, socially, important for the governments and agribusiness in the region because of rice's fast growing domestic market; and partners agreed not to miss the momentum that this crop was providing. At the same time, they understood that measures taken regarding rice would benefit other crops, too, such as strengthening of institutional and personal capacity for administration, research, extension and production. This was because in most African rice producing countries, those working in the rice value chain are involved in other important crops as well, unlike in many countries in monsoon Asia.

As a result of these discussions, MDBs decided to participate in the Steering Committee of CARD, recognizing rice production as one of the credible entry points to revitalize the agricultural sector as a whole.

STRUCTURE AND FUNCTION OF CARD

Simple structure of CARD Initiative based on Partnership

Following the announcement of the inauguration of CARD at the TICAD IV meeting in Yokohama in May 2008, seven development partners and 12 rice producing SSA countries listed in i) and ii) below jointly endorsed the overall target of the initiative: "doubling the rice production in SSA in 10 years" at the 1st CARD General Meeting (GM1) in Nairobi in November 2008. In numerical terms, the initiative envisaged that the baseline production of 14 million tons of rice (average in 2002-2006 FAO

statistics) would be doubled to reach 28 million tons in 2018. These 12 countries (group 1) accounted for about 85% of total production of rice in SSA as of 2008. They also agreed on the implementation guidelines of the initiative, and the working program of the initiative for the first year, at the GM1.

- i) Africa Rice Center, AGRA, Forum for Agricultural Research in Africa (FARA), International Rice Research Institute (IRRI), JICA, Japan International Research Center for Agricultural Science (JIRCAS), NEPAD formulated the Steering Committee (SC). Food and Agriculture Organization (FAO, UN) joined soon after GM1. Three other partners, International Fund for Agricultural Development (IFAD), African Development Bank (AfDB) and The World Bank, all regular participants at the preparatory stage and at the first GM, joined SC at GM2 in May 2009.
- ii) Cameroon, Ghana, Guinea, Kenya, Madagascar, Mali, Mozambique, Nigeria, Senegal, Sierra Leone, Tanzania, Uganda.

Participants at GM1 also endorsed a simple structure of the CARD initiative (Fig 3.). AGRA and JICA jointly supported a small but dedicated secretariat for the initiative, and Dr. Ngongi, then the president of AGRA and former Deputy Director General of WFP, was appointed first Secretary General of the Initiative. The Secretariat organized the General Meeting (GM), where all interested parties shared lessons and perspectives on rice development. The secretariat also served for the national task teams (later it was named as the national task force for NRDS) of 12 countries and a group of development partners who committed to support implementation of the Initiative. These committed development partners formulated the Steering Committee (SC) to coordinate activities among them to respond to the needs proposed and discussed in the GM by the 12 participating rice producing countries. Other development partners participating in GMs and other CARD events were bilateral and multilateral development organizations such as USAID, AFD and WFP, NGOs such as CRS and BRAC, and private foundations such as MBGF and the Aga Khan Foundation. They also contributed to the process when they share their experiences with the CARD members.

Expansion of coverage

After nearly a year of implementation of the initiative (formulation and analysis of the NRDS in 12 countries of the first group), SC members jointly started, at the GM3 in 2010, supporting the second group of 11 countries (group 2, listed in iii) to enter the NRDS process (see next section).

Countries in the second group have various reasons for and interests in promoting rice development. Some of them needed to revitalize this staple crop as a foundation of their rural development in post-conflict situations, and others selected rice as one of the most promising crops for diversifying their production portfolio. With the additional 11 countries, a total of 23 participating countries cover more than 95 % of the total production of rice in SSA.

- i) Benin, Burkina Faso, CAR, Côte d'Ivoire, DR Congo, Ethiopia, Liberia, Rwanda, The Gambia, Togo, Zambia

Fig. 3 Participants in CARD

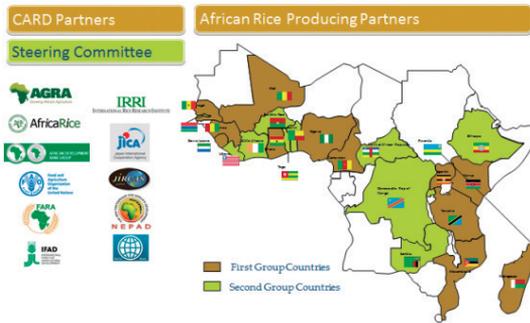
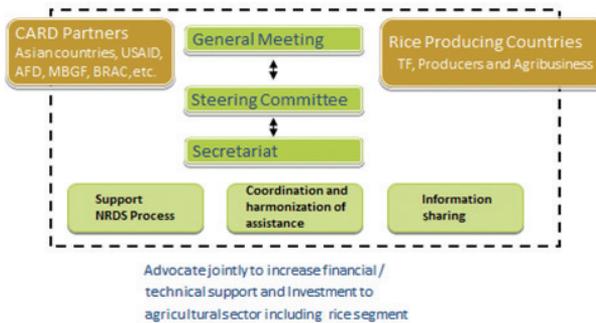


Fig. 4 Structure of CARD



ACHIEVEMENTS TO DATE

NRDS, country-owned process for rice development

The CARD initiatives defined themselves as a consultative group among African rice producing countries and bilateral and multilateral development partners to coordinate their investment in rice-related development programs. Based on the findings in the preliminary works, participants agreed to have a comprehensive information package of rice in their countries as a commodity and have a policy direction for rice development for their countries, as each of them had their own unique bio-ecological settings for production and socio-economic environment for rice industries. As a result, each rice producing country set up a task force (TF) to prepare an NRDS, which compiled all necessary information about the current status of rice development in the country and the potential for rice in the country, from both bio-physical and socio-economic viewpoints (the first step in Figure 5 below). Together with ARC, IRRI and JIRCAS, the Secretariat jointly prepared a format of the NRDS, and it worked together with FAO and JICA to sensitize the NRDS format to the TF members. The TFs started analyzing, with the participation of a wide range of stakeholders, the state of the rice value chain, and identified possible policy options to realize the best scenario for rice development to serve the country's strategy for food security and agricultural development. They also collated information regarding government- and donor-financed support in related areas and identified gaps where interventions were needed most to improve them (the second step in Figure 5). All NRDS documents and supporting material are open to the general public at the HP of the CARD initiative secretariat. NRDS documents must be revised from time to time, as 'living' document, to update them with new information and analyses. <http://www.riceforafrica.org/new/>

To improve their rice industry based on gap analysis, TFs and stakeholders jointly produced a prioritized list of possible interventions to strengthen their own systems (the third step in Figure 5). Each of the concepts of prioritized interventions must be tested through their mechanisms for sector strategy such as the CAADP Investment Plan (the fourth step in Figure 5). Practically all of the Development Partners in the CARD initiative are also supporting partners of CAADP and agreed to jointly support formulation and implementation of NRDS based on their own relative advantages and to look for any opportunity for

synergies among their interventions.

Science base for country strategy

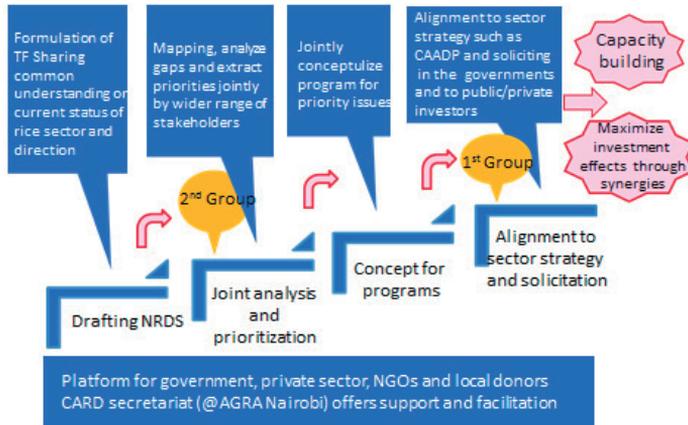
One of the common challenges for all participating countries at the entry point of the initiative was the lack of reliable statistics and base-line data for rice development. It is a natural consequence of prolonged underinvestment in the agricultural sector in the past decades, but CARD partners, particularly research institutions, worked on the capacity building of national research systems. As a major contribution in this area, JICA Research Institute and a group of researchers led by Professor Otsuka of GRIPS jointly started a base-line survey of rice in selected group-1 countries from 2009 and the interim products were shared with all interested parties at the seminar attached to GMs. This booklet contains a summary of the study.

Resources for implementation

It is not really possible to single out the additional expenditure specific for rice development under CARD as most of the financing partners, such as WB, AfDB, IFAD, have had sector financing. However, some funding programs dedicated to rice development have been launched in the period. They are, for example, GRiSPs, the CGIAR system-wide rice research program of which JIRCAS is also a member, and PHRD funding to complement the WAAP credit program mostly focused on rice. GAFSP or the Global Agriculture and Food Security Program has been in operation since 2011. It is a trust fund administrated by WB and funded by bilateral donors including Japan and a private foundation (MBGF) for both public and private windows. Over 60% of its allocated amount, totaling about USD 660 million to date, was distributed to projects in SSA countries including substantial rice-related development.

JICA has increased the number of rice-related interventions under CARD, including two new Yen loans for financing irrigation (Kenya and Tanzania), five new rice-based technical cooperation projects (Mozambique, Nigeria, Rwanda, Ethiopia and Cameroon) and a number of technical cooperation projects that have entered into new phases to further intensify their activities particularly in capacity building of stakeholders (Tanzania, Uganda, Mozambique, Ghana and Sierra Leone). (See the last section for a more detailed description of these projects.)

Fig. 5 Activity in each CARD country



Cases of collaboration for synergies

In the past five years, communications traffic among development partners and relevant government departments in rice producing countries has increased sharply. Although further improvement both in quality and quantity of cooperation is inevitable, partners now know others’ relevant programs much better and much more in advance, and have captured more opportunities for exploring synergies in the specific countries or in various segments of value chains. Some cases of collaboration materialized/ planned to date are shown in Figure 6.

Fig. 6 Cases of Collaboration On-going/ Planned with Partners

<p>Collectively support national NDRS TF team for technical/capacity building</p> <p>ARC/IRRI/JIRCAS: Global Rice Science Partnerships/OGIAR AfDB/ARC/JICA: Africa Rice Initiatives (Nerica seed multiplication in national systems/ Capacity development) IRRI/PhilRice/JICA: Training for young researchers and core extension staff IFAD/JICA: Planning joint works on promotion of S to S Cooperation JIRCAS/JICA: Joint works on rice development in inland valleys in Ghana USAID/JICA: Collaborative works on CD in irrigation systems in Tanzania WB/JICA: Collaborative works on rice productivity and irrigation component with PPP NEPAD/JICA: Alignment of NRDS with CAADP (training of NRDS TF)</p>
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- MOU on collaboration in food security including CARD-related activities with IFAD, WFP and BRAC
- Preliminary discussion started with KOICA on their participation in CARD
- G20 Agricultural Minister Meeting in June 2011 recognized CARD as a vehicle for rice development in Africa

ARGUMENTS FOR CARD

Funding mechanism or not

These settings made the CARD initiative unique among various systems of this kind in the development business as it is not a funding mechanism.

Development initiatives are often created to secure funds for specific development purposes accessible for a limited number of institutions. Some of them are said to have fallen into a trap with participants becoming excessively focused on fund raising. The CARD initiative deliberately avoided this trap and concentrated on the subject, i.e., strengthening of the national system capacity and making their proposal competitive and bankable. The initiative assumed that the responsibility of securing funding for the rice development projects/programs in each of the participating rice producing countries rests primarily with the countries themselves and secondly with each of the supporting members. Thus, each of the national TFs is made responsible to convince its fiscal authorities to allocate a reasonable share of the national budget to the relevant programs/projects, and planning authorities, to give higher priority to the credible rice-development programs/projects.

In other words, it was understood that fund raising for rice development is the joint task of all partners in CARD. Its members jointly make rice development programs/projects bankable and more relevant among competing projects/programs by making credible cases for them through science-based exercises. With a separate funding mechanism for a single commodity being unrealistic, interaction among NRDS TF and national focal points of CAADP became more important for each other. Thus, overall, the decision to make the initiative a platform for coordination and synergies, rather than a funding mechanism, can be judged as a wise one.

Alignment with sector development strategies ... CAADP and CARD need each other

All participants agree to make sure that NRDS fully aligns with the existing national development plans, such as Poverty Reduction Strategies, and particularly, the sector strategy such as CAADP Country Investment Plan (CIP) where applicable.

CAADP, or Comprehensive African Agricultural Development Programme, is a pan-African initiative launched by the Maputo Declaration at AUC Head of the States Summit in 2003. The Maputo Declaration re-defined the agricultural sector as the main engine of the development of the continent and the heads of states jointly agreed to increase the allocation of their own national budget up to 10% or more to agriculture and food security-related expenditure.

After several years of silence since the declaration, CAADP had renewed momentum in 2008 when there was a food price surge in many countries and development partners started supporting preparation of CAADP/CIP for each of the countries and committed to finance the CIP through bilateral and multilateral channels.

Often CIP is produced as a comprehensive shopping list for the sector, covering the whole range of possible interventions required, each item of which needs to be prioritized. By contrast, NRDS is prepared in such a way that it fits into a whole picture of sound sector development, typically that of CAADP/CIP, and in return, NRDS processes should offer a concrete, tangible and prioritized proposed intervention regarding the whole picture.

Progress of the CARD initiative has been welcomed by AUC/NEPAD, particularly the capacity building of national systems to work on the basis of analytical frameworks and in a participatory manner with a wide range of stakeholders. The CARD secretariat made a presentation about the Initiative at the CAADP partnership platform meeting in 2012, and NEPAD officials in charge of CAADP started communicating with the CARD secretariat in April 2013 to build up institutional engagement of the two initiatives for further concrete interactions.

JICA recognized the importance of CAADP CIP as a basis on which each of JICA's supported projects and programs are planned and implemented. In view of this, JICA will conduct a training course, targeting the focal CAADP country and CARD TFs, to help promote interaction among them and to produce a credible rice development program within CAADP CIP.

ELEMENTS PROMOTED BY CARD INITIATIVE

Partnership with emerging donors and Asian countries

The CARD Initiative has from the early stages encouraged new partnerships among African rice producing countries and emerging donors and Asian rice producing countries. Brazil, which started its institutional engagement with Africa for agricultural development in about 2005, used CARD meetings to learn about the demands and needs of African countries in this sub-sector. Likewise, Egypt, a decade-long partner of JICA through tripartite cooperation for capacity building in irrigation engineering and other related areas, expressed at various CARD meetings its policy to enhance its cooperation with African countries.

One particularly notable progress item observed is the partnership among African rice producing countries and their Asian counterparts. At GM2 in Tokyo in 2009, representatives of five Asian countries, Indonesia, Malaysia, Philippines, Thailand and Vietnam, were invited to share their experiences of rice development. Since then, the Initiative has provided a series of credible venues of dialogue among 23 African and 5 Asian countries. As an immediate outcome of the exercise, Indonesia sent a ministerial-level mission to Tanzania in 2010 to identify the concrete cases of cooperation in rice development between the two countries, and Thailand has strengthened its dialogue with some countries and moved toward project formulation on rice development in the last two years. Vietnam participated in JICA's technical cooperation project for small-scale irrigation in Mozambique with 5 to 6 long-term technical experts. The project is now in operation as a Mozambique-Vietnam-Japan tripartite cooperation undertaking.

JICA often goes on to facilitate communication and to support demand-resources matching. JICA's long-time commitment to agricultural development in Asian countries enables it to offer advice and information for best matching. Other SC members are also now interested in working on this venture and, for example, IFAD started funding study tours and matching exercises between African countries and Asian partners for rice development.

Key for the future of the rice industry ... Private sector

Another element that has been emphasized in the CARD initiative is

private sector investment in rice development. The global food price hikes in 2008, 2010 and onward stimulated private sector partners participation in agribusiness including rice development. In response to the growing interest of both public and private sectors, the CARD secretariat started proactively contacting private enterprises, including input industries (seed, fertilizer), farm operators, agro-machinery businesses and traders. It also set venues for dialogue among all interested parties. In 2012, the Secretariat started supporting six volunteer countries to extract policy elements jointly with private sectors and producers to promote agro-mechanization in rice development. Preliminary findings from the exercise were shared with all participants at the GM5 in 2013 for further discussion to develop mechanization action plans in each country. Also at GM5, private farm operators, mostly new-comers in SSA, were invited. They shared, with many other participants from both private and public sectors, their lessons and expressed their demands for policy adjustment needed for further investment.

In 2013, the exercise will be extended to the input business such as seed and fertilizer in some volunteer countries. These exercises will also be complimentary to on-going policy dialogue at the sector-wide level throughout the continent, such as the Cooperation Framework under G8 New Alliance.

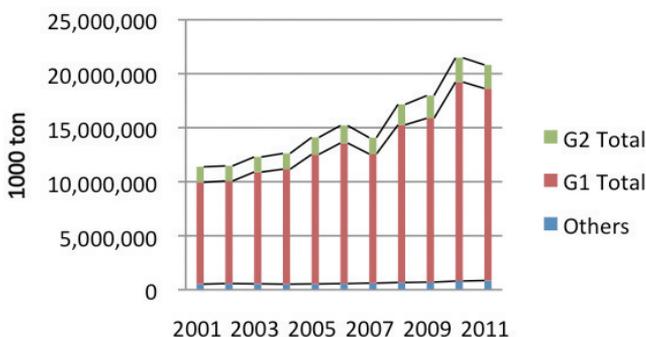
SOME FACTS ABOUT CARD

Trend in Rice production in SSA

The CARD secretariat summarized the current status of rice development in SSA at the GM5 in Senegal in February 2013.

Figure 7. shows break down of volume of paddy production in SSA by group in 2001-2011 based on FAOSTAT data.

Fig.7 Paddy Production in SSA (2001-2011, FAOSTAT)

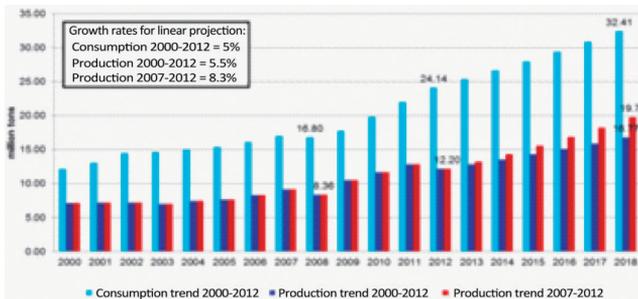


According to FAO STAT, production of rice (paddy) in SSA (a total of 39 countries where data is available) is 18 million tons (average of 2007-2011), an increase of 39% from the base line production of 13 million tons (average of 2002-2006). The area cultivated for rice increased from 17% to 9.2 million ha (average 2007-2011) from 7.8 million ha (average of 2002-2006).

A positive yield trend from 1.7t/ha in the base period to 2.0t/ha in the next 5-year period is observed. It is the fastest improvement of the yield in the past few decades in the region; however, it is still far too low compared with the yield level achieved in many Asian rice producing countries.

Figure 8, prepared by Africa Rice Center (ARC) for the GM5 based on USDA data, shows the projection of consumption and production in SSA toward 2018. ARC estimates that the CARD's target figure in 2018 can be achieved if the growth rate of production in the last 5 years is maintained in the coming years (about 8.3% per annum).

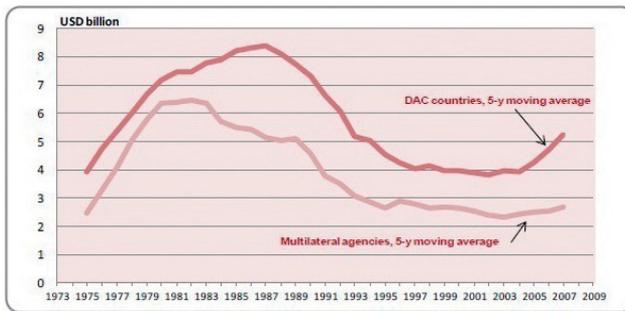
Fig. 8 USDA production and milled rice consumption (prod + imports) T2000-2012



Revive of investment in the agricultural sector including rice-related segments

World Development Report 2008 of the World Bank cautioned about the waning interest of both national governments and development partners in agricultural sector development. According to the OECD/DAC records, since the Maputo Declaration of CAADP in 2003, and encouraged by the global price hike of commodities including food/agricultural products, the trend of declining ODA investment in agriculture has been reversed (Figure 9 , OECD/DAC, Dec. 2011). MDBs, EU, USAID and other major sources of ODA finance expressed their commitment to support the sector and food security-related subjects in recent years and hope this upward trend would continue.

Fig. 9 Trends in aid to agriculture and rural development (ARD) 1971-2009, 5-year moving average commitments, constant 2009 prices



Impact of CARD initiative on JICA's own operation

While JICA has been supporting the administration of the initiative since it was launched, CARD has impacted JICA's operation in various ways. Firstly, this was the first ever wide-scale, multi-actor developmental initiative that JICA initiated and managed through the whole process. The process has presented JICA with enormous challenges, from structuring and leading the discussion for sound organizational design, to communication with members for building up the common ground of understanding, to managing efficient information, and to coordinating and accommodating the differentiated interests of participants. This has certainly been a capacity building exercise for JICA, and the lessons learned thus far will help improve the efficiency of the initiative's management and improve JICA's responses to other initiatives in which it may participate.

Secondly, through the process, JICA could refocus its advantage—a strong network of offices in the region—and take steps to better use this advantage. JICA's organization functioned well to support the Secretariat in sensitizing and mobilizing its counterparts in the relevant ministries and departments and helped to accelerate the in-country exercise of NRDS. This process was an additional burden for JICA's country offices, but the extra burden was well compensated for by better communication and widened coverage of the dialogue in related subjects. As most of the programs and projects are formulated on a country basis and beneficiaries of each intervention are defined country-wise, it often happens that the organizational scope tends to be limited likewise. However, the value chain approach adopted in CARD and extensive discussion in the related events and in-country consultation helped JICA's country-wise interventions become more flexible and wider in scope.

Thirdly, exercises of NRDS in countries and related dialogues accelerated the shift or widened the scope of JICA's intervention, which had tended to focus on production. Most of the rice-related projects formulated and implemented since the start of CARD in the past 4-5 years have components relating to post-harvest and market orientation. As a result, these interventions came to combine elements of productivity in the field with competitiveness in the market; projects in Ghana, Senegal, Uganda, Tanzania, and others are such examples. Although this hybrid model is still young and JICA needs to accumulate

more data and experience, it is hoped these types of projects will contribute to fill the gap between producers and the market which is often left unattended.

Fourthly, CARD provided opportunities for interaction and mutual learning for all participants including JICA. Often staff in the country office and technical experts in the field of development partners devote themselves to their own specific country program or projects with defined terms of reference, but have had few opportunities to learn from other interventions. A series of CARD events offered venues where JICA personnel from various country programs could meet professionals of other institutions and discuss and exchange views on a wide range of subjects along the rice value chain. Deriving from these interactions, there will be more opportunities for synergies across programs and projects in the sector.

CHALLENGES FACING CARD IN THE SECOND FIVE YEARS

There are enormous challenges common to all CARD partners in the second five years.

Among others, as the author sees it, here are some of the most important issues to be dealt with in the forthcoming CARD events:

1. Quality of prioritized intervention for rice development in each country.
2. Scientific-based monitoring of performances of programs/projects under the Initiative.
3. Strengthened coordination among partners for materializing synergies.
4. Public Private Partnership for input industry, mechanization and others.
5. Alignment with sector strategies and regional focus.

The nominal target of “doubling rice production in 10 years” is expected to be achieved by the end of the term of this initiative, but achievement is subject to stable local demand for rice, continued collaborative actions among partners, and the stable and continuous upward trend of resource allocation to this subsector. The real challenge, therefore, is still ahead of us. The partners working under the umbrella of the CARD initiative, including JICA, do not underestimate the magnitude of the difficulties.

But if this venture turns out to be successful, in five years we will be able to see, though with varying degrees in different countries, signs of contributions of rice production to people's improved food security, and the agricultural sector of some countries having been strengthened as an industry. Toward that end, JICA is determined to continue to work together with all partners, employing the various instruments it has at its disposal from human capacity building to economic infrastructure development.