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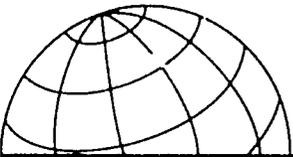
Midterm Evaluation of the Cereals Marketing Reform Subproject

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**Midterm Evaluation of the
Cereals Marketing Reform Subproject
(608-0191)**

**Prepared by
M. Gadbois**

**Submitted by
Tropical Research & Development, Inc.
7001 S.W. 24th Ave.
Gainesville, FL 32607**

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Acronyms

A.I.D.	Agency for International Development
AIRD	Associates in International Resources and Development
ASAL-I	First Agricultural Sector Adjustment Loan
ASAL-II	Second Agricultural Sector Adjustment Loan
CMRP	Cereals Marketing Reform Subproject
DAI	Development Alternatives, Inc.
DPAE	Division of Economic Affairs and Planning
DPV	Division of Crop Production
DVRA	Division of Extension and Agrarian Reform
ENA	École National de l'Agriculture
EPASP	Economic Policy Analysis Support Project
ESAP	Economic Structural Adjustment Program
FNBT	Farine Nationale de Blé Tendre
GDP	Gross Domestic Product
GOM	Government of Morocco
IAV	Institut Agronomique et Veterinaire Hassan II
ICEA	Ingénieurs Conseillers Économistes Associés
IMF	International Monetary Fund
INSEA	Institut National de Statistique et de l'Économie Appliqué
IQC	Indefinite Quantity Contract
MARA	Ministry of Agriculture and Agrarian Reform
MIS	Market Information System
OECD	Organization for Economic Cooperation and Development
ONICL	Office National Interprofessionnel des Céréales et Légumes
SCAM/CMA	Sociétés Coopératives Agricoles Marocaines/Coopératives Marocaines Agricoles
SDR	Special Drawing Rights
TDY	temporary duty assignment
TR&D	Tropical Research & Development
USAID	United States Agency for International Development

Executive Summary

The Cereals Marketing Reform Subproject (608-0191) (CMRP) is defined by the Memorandum of Understanding of September 29, 1989 between the Government of Morocco and USAID/Rabat. The prime contract for the CMRP was let in July 1991 to Development Alternatives, Inc. (DAI). This \$2.1-million project was designed to assist the Government of Morocco (GOM) in developing a cereals marketing strategy with price, domestic marketing, international trade, and storage policies that maximize cereals marketing efficiency and are consistent with both long-run economic growth and national food security objectives. The project provides for the services of one long-term technical assistant, 28 person-months of expatriate consultants, and 36 person-months of Moroccan consultants plus training and commodities.

The one-person, midterm evaluation team spent three weeks in Morocco, from February 18 to March 12, 1993, and concluded that the CMRP had made excellent progress toward supplying project inputs, producing desired outputs, and achieving the project's goal and purpose-level objectives. This progress is most evident in the commitment to policy reform made by Ministry of Agriculture and Agrarian Reform (MARA) policymakers and in the ongoing lively debates that concern the timing of the reforms and the procedures that must be implemented to achieve the reforms.

In a period of less than 20 months, the project has succeeded in moving the policy debate from the level of confidential negotiations between the World Bank and high-level GOM policymakers to a semipublic debate involving a much larger group of actors involved in the cereals market, including millers, domestic cereals traders and importers, representatives of farmers' associations, and other governmental and quasi-governmental groups such as MARA, Office National Interprofessionnel des Céréales et Légumes (ONICL), and Sociétés Coopératives Agricoles Marocaines/Coopératives Marocaines Agricoles (SCAM/CMA).

The project has succeeded in furthering policy reform in spite of the absence of strong sponsorship of policy reform. The World Bank concluded the Second Agriculture Sector Adjustment Loan (ASAL-II) program without making substantial progress in the various sectoral loans, and the interest of USAID/Rabat in policy reform has declined in recent years. It is to the extreme credit of CMRP that the cereals policy reform dialogue has been heightened despite the reduction in pressure from donors pressure. In this regard, CMRP can perhaps be regarded as a model for the postconditionality structural adjustment project.

The project has also done an excellent job in institution-building, in improving the capability of both the Division of Economic Affairs and Planning (DPAE) and ONICL to undertake analyses of cereals policy reform, and in using the subsector approach to cereals policy reform analysis.

The long- and short-term technical assistance provided has been excellent. The long-term technical advisor has done a superb job in coordinating the complex policy studies undertaken

in the project and in opening and maintaining the policy dialogue between the many actors involved in cereals market reform, many of whom form opposing constituencies.

While the project has achieved a great deal, it was overly ambitious in its scope, given the multitude of issues involved in the complex and strategic cereals subsector. Cereals production represents approximately 20 percent of the agricultural gross domestic product, with more than 90 percent of all farms participating in cereals production. Cereals consumption, especially of wheat and wheat flour, is the primary food in the Moroccan diet, especially in urban areas. Given the complexity of the cereals subsector, it is to the project's credit to have achieved so much in such a short time. The third year of the project, beginning in August 1993, will prove crucial as the remaining cereals reforms are expected to be enacted. Many issues concerning policy implementation in which the project and the long-term advisor can provide much-needed assistance will arise. It is essential that this level of participation in the final year be increased to cover at least six months.

Recommendations and conclusions

General

1. The project was overly ambitious, given the complexity of the cereals reforms and the strategic nature of cereals to the Moroccan economy and to Moroccan society as a whole. (The cereals subsector, including production processing and marketing, comprises one-third of the total agricultural gross domestic product, and cereals account for more than 60 percent of total calorie consumption.) It is a great credit to the project personnel that so much has been accomplished in only 18 months. Increased funding and level of effort for the long-term project advisor is strongly recommended for the third year.

2. To the extent possible, CMRP should increase the use of Moroccan consultants from the university community (École Nationale de l'Agriculture (ENA), Institut National de Statistique et de l'Économie Appliqué (INSEA), and Institut Agronomique et Veterinaire Hassan II (IAV)) and consulting firms such as Agro-Concept, thereby enhancing institutional development and the sustainability and domestic proprietorship of the policy reform process.

Studies

1. CMRP should undertake a rapid reconnaissance, farm-level survey to increase the understanding of farmers' attitudes toward policy reform and their proposed production strategies after policy reform under different scenarios. The survey sample should be carefully stratified by farm size in order to represent all types of farmers. Rapid reconnaissance surveys would concentrate on identification of grain marketing and storage problems at the farm level and on ways to resolve them. The failure to conduct sufficient farm management research at DPAAE is evident in the general lack of knowledge concerning farm-level

conditions and prevailing farming systems at DPAE. The farmers seem to be the forgotten element in the policy analysis process.

2. The study concerning the impact of cereals marketing reform on the feed and livestock industries, begun by Jeffrey Metzger of AIRD in October 1992, needs to be continued. Preliminary policy recommendations indicate that the GOM should liberalize the import (except for appropriate levels of variable levy) of maize and barley for feed purposes. The impact of policy reform on the availability of animal feed requires further economic and technical analysis, but it is beyond the scope of CMRP. Therefore, a more in-depth feed-grain study should be undertaken by Mr. Metzger in conjunction with MARA and should be financed by funds remaining under the 1991 project.

3. A study needs to be conducted in the final year of the project on the methodology for estimating grain stocks at the farm and commercial levels. Relatively little information regarding cereals stocks at the farm and commercial level now exists. The need to estimate in-country grain stocks more accurately is increasingly important because the existing storage infrastructure at the SCAM/CMA level may be privatized. Methodological issues could prove to be quite complex in estimating existing stocks, especially at the farm and small trader level. Stratified sampling by farm type (probably based on farm size) will be necessary, in order to estimate on-farm stocks.

Developing a cereals marketing strategy

Disseminating pertinent information about implementing the remaining cereals policy reforms will be of primary importance during the third year of the project. Two highly-recommended activities are planned.

1. CMRP should assist DPAE in preparing and publicizing a practical guide for all persons involved in the cereals market. The "Businessman's Guide to Rules and Regulations Governing the Cereals Market" will be written in language the layman (i.e., noneconomist) can understand. Intended for traders, importers, millers, farmers, and others, the guide will provide step-by-step instructions on what businessmen can expect in a liberalized market. CMRP can play a major role in assisting the implementation of the upcoming trade and soft wheat reforms.

2. Early in the third year, CMRP should prepare a document synthesizing the findings of the Phase II studies, with special attention to the impacts of the trade and soft wheat reforms on the major participants, the identification of major beneficiaries and losers, and recommendations for possible compensation. The findings should be discussed in a two-day seminar. Final conclusions and policy recommendations should be presented to the Inter-Ministerial Oversight Committee.

Increased CMRP third-year funding

An increased level of funding for the third year of the project is recommended, because of the important activities scheduled and the need to increase the level of effort of the long-term advisor. Initial budget projections prepared by CMRP of an additional \$700,000 over the course of one year seem reasonable.

1. Introduction

Since the early 1980s, the Government of Morocco (GOM) has been engaged in a far-reaching Economic Structural Adjustment Program (ESAP). Major financing for ESAP came from the World Bank and the International Monetary Fund, with supplemental funding from the United States Agency for International Development (USAID) and other bilateral donors. At the macroeconomic level, ESAP has included fiscal, monetary, exchange rate, and trade reforms. At the sectoral level, agriculture has received two sectoral adjustment loans in 1985 and 1987 for \$100 and \$225 million respectively. Key sectoral reforms included cuts in the level of subsidies, liberalization of agricultural and food pricing and marketing, and the privatization of the technical and commercial services performed by parastatals. Key areas of agricultural reform included the cereals, oils, and sugar subsectors.

The importance of cereals to the economy and society of Morocco is undisputed. Cereals production covers about 80 percent of areas planted in a given year, and cereals provide more than 60 percent of the calories consumed. Cereals production provides approximately 20 percent of the agricultural domestic product and employs a large percentage of the rural population at least part-time. Grain milling comprises 6 percent of the value of industrial output in Morocco and approximately 20 percent of agroindustrial output.

This report is a midterm evaluation of the Cereals Marketing Reform Subproject (608-0191) (CMRP). The evaluation was conducted by Millie Gadbois of Tropical Research and Development Inc. (TR&D), which was contracted by the Agency for International Development (A.I.D.) under an Indefinite Quantity Contract (IQC) No. PDC-1406-I-00-0073-00. The objective of this midterm evaluation is to determine whether the CMRP has been an effective instrument in assisting the GOM to introduce reforms for cereals markets, to foster private sector involvement in cereals marketing, and to formulate an import policy supportive of the domestic cereals markets.

A.I.D requested that the evaluation assess (1) the extent to which the project has had an institution-building role in developing the capacity of the Division of Economic Affairs and Planning (DPAE) and the Office National Interprofessionnel des Céréales et Légumes (ONICL), the major project collaborators, to conduct the types of analyses required to formulate a cereals policy and (2) the extent to which project reports and analyses and other project activities have been used in the policy formulation process. Recommendations for future activities in the final year of the project were sought. (Appendix A presents the scope of work for the midterm evaluation. A list of persons interviewed during the evaluation is provided in Appendix B.)

This report is organized in four chapters including this introduction. Chapter 2 presents an overview of project history and background, including the rationale and objectives for policy reform, and the critical issues facing cereals marketing reform. Chapter 3 evaluates CMRP,

its objectives, inputs, outputs, problems, and constraints and assesses the impact of the project on Moroccan cereals market reform. Chapter 4 discusses project administration and management, and Chapter 5 provides recommendations for future activities in the project's final year, updates on the key issues remaining in cereals marketing reform, and recommendations for the future.

2. Project background and history

2.1. Policy reform in Morocco

Morocco's balance-of-payments problems originated in the early 1970s when the GOM began an ambitious investment program financed by the short-lived boom in phosphate prices. These high world phosphate prices offset the higher import costs associated with the first oil shock. The decline in phosphate prices in the mid-1970s, together with the heavy military expenditures incurred in asserting Morocco's claim to the Spanish Sahara, caused the GOM to rely on increased external borrowing and grants and public sector borrowing. The second oil price rise in 1979-80, together with decreasing world phosphate prices, rising interest rates on foreign loans, and several successive years of drought, exacerbated the GOM's current account situation.

By the late 1970s, the GOM had turned to the International Monetary Fund (IMF) for balance-of-payments assistance. Early efforts to undertake economic reform were half-hearted because of Morocco's continued access to international capital markets (Hood et al. 1988). Between 1975 and 1983, Morocco's foreign debt rose from \$1.8 billion to \$13.9 billion—more than 100 percent of the gross domestic product (GDP) and over 300 percent of foreign exchange earnings. Debt service totaled 53 percent of total receipts from the export of goods and services, with interest payments alone equivalent to 20 percent of total export revenues.

The World Bank initiated policy-based lending to Morocco in 1983, by providing a series of sector-adjustment loans and rescheduling Morocco's debt. The IMF also provided a Special Drawing Rights (SDR) \$200 million stand-by loan. Between 1984 and 1987, loans totaling \$840 million were signed to support the reform process in agriculture, industry and trade, public enterprises, and education. Key industrial and agricultural sectors received initial attention.

2.1.1. Agricultural Sector Reforms

The First Agricultural Sector Adjustment Loan (ASAL-I) began in 1985 for \$100 million. ASAL-I reforms included gradually eliminating fertilizer subsidies, increasing recovery of water costs and the costs of marketing services provided to farmers by irrigation agencies, phasing out governmental control of animal feed price and distribution, and setting higher floor prices for cereals. According to the Organization for Economic Cooperation and Development (OECD) in 1992, the income redistribution effects of ASAL-I have been ambiguous, and there are no obvious beneficiaries, although the GOM has made definite steps toward reducing producer subsidies.

The Second Agricultural Sector Adjustment Loan (ASAL-II) for \$225 million concerned three main areas of reform: the prices and incentives framework, the liberalization of markets, and the promotion of agroindustrial exports. Specific reforms were envisioned for the major crop subsectors: cereals, oil crops, and sugar. The cereals subsector is undoubtedly the most complex and crucial, given its importance to Moroccan consumers and producers. The reforms envisaged under ASAL-II were probably overly ambitious and were outlined only broadly in negotiations between the World Bank and the GOM. The final disbursement of ASAL-II was made in 1992 before most of the reforms had been fully undertaken.

2.2. The cereals subsector and policy reform

As noted previously, the consumption and production of cereals form an important part of Moroccan society and economy. Cereals production represents approximately 20 percent of agricultural domestic product, with more than 90 percent of all farms participating in cereals production, either for their own consumption and for animal feed. Cereals especially wheat and wheat flour, are the staple foods of the Moroccan diet, particularly in urban areas. Wheat flour is used in bread and other baked goods which are eaten at all meals.

Major cereals are hard wheat (durum), soft or bread wheat, barley, and maize. Of the total land area planted in cereals in 1989, 45 percent was planted in barley, 27 percent in soft wheat, 21 percent in durum, and the remaining 7 percent planted in maize. The production of soft wheat has greatly increased in recent years because of the subsidized price available to producers.

Cereals crops are overwhelmingly rainfed, and production fluctuates widely depending on the rainfall. In 1991 total cereals production was 8.5 million tons, whereas in 1992, only 2.7 million tons were harvested because of a drought.

Cereals imports are comprised mostly of bread wheat, with some maize. Cereals imports typically account for 50 to 75 percent of all food imports. Cereals imports have become increasingly important in recent years because of the fixed amount of available arable land and increasing population pressure.

Although state intervention in cereals markets has existed since the days of the Protectorate, the government increased its involvement considerably in the 1970s, seeking to provide a guaranteed minimum income to producers, as well as affordable food prices to consumers, and a higher level of food self-sufficiency.

In 1973 ONICL was reorganized to oversee grain and pulse purchases from producers at official prices and to regulate storage, milling, and imports. The marketing system legislated in the 1970s included a guaranteed and fixed price (*prix fixe*) for bread wheat, and minimum support prices (*prix de soutien*) for durum, barley, and maize. Consumer prices for major foodstuffs were set based on the producer price plus storage and transfer costs less subsidy

transfers. Since 1988 cereals subsidies have been limited to 1.2 million tons of wheat (or 1 million tons of flour at the 80 percent conversion rate) in order to reduce abuses in subsidy declarations and, more importantly, to decrease GOM budget outlays to amounts that could be covered by import levies.

The previous system in which prices and margins were fixed by the state provided high domestic producer prices and consumer subsidies and were partially financed by import levies. Spiraling budgetary costs and an inefficient marketing system, which excluded competition in both marketing and milling, had created a crisis in Moroccan public finance.

2.3. Rationale and objectives for cereals policy reform

Cereals policy reform was undertaken to improve resource-allocation efficiency in the agricultural sector, to reduce the high budgetary costs borne by the GOM in financing food policy, and to encourage productivity gains. The cereals sector reform program was based on the findings of the USAID-funded "Price and Incentives Study" (1987). The study concluded that while Morocco did have a comparative advantage in dryland cereals and some irrigated cereals production, the present structure of official incentives did not encourage producers. It was estimated that consumers were overtaxed in relation to international cereals prices, were constrained by GOM interventions in the marketing system, and in most cases, did not benefit from input subsidies.

A reform program based on the conclusions of the "Price and Incentives Study" was developed. The major objective was to completely liberalize the domestic and import cereals market by the end of 1992. The major components of the reforms were (1) the gradual elimination of the consumer subsidy for the lower quality flour—Farine Nationale de Blé Tendre (FNBT) (2) the liberalization of the controlled soft wheat marketing channel from point of supply (either domestic or imported) to the industrial mills, and (3) the liberalization of cereals imports.

In 1988 several key cereals market reforms had been implemented as the support price systems were eliminated for cereals other than soft wheat (durum, maize, and barley) and the domestic market for those cereals was completely liberalized. In addition, the consumer subsidy for FNBT was reduced.

The implementation of the remaining reforms was first postponed in 1990 in a mutual agreement between the World Bank and the GOM, which delayed the release of the final installment of ASAL-II funds. By the end of ASAL-II in 1991, no agreement had been reached between the World Bank and the GOM regarding the implementation of these reforms. In 1992, however, the World Bank disbursed the final ASAL-II funds without insisting that the remaining cereals conditionalities be met. (The conditionalities for the sugar and oils subsectors were also dropped by the Bank.)

The CMRP has continued the policy dialogue begun by the World Bank by exploring the various policy alternatives, assessing the impacts of cereals policy reform on potential gainers and losers, and proposing strategies for the future. Close contact has been maintained by CMRP with World Bank technical staff members to keep World Bank informed of study results and any changes in cereals policy.

3. Review of the Cereals Marketing Reform Subproject (CMRP)

3.1. Purpose and objectives

The CMRP has six objectives at the purpose level:

1. to ensure an adequate, reliable, and readily available supply of cereals products at prices that reflect the absence of subsidies and government controls;
2. to promote and facilitate the production and distribution of cereals products and related services that accurately reflect the comparative advantage of cereals production and consumer preferences;
3. to create the conditions necessary to ensure the development of equitable and competitive exchange relationships in the market system;
4. to stimulate the creation of productive and remunerative employment opportunities;
5. to increase incomes for cereals farmers; and
6. to stimulate the development and adoption of improved technologies and organizational arrangements that will lead to increased resource productivity in all aspects of cereals production and distribution.

The achievement of these objectives is intended to contribute to the stated project purpose of developing a cereals marketing strategy with price, domestic marketing, international trade, and storage policies that would maximize marketing efficiency consistent with both long-run economic growth and national food security objectives. CMRP is a subproject of USAID's Economic Policy Analysis Support Project (EPASP), the overall goal of which is to assist the GOM in making a successful transition to a more market-oriented system. CMRP combines technical assistance, training, and other institution-building activities to develop a cereals strategy for a deregulated cereals market.

Project activities that support these objectives can be divided into three phases:

1. the first phase, from July 1991 through February 1992, consisted primarily of synthesizing existing subsector analyses and studies and carrying out rapid appraisals of various aspects of the subsector needing further diagnosis;
2. the second phase, from March 1992 through July 1993, emphasizes maintains emphasis on more in-depth analyses of the issues and research topics raised in the first phase;

3. the third phase, from August 1993 through the project completion date now scheduled for September 30, 1994, was originally planned as a phase-down period, in which the second phase results were synthesized and discussed. Circumstances now indicate that during this period, the project should actively assist the GOM in implementing the revised policy reforms, working out implementing details, and helping to publicize the details to concerned cereals market actors, such as traders, farmers, millers, importers, and transporters.

CMRP is attached to the Division of Economic Affairs and Planning (DPAE), a division of the Ministry of Agriculture and Agrarian Reform (MARA), although it also works directly with two other divisions in MARA, the Division of Crop Production (DPV) and the Division of Extension and Agrarian Reform (DVRA), and with the National Cereals Office (ONICL), a parastatal organization attached to MARA. The project has a broad mandate, however, and interacts with the diverse set of actors involved in the cereals marketing channel, such as farmers, traders, millers, and importers.

The Inter-Ministerial Oversight Committee chosen to guide project activities recognizes the multifaceted nature of CMRP and has representatives from five GOM ministries (Agriculture, Trade and Industry, Interior, Finance, and Economic Affairs). The Technical Committee, which guides project activities on a daily basis, has representatives from four MARA divisions (DPV, DVRA, DPAE, and ONICL).

3.2. Inputs

Key project inputs include the provision of technical assistance, training, and commodities.

3.2.1. Technical assistance

The prime contractor for CMRP is Development Alternatives, Inc. (DAI) of Bethesda, Maryland. DAI signed a contract in February 1991 for \$2.1 million to include the services of one long-term technical assistant, 28 person months of short-term expatriate technical assistance, and 36 person months of local consultants. DAI has subcontract relationships with the Agricultural Economics Department of Purdue University, Associates in International Resources and Development (AIRD) of Cambridge, Massachusetts, Ingénieurs Conseillers Économistes Associés (ICEA) of Paris, the Moroccan firm Agro-Concept of Rabat, and the Moroccan institute, Institut National de Statistique et de l'Économie Appliqué (INSEA).

The long-term technical advisor took up residence in Morocco in July 1991, although he had earlier undertaken a six-week temporary duty assignment (TDY) to make logistical arrangements and initiate project activities. His overall responsibilities are to advise and provide timely assistance to MARA/DPAE, ONICL, other GOM departments, and key private-sector groups involved in the cereals subsector on matters of policy reform. Another major responsibility is to manage, both technically and logistically, the activities of numerous

consultants as they undertake a series of broad range studies and statistical analyses of the cereals subsector.

By all accounts, the long-term advisor has done an excellent job in all facets of his demanding job, which requires the technical skills necessary to undertake cereals policy analysis on a wide variety of complex and interwoven issues and the administrative and management experience to coordinate the technical studies undertaken by the project consultants. In addition, the long-term technical advisor has demonstrated superb communication and diplomacy skills in developing the process of policy dialogue between the disparate groups included in cereals policy reform. It is to his credit that even those actors who prefer the status quo (ONICL, some millers, and large cereals producers), have become active participants in the cereals policy reform process. The advisor has become such an integral part of the Moroccan cereals policy reform process that key actors such as millers and provincial parastatal representatives contact him for updates on the reforms.

The project has thus far supplied a total of 51 months of short-term technical assistance, including 24 months of expatriate and 27 months of Moroccan technical assistance. The quality of the short-term assistance has been excellent and is appreciated by the users, both the in government and in the private sector. Short-term technical assistance has come primarily from DAI, Purdue University, AIRD, and Agro-Concept. Many of the expatriate consultants have had extensive experience with the policy reform process in Morocco. Though they appreciate the general excellence of the studies undertaken, some MARA officials feel that (1) the project relied too heavily on outside technical assistance, and (2) the participation of Moroccan institutes and consulting firms should have been greater. The trend of the project is toward a greater use of Moroccan consultants in the third year. The reports, studies, and analyses undertaken during the project are discussed in more detail below. A list of all studies and reports produced by the project is included in Appendix C.

The major recommendation concerning technical assistance is to increase the level of effort of the long-term technical advisor from 2 to 7 months during the project's third year, with at least 5 months in Morocco. His input is urgently required by GOM policymakers because the final cereals policy reform implementation procedures will be undertaken in this final year. In retrospect, it would have been more appropriate for the long-term advisor to remain in Morocco for the full 3 years because of the complexity of the issues facing cereals policy reform.

3.2.2. Training

The project undertook both long- and short-term training.

Three Moroccan students are pursuing Masters of Science degrees in agricultural economics at Purdue University. Two of the students, Mr. Kchit and Mr. El Harti, will return to ONICL, while the third, Mr. Imrani, will return to MARA/DPAE. All are doing well in their studies and should be back at their respective jobs before the project completion date of

September 30, 1994. The thesis topics pursued by the students concern the cereals market reform process, including modeling the impacts of Moroccan cereals market reform and cereals pricing, both international and domestic.

CMRP has also financed the theses of three students pursuing master's degrees in agricultural economics at the École Nationale de l'Agriculture (ENA). The research topics are relevant to aspects of cereals market reform and deal with the economics of current and future cereals storage systems, the demand for flour, and competition between industrial and artisanal milling. The DAI long-term advisor has actively supervised the three students.

A 3-week training course on international trade theory and computerized trade modeling was taught by Prof. Abbot from Purdue University and was appreciated by the DPAA and ONICL personnel attending. Another short-term course in financial and investment analysis to train GOM personnel to evaluate investment opportunities in cereals storage and milling is planned for the present quarter.

CMRP undertook a major 2-day seminar in February 1992 to synthesize the results of the studies and analyses undertaken in the project's first phase. Approximately 140 GOM officials and private sector representatives participated, including farmers, traders, cooperatives, millers, bakers, and cereals importers. The present midterm evaluation interviewed many of the conference participants, who say they appreciated the lively debate. They commented that this was the first time that an open discussion of the implications of the cereals reform process had been undertaken in Morocco. The seminar opened up debate concerning aspects of the reform process. Before CMRP, all discussion that had taken place was solely within particular interest groups, such as millers and traders, or within parastatals such as ONICL or SCAM/CMA. The CMRP seminar provided the stage for the open discussion among all the actors concerned in the reform process.

Another seminar (*déjeuner-debat*), held in early February 1993, was on the results of the study on the implications of cereals reforms on Moroccan food security and was attended by approximately 25 participants from MARA and the private sector.

The project has also financed the participation of three DPAA members in training courses conducted by the Institut Agronomique et Vétérinaire Hassan II (IAV Hassan II) on cereals storage and the participation of one in a three-day workshop conducted in Paris on "Risk Management in Liberalizing Economies."

The long-term advisor has also given lectures on cereals marketing reform to university groups at ENA in Meknes and at IAV in Rabat.

Significant on-the-job training has been provided by the project, in which DPAA and ONICL staff members have participated with technical assistants on CMRP studies. Approximately 20 advanced INSEA applied economics and statistics students were trained to participate in the second artisanal milling study conducted in 1992.

3.2.3. Equipment and supplies

The project has purchased two project vehicles, five office model computers, six portable laptop computers, a portable ink jet printer, two laser printers, various software packages, and a high-capacity photocopier. The GOM provides office space at DPAAE, communications facilities, office supplies to the project, and vehicle repairs and gas.

3.3. Outputs

3.3.1. Studies and analyses

CMRP has published more than 25 reports and working papers during the first 20 months of the project. The reports seem to be generally of high quality and have been appreciated by GOM policymakers and officials, Moroccan academics, and interested members of the private sector. In general, the CMRP studies and analyses have provided answers to many of the questions that have arisen concerning cereals marketing and pricing policy reform. According to the users, they also have enhanced the thinking of cereals policymakers at DPAAE, ONICL, and MARA, causing them to consider the costs and benefits of the issues in a more precise and informed manner.

The studies and analyses performed during Phase I (July 1991-February 1992) synthesized existing studies and knowledge of the structure, conduct, and performance of the cereals subsector and undertook rapid reconnaissance surveys to fill in gaps in knowledge concerning the cereals market. Phase I studies and analyses were divided into four major components of the complex cereals subsector:

1. production,
2. domestic marketing, grain storage, and milling,
3. Morocco's foreign trade in cereals (mostly imports), and
4. cereals consumption and food aid.

The personnel conducting the studies included 26 MARA staff members from four divisions (DPAAE, DPV, DVRA, and ONICL) and 14 consultants from the United States and Morocco. Each group prepared and presented a synthesis report of its findings at the February 1992 CMRP seminar.

Further questions were raised as a result of the Phase I studies. Four major themes were identified as needing further research during Phase II of CMRP:

1. future competition in the wheat milling industry,

2. impact analysis of subsector policy changes,
3. strengthening Moroccan cereals production and marketing systems, and
4. institutional change in support of cereals policy reform.

CMRP conducted numerous studies in each of the four areas of applied research. The series of Phase II studies on cereals milling are perhaps the most ambitious, assessing the potential impact of policy changes on Morocco's milling industries. Once the GOM has eliminated subsidies to and controlled prices for Farine Nationale de Blé Tendre (FNBT) and liberalized the supply of bread wheat to flour mills, CMRP studies anticipate that:

1. a substantial number of the country's industrial flour mills will close because poor location, out-dated equipment and poor management will make them uncompetitive,
2. the milling industry will become increasingly concentrated,
3. competition will increase among the three competing marketing channels (soft wheat, hard wheat, and artisanal mills), and
4. industrial mills will further diversify the range of products sold, necessitating modernization of the existing product classification and grading system.

Many issues and details concerning the implementation of these reforms await policy-makers. Decisions will have to be made in the upcoming year concerning the timing of the reforms, addressing such issues as whether the reforms should be phased-in gradually over a transition period or immediately and whether compensation should be granted for mills that are negatively effected by the reforms. Important institutional issues also must be resolved concerning such issues as who will be responsible for overseeing the new systems of product grading and classification.

The series of studies on needed institutional reforms is also important. The upcoming study on ONICL will be crucial in defining its future role in a liberalized market. A study of the future role of the SCAM/CMA in a free market is also important; if the SCAM/CMA are disbanded or in bankruptcy, what will become of their massive storage infrastructure, probably needed for maintaining food security stocks.

3.3.1.1. Sociétés Coopératives Agricoles Marocaines/Coopératives Marocaines Agricoles (SCAM/CMA)

SCAM/CMA, incorporated in the 1930s, are the traditional cooperative structures that supplied inputs and arranged agricultural marketing. After independence, these cooperatives became state-owned and managed the state-regulated agricultural-marketing system. Efforts

were undertaken to reform the SCAM/CMA in 1971, 1976 and 1988. Though these efforts were not entirely successful, the marketing of all cereals except soft wheat has been liberalized.

The upcoming policy reforms to liberalize the price of soft wheat and its marketing channel will largely remove the need for SCAM/CMA.

The future disposition of SCAM/CMA, whose main assets include regional grain handling and storage facilities, remains an important unresolved issue in Moroccan cereals marketing reform. Present expectations are that SCAM/CMA would continue to play a role in maintaining security stock and perhaps in distributing cereals to mills in those areas experiencing serious production shortfalls.

3.3.2. Institution building

The cereals marketing subproject is continuing the institutional strengthening initiated by the USAID-funded Planning, Economics and Statistics Project (608-0182). This project has provided 10 years of assistance to DPAE to strengthen its capacity to conduct economic and statistical analysis. CMRP has contributed to institution-building at both DPAE and ONICL through long- and short-term training, seminars, and on-the-job training. The CMRP studies and analyses have been planned and carried out collaboratively between long- and short-term project staff and the staff at DPAE and ONICL, enabling their personnel to participate in policy reform analysis.

The project has strengthened the capacity for applied policy analysis within both DPAE and ONICL. A visit with provincial ONICL officials in Meknes during the evaluation revealed that the staff had developed the ability to analyze the future impacts of policy reform as they discussed the appropriate roles for ONICL in a liberalized market.

DPAE and ONICL directors feel the project has been an enormous support to their institutions in developing analytical capabilities. They regret that the project is ending next year.

Within ONICL, CMRP is developing a Market Information System (MIS) for improving the collection and dissemination of market price information. The system will be completely up and running by next year, as the project anticipates the arrival of a medium-term consultant who will work with ONICL in implementing this system. As a result of CMRP, ONICL is already publishing the improved price data in monthly bulletins ("Marché des Céréales et des Légumineuses").

An agreement needs to be finalized by MARA between ONICL and DPAE over the ultimate responsibility for the collection of price data. At present, they both collect price data, a seemingly unnecessary duplication of tasks and a waste of resources.

The agricultural economics program at ENA/Meknes and the applied economics and statistics programs at INSEA in Rabat also have been strengthened by their participation in CMRP activities.

3.3.3. Development of a cereals marketing strategy

The information generated in the CMRP Phase I and II studies and disseminated in project seminars and meetings and in formal and informal discussions is being used by policy-makers to develop a coherent strategy for cereals market reform. The detailed analyses and recommendations of the various Phase II milling sector and institutional reforms studies are avidly awaited. The project will play a heightened role in the third year of the project as the details and implementation arrangements for the final reforms are developed. Policymakers at MARA, in particular, would like the CMRP long-term advisor to maintain a strong presence to assist GOM policymakers in formulating the implementing guidelines (mesures d'application) for the new commercial legislation.

In the final year of the project, CMRP will assist DPAE in devising a "Businessman's Guide to Moroccan Cereals Reform," which will be written for all actors involved on the cereals market, including traders, farmers, importers, and millers. The guide will provide step-by-step instructions on all the procedures of the newly-liberalized market. Written for the population at large and available in Arabic, French, and English, it will be heavily publicized by the GOM to prepare all actors for the changes in the cereals market.

3.4. Problems and constraints

3.4.1. Lack of farm level data

The lack of knowledge within DPAE concerning farm-level conditions and prevailing farming systems is surprising. DPAE apparently has not conducted sufficient farm management studies. The impacts of the input subsidies elimination and questions concerning the impact of policy reforms cannot be analyzed without this information. In fact, the relevance of models can be called into question in the absence of a basic understanding of production conditions.

CMRP at least should conduct a carefully-worded farm-level rapid reconnaissance survey of farmer attitudes toward cereals policy reform and marketing at the farmgate. Relatively little information is known about this end of the cereals marketing chain, with the exception of the detailed farmgate studies conducted in the Chaouia and Zaer regions as part of the French-funded *Mise-en-Marche* project. Information also could be collected concerning on-farm storage. Careful attention should be paid to the sample, to ensure that it is stratified by type of farmer or farm size.

3.4.2. Lack of incentives to GOM collaborators

The inability of CMRP to offer meaningful incentives to GOM collaborators has posed a problem for the project. Ministry personnel are asked to contribute extra time and effort to project activities while working collaboratively with Moroccan and expatriate consultants who are earning much higher salaries. The fact that IAV, ENA, and INSEA personnel are much better paid and can work virtually unlimited consulting hours is particularly disappointing to GOM civil servants.

3.4.3. Diminished donor conditionality in policy reform

Reduced interest in cereals market policy reform on the part of the World Bank has greatly reduced donor sponsorship of such reforms. In addition, policy reform is no longer a major preoccupation of AID/Rabat. When CMRP was designed, it was seen as advancing the ASAL-II agenda, but the last installment of ASAL-II funding was released in 1991 before many of the agreed-upon reforms were ever undertaken. In the short run, this reduced sponsorship has been frustrating for the project and has made CMRP's task more difficult; in the long run, it may be beneficial since the upcoming reforms are demand-driven and are being undertaken because of their perceived potential benefits, not because of conditionalities. When a government is committed to reform, conditionalities are largely redundant. They even can prove counterproductive since the reforming country often feels that the donor is interfering with its national sovereignty.

3.4.4. Lack of progress in cereals reform agenda

Three major areas of policy reforms remain to be implemented for the soft wheat market: (1) trade liberalization, liberalizing imports of all cereals, (2) elimination of the controlled soft wheat marketing system, and (3) elimination of the FNBT.

According to informed GOM policymakers, the 1993 harvest will be the last before these reforms, which have been scheduled for several years, will be implemented. The new *Loi de Commerce Exterieur* is scheduled to be enacted in October 1993.

GOM officials advance plausible reasons for the delay in implementing the above reforms. The failure of last year's rains, coupled with another year of drought, has made it an unpropitious time to remove the FNBT subsidy and liberalize the soft wheat market. Given the upcoming parliamentary elections, it would not be a wise political decision to implement the reforms after last year's bad harvest. Policymakers at MARA generally acknowledge that the GOM believes the 1993 agricultural season will be the last under the old system.

3.5. Impact of CMRP on cereals policy reform

Policy reform is a process, usually a long-term process, the precise beginning and end of which is difficult to pinpoint. Such is the case with cereals marketing reform in Morocco, which began in the mid-1980s, years before the entry of CMRP onto the scene in 1991.

The CMRP was conceived to assist in implementing basic reforms and to diagnose and assist in solving the secondary problems or unintended impacts that were sure to arise when the reforms were implemented. The sheer complexity of the cereals subsector cannot be overlooked. It touches nearly all aspects of Moroccan economy and society, from producers to consumers, in addition to the many persons who earn their livelihood in the sector, from rural collectors to industrial millers. Nor can the political consequences of changing the status quo, possibly altering the configuration of winners and losers in the reformed policy environment, be accepted without carefully weighing the potential costs and benefits.

Therefore, the major role of the project is not to bring about the reforms, because that was already planned and partially initiated some years before the project began. Rather, its role is one of information dissemination, analysis of potential impacts, analysis of the timing and sequencing of reforms, and analysis of secondary measures that need to occur as a result of the initial reforms. The project also has illustrated the economics and social price paid by Morocco to maintain the highly regulated system of the past. The extent to which the project has been able to achieve its objectives is described below.

3.5.1. Economic and social price of the regulated system

CMRP has successfully illustrated the costly impact of the highly regulated cereals market in its studies of FNBT, product quality, the milling industry, the *accords de modération*, milling industry restructuring and the overall costs and benefits of the regulated system.

FNBT. The rapid reconnaissance survey of the flour situation conducted in five representative provinces demonstrated the dimensions of the FNBT problem. The conclusion that 50 percent of the subsidy was not reaching any consumer (much less poorer consumers) was advanced by the project in February 1992. Since then, policymakers have widely accepted this conclusion, leading to the recommendation of two interministerial commissions to eliminate FNBT—the first step in the eventual deregulation of the bread wheat market.

The milling industry and product quality. The demand studies (McDermott and Bouzri 1992; Bouzri and Baudonnel 1992) and milling studies (Falgon 1992, 1993; Achy 1993) have formally highlighted the negative consequences of the current system: the poor and irregular product quality from the industrial mills, the inefficiency within those mills, and the level of consumer discontent at the lack of choice.

Accords de Modération. CMRP fieldwork first uncovered the existence of these *accords* and their consequences on the price of free flour, bread prices, and restraint of trade. As a result, the existence and impact of the *accords* were brought into public debate for the first time.

Restructuring the milling industry. The project investigated the degree of change required in the milling industry and the fact that this has been met with some reluctance on the part of the less dynamic owners, who fear they will not be able to compete under the liberalized system. The milling studies have also demonstrated the extent to which the regulated system prevents the key actors from playing their traditional role as economic (and price signal) coordinators in the cereals subsector with the resultant loss of efficiency and investment.

Cost-benefit analysis of liberalization. The preliminary analysis by Salinger (1992) is the first attempt to enumerate the economic/financial price that the GOM and Moroccan consumers pay so that a relatively small number of people can benefit from the absence of competition.

3.5.2. Information dissemination

As result of CMRP, the status of the discussion of cereals marketing reform was transformed from a semisecret to a semipublic debate, with the seminar held in February 1992 to discuss the synthesis of the first-phase findings, the synthesis report, and the accompanying publicity concerning the seminar. The synthesis document has been widely distributed: more than 300 copies have been made available within the GOM and to concerned actors. Alternative implementing procedures and recommended options for policy implementation were presented at the 1992 seminar and in the document, as were ideas concerning the timing and sequencing of policy implementation. The synthesis document has been widely read and was avidly discussed by ONICL and other officials during the evaluator's visit to Meknes.

Less formal information dissemination continues in other meetings and in frequent work with cereals market interest groups.

The "Businessman's Guide," planned for publication in the third year to explain the practical steps involved in the new environment to all the actors in cereals marketing (farmers, traders, millers, etc.), is simply a continuation of this process. The guide will be publicized widely in several languages. The long-term advisor's 10 years of experience in agricultural extension and in public meetings with interest groups will be extremely useful here.

3.5.3. Impact analysis

The second-year CMRP program was heavily involved in analyzing the impact of the remaining policy reforms. Cereals-marketing-reform impact studies were conducted on the milling industry (Falgon 1992; Achy 1993), the livestock feed sector (Metzel 1992), the lifting of FNBT on the poor (McDermott 1992), and food security (Stedman and Benabderazik 1992). A final report on the milling industry impacts (ICEA) and another on the modeling of the farm level and domestic price impacts (Purdue) will be published soon. A

rapid reconnaissance of the farm-level impacts will also be conducted during the third year of the project.

3.5.4. Analysis of the timing and sequencing of reforms

The schema for the timing and sequencing of reform measures, proposed in the CMRP Synthesis Report of February 1992, presented a detailed flow chart of a set of reforms with hypothetical but realistic timing. The proposed schema has been used by the Director of DPAAE and by the Ministry of Finance personnel in planning the interconnection and sequencing of reform measures.

3.5.5. Analysis of secondary issues

Once the major remaining reforms are agreed upon and dates are set for their implementation, secondary measures must be attended to. As was the case with the milling industry, the initial milling study raised issues concerning artisanal milling and other industrial, non-breadwheat milling. Follow-up studies concerning the future roles of ONICL and SCAM/CMA, food security, and security stock planning will be conducted during the final year of the project.

The critical work on the implementing guidelines of the newly enacted Foreign Trade Law (Loi de Commerce Extérieur) also must be undertaken during the third year of the project.

3.5.6. Conclusion

The table below summarizes the work undertaken by CMRP in assisting the implementation of cereals policy reforms. Perceived or real problems for each of the major reforms have been studied, solutions proposed, and facilitating activities undertaken by CMRP.

Table 1: Reforms, perceived or real problems, and facilitating activities

Reform	Perceived or real problem	Facilitating activity
<p>Trade: Free cereals imports</p>	<ul style="list-style-type: none"> ● Lack of coordination ● Lack of information ● Possible periods with no grain supply 	<ul style="list-style-type: none"> ● Provide better information on international trade ● Improve stock information system ● Maintain transitional grain stock while evaluating the success/problems of free imports
<p>Suppression of FNBT</p>	<ul style="list-style-type: none"> ● Loss of subsidy to the poor (20% of total) ● Timing: 2 years of successive drought ● Loss of benefits (rents) to the beneficiaries of the present system 	<ul style="list-style-type: none"> ● Establish other compensatory programs (beyond the scope of CMRP)
<p>Liberalizing input supply to mills</p>	<ul style="list-style-type: none"> ● Mills unable to compete in new system will block reforms 	<ul style="list-style-type: none"> ● Examine issue of compensation to uncompetitive millers

4. Project management

4.1. Introduction

The Memorandum of Understanding of September 1989 presents the various functions and responsibilities of the three major actors involved in CMRP: USAID (the donor agency), the GOM (as represented by MARA), and DAI (the primary contractor) together with the subcontractors.

USAID is responsible for overall project management, disbursement of funds, and the monitoring and evaluation of project activities. The prime contractor, DAI, and subcontractors are responsible for project implementation in collaboration with the GOM, primarily MARA.

4.2. Development Alternatives, Inc., and subcontractors

The prime contractor for CMRP is DAI. Project subcontractors are the Agricultural Economics Department at Purdue University, AIRD of Cambridge, Massachusetts, the Paris-based ICEA, the Moroccan firm Agro-Concept of Rabat, and the INSEA in Morocco. The project also collaborated with the ENA located in Meknes and with IAV.

The technical assistance provided by the contractors and subcontractors has been generally excellent according to the users of the studies, report, and seminars. While the time allotted for the midterm evaluation did not allow for a systematic review of all CMRP documents, the key documents reviewed seem to be well-written, especially considering the short time allotted for data collection, analysis, and synthesis of findings. The collaborative nature of the CMRP research, usually jointly undertaken by expatriates and Moroccans, further enhanced the utility of the research efforts by developing the capacity of DPAAE, ONICL, and other Moroccan economists to analyze issues related to cereals policy reform.

The long-term policy advisor provided by DAI has done an excellent job in implementing CMRP, in coordinating and overseeing all project research, and most importantly in creating the conditions for meaningful analysis and discussion of cereals policy reform. The long-term advisor has also established a well-functioning CMRP office integrated within DPAAE, which serves as a point of liaison for consultants and GOM personnel involved in the project and provides administrative and logistical support. The project is well assisted by a competent office manager, a B.A. graduate in modern languages, who also assists with document translation. DAI headquarters in Bethesda, Maryland, provides logistical and administrative support in addition to short-term technical assistance to the project.

The short-term technical assistance has come primarily from DAI, Purdue University, AIRD, and Agro-Concept. The expatriate consultants both from Purdue University and AIRD have had extensive experience in Morocco, particularly in agricultural and trade policy reform, which has been appreciated by their Moroccan counterparts. The Moroccans stated that the

training in modeling potential impacts of policy reforms on domestic prices, stocks, supply, and demand was especially useful to them.

The evaluator had too little time to interview AIRD, INSEA, and Purdue University, although other in-country subcontractors were interviewed.

4.3. Government of Morocco

The GOM agreed in the Memorandum of Understanding to contribute office space and secretarial support to the project, in addition to forming the International Oversight and Technical Committee and contributing its time.

The GOM has successfully established the two committees that serve as overall coordinators of project activities. The Interministerial Oversight Committee, chaired by the Secretary General of MARA and comprised of representatives of the Ministries of Agriculture, Finance, Economic Affairs, Commerce and Industry, and Interior is responsible for overall project coordination. The committee has met several times to review annual workplans and assess project implementation. The committee chairman, the MARA secretary general, has been particularly active in reviewing in project's progress and providing guidance at the policymaker level.

The second committee overseeing project activity is the technical committee, formed by representatives from three divisions of MARA (DPAE, DPV, DVRA) and ONICL, the parastatal located within MARA. The technical committee has been active in overseeing project activities and participating in seminars. DPAE and ONICL personnel have been the major participants as project activities have been centered on those divisions. The acting director of DPAE has served as the counterpart of the long-term technical assistant and combines extensive experience in Moroccan policy reform with a particular interest in cereals policy reform. The director of the ONICL statistics division and his staff have participated in many of the CMRP studies.

The GOM has provided both office space and basic office supplies to CMRP.

The GOM has provided necessary inputs, as specified in the Memorandum of Understanding. The only deficit has perhaps been the limited participation by DPAE personnel in the second phase of CMRP activities due to the lack of meaningful incentives to participate in CMRP when they already have assigned tasks. The higher salaries and the opportunity to work virtually unlimited hours of consulting enjoyed by IAV, ENA, and INSEA discourages DPAE personnel because they receive no additional stipend to participate in CMRP activities.

4.4. USAID

The CMRP is a subproject of the Economic Policy Analysis Support Project (608-0191), whose overall program goal is to contribute to a successful transition of the Moroccan

economy to greater market orientation. CMRP has been managed by the Agricultural Development Office (ADO). USAID's agricultural strategy has changed since the inception of the project, when it explicitly emphasized the cereals sector and an improved economic policy environment. The ADO focus at present has shifted to a strategy emphasizing export promotion and privatization. Although still actively interested in policy reform, it has been less of a priority for the Mission. USAID's change in focus, together with the World Bank's decision to change its focus from sectoral adjustment to investment loans, has effectively reduced donor support for cereals marketing reform. As mentioned earlier, this reduced donor sponsorship of policy reform is not necessarily negative because the enacted reforms are therefore demand driven and probably more lasting and meaningful.

Appendix A

Contract No: PDC-1406-I-00-0073-00

Statement of Work

OBJECTIVE

The objective of the mid-term evaluation for the Cereals Marketing Reform Subproject is to determine whether it has been an effective instrument in assisting the Government of Morocco to introduce reforms for cereals markets, foster private sector involvement, formulate an import policy supportive of the domestic cereals market, and recommend any measures that may serve to advance the achievement of objectives during the remaining implementation period.

SCOPE OF WORK

The contractor will conduct the evaluation in three stages. They are:

- (1) review structural adjustment and Cereals Market Reform documentation, including pertinent Project Agreements, amendments, and other documentation at USAID/Morocco, as well as project work plans, quarterly reports, and subject reports by the contractor; in addition, review documentation pertaining to seminars and conferences, workshops, and short and long term training; two days of consultation in Washington D.C. with AID/W and the IBRD are allowed for review of ESAP documentation;**
- (2) conduct interviews with relevant officials in the Ministry of Agriculture and Agrarian Reform, ONICL, other relevant government agencies and with the private sector to determine the relevance, pertinence, and acceptance and use of Cereals Market reform "products;" identify measures to facilitate achievement of objectives;**
- (3) produce a draft evaluation report and present it to a joint US/AID/Government of Morocco seminar; based on comments by US/AID and the Government of Morocco, produce a final evaluation report.**

The contractor will present a draft report to a joint U.S.-Moroccan seminar toward the end of the third week of the consultation. The final report must be issued no more than one month following the departure of the consultation from Morocco, in French and in English.

An inclusive list of questions that US/AID/Morocco expects to be addressed in the evaluation is as follows:

- (1) Has work foreseen in the original project design been completed as scheduled?
- (2) To the extent that the project has had an institution-building role in developing the capacity of the DPAE to conduct the types of analyses required for cereal policy formulation, what is the success of the project to date, and what additional steps are needed?
- (3) To what extent have Project reports and analyses been used in the policy formulation process and by what services of the Government of Morocco and in what ways? Are there other ways in which project activities have facilitated the cereals policy reform process?
- (4) Can specific policy reforms be tied to reports, analyses and other actions conducted under the Project? What are users' (government services and private sector) impressions of the quality of reports and analyses for which the Project has been responsible?
- (5) Was the project, as originally designed, complete in terms of being able to reach stated objectives? Are there elements which should have received more attention? If affirmative, should the Mission consider whether amending the project or using other means to address them? What are the evaluator's specific recommendations for activities during the second half of the Project?

SCHEDULE OF WORK AND MINIMUM LEVEL OF EFFORT

The consultant is allowed a total of 4 weeks for this work. S/he should begin with 2 days of preparation time with AID/W and the IBRD prior to departure to Morocco mid-to-late January. Three weeks are allowed in country and an additional three days in Washington D.C. for preparing the final report.

DELIVERABLES

Deliverables will include 50 (25 in English and 25 in French) copies of the final version of the mid-term evaluation report. The consultant will also furnish 10 copies of the draft report, in English, for the seminar to be held in Morocco toward the end of the consultancy.

Appendix B

List of persons contacted

Washington, D.C.

Laura Tuck	World Bank
Scott Simons	DAI
Elliott Berg	DAI
David Kingsbury	DAI

Morocco:

David Wilcock	Project Director, CMRP, DAI
Charles Uphaus	Agricultural Development Officer, USAID
John Schamper	CMRP Project Officer, USAID
Mohammed Hunafi	USAID
Mohammed Ben Sania	Consultant, USAID
John Wilson	Agricultural Attaché, U.S. Embassy
Mitch Skalicky	U.S. Wheat Representative

Albert Sasson	Ing. Général de l'Agriculture, Directeur MARA/DPAE
M. Belhadfa	Chef, Division de Céréales et Cultures Fourragères, MARA/DPV
Mahmud Marzaki	Directeur Général, DVRA
Aloui Abdeltaoui	Secrétaire Général, MARA
Mohammed Guerraouir	Directeur Général, ONICL

Appendix C

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Appendix D

Summary of short-term technical assistance

CMR PROJECT: SUMMARY OF SHORT-TERM TECHNICAL ASSISTANCE TO 12/31/92

Year & Period	NAME	ORGA	DATES	SUBJECT	Person Months
STARTUP:					
'91 - 1	DAVID WILCOCK	M DAI	5/20-6/29	Project Startup	1.25
PHASE 1: SYNTHESIS AND DIAGNOSIS:					
'91 - 2	LYNN SALINGER	M AIRD	9/24-12/3	Group C: Trade	1.00
'91 - 2	LYNN SALINGER	US AIRD	10/7-11/15	Group C: Trade	0.50
'91 - 2	DIRK STRYCKER	US AIRD	10/7-11/15	Group D: Demand Estimation	0.50
'91 - 2	VALERIE BEYERS	M DAI	10/14-10/28	Admin. Systems and Accounting	0.50
'91 - 2	LAURENCE KENT	M DAI	10/21-11/15	Group B: Mktg and Laws	0.75
'91 - 2	JEFF METZEL	M AIRD	10/21-12/7	Group A: Production	1.00
'91 - 2	PHILIP ABBOTT	US PURD	11/11-11/29	Group C: Trade Modeling	0.75
'91 - 2	PHILIP BOYLE	M DAI	11/23-12/15	Group D: Food Aid and Welfare	0.75
'91 - 2	ELJOT BERG	M DAI	11/25-12/2	General Policy Review	0.25
'91 - 2	DAVID KINGSBURY	US DAI	11/24-12/6	Paper on Risk in Cereals Trade	0.50
'91 - 2	WALLY TYNER	M PURD	12/6-12/14	Group A: Production	0.25
'92 - 2	LYNN SALINGER	M AIRD	2/10-3/4	Group C: Seminar Prep.	0.75
'92 - 2	PHILIP BOYLE	M DAI	2/8-2/22	Group D: Seminar Prep.	0.50
'92 - 2	WALLY TYNER	M PURD	2/12-2/26	Group A: Seminar Prep.	0.50
PHASE 2: MORE DETAILED STUDIES:					
'92 - 3	BRUCE SCHULTE	M DAI	4/6-5/6	Market Info Systems (MIS)	1.25
'92 - 3	HENRIOT SABOURI	M DAI	4/27-5/2	Cereals Storage	0.25
'92 - 3	RONALD ANDERSON	M IBRD	4/7-4/17	Future Markets Work	0.25
'92 - 3	CLAUDE FALGON	M ICEA	5/3-5/15	Planning Milling Studies	0.50
'92 - 3	CHARLES STEEDMA	M DAI	5/11-4/5	Food Security Study	1.00
'92 - 3	PHILIP ABBOTT	M PURD	5/11-5/30	Trade Modeling Training Course	0.75
'92 - 3	ANN MCDERMOTT	US DAI	6-6/92	Targeting Food Subsidies	1.00
'92 - 3	MAHMOUDI	M INS	6/15-7/16	Data Needs Study	1.25
'92 - 3	WALLY TYNER	M PURD	6/20-7/10	Data Needs Study	0.75
'92 - 3	TOM ZALLA	M DAI	6/20-7/15	Data Needs Study	1.00
'92 - 3	DRIOUCHI	M ENA	6/22-7/11	Data Needs Study	0.75
'92 - 3	WILL SHERMAN	M USDA	6/22-7/11	Data Needs Study	0.75
'92 - 3	DRISS BENATYA	M IAV	6/22-7/16	Data Needs Study	1.00
'92 - 3	JEFF METZEL	M AIRD	9/3-10/1	Cereals, Feeds and Livestock	1.00
'92 - 3	ANN MCDERMOTT	M DAI	9/16-11/16	Demand for Wheat Flour	1.00
'92 - 3	NAJAT BOUZRI	M DAI	9/16-11/16	Demand for Wheat Flour	1.00
'92 - 3	CLAUDE FALGON	M ICEA	9/16-10/31	Wheat Flour/Millers Survey	1.00
'92 - 3	GREG. BAUDONNEL	M ICEA	9/16-10/31	Demand for Wheat Flour	1.00
'92 - 3	LYNN SALINGER	M AIRD	12/1-12/15	BT Decontrol C/B Analysis	1.00
'92 - 3	PHIL ABBOTT	US PURD	10/1-12/30	Reform Impact Modeling	0.75
MOROCCAN SUBCONTRACTORS					
PHASE 1:					
'91 - 2	HASSAN BENABDE	M A-C	10-12/91	Group C: Trade	1.75
'91 - 2	OMAR ALOUI	M A-C	10-12/91	Group B: Marketing	1.75
'91 - 2	AZZOUZ JAKHJOUK	M A-C	10-12/91	Group A: Production	1.50
'91 - 2	SAAD BELGHAZI	M A-C	10-12/91	Group B: Marketing	1.00
PHASE 2:					
'92 - 3	HASSAN BENABDE	M A-C	3-7/92	Admin. and Food Security	1.25
'92 - 3	OMAR ALOUI	M A-C	6-7/92	LP Modeling	1.00
'92 - 3	HASSAN BENABDE	M A-C	9-12/92	Milling Studies	1.50
'92 - 3	OMAR ALOUI	M A-C	9-12/92	Milling Studies/LP	2.50
'92 - 3	AZZOUZ JAKHJOUK	M A-C	9-12/92	Milling Studies/LP	2.00
'92 - 3	LEILA AYOUBI	M A-C	11-12/92	Milling Studies	1.25
'92 - 3	FACULTY	M INSEA	7-12/92	Artisanal Milling Study	7.00
'92 - 3	STUDENTS	M INSEA	7-12/92	Artisanal Milling Study	(34.5)
'92 - 3	LACHEN ACHY	M INSEA	12/92	Design of BD Milling Study	0.25
SUMMARY OF CONSULTING IN PERSON MONTHS (NOT COUNTING INSEA STUDENTS):					
		PHASE 1	PHASE 2	TOTAL	
DAI AND US SUBS		9.75	17.25	27.00	
MOROCCAN SUBS		8.00	16.75	22.75	
TOTALS		15.75	34.00	49.75	