

PD-ABR-781
103154



Abt Associates Inc

55 Wheeler Street
Cambridge, Massachusetts
02138-1168

617 492-7100 *telephone*
617 492-5219 *facsimile*

Hampden Square, Suite 600
4800 Montgomery Lane
Bethesda, Maryland
20814-5341

301 913-0500 *telephone*
301 652-3618 *facsimile*

640 North LaSalle Street
Suite 400
Chicago, Illinois
60610-3781

312 867-4000 *telephone*
312 867-4200 *facsimile*

Agricultural Policy Analysis Project—APAP III

End of Project Report

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Prepared by

Gordon Straub
Rory Anderson

I INTRODUCTION

The initiation of the USAID-funded Agricultural Policy Analysis Project (APAP) series in 1983 coincided with the beginning of an era of profound world-wide economic opportunities and risks. Global economic interdependence and an appreciation for the power of free market economies altered the world's business environment and forever changed the structure of the global food and agriculture sector. National governments assessed their economic and sectoral policies and revised them slowly as economic tools and analytical methodologies became available. They began to move from interventionist and distortionary policies toward those that acknowledged the efficacy of markets in allocating resources. New global trade agreements and the emergence of forceful new and expanding trading blocks have also influenced the world's agriculture structure. In addition, people everywhere are more aware today than ever before of the fragile state of the environment and productive resource base upon which agriculture is dependent.

USAID recognized the implications of such profound change in the world's agricultural sector early in the process, and decided to actively participate in and facilitate that change and utilize the opportunities it offered to help reach the Agency's sustainable economic growth objectives.

USAID has long played a leadership role in the donor community on establishing priorities in agricultural policy, in influencing other donors' policy initiatives (particularly related to economic liberalization), and in understanding the growing role of markets and agribusiness in agriculture-based economic growth. Through a clearly articulated approach to policy reform and economic development, USAID has lead strategic thinking and assisted developing countries to understand and promote the growth and poverty reduction potential of their agricultural sector. Bi-lateral dialogue has been a major tool used by USAID to generate this economic and agricultural policy change.

Through the APAP series of development interventions, Abt Associates Inc and its subcontract partners provided agricultural policy assistance to USAID central and regional bureaus, USAID field missions, and host-country decision makers during the period 1983-1999. USAID missions and bureaus have obtained country-specific assistance through buy-ins to the project, while core funds were utilized to support limited synthesis research, training, methods development, and dissemination to enable countries to benefit from the experience of other countries.

This report covers the final five years of APAP, 1993-1998, known as APAP III. However to solely focus on APAP III and describe accomplishments and results without a discussion of the early and mid-life of APAP would provide an incomplete picture because the key issues addressed in APAP III, in fact, evolved during APAP I & II. The following section provides a brief background of the full fifteen years of APAP activity.

II BACKGROUND

APAP I (1983-1988)

APAP I provided a broad range of analytical support services and training programs for USAID missions in all geographical regions of the world as they began to initiate policy dialogue with host country governments, the goal of which was to promote sustainable economic growth through policy reform. The central themes of APAP I included

- 1 Price policy reform (including work on input subsidies, price supports, official marketing margins, consumer subsidies, cereal export reform, and the effects of exchange rate reform on agricultural incentives),
- 2 Expanding the role of the private sector through privatization of fertilizer distribution liberalization of grain marketing, and elimination of policies that promote food imports,
- 3 Food aid to support policy reform by minimizing the short-term negative impacts on vulnerable groups in society,
- 4 Building the capacity of host governments to conduct and apply rigorous agricultural policy analyses, and,
- 5 Identifying and analyzing policies and their effects on agriculture

APAP technicians and specialists designed many of the tools and methodologies for better and more meaningful policy analysis. Many of these tools (such as the policy inventory, ADO Guidelines for Policy Analysis, etc.) are useful even today, more than a decade since their creation. Likewise, most of the issues identified in the early years of APAP remain significant especially in the countries of the ex-Soviet Union and Eastern Europe where privatization, price policy, and equity issues are high-priority government concerns.

During its first five years, APAP assisted 26 country missions and three regional bureaus in analyzing needs and options for policy reform, and in developing institutional capacity for conducting agricultural policy analysis.

APAP II (1988-1993)

APAP II followed the first five years as a vehicle to consolidate the gains of APAP I and addressed *anticipated second generation* issues and problems. APAP II concentrated on

- 1 Agribusiness and international trade policy,
- 2 Effects of economic structural adjustment on agriculture,
- 3 Sustainable agriculture and natural resource use, and,
- 4 Political aspects of sustainable agricultural policy reform

APAP II activities in agribusiness policy and international trade addressed issues that arose from the impacts created by the broader role of private sector institutions and individuals identified and supported by APAP I. The Project developed a targeted "Agribusiness Policy Inventory" which focused on identifying specific policies that inhibit or promote the development of a vibrant agribusiness system in varying cultural and national settings. It also developed and applied a concise methodology to measure the contribution of agribusiness to a country's GDP to demonstrate the significant role agribusiness plays in national economies. In addition, the Project developed and applied the Policy Analysis Matrix (PAM) that is a tool that allows decision makers to assess the position of the private sector vis-a-vis trade and domestic policies and market failures. Hundreds of national policy makers from all regions of the world received intense training in the application of the PAM in their countries. The PAM continues today to help policy makers assess the trade-offs involved in implementing reforms that ensure efficient resource use.

The APAP II team also developed the Natural Resource Policy Inventory that examined the linkages between agricultural and natural resource policy agendas. In the second five years of APAP, 24 countries and three regional USAID bureaus were served by nearly 50 buy-ins.

**THE AGRICULTURAL POLICY ANALYSIS PROJECT
PHASE III**

APAP III (1993-1999)

APAP III, the final phase of the APAP series of projects, was active during the period 1993-1999. This phase was implemented by a consortium led by Abt Associates and consisted of the following organizations:

- ▶ **Abt Associates Inc (Prime Contractor)**
- ▶ Development Alternatives Inc (DAI)
- ▶ International Science and Technology Institute (ISTI)
- ▶ Training Resources Group (TRG)
- ▶ Food Research Institute, Stanford University (FRI)
- ▶ Harvard Institute for International Development (HIID)
- ▶ Purdue University, Department of Agricultural Economics
- ▶ International Food Policy Research Institute (IFPRI)
- ▶ University of Arizona
- ▶ Associates for International Resources and Development (AIRD)

The issues, lessons, findings, and experiences of Phases I and II naturally evolved into the design of APAP III. The following basic themes were incorporated into and became the primary foci of APAP III:

- 1 Improving market performance,
- 2 Promoting environmentally sustainable agricultural policies, and,
- 3 Addressing equity concerns

These themes became the foundation of the APAP strategy which incorporated the following three interlocking strategic components: (1) a core, state-of-the-art research program, (2) capacity for providing timely policy-related technical assistance to missions, bureaus, and host-governments, and (3) training and dissemination activities to provide information on policy reform, policy-related experiences, and widely available analytical methodologies and tools. Specific technical areas were targeted as first-level activities, including (a) international trade, (b) impacts of economic adjustment programs, (c) natural resources, (d) improved policy-analysis activities, and, (e) the political dynamics of agricultural policy decisions.

To accomplish these activities, APAP III developed three major strategic directions. First, APAP was instrumental in providing policy support to USAID Missions and Bureaus. Second,

APAP III built a strong base of comparative research syntheses and appropriate methodologies to improve policy analysis. Finally, the project made information and analytic capacity widely available via training and dissemination activities around the world. The Project practiced an integrated approach so that each strategic direction was complementary and consistent with the other two. The Abt Team's experience in supporting policy dialogue, promoting private sector involvement, and advising on agribusiness development provided a solid foundation for activities to improve market performance.

APAP III emphasized efforts to make markets work better through better policies. It focused on identifying economy-wide and sectoral policy issues and resolving problems relating to agricultural growth. APAP III addressed some very specific issues. The project emphasized the need to implement policy analysis and reform to make markets work better. The project promoted agricultural and environmental sustainability. It assessed impacts of policy reform on various socio-economic groups and on natural resources, such as water and forests. It also built national capacities to initiate, implement and sustain agricultural policy reform.

The APAP III activity continued to apply tools and methodologies developed in APAP I and II and developed additional tools to address country needs. Among the tools not previously mentioned are

- 1 Guidelines on National Comparative Advantage and Agricultural Trade - practical methods for conducting comparative advantage analyses,
- 2 Guidelines on Agricultural Market Performance - analytical methods to assist in assessing market performance in developing countries, and,
- 3 Food Security Policy Inventory - a tool for identifying policies that affect food security, their impacts, and the priorities for reform or further research

APAP's changing areas of emphasis have reflected USAID's changing commitment to and emphasis on agricultural development and natural resource management since the early 1980's

- APAP I focused on establishing the policy framework in USAID recipient countries and the policy implications of food aid and trade. It also emphasized the need to train host-country decision makers in the policy analysis tools and methodologies available at the time.
- APAP II supported structural adjustment, trade, and the contribution of agriculture to GDP.
- APAP III emphasized policies relating to agribusiness, food security and marketing, and the analysis of performance. APAP made considerable progress in developing ways to work with decision makers, create demand for policy analysis, and provide tools that respond to analytical needs as reform efforts evolved.

IV SUMMARY OF APAP ACCOMPLISHMENTS

Economic and agricultural policy analysis and dialogue have been the primary tools utilized by the staff and consultants of APAP III to bring about policy discussion change and implementation. Other discretely different but related tools, including training, exchanges, workshops, seminars, and case studies have also been used widely during the life of the project.

During the five-year life of APAP III, APAP specialists conducted work through 43 Technical Service Orders (TSO) through the Core Contract and 24 Delivery Orders (DO) through the Buy-In Contract (Annex I). This work was conducted in 21 countries around the world. In total, the APAP series of projects worked in 50 countries throughout the world, listed below:

Antigua	Kenya
Bangladesh	Liberia
Belize	Macedonia
Botswana	Madagascar
Burkina Faso	Malawi
Cameroon	Malaysia
Costa Rica	Mali
Côte d'Ivoire	Morocco
Dominica	Mozambique
Dominican Republic	Niger
Ecuador	Pakistan
Egypt	Peru
El Salvador	Philippines
Ethiopia	Poland
Ghana	Russia
Grenada	Saint Kitts/Nevis
Guatemala	Saint Lucia
Guinea	Senegal
Harti	Sri Lanka
Honduras	Thailand
India	Uganda
Indonesia	Yemen
Jamaica	Zambia
Jordan	Zimbabwe

Over the five-year life of the APAP III activity, demand for in-country assistance was great, and in fact exceeded expectations. APAP was able to respond positively to this high demand with quick turn-around and high-quality provision of technical assistance. The project also responded

quickly to USAID regional bureau requests. The Project, however, was less successful in utilizing projected core budget funds for broad economic and agricultural policy research as originally contemplated in the project design because USAID had to greatly reduce core budget funds in response to general agency budget reductions.

This End of Project Report will not discuss each of the almost seventy individual TSOs or DOs to which APAP III responded. To do so would serve no purpose as deliverables for each of the tasks are available in USAID's Center for Development Information and Evaluation. (A list of all TSOs and DOs for the entire fifteen years of APAP is provided in Annex 1.) This report provides synopses of selected activities which are representative of the collected work performed through APAP III.

In June, 1998, USAID/W through APAP, III sponsored a world-wide workshop called "Agricultural Policy Reform, Growth and Food Security: Preparing for the 21st Century" which examined and reviewed the full fifteen years of APAP to identify best practices, lessons learned, and key issues for agricultural policy, food security and global trade for the future. (Annex 2)

Malawi

APAP played a central role in supporting USAID efforts to liberalize Malawi's agricultural economy by providing short-term teams to conduct specific analyses and long-term assistance to help coordinate the policy reform effort. Through these efforts, an economy characterized by pervasive government control is being replaced by one directed by market forces.

In 1994, an APAP team coordinated and developed a package of policy adjustment recommendations with the Government of Malawi, the private sector, and donors. Policy reforms focused on increasing equity and efficiency in Malawi's agricultural sector through liberalization of agricultural output and input markets and reform of agricultural institutions. The reforms opened opportunities for the small farm sector by eliminating production and marketing quota systems that benefited elite estate owners and government parastatals.

Following Malawi's first open democratic elections, delays in implementing key reforms threatened to affect agricultural production and productivity. For example, policy changes for liberalizing fertilizer distribution were at an impasse. Devaluations of the Malawian currency affected both the value and replacement costs of fertilizer stocks. Ambiguity existed over the changing roles of parastatals and private sector distributors. Government consultations with an APAP advisor led the government and parastatal officials to implement liberalization recommendations quickly.

In 1996, an APAP team assessed the functions of the Agricultural Development and Marketing Corporation (ADMARC) and developed a Strategy and Action Plan for privatization. A second team assessed the food security situation in the country and examined whether changing

policies support both food security and the transition to a market economy. Their report served as a catalyst stimulating dialogue on food security and enhancing understanding of the actions the government can take to promote food security without undermining the momentum towards a market economy.

Madagascar

APAP specialists assisted Madagascar's transition from a state-dominated to a free market economy. They analyzed the impact of price reform in the rice subsector, demonstrating the negative economic impact of the existing state monopoly and the related barriers to interprovincial trade in rice. APAP's work was coordinated with the World Bank's structural adjustment program and resulted in the liberalization of the rice marketing system.

APAP teams conducted studies on the creation of a buffer stock to protect urban rice consumers from sharp increases in prices due to liberalization and import restrictions. A subsequent study under a different USAID-funded project, the Agricultural Marketing Improvement Strategies (AMIS) project, highlighted the positive impacts of liberalization on rural and urban consumers.

Jordan

Working with the World Bank and GTZ (the German aid organization), USAID assisted the Ministry of Agriculture in Jordan to design and implement far-reaching agricultural policy changes. APAP II completed a comprehensive analysis of policies affecting agriculture in Jordan. The Ministry of Agriculture used these findings to develop an Agricultural Policy Charter.

In follow-up to that success, USAID requested an APAP III team to work with the Ministry of Agriculture to develop a planning frame that established priorities for more than 75 potential reforms, rank ordered them within the context of charter objectives, and analyzed the technical and institutional requirements for implementation. Separate APAP teams worked on legal and regulatory issues, environmental assessment needs, and quantitative methods for monitoring progress. Each team hosted a series of workshops to discuss findings. APAP provided training to Ministry staff in computer-assisted analysis and in the design and testing of a household-level survey.

Through painstaking research, ongoing collaboration, and careful decision making, a \$300,000 USAID investment in APAP III helped Jordan's policy makers create a more competitive agricultural sector and leverage \$75 million in support from other donors and financial institutions.

Haiti

In the late 1980s, about 60 firms were exporting or processing agricultural products in Haiti. But from 1991-93, the Organization of American States restricted imports and exports and most

international trade ceased. In 1995, APAP conducted an agribusiness sector assessment and worked with USAID/Haiti to develop an action plan to address factors that constrained trade.

The APAP team recommended that donors provide loan or grant funds to recapitalize Haitian agribusinesses, establishing an operating capital loan program to enable experienced agro-industrial firms to increase their level of activity. The team also recommended training for loan officers in Haiti's commercial banks to increase their capacity to lend profitably and efficiently to the agricultural sector.

The team advised donors to strengthen foreign trade and investment, for example, through the creation of a clearinghouse for information and advocacy and the provision of grants to investors to reduce the costs of overcoming constraints. Finally, the team recommended increasing credit and extension services to farmers.

Each recommendation was designed to increase food security in the short term and reduce the need for food aid which can remove farmers' incentives to produce, change local food preferences, and create uncertainties that complicate the management of agribusiness. Understanding this connection helped donors and the Government of Haiti to plan for the long run and put in place food security policies that foster agribusiness development, strengthen markets, and increase agricultural productivity.

Egypt

In 1994, under a buy-in with USAID/Cairo, an APAP team assessed the impact of Egypt's policy environment on agricultural services and industries. Field work involved an extensive review of secondary materials, including laws and regulations, and interviews with entrepreneurs and policy makers. Using the agricultural policy inventory, the team summarized policies and assessed how they affected employment, trade, investment, and technology transfer in agricultural enterprises.

The team found that many important pricing reforms had been made (including the liberalization of the exchange rate), but other policies were constraining progress. For example, laws restricting the hiring and firing of employees discouraged entrepreneurs from making new investments and acquiring new technology. Although the government had changed its policy of guaranteeing employment to all university graduates, government offices and public enterprises remained over staffed, setting a tone that affected the private sector too.

Dominican Republic

In a review of environmental policies in the Dominican Republic, an APAP team found that many pressing environmental problems were linked to inadequate policies and insufficient support for improved cultivation practices. The study focused on four key areas: sustainable agriculture,

water resource management forestry, and wildlands and biodiversity It identified the major policies in each area and cataloged the major government agencies responsible for policy implementation

The APAP team recommended new policy initiatives, including community conservation programs and active private sector participation in the dissemination of integrated pest management technologies To address soil erosion, the team recommended the development of a national water resource management plan To improve forestry policies, they advised that resource ownership rights be clarified, environmental education programs in schools be bolstered, and that forestry research and management capabilities be strengthened, especially in native species The development of policies affecting wildlands and biodiversity required studies of the economic and social value of wildlife species and better coordination among responsible agencies Finally the team recommended the expansion of two national parks and the development of integrated management plans to financially benefit both neighbors of protected areas and the implementing agency

Macedonia

In 1995, an APAP team traveled to the former Yugoslav Republic of Macedonia to assist the government in developing a new policy framework Their work was part of the preparatory work for a proposed World Bank project to support private farmers

Agriculture was the only growth sector in Macedonia in 1994 and its role in the nation s economy was recognized as extremely important The government was just beginning the transition to a market economy and had begun to work towards the integration of its agricultural policy within Europe and the World Trade Organization It was restricted by the United Nations sanctions against Serbia one of its largest trading partners, and a Greek-imposed blockade that prevented access to a deep- water sea port

The APAP team gathered data and conducted analyses on several commodities Analysis indicated that the level of subsidies and protection was relatively high for wheat and relatively low for milk and sunflower seed The team recommended that the levels of protection be brought down gradually by eliminating guaranteed prices based on cost of production and creating a market information system to provide farmers with price signals They advised the government to assess its strategy of 100 percent food self-sufficiency and determine whether benefits would accrue from agricultural exports

Although the government gathered social sector information routinely, it had little information on the private sector, especially private farms The team recommended that the government conduct a statistical survey to provide baseline data on agricultural production and socioeconomic variables in the private sector and determine long-term agricultural comparative advantage Promising commodities were livestock and early season fruits and vegetables

Mozambique

A 1995 evaluation of USAID's Private Sector Support Program (PSSP) in Mozambique documented the significant changes that had occurred in the agricultural and petroleum sectors over the previous five years. An APAP team found that PSSP was an important contributor to the joint efforts of the government of Mozambique, the World Bank, the International Monetary Fund, and other donors in reorienting the Mozambique economy towards market-based sustainable growth. Liberalization of agricultural prices had progressed to cover nearly all agricultural products and people were more and more willing to trust the market process. The development of a market information system, through technical assistance from APAP, facilitated the liberalization of prices and provided a tool for both making and monitoring agricultural pricing policy.

Although divestiture of state farms was almost complete, several problems remained, including conflicting land claims, land access issues for farmers, and conflicts relating to urban spread and access to water. The Commodity Import Program provided tractors, small trucks, and other farm equipment, helped reestablish farm production, improved the movement of people and products to and from market centers, and increased the supply of agricultural inputs. In Maputo and Beira, a functional free market in food grains and other foodstuffs had replaced the rationing system. Retail trade had been liberalized and expanded as small-scale itinerant traders supplied consumer goods to rural areas and scoured the countryside for farm products to retail in an increasing number of open-air markets.

Food aid, provided by the United States and other donors, was handled in ways that contributed to the development of private trade in grain. Until 1990, state-owned milling and wholesaling enterprises were the sole recipients of program food aid. When these public firms failed to make all of their counterpart local currency payments, donors decided to allocate part of the maize to private millers. In 1991, private mills handled 20 percent of food aid, in 1992, they handled about 80 percent of food aid. In subsequent years, all commercial food aid was allocated to the private sector.

PSSP's policy agenda included petroleum importation and marketing because of the need to assure adequate fuel for transportation and agricultural activities. USAID was active in policy dialogue, contributing to significant policy reforms in the importation, pricing, and marketing of petroleum products.

Activities included on-the-job training, and degree and non-degree courses for a small number of Mozambican professionals. These individuals are now addressing Mozambique's ongoing work in private sector development.

Russia

The 26 states of Central and Eastern Europe and the Newly Independent States of the former Soviet Union have been undergoing profound social, political, and economic transformation since 1989. Perhaps more than in other countries of the region, the evolution of Russia's economy and society has created an increasing international interest to participate in the transformation and benefit by the emergence of this potentially huge market. Today democratically elected regional leaders have growing power in Russian decision making. Crucial decisions about policy reform which policies and how dramatic the reform are now made at the regional level.

Eight years after the collapse of Moscow's political and economic levers, the Russian federation is still evolving. Functioning central executive and legislative bodies have failed to emerge to replace the old regime, and regional leaders have surfaced to fill the voids left behind. The United States recognized this diffusion of power in Russia and its policy implications in the mid-1990's, and began to focus policy interventions on Russia's governors and other regional leaders and to target assistance on regions where local those leaders demonstrated a commitment to open policy discussion and reform.

The USAID-sponsored Program to Revitalize Agriculture Through Regional Investment in Russia (PRARI) was a USAID/W Global Bureau APAP III buy-in and originated from concerns of the Working Group on Reform and Privatization of the Gore-Chernomyrdin Commission (GCC). The Working Group searched for effective Russian partners to bring about political and economic reform and chose to strive for accelerated agricultural reform at the local or regional level to create the right business conditions to stimulate investment. Regional leaders became the U.S. government's partners in agribusiness development.

PRARI was designed to analyze existing national and regional agricultural and investment policies in Russia and promote trade and investment. The stated objectives of PRARI were to identify current policy constraints to domestic and foreign agribusiness investment in Russia and to recommend further actions at the regional level to improve the environment for investments in this sector. During this process PRARI staff and consultants worked closely with Russian and U.S. interests to identify five primary and five secondary regions to participate in the program. Assistance provided to the selected regions included technical assistance in investment and regional policy issues, institutional strengthening, investment promotion training, market and investment intelligence, and region-specific subsector analyses following a commodity systems approach. Key periodic public events, combined with the consistent support of PRARI consultants, USAID and the USDA have guided PRARI's course.

The design of PRARI was legitimately based on principals of decentralization, the impact of the program and concrete results that must necessarily vary from region to region and between policy expectations and new investments. The significant variations between and similarities among different regions, the effectiveness of local governments, the power relations between the center and

the regions are all factors which affect any one region's ability and desire to generate and accept change

PRARI has created significant policy awareness and competition among regions. Most PRARI regions have embraced the concept of creating some type of an investment promotion institution or center, but still lack the financial wherewithal to proceed. PRARI has been instrumental in the development of Russian business and trade associations, and in the planning and conduct of several regional investment promotion fairs and workshops. PRARI consultants have assisted regions in the drafting of specific laws and regulations, and now are playing a crucial role in raising public awareness of the need to enact those laws. U.S. investors and agribusinesses are now more aware of potential investment opportunities in Russia as a result of PRARI interventions. USAID/Russia has now extended and expanded the program.

USAID/W

In 1998, USAID/W requested APAP III to develop both a U.S. strategy for meeting the Food Summit Target established in the 1996 World Food Summit and a recommendation for a Presidential Initiative to meet those targets. The two reports, published in September 1998, develop the foundation and strategy for meeting the Food Summit target. The documents were widely distributed and form the nucleus of the United States Inter-Agency Working Group Action Plan for Summit follow-up.

This initiative to enhance developing countries' ability to conduct agricultural policy analysis and reform has yielded a substantive set of important lessons learned. All three of the APAP activities have helped USAID understand these lessons and it is important for field missions to utilize these lessons to improve the programming of agricultural policy assistance. The lessons will serve as input in the development of future agricultural policy research and analysis activities.

Agricultural development is directly linked to economic development in virtually every USAID-supported country. Economic growth has been USAID's "bread and butter" for decades and the steady decline in total resources dedicated to agriculture by USAID over the past several years has inhibited the development of agriculture in client countries, which has influenced economic growth in those countries. Recently, USAID has begun to look again towards agriculture (policy and agribusiness in particular) as a critical element in development and economic growth, and has elevated agricultural development again to strategic prominence. Initiatives to "grow" less developed economies must, in most cases, include specific agricultural policy and institutional interventions.

Policy and Institutional strengthening efforts must be understood in terms of local level impact. While agricultural policy analysis is a necessary component of successful policy dialogue and reform, it is not sufficient alone to accomplish that end. True policy reform is locally developed and owned, and must include all stakeholders. Local incentives must be understood and accommodated, and local training and outreach is often an important component to agricultural policy reform.

Donor coordination practice it, don't just talk about it. Policy reform is by definition a process which includes research, analysis, formulation, dialogue, legislation, local understanding and behavior change. To achieve that with the limited resources of USAID bilateral, regional, or global programs, is a daunting task. Other agencies in the international donor community face the same challenges. Even with multiple donor programs in a given country, policy dialogue is often bilateral dialogue, sometimes transmitting conflicting messages to local governments. Effective policy change requires the combined efforts of all development assistance activities in the country. It imposes a higher responsibility on donor coordination.

Agricultural policy reform is not accomplished in a vacuum. Agriculture is important as it is just one sector. Policy dialogue is multi-sectoral. Agricultural policy dialogue is conducted within the context of a variety of sectors --- forestry, urban, industry, etc., and efforts to promote agricultural policy reform must take into consideration inter-sectoral conflicts and complementarities.

Timing is key. Good, effective policy dialogue is demand-driven or builds demand as people learn more about the results and implications of good policies. It must respond to local

interests and requirements. Timing is an important element of the local setting. If one attempts to engage in policy dialogue on policy issues when the local policy makers are engaged in other issues or have yet to express an interest in that specific issue, the dialogue will likely lead nowhere. Conversely, important events such as a change in government can create a target of opportunity for successful policy dialogue.

Policy dialogue requires solid analysis A solid analytical base is necessary for effective policy dialogue. Good analysis establishes credibility and helps the analyst understand the underlying causes of an issue. Also, solid analysis obviously is more likely to lead to effective policy than no or poor analysis.

VI CURRENT TRENDS AND RECOMMENDATIONS FOR THE UNFINISHED POLICY AGENDA

Trends

The purpose of this section of the APAP III End of Project Report is to develop a set of recommendations for USAID involvement and intervention in the agricultural policy arena over the next 5 -10 years

A decent standard of life is within reach of many millions of the world's most severely impoverished people. USAID can help achieve this vision through improved specification of priorities for accelerated agricultural growth and consequent massive employment increase and poverty reduction. Concurrently, newly emerging economies can be assisted in capitalizing on potentials for high-value commodities to reach the four to six percent agricultural growth rates that are within their grasp. That will make a contribution to non-farm employment growth and provide stability for their industrial transformation.

In this broad context, analysis at the completion of APAP III has identified three unique sets of trends for the past two decades which provide different yet equally important lessons for USAID policy assistance as the Agency prepares for the next ten-year program cycle.

The first and most striking trend has been the extraordinary income growth experienced by billions of people in Asia and elsewhere. The unique trend associated with rapid agricultural income growth has been steep declines in poverty levels over the past 20 years. Recent data show that this decline in poverty was minimally influenced by manufacturing and urban growth, and was in fact virtually entirely the result of the direct and indirect effects of agricultural and rural growth. These are stunning findings that must be understood and utilized in developing future policy strategies aimed at poverty reduction.

More open markets, freer trade, rapid expansion of the private sector, emphasis on high value commodities, and critical but judicious investments in public institutions supported a 4.0 to 6.0 percent growth rate in agriculture in these recently successful countries, in contrast to the 3.0 to 3.5 percent that characterized rapid agricultural growth in earlier decades. The large impact on poverty from rapid agricultural growth is due to interactions between the rural sector and the rest of the economy. Growth in agriculture generates large increases in disposable income that in turn increases demand for simple domestically produced goods and services, and hence massive increases in rural and market town employment. To harvest these benefits, countries must develop a facilitative economic policy context.

The second trend is a less positive. In much of Africa, Central America, and several countries in other regions, per-capita income and agricultural production are declining, with a concurrent decline in employment and rise in food insecurity and poverty. Persistently low-income economies are highly susceptible to risks and are unable to buffer themselves from both natural and man-made disasters. Their trade, as a share of global trade, has been sharply reduced. These countries tend to focus for political reason on the urban sector, although their populations are predominantly rural. Concurrently, fragmented foreign aid often makes it impossible for such countries to focus on a few selected priorities and activities that have potential for success. The lesson learned through APAP in this context is that USAID should work with national governments in such countries to build a strategy and consensus about the priority areas in the agricultural and rural sectors that will provide the growth in employment and related reduction of poverty witnessed elsewhere.

A third, quite different trend occurs in emerging economies of the former Soviet Union, eastern European countries and the Middle East. These transition countries demonstrate a sharp upward trend in unemployment, poor participation in the global economy and trade, and poor private sector development, particularly in the small and medium scale sector so vital to employment growth. Generally, agriculture has declined to less than twenty percent of GDP but remains the driving force in employment generation, accounting for at least two-thirds of incremental employment during periods of rapid growth. Increased agricultural production and expenditure of the consequent income increase in the still large agricultural sector is the dominant source of employment growth. That dominance is reinforced by the redundancy of labor in the inefficient large scale industrial sector. These countries also need a strategy for agricultural policy reform that is more growth-oriented with specific emphasis on trade reform, high value commodity production, productivity-increasing technology, private sector participation, employment generation and poverty reduction.

Thus, the challenge for USAID is to identify activities which will maintain and reinforce the favorable trends and reverse the unfavorable ones. The former requires additional trade reforms, further encouraging private sector activities, and speeding the pace of technology generation and adoption and, in some cases, getting agricultural growth back on the agenda. Reversing the unfavorable trends requires strategic planning to set a few implementable priorities that can bring accelerated agricultural growth and a focus on the consequent employment impact as the center piece of poverty reduction policy, as well as pursuing the successful measures of the success stories.

USAID is key to supporting countries in these activities by assisting the development of consensus-based strategies, affecting the essential macro-policy reforms as well as sector-specific reforms and institutional investments.

Given agriculture's central role in generating employment and reducing poverty, USAID must continue to replicate solutions that foster policies and institutions that promote increased production, processing, and marketing of crops, livestock, fish, and forestry products. Successful

solutions must harness the benefits of macro- and micro-economic reforms to channel private and public investment to the agricultural sector

Creating the policy environment and institutions to promote efficient agricultural growth is ultimately the responsibility of national governments. Foreign aid, and particularly that of USAID, can strengthen the national entities and policy-makers that understand and foster agriculture and help them to focus attention on the critical priorities for achieving sustainable and equitable growth.

Recommendations

The following are recommendations that Abt Associates Inc provides to USAID for consideration as it plans the agricultural program for the future. USAID should position itself as a catalyst for continued improvement of client countries' agricultural sectors by

- Creating opportunities and forums for policy dialogue between policy makers and local civil society and NGOs to help inform them of all of the implications and benefits of policy reform and strategic priorities and reduce resistance to needed changes. For example, a regional Livestock Action Plan effort conducted by APAP in the Sahel led to better coordination among nations of their national herds and livestock resources, and subsequent growth in herder and trade incomes,
- Developing linkages between both national-level policy forums and international policy forums. APAP guided Morocco's agricultural policy strategy on trade, which resulted in Morocco's move into a world leadership role and its eventual hosting of the GATT trade round and trade agreement signed in Morocco in 1994. The result has been expanded Moroccan trade and a greater ability to enter into such negotiations in the future,
- Helping public officials understand the relationship between the macro- and micro-policies that affect the attractiveness of foreign investment, as in the aforementioned PRARI work in Russia. APAP conducted this work to improve the policy environments in various oblasts in order to attract U.S. agricultural investment in the region, resulting in significant changes in policies that are leading to more attractive investment environments,
- Helping public officials to understand the implications of macro-economic adjustments on sectoral strategies, as in APAP's work for the Mexican government and World Bank in the wake of the 1994 peso crisis
- Increasing access of policy researchers and policy-makers to world-level dialogue and learning through technology access such as Abt Associates has supported in its EAGER project and in Cabinet Networking Leland-sponsored activities for policy makers and cabinet decision makers,

- Assisting associations and businesses to improve their access to market information, trends and globalized networks through internet access, such as Abt Associates has worked on in Southern and Western Africa in its AgLink activities, and,
- Assessing the impact of nominal and effective protection on the incentives faced by producers as in APAP's work for the World Bank looking at state and emerging private sector grain and livestock producers in Romania

Chapter VII APAP III FINAL REPORT

Fiscal Summary

Contractor Abt Associates Inc
Contract # LAG -C-00-93-00052-00
Reporting Period 9/30/93 to 6/30/99

Administrative Information - Core Contract

Contract Data	Total level of effort	278 p/m
	Total estimated cost	\$4,847,427
Cumulative level of effort		215 39 p/m
Unused level of effort		62 61 p/m
Cumulative expenditures to date (including fee)		\$4,847,427
Remaining unexpended balance		\$0

Administrative Information - Buy-In Contract

Contract Data	Total level of effort	667 p/m
	Total estimated cost	\$18,700,000
Cumulative level of effort		317 66 p/m
Unused level of effort		349 34 p/m
Cumulative expenditures to date (including fee)		\$5,167,329
Remaining unexpended balance		\$13,532,671

Financial details by project are attached Details show task/delivery order costs only

APAP III Core Contract Detail

Task	Total Costs Incurred (not including fee)
INDRA	\$37 99
Y1 ADMIN/MGT ABT	\$97,856 14
Y1 ADV/COORD ABT	\$57,508 03
Y1 ADV/COORD DAI C2	\$72,070 93
Y1 ADV/COORD DAI C3	\$67,061 67
Y1 ADV/COORD ISTI	\$76,384 61
Y1 TSO1 HIID	\$414 70
Y1 TSO1 PURDUE	\$986 89
Y1 TSO1 TRG	\$2,118 11
Y1 TSO10 ABT	\$7,569 65
Y1 TSO10 DAT	\$5,726 85
Y1 TSO2 ABT	\$1,941 62
Y1 TSO3 ABT	\$2,913 04
Y1 TSO4 ABT	\$22,462 12
Y1 TSO4 DAI	\$0 00
Y1 TSO5 ABT	\$0 00
Y1 TSO5 ISTI	\$39,797 02
Y1 TSO6 ABT	\$1,465 28
Y1 TSO7 ABT	\$0 00
Y1 TSO7 PURDUE	\$17,391 69
Y2 ADMIN/MGT ABT	\$156,314 60
Y2 ADV/COORD ABT	\$80,644 33
Y2 ADV/COORD DAI C2	\$47,740 08
Y2 ADV/COORD DAI C3	\$47,742 72
Y2 ADV/COORD ISTI	\$49,204 28
Y2 TS020 ABT	\$231 48
Y2 TS020 AIRD	\$282,485 61
Y2 TS021 ABT	\$42,539 37
Y2 TS021 DAI	\$21,014 27
Y2 TS021 ISTI	\$15,176 20
Y2 TS022 TRG	\$3,081 12
Y2 TS023 ABT	\$169,638 90
Y2 TS024 FRI	\$0 00
Y2 TS025 ABT	\$146,142 73
Y2 TS025 TEAMS	\$40,200 00
Y2 TSO12 ABT	\$0 00
Y2 TSO12 TRG	\$1,005 66
Y2 TSO13 ABT	\$286 33
Y2 TSO13 AIRD	\$467 88
Y2 TSO13 HIID	\$532 67
Y2 TSO13 PURDUE	\$643 86
Y2 TSO13 TRG	\$1,341 52
Y2 TSO14 ABT	\$0 00
Y2 TSO14 DAI	\$19,830 07
Y2 TSO15 ABT	\$0 00
Y2 TSO15 AIRD	\$1,555 67
Y2 TSO17 ABT	\$0 00
Y2 TSO17 AIRD	\$11,024 95

APAP III Core Contract Detail

Task	Total Costs Incurred (not including fee)
Y2 TSO19 ABT	\$3,992 07
Y3 TS027 ISTI	\$20,694 41
Y3 TS029 DAI	\$42,772 10
Y3 TS030 ABT	\$278,510 03
Y3 TS031 ABT	\$5,610 05
Y3 TS032 ABT	\$824 91
Y3 TS033 ABT	\$20,377 91
Y3 TSO27 ABT	\$14,859 11
Y4 TS034 ABT	\$1,133 92
Y4 TS035 ABT	\$55,175 64
Y4 TS036 ABT	\$4,295 02
Y4 TSO37 ABT	\$16,147 75
Y4 TSO38 ABT	\$6,498 16
Y4 TSO39 ABT	\$253,237 88
Y4 TSO40 ABT	\$5,388 40
Y5 ADV/COORD DAI 3	\$2,111 67
Y5 TSO41 ABT	\$6,347 43
Y5 TSO41 DAI	\$0 00
Y5 TSO42	\$9,935 09
Y5 TSO43	\$34,897 02
Y5 TSO44	\$50,935 81
Y5 TSO45	\$52,386 59
Y5 TSO46	\$24,071 71
Y5 TSO47	\$117,318 12
Y5 TSO48	\$0 27
YR3 ADMIN/MGT ABT	\$135,514 83
YR3 ADV/COORD ABT	\$61,254 12
YR3 ADV/COORD DAI 2	\$33,908 41
YR3 ADV/COORD DAI 3	\$32,847 91
YR3 ADV/COORD ISTI	\$76,229 92
YR4 ADMN/MGT ABT	\$153,854 88
YR4 ADV/COOR ABT	\$5,720 58
YR4 ADV/COOR DAI 2	\$4,895 95
YR4 ADV/COOR DAI 3	\$4,895 95
YR4 ADV/COOR ISTI	\$8,448 11
YR5 ADMN/MGT ABT	\$173,704 65
YR5 ADV/COOR ABT	\$66,478 34
YR5 ADV/COOR DAI 2	\$4,631 99
YR5 ADV/COOR ISTI	\$0 00
Total	\$3,402,457 35

APAP III Buy in Contract Detail

<u>Delivery Order</u>	<u>Total Costs Incurred (not including fee)</u>
ECUADOR1	\$126,587 80
EGYPT1	\$74,827 79
ETHIOPIA	\$114,546 91
FOOD SAFETY NET	\$32,898 76
GRWTH MDLNG	\$55,370 65
JORDAN1	\$236,161 54
MALAWI1	\$115,073 30
STNBLE FNC	\$416,364 42
ENI	\$29,791 07
ENI 2	\$33,985 77
FOOD SECURITY X	\$19,647 60
GHANA	\$20,339 37
MACEDONIA	\$79,732 75
MALAWI 3	\$83,170 45
MALAWI2	\$939,176 64
MOZ 2	\$73,929 77
MOZAMBIQUE 1	\$128,579 49
OECD X	\$17,255 80
PERU	\$33,385 87
PRARI	\$279,513 76
SAHEL	\$157,726 49
SENEGAL 2	\$762,142 11
SENEGAL1	\$57,421 72
Y2 APRW	\$86,024 94
ZIMBABWE	\$116,521 67
Total	\$4,090,176 44

Annex 1
APAP Selected Publications

Agricultural Policy Analysis Project (APAP)
Selected Publications, 1984-99

- Ref No ¹
- PN-ABX-246 Abbott Richard David Kingsbury et al 1995 *Haiti Agribusiness Assessment*
Report No 1004 Volume I Main Report and Volume II Supplementary Reports (Also
available in French)
- PN-ACA-292 Abbott, Richard D and Roger J Poulin 1996 *The Future of Admarc A Policy Analysis*
Report No 1012
- PN-ABL-137 Abel Martin and Thomas Earley 1991 *Demand Management of Thailand's Food System*
Report No 309²
- PN-ABH-063 Abel Martin and Thomas Earley 1990 *The Role of Agricultural Trade in the Economic*
Development of Malaysia Thailand and Indonesia Report No 300
- PD-AAZ-386 Abel, Martin Theresa Bradley, Ahmed Abo-Rawash Azza Emara and Adnan Nassar 1989
Egypt An Evaluation of Prices of Major Agricultural Commodities in Relation to World
Prices Report No 101
- PN ABC-071 Abel Martin 1986 *Agricultural Policy Analysis Guidelines Volume I Concepts and*
Principles Main Document No 1
- PN-ACD-352 Abt Associates Inc et Development Alternatives Inc 1995 *Project d Adjustement du Secteur*
Fr *Riz (PASR) Plan de Travail* Report No 1040
- PN-ACB-541 Adoum Carol M and Charlie Stathacos 1997 *Policy Reform Workshops*
Report No 1027
- PN-ACA-296 Adoum Carol M 1997 *CSIR S Human Resource Skill Base Market Knowledge and*
Commercialization Systems for Institutionalizing the Sustainable Finance Initiative
Report No 1015
- PN-ACE-699 *Agricultural Policy Reform Growth and Food Security Preparing for the 21st Century*
1998 Workshop Program
- PN-ABN-044 Aluwihare P B and Masao Kikuchi 1992 *Trends and Policy Directions for Irrigation*
Investment and Management in Sri Lanka Report No 323
- PN-ACB-540 Armor Thomas H 1997 *CSIR Commercialization Strategy Progress with Start-Ups of*
Business Development Units in CSIR Agriculture Sector Institutes Report No 1026

¹ Publications with a reference number are available from USAID Publications with no reference number are available from Abt Associates All reports are in English, except those marked Sp (Spanish) and Fr (French)

² APAP's report numbering system designates different types of reports Technical reports begin with the digit one or two core and collaborative research reports begin with three, methods and guidelines reports begin with four handbook reports begin with five

- PN-ACA-302 Associates for International Resources Development and West Africa Enterprise Network
1997 *Market Analysis Handbook for the West African Entrepreneur* Report No 5001
- PN-ABL-930 Azarcon Yolanda and Randolph Barker 1992 *Trends and Determinants of Irrigation
Investment in the Philippines* Report No 321
- PN-ACD-679 Bailey, Lincoln 1996 *Study of the Smallholder Coffee Authority* Report No 1063
- PN-ACE-298 Barry, Abdoul Wahab 1999 *Programmes D Adjustement Structurel Echanges Regionaux et
Fr Securite Alimentaire en Afrique De L Ouest* Report 1067
- PN-ACD-358 Baudouin, Michel et Emmanuel Simantov 1996 *Caracteristiques Qualitatives de la Demande
Fr de la Riz et Autres Cereales Locales au Senegal* Report No 1046
- PN-ABQ-133 Ben-Senia Mohammed 1993 *The Impact of Changes in Agricultural Prices and Public
PN-ABQ-134 Fr Expenditure on Household Welfare in Morocco* Report No 361
- PN-ABQ-649 Benito Carlos 1993 *Debt Overhang and Other Barriers to Growth in Agriculture in El
PN-ABQ-129 Sp Salvador* Report No 134
- PN-ACA-293 Bernier, Rene 1996 *USAID/Ghana Strategic Objective 1 Baseline Data Assessment
Report No 1013*
- PN-ACF-904 Bingen, R James and Derick W Brinkerhoff 1999 *Agricultural Research in Africa and the
Sustainable Financing Initiative Review Lessons and Proposed Next Steps* Report No 1072
- PN-ABQ-141 Bivings, Leigh and Carl H Gotsch 1993 *Agricultural Policy Analysis Using Market Level
Models* Report No 412 Vol IV
- PN-ACA-297 Block, Steven and C Peter Timmer 1997 *Agriculture and Economic Growth in Africa
Progress and Issues* Report No 1016
- PN-ABQ-132 Block Steven 1993 *Proceedings from Workshop for African Policy Makers* Report No 137
- PN-ABN-361 Block, Steven with C Peter Timmer 1992 *The Agricultural Transformation in Sub-Saharan
Africa A Progress Report* Report No 342
- PN-ABL-136 Block, Steven 1991 *The Cotton Economy of Pakistan* Report No 121
- PN-ABK-620 Block, Steven 1991 *Agricultural Data and Databases in Niger* Report No 122
- PN-AAZ-586 Block, Steven 1988 *Food Aid and Economic Policy Reform* Staff Paper 12
- PN-ABC-066 Block Steven 1988 *Agricultural Policy Reform in Niger The Agricultural Sector
Development Grant* Staff Paper No 17
- PN-AAZ-495 Block, Steven and Marty Makinen 1987 *Title III and Food Security An Application in
Bangladesh* Staff Paper 5
- PN-ABN-030 Bouis, Howarth E 1991 *A Rice Corn and Livestock Sector Model for Analysis of Agricultural
Policies in the Philippines* Report No 402
- PN-ABF-993 Bradley Theresa, M Basterrechea Eduardo Villagran and Luis A Castaneda 1990
Guatemala Natural Resource Policy Inventory Vols I-III Report No 108

- PN-ABH-523 Bradley Theresa and Fred Mangum 1990 *Belize Natural Resource Policy Inventory* Report No 110
- PN-ABH-527 Bradley, Theresa Dennis McCaffrey et al 1990 *Costa Rica Natural Resource Policy Inventory* Vols I-III Report No 112
- PN-ABC-602 Bremer-Fox, Jennifer 1988 *Calculating Border Price Equivalents for Agricultural Commodities A Field Guide to Measure Market Distortion* Microcomputer Tool No 4
- PN-ABC-061 Bremer-Fox Jennifer 1988 *Techniques for Rapid Analysis of Government Market Interventions Affecting the Agricultural Sector An Application of Partial Equilibrium Analysis* Staff Paper 19
- PN ABC-063 Bremer-Fox Jennifer and Samir Zaman 1988 *Agricultural Policy Inventory—A Tool for Setting Priorities for Analysis and Dialogue* Staff Paper 24
- PN-AAZ-494 Bremer, Jennifer 1987 *Agricultural Policy Analysis—Privatization of LDC Agricultural Markets Options for Reducing the Roles of Agricultural Parastatals* Staff Paper 4
- PN-ACC-529 Brinkerhoff Derick W 1998 *Reorganizing Saccar as a Sector Coordinating Unit Institutional Options Issues and Recommendations* Report No 1036
- PN-ACD-362 Brinkerhoff Derick W 1998 *Proposed Action Plan for ASARECA S Competitive Grant System Components Issues and Options* Report No 1051
- PN-ACA-298 Brown, Donald G , et al 1997 *Assessment of the Future Role of Instituto Dos Cereais De Mocambique (ICM)* Report No 1017
- PN-ACA-291 Brown Donald G Shlomo Reutlinger and Anne M Thomson 1996 *Malawi Food Security in a Market-Oriented Economy* Report No 1011
- PD-ABM-495 Brown Donald and Jeff Dorsey 1995 *Mozambique PL-480 Title III Evaluation* Report No 1005
- PD-ABM-496 Brown Donald David Brown Jeff Dorsey and Philip Warnken 1995 *Mozambique Private Sector Support Program Evaluation* Report No 1006
- PD-AAZ-389 Bucknall James and Harvey Gutman 1989 *Zaire Final Report of the Evaluation of the Agricultural Policy and Planning Project* Report No 103
- PN-ABP-183 Catterson Thomas Wendy Wilson, Sarah Gavian and Carol M Adoum 1993 *Natural Resources Management and Program Food Aid in Niger* Report No 129
- PN-ABP-243 Fr
- PN-ABJ-934 Christensen, Cheryl 1991 *Demand Management in Egypt* Report No 311
- PN-ABH-526 Christensen Cheryl 1990 *Adjustment and Agriculture Issues for the 1990's* Report No 304
- PN-ACE-698 Cook Andrew 1998 *Transport In West Africa Trucking Efficiency In West Africa s Central Corridor* Report No 1066
- PN-ACE-291 Cook Andrew 1999 *Impact Assessment of the Livestock Action Plan* Report No 1068

- PN-ACE-697 Cook Andrew et al 1999 *Efficacite Du Camionnage Dans Le Couloir Central De L Afrique Fr De L Ouest* Report No 1069
- PN-ABL-322 Cory, Dennis and Eric Monke 1991 *Using the Policy Analysis Matrix to Address Environmental and Natural Resource Issues* Report No 334
- PN-ABJ-933 Coutu Art 1991 *The Failure to Institutionalize Public Agricultural Policy Analysis Units* Report No 318
- PN-ABL-138 Coutu Art 1990 *Sustainability and Institutionalization of U S Investments in Agricultural Policy Analysis in Pakistan* Report No 310
- PD-AAZ-387 Coutu, A J George Johnston Howard Ray Jaime Carrera and Julio Chang 1989
PD AAZ-388 Sp *Ecuador Evaluation of the Agricultural Sector Reorientation Project* Report No 102
- PN-ABL-325 Dawe David and C Peter Timmer 1991 *Rice Price Stabilization Contrasting Experiences in the Philippines and Indonesia* Report No 339
- PN-ABL-324 Dawe, David 1991 *A Quarterly Palay Production Forecasting Model* Report No 403
- PN-ABL-326 Dawe, David 1991 *A Model for Short-Term Agricultural Price Monitoring and Forecasting* Report No 404
- PN-ABL-140 Deolalikar, Anil 1991 *Food Demand Management in India* Report No 319
- PN-ABH-911 Devarajan Shantayanan and Dani Rodrik 1990 *Macroeconomic Adjustment in Developing Countries* Report No 303
- PN-ACD-360 Dorosh Paul A 1996 *Expansion of the Government of Senegal Rice Market Information System* Report No 1049
- PN-ACB-543 Ellsworth, Lynn 1997 *The Road to Financial Sustainability* Report No 1030
- PN-ACC-952 Ellsworth, Lynn 1998 *Good Practice In Competitive Grant-Making Applications to ASARECA-Affiliated Networks* Report No 1037
- PN-ACE-299 Ender Gary and David Wilcock 1998 *Guidlines on Agricultural Market Performance* Report No 1065
- PN-ABX-973 Ender Gary, Tim Mooney, et al 1995 *Policies Affecting Agribusiness in Egypt A Comprehensive Assessment Using the Agribusiness Policy Inventory Method Volume I Main Report and Volume II Synthesis* Report No 1002
- PN-ABX-972 Ender, Gary, et al 1993 *Guidelines for Agricultural and Natural Resource Policy Analysis* Report No 407
- PN-ABQ-140 Ender, Gary 1993 *The Agribusiness Policy Inventory The Tool and Its Use in Policy Analysis and Reform* Report No 408
- PN-ABP-621 Ender, Gary Kenneth Smarzik Imran Ali, Timothy J Mooney and Ruben Nuñez 1992 *Financial and Other Policy Constraints to Agribusiness Development in Pakistan* Report No 344

- PN-ABP-852 Ender Gary 1992 *Post-Rationing Wheat Policy in Pakistan Issues and Opportunities* Report No 345
- PN-ABN-087 Ender Gary 1991 *Lessons Learned from a Policy Dialogue Wheat Price Policies in Pakistan* Report No 331
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- PN-ACA-300 Gage, James D 1996 *The Sustainable Financing of SACCAR Understanding the Costs and Implications* Report No 1019
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- PN-ABN-029 Goldman Richard H 1992 *Demand Management of Food Systems in Asian and Near Eastern Countries* Report No 340
- PN-ABL-141 Goldman Richard H Malcolm Hall and Agha Imran Hamid 1991 *Pakistan Edible Oils Policy Study* Report No 324
- PN-ABN-049 Goldman Richard H 1991 *Demand Management of Asian and Near East Food System An Introductory Overview* Report No 307
- PN-ABQ-141 Gotsch Carl H 1993 *Outline and Lecture Notes* Report No 412
- PN-ABQ-141 Gotsch Carl H 1993 *Learning Spreadsheets and Analyzing Aggregate Data* Report No 412 Vol I
- PN-ABQ-141 Gotsch Carl H 1993 *Policy Analysis Matrix (PAM)* Report No 412 Vol II
- PN-ABQ-141 Gotsch, Carl H 1993 *Natural Resource Policy in a PAM Framework* Report No 412 Vol III
- PN-ABQ-141 Gotsch Carl H 1993 *Optimization in Agricultural Policy Analysis Micro-Level Modeling Using GAMS* Report No 412 Vol VI
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- PN-ABK-623 Grennes Thomas 1991 *Macroeconomic Policy in Costa Rica and Its Influence on
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- PN-ACC-526 Gribi, Noubia and Dr Hounkanli Yaovi Jean 1997 *Commerce in the Livestock/Meat
Industry* Report No 1031 (Also available in French)
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- PN-ABP-593 Hall, Malcolm and Maliha H Hussein 1992 *Pakistan Animal Feedstuffs Policy Study*
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- PN-ABQ-131 Jackson Donald R 1993 *El Salvador Agricultural Policy Analysis Assessment Synthesis*
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- PN-ACD-353 Kingsbury, David S 1995 *Programme d'Adjustement du Secteur Riz - Analyse su Mecanisme
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- PN-ABG-776 Kristjanson Patricia Mark Newman, Cheryl Christensen and Martin Abel 1990 *Export Crop
Competitiveness Strategies for Sub-Saharan Africa* Vols I-II Report No 109
- PN-ABT-214 Kulibaba Nicolas 1994 *Improving the Effectiveness of Agricultural Policy Reform in Africa
Training Module for Agricultural Development Practitioners* Report No 411
- PN ABX-234 Kulibaba, Nicolas 1993 *Improving the Effectiveness of Agricultural Policy Reform In Africa
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Policy Reform In Africa Synthesis* Report No 360
- PN-ABN-084 Lamberte Mario 1992 *Financial and Trade Liberalization and the Agricultural Sector*
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- PN-ABX-245 Levine William T , et al 1995 *Institutional Development Support for Agricultural Policy
PN-ABX-244 Implementation Planning and Evaluation and Hashemite Kingdom of Jordan Ministry of
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- PN ACC-528 Love Alexander Ray 1997 *Food Security and Donor Collaboration on Policy Performance*
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- PN-ACF-902 Love Alexander R 1999 *Food Security and Donor Collaboration - Next Steps 1999*
Report No 1070
- PN-ABQ-138 Lund, Susan *The Economics of Forest Policy Examples from Southeast Asia*
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- PN-ABP-861 Mahmood, Moazam with Fawad Khan, Tariq Husain and Sadia Bashirudin Ahmed 1992
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- PN-ACA-758 Mahone Sloan 1997 *Assessment and Recommendations for Saccar s Information Unit*
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Trade* Report No 4001
- PN-ABH-524 McCandless, George T and Evan Tanner 1991 *Honduras Agricultural Price Controls*
PN-ABH-525 Sp Report No 114
- PN-ACD-365 Metzel, Jeffrey 1998 *Programme D Ajustement du Secteur du Riz (PASR) Rapport de
Fr L Impact sur la Production* Report No 1054
- PN-ACD-366 Metzel, Jeffrey 1998 *Impact of the Rice Sector Reform Program on Rice Production in
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- PN-ACD-356 Metzel, Jeffrey 1996 *Programme d Ajustement du Secteur Riz - Rapport de Mission Sur
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- PN-ABN-028 Mongkolsmai, Dow and Mark W Rosegrant 1992 *Trends and Determinants of Irrigation
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- PN-ACD 677 Mushani, Waki 1996 *Kasungu Flue Cured Tobacco Authority (KFCTA) Study*
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Reduction A Case Study for the OECD DAC Informal Network on Poverty Reduction Scoping
Study* Report No 1073

- PN-ABP-859 Newman Mark D Richard Abbott Clare Stephens and Bill Haines 1993 *Europe's Single Market Implications for Agricultural Exporters from North Africa and the Near East* Report No 350
- PN-ABH-230 Newman Mark and Christine Erbacher 1991 *Trade Associations and Foreign Aid US Commodity and Industry Interests and Trade Development Activities of Foreign Assistance Programs* Report No 302
- PN ABH-561 Newman, Mark Tim Josling and Theresa Bradley 1991 *Third World Stakes in Trade Negotiations Recent Developments Issues and Implications for A I D Support Activities* Report No 305
- PN-ABP-568 Nuñez Ruben D Jose Abel Hernandez et al 1992 *Dominican Republic Natural Resource Policy Inventory* Vols I-II Report No 128
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Annex 2
Workshop Summary

*“Agricultural Policy Reform, Growth and
Food Security:
Preparing for the 21st Century”*

WORKSHOP SUMMARY

**Workshop held on
June 25, 1998
Ronald Reagan Building
Washington, DC**

Sponsored by the U S Agency for International Development (USAID)



AGRICULTURAL POLICY ANALYSIS PROJECT, PHASE III

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Agricultural Policy Reform, Growth and Food Security Preparing for the 21st Century

Workshop sponsored by the U S Agency for International Development (USAID)
Ronald Reagan Building, Washington, D C
June 25, 1998

In June 1998, USAID sponsored a workshop on *Agricultural Policy Reform, Growth and Food Security Preparing for the 21st Century*. About 120 persons attended, including participants from USAID/Washington, USAID field missions, the World Bank, and other public and private sector development organizations. In the morning, participants reviewed the 15 years of experience of the Agricultural Policy Analysis Project (APAP) and other policy activities, to identify best practices, lessons learned, and key issues. At lunchtime, Dr G Edward Schuh, Chair of the Board for International Food and Agricultural Development (BIFAD), addressed the group. In the afternoon, participants examined trade liberalization and the follow-up to Marrakech and the World Food Summit. This paper supplements the workshop program and presents a summary of the day's deliberations, organized to capture key messages worth remembering in ongoing USAID work.

Highlights

The experience of the Agricultural Policy Analysis Project (APAP) and other policy activities identifies numerous best practices and lessons learned. Best practices include listening to policymakers to understand their perspectives, producing solid analysis, building ongoing analysis into the reform effort, collaborating with host country professionals to build capacity, having appropriate tools for policy analysis, and mobilizing private sector interests to become stakeholders. Policy analysis and reform require long-term commitments on the part of both donors and host country governments to allow time to build trust and achieve results.

APAP's history mirrors the changing nature of USAID's commitment to agriculture. APAP's field-service orientation led to the development of several tools for policy analysis and many successes in supporting policy reform. APAP guidelines for promoting policy reform were incorporated into the training process for USAID officers. APAP-sponsored courses trained over 300 policy analysts and its outreach through reports and newsletters extended to hundreds of professionals in all walks of policy life.

The Uruguay Round Agreement on Agriculture and the Marrakech Agreement provide new rules for agricultural trade. The initial impact on food security was negative because food stocks were reduced and prices increased. In the long term, a more efficient allocation of resources is expected with increased agricultural production and trade and a decrease in world prices.

Since the most food secure countries are those that are integrated into the world economy, developing countries have a strong interest in trade liberalization. Developed countries have a responsibility to assist by supporting developing countries with trade policymaking, trade policy

administration, and technical assistance in agriculture and agricultural policy. In addition, developed countries need to curb their own use of trade distorting mechanisms and address food aid issues.

Coordinating U.S. policy and donor assistance to promote food security is a special challenge. The U.S. government needs to develop a coherent strategy and policy on food security and to make agriculture a major development priority.

The World Food Summit goal is that by 2015 the numbers of malnourished people will be cut in half. Strategies are being identified to work toward this goal, but the practical aspects of coordinating to achieve change are challenging. An Inter-Agency Working Group established to prepare for the Summit is continuing to provide policy oversight and is working to strengthen commitments to food security at home and abroad.

Panel I Conducting Public Agricultural Policy Analysis and Reform Best Practices

Chair	John Lewis, USAID/G/EGAD
Presenters	Gary Ender, Abt Associates Peter Timmer, HIID/APAP
Panel	Cheryl Christensen, USDA Mark Newman, Abt Associates

Listen to policymakers to understand their perception of the problem. Policymakers seek assistance from people who, they believe, can help them solve their problems. To be part of the solution, policy analysts need to set aside models and ideology. By listening to what bothers policymakers, analysts can respond directly to their needs. Policymakers often have problems that require short-term analysis. In APAP's experience, having the flexibility to conduct analysis that responds to these problems can be very helpful in getting a policy reform process moving.

Figure out how to make markets work better. In the development process, it's important to understand what markets can do well and what they don't do well. The interventions to overcome a lot of market failures have consequences that are worse than the failure itself. Failing markets get the attention of policymakers. For example, in Eastern Europe, policymakers believe they are facing a food security crisis when agricultural production falls. Helping them understand how markets work is critical to developing alternate ways of formulating policies. Three areas merit attention in market assessment—political economy, growth and distribution. How do rent seeking and corruption limit the effective operation of markets? How can the growth process be sustained? When absolute poverty diminishes and a middle class emerges, how can incomes be distributed in a way that avoids destabilizing the polity?

Build policy analysis into the reform process. Incorporating analysis into policy reform decisions is a process that involves both analysts and those who use their results. Sometimes policymakers request policy analysis and are interested in using the results. Sometimes donors

require policy analysis and policymakers become interested in the findings. USAID-sponsored programs in countries such as Honduras, Pakistan, Egypt and Malawi have engaged governments in policy dialogue, often increasing demand for policy analysis. For example, at the beginning of the Egypt Policy Reform program, about 12 years ago, the government agreed to annual policy benchmarks that included policy analysis. Studies were made benchmarks and supported by USAID. Studies are no longer supported in this way, but analysis is still a strong part of the process.

Policy analysis supports policy dialogue, responds to needs for information as reform evolves, and sometimes upsets conventional wisdom. For example, policymakers in Africa used to believe that the way to help small farmers was to give high prices for their commodities because they derive the bulk of their income from selling commodities. But research conducted by Michigan State University showed that many small farmers were net purchasers of food commodities. Research findings helped convince policymakers of the need to change policies.

Collaborate with host country analysts to conduct analysis and communicate with policymakers. Policy analysis may be supplied by expatriate contractors or local researchers or both. Collaboration with host country analysts strengthens policy analysis by adding local insights and by ensuring that local people in government and business have the analytical skills for policy reform work. Under APAP, collaboration often included training so that Ministry staff and others could continue to do the policy analysis needed for decision making.

USDA's Economic Research Service (ERS) responds to more than 300 requests for short-term assistance each year. The requests require an appropriate database and staff who are trained in research so they can formulate the problem correctly and answer it. ERS has worked with a number of countries to put in place the institutional capacity for people to do their own analyses. ERS provides training and reviews analyses, but never authors the analysis. In every case, when ERS leaves, the capacity to continue doing analysis has been sustained.

ERS also trains host country counterparts to write short pieces that policymakers can read (the two page summary) and to present their results verbally to policymakers. The payoff is that research is available in a form policymakers can use, both written and verbal. And local analysts can be drawn into decision making at short notice.

In USAID's Equity and Growth through Economic Research (EAGER) project in the Africa Bureau, research institutions are being assisted to develop capacity for policy analysis and the maintenance of databases. Governments are under enormous pressure to deal with political crises. Research institutions, such as the Center for Policy Analysis in Ghana, can be more objective. In fact the Center has been quite critical of government policy and has sustained this ability with strong analytical capacity, avoiding alignment with either the government or the opposition.

Use tools such as the agribusiness policy inventory developed by the Agricultural Policy Analysis Project (APAP). APAP developed policy inventories to provide a comprehensive overview of the policy environment and its constraints and opportunities. Inventories can go beyond

the analysis of specific issues to examine policies at several levels—macro, sectoral and sometimes sub-sectoral, depending on the interests of the USAID mission and the country. Preparing an inventory involves working very closely with host country personnel, bringing local knowledge and insights into the analysis of the policy situation. Policy inventories help in identifying stakeholders and involving them in the change process. Understanding the viewpoints of both winners and losers is essential to developing workable options.

About four years ago, APAP conducted an inventory of agricultural policies in Egypt. Of the approximately 15 reforms recommended, virtually all have been implemented either by the government directly or through different USAID projects.

Recognize the need for extended donor and host country commitment Long-term commitment is essential to achieve results because policy dialogue itself takes a long time to build up trust and confidence. Also, the government must build a consensus within the country for reform. Foreign advisors can go home, but policymakers must deal with the consequences. Developing mutual trust is critical to making policy reform work and be self-sustaining.

Mobilize private sector interests to participate in the dialogue and become stakeholders Part of having a civil society is to mobilize interest groups and encourage them to find their voice and understand what their interests are. The danger is that private sector groups become lobbies that tie up the policymaking process because the Ministry doesn't have the capacity to respond. Or that one or more interest groups get favored treatment. Having government-based programs that can provide unbiased economic analysis is a valuable asset because the job of government is to assess competing demands and make the decisions.

Forming task forces helps enlist private sector participation both in identifying issues, doing analysis, presenting options and discussing which options should be selected. All of these are being pursued in USAID's policy reform program in Egypt. During implementation, the reform program is promoting the creation of trade associations in the private sector.

In Romania, USDA's Economic Research Service has worked with trade associations being developed under the USAID program. Through subscriptions and contributions, they (not the Ministry of Agriculture) are providing the funding to continue analytical work.

**Panel II Highlights of 15 Years of the Agricultural Policy Analysis Project (APAP)
Lessons Learned and Worth Remembering**

Chair	Richard Fraenkel, USAID
Presenter	Bill Levine, Abt Associates
Panel	Gary Ender, Abt Associates Mike Weber, MSU Derrick Brinkerhoff, Abt Associates Gordon Straub, Abt Associates

Cornelius Houtman, EU, Director General VIII

APAP's history mirrors USAID's commitment to agriculture APAP began after a decade of USAID projects with either minor or major policy foci. During APAP I (1983-88) commitment to agriculture was strong with significant technical staff in the agency and in the field and agriculture receiving substantial agency resources. As a centrally-funded project APAP recognized policy as a critical component of agricultural development projects. APAP I assistance included identifying agricultural policies and their impacts on agricultural production, assessing the impact of price policy reforms and the role of food policy as a policy reform tool, promoting policy changes that enhance the role of the private sector, and strengthening the capacity of policymakers and analysts to undertake and implement policy analysis.

During APAP II (1988-93), USAID began to question and then reduce the role of agriculture. In the face of a shrinking budget, APAP II modified its policy agenda and downplayed food aid issues, focused on policies that promoted agribusiness and improved trade, analyzed the effects of structural adjustments, and examined the impact of environmental and natural resource policies on sustainable agricultural development.

APAP III (1993-98) carried on through the low point of the agency's attention to agriculture and, more recently, agriculture's return to favor within the agency. APAP III emphasized policy analysis and reform to make markets work better, refocused food security, and revisited institutional strengthening.

APAP emphasized service to the field with strong outreach Throughout, APAP has been field-service oriented. Despite an ever-decreasing core budget, researchers from Abt Associates and APAP partners were able to produce more than 200 reports over the life of the project and to distribute a total of 2,000 copies. APAP-sponsored courses trained over 300 policy analysts at Harvard, Stanford, Oklahoma State and Purdue and many others were trained in the field. In addition, *Newsbriefs*, the APAP newsletter, was distributed to over 1,600 professionals in all walks of policy life.

Policy reform is a long-term process that requires building commitments and understanding Policy reform is a process—not a moment in time. It's a long-term, difficult process that requires building commitments and relationships and understanding of how policy reform works. Even after reforms are passed, entrenched interests of the old system are still in place. Backsliding and failure to implement are possibilities. The effects of reform need to be examined continually.

APAP successes in promoting policy reform over the long term include the development of a set of guidelines that were incorporated into the training process for USAID agricultural officers and are helping new generations of agricultural policy specialists direct policy programs. In addition, APAP's support for the Policy Analysis Matrix (PAM) led to its becoming a widely used model both within ministries and by social scientists throughout the world.

Good, solid analysis is essential in negotiating policy reform On-the-ground research often provides insights that challenge conventional wisdom. For example, research in Africa documents more food buyers than sellers in rural areas. Also, research shows that rural labor markets contribute to food security for the bottom quarter or bottom third of the rural population. Rural labor markets deserve more attention. Rural populations are not homogeneous groups. In Africa, as in the United States, only 20-25 percent of the farmers are responsible for what's marketed. They are the commercial farmers, potential targets for agribusiness.

In 1992, groups in El Salvador signed peace accords and a 12-year civil war came to an end. APAP conducted policy analyses and developed a policy matrix to show what policies merited attention. USAID joined forces with other donors—the Inter-American Development Bank and the World Bank—and created a joint policy reform agenda. APAP provided solid analysis that was widely disseminated, that helped engage stakeholders, and that assisted in drawing links between agriculture and other sectors such as forestry and fisheries. Today, the agricultural sector is becoming competitive on world markets. Difficult policy positions are starting to pay off.

In many countries, basic data collection systems need to be built Although APAP worked with a lot of people in many countries, much more work is needed to build usable databases and train staff to use them. Training is an ongoing process because trained staff move on to new positions. One of the success stories in Pakistan was a very useful course focused on the kinds of tools, data and thought processes needed to provide rapid responses to high-level questions.

Collaboration with other USAID projects and local firms helps build analytical capacity Through Food Security II, another centrally-funded USAID project, Michigan State University has cooperated closely with APAP, sharing databases and other in-depth work to promote policy change in several African countries. In Pakistan, some of the APAP studies and analyses were done entirely by local firms and some were done in collaboration with foreign partners. Using local firms helped build up the analytical capacity within the country.

Policy can serve as an important stimulus for change APAP's work with the Sustainable Financing Initiative (SFI) in Africa illustrates that the financing of research is closely integrated with institutional and policy aspects and that the need for new policies can promote change. SFI is a multi-donor effort in which USAID works closely with the Special Program for Assistance in Agricultural Research (SPAAR). SFI addresses ways to decrease dependency on external donor funding by tapping into local and private sources. In analyzing the capacity of institutions to assess their priorities, choose strategies and seek funding, a common problem is researchers who feel that good research speaks for itself. Since research does not create its own demand, SFI is working with institutions to encourage stakeholder involvement and linkages between research and the management of research.

SFI's experience in two and a half years of operation indicates that many research institutions have a strong organizational culture that makes change very difficult. Sustainable financing is a

slow process and coordinating research regionally, among countries, is a complex task. APAP's approaches and analytical tools can help research systems rethink how they do business.

Policies that affect agriculture are often made outside the Ministry of Agriculture, but within the government. The Ministry of Agriculture is only one of the ministries affected by policy change. Stakeholder analysis needs to include the views and concerns of other Ministry personnel whose jobs are affected by the change. Their views or concerns may impede change, as illustrated by coffee policy work in Rwanda and rice policy reform in Senegal. In many countries, APAP started the debate on what are the appropriate missions of various ministries, the private sector and non-governmental organizations.

Defining agriculture broadly shows the links between policy reform programs and broader economic growth. During APAP II, researchers examined the contribution of agriculture to gross domestic product (GDP), using a definition of agriculture as all food and fiber industries, including farm production, processing, and value-added businesses. In this context, agriculture's contribution was much larger than when only farm production was considered. In Jordan, for example, agricultural production accounts for about seven percent of GDP. When agribusiness is included, the total is 28 percent of GDP.

Governments have an important role in making markets work by providing services such as inspection, registration and the regulation of competition. The challenge is to get from the present position to a new role for government. Transition studies and other implementation actions help governments figure out what their new roles should be and provide incentives to move in that direction.

Panel III Country Case Studies Identifying Key Issues, Making the Policy Reform Process Work, Creating Self-Sustaining Institutions

Chair	Jerry Wolgin, USAID
Panel	Christian Foster, Russia PRARI Nick Kulibaba, Sahel Region Tim Mooney, Ethiopia, Mozambique Ismael Ouedraogo, Senegal

Program to Revise Russian Agriculture Through Regional Investment (PRARI) addresses the agribusiness investment climate in Russia by promoting dialogue between potential investors and regional policymakers, a totally new concept for the Russians. USAID and USDA's Economic Research Service work together to identify viable agribusiness investment opportunities and facilitate partnerships between U.S. and Russian agribusiness firms. Over the past year and a half, PRARI has facilitated U.S. agribusiness investment in Russia totaling several tens of millions of dollars.

The decision to work at the regional level came after five years of effort at the national level produced few results. During this time, a cadre of Russian experts trained in market economics in the West. They were hired to work as consultants in the 10 oblasts (provinces) where PRARI works. PRARI created an incentive system among the oblasts to compete to attract investment. Now other oblasts want to participate. And PRARI has created a massive database of all Western initiatives in the Russian Federation that include some type of agricultural technical assistance.

A collaborative workshop in January 1998, involving U.S. and Russian investors and regional and federal officials, created a policy reform agenda oriented to increasing investor confidence. PRARI is supporting Russian regional leaders in their efforts to encourage specific, market-oriented policies and institutions.

Sahel Livestock Action Plan evolved from a USAID-sponsored 1989 analysis of the barriers to trade in livestock among Sahelian countries. But many governments and policymakers were disinterested in implementing the plan because of well-established patronage networks. Analysts decided to re-examine the barriers from the point of view of the livestock trader, producer, butcher and transporter and to make information available in terms that were understandable and accessible to the larger community of private business people. Analysis focused on efficiency—how to get goods to market so that people make a reasonable profit and consumers pay a reasonable price. Then USAID brought stakeholders together to debate the recommendations—livestock traders, butchers, transporters, police, customs all at the same table. These stakeholders had a high degree of inspiration and dedication and argued well on behalf of their own interests. Governments found they could not stay out of the debate. It was so public that they had to respond.

In the **Madagascar Non-Traditional Exports Project**, USAID's task was to help identify products to promote for export, including non-traditional spices, essential oils, medicinal plants and herbs. Using a Chief-of-Party who was non-resident was an effective strategy. A large part of policy reform is selling—and it's important to recognize the pace of the customer. Having a chief-of-party who came and went encouraged local staff to assume ownership and set the pace. The first year after the project ended, essential oil exports increased \$3.3 million. Having non-resident advisors worked well also in the Agricultural Implementation Project in Tunisia and in the Kenya Market Development Project.

Having a non-resident advisor works best in relatively small countries or at regional levels in larger countries. Well-trained local advisors are essential and the local staff need to be respected by government officials and others. Sometimes expatriates are essential to provide organizational and technical skills and a level of objectivity that isn't available locally. And expatriates often serve as crucial communication and information channels among various partners.

Agricultural Sector Adjustment Program in Senegal targeted four sectors—rice, cotton, groundnuts and sugar. USAID worked on rice and reform was successful in the sense that the government liberalized the domestic market and liberalized the import of rice. Success required

donor collaboration and agreement. If donors are bickering among themselves and competing, the dissension can be used as a reason for not making policy change.

Achieving growth and alleviating poverty requires attention to environment, incentives, institutions, and investments. The environment has to be sustainable. Policies have to provide incentives to the rural sector and be coherent at the macro level. Institutions need to be decentralized so local communities are empowered. The government needs to let the private sector take leadership in investing. Incentives, institutions, and investments, all three need to be promoting growth.

APAP helped build local capacity in several projects. In the Sustainable Financing Initiative, APAP financed a grassroots activity for the development of a strategic plan for the regional organization covering research in eastern and southern Africa. The plan has been fully vetted and approved by the Board. Through the Agricultural Marketing Improvement Strategies (AMIS) project and the Leland Initiative, emerging agribusiness trade associations are being hooked up to the Internet and are learning how to use it to be competitive. Now agribusiness associations in different parts of the continent are talking to one another.

In Guatemala, APAP promoted the use of the policy analysis matrix (PAM), strengthening the ability of institutions to do analysis. In Central America, APAP's natural resource policy inventory (Green Book) helped get both private and public sector institutions interested in reforming environmental legislation.

Work in Senegal included institutional capacity building within the government and in local parastatals. When government analysts participated in policy analysis matrix (PAM) training and saw that rice production in Senegal was not profitable, they were willing to question the entire development strategy for the Senegal River Valley. PAM helped internalize the economic lessons. Over the next couple of years, the consensus within the government shifted and the need to diversify gained acceptance.

The success of policy efforts depends on competent policy analysis, communication of outcomes to policymakers and stakeholders in ways that allow a framing of issues for constructive debate, and overcoming the vested interests against policy change. Evaluations of projects completed under APAP I and II showed that an effective policy champion within the government and quality technical advisors were needed for project success. Many policy analysis units start out as informal working groups and become institutionalized over time. Their placement to enable good linkages between the unit and in-country policymakers facilitates change.

**Keynote Address Agribusiness and Policy Reform as Engines of Economic Growth,
by G Edward Schuh, Chair, Board for International Food and Agricultural
Development (BIFAD)**

Agricultural research and new production technology are the fundamental sources of economic growth and food security. Other engines for economic growth are the agricultural inputs and distribution sectors. Economic reforms can generate short-term economic growth and enable longer-term economic growth. Institutional reforms that provide a safety net for the disadvantaged are also needed. The most efficient way to address food security is to invest in agricultural research that, in turn, generates widespread and equitable economic growth.

Agriculture is important because everybody eats food. When the price of food declines, everybody experiences an increase in real income. Each individual increase may be small, but for everybody across the economy, it's a lot. That's the basis for the very high social rates of return one gets from investing in agricultural research. And since the poor spend a larger share of their budget on food than do middle and upper income groups, the poor benefit especially from the development of agriculture.

The introduction of new production technology in agriculture is the key to economic growth. New agricultural technologies flow from conscious decisions to invest in the human capital and resources that produce technology. Thus, science and technology policy is an important element of agricultural development policy.

Food security is an issue of poverty, not agricultural production. Agriculture is a means of producing widely-distributed increases in per capita incomes. That's what makes agriculture an engine for economic growth.

Developing new production technologies for tradeable commodities makes the country's agriculture more competitive. On the export side, the country will earn more foreign exchange, on the import side, the country will have more foreign exchange to finance a higher rate of economic growth—or to service existing debt. Again, investment in new technologies in agriculture contributes to higher rates of economic growth. Eventually, higher growth generates additional employment, addressing poverty and food security.

Education is needed to help policymakers in USAID and the U.S. Congress to understand what policies are needed. Farmers and commodity groups are realizing now that future markets are going to be in developing countries and that specialization is essential to ensure comparative advantage.

Agribusiness sector investments have the potential to be an engine for economic growth, for example, investments in the distribution of commercial fertilizer and seeds and investments in the transportation infrastructure. In Africa, the prices of modern inputs have been so high that farmers

cannot afford to adopt them. Also, the input sector is underdeveloped. People sell and distribute without knowing what fertilizer to use for different crops or when and how it should be used. The input and distribution sectors are critical to the modernization of agriculture, to a reduction in food prices, and to generating the foreign exchange needed to finance higher rates of economic growth. Agribusiness needs technical assistance and investments in education to get cheap fertilizer into countries, distribute it efficiently, and keep prices down.

Donors can bring agribusiness and policymakers together to promote reforms. For example, in one African country, USAID sponsored a policy workshop one day and an agribusiness forum the next, with policymakers participating in both discussions.

Policy reform refers to getting prices right, getting trade and foreign exchange policy right, and putting in place other macroeconomic reforms that are incentives to agriculture. Policy reforms improve the access of domestic farmers and producers to foreign markets. Policy reforms enable a country to make more efficient use of its resource endowment and contribute to higher rates of economic growth. Gains from policy reform are usually one-time gains. Once the economy is on an efficient growth path, most of the gains will have been realized. Over time, investments in new production technology, research and human capital will affect the longer-term growth rate.

Some policy reforms that benefit agriculture raise food prices for urban consumers and create the need for a safety net for low-income urban groups, for example, targeted feeding programs or other forms of dealing with food access without distorting food prices.

Panel IV Trade and Food Imports Trade Liberalization and Marrakech Follow-Up

Chair	John Becker, USAID
Presenters	Charles Hanrahan, CRS B Lynn Salinger, AIRD
Panel	David Wilcock, FAO/DAI Ron Trostle, ERS Eugenio Diaz Bonilla, IFPRI Chris Goldthwait, USDA

The Uruguay Round Agreement on Agriculture went into effect in 1995, bringing agriculture under the General Agreement on Tariffs and Trade (GATT) or World Trade Organization (WTO) discipline for the first time. The Agreement addresses three broad areas. First is market access for agricultural products. All signatories are required to bind (essentially publish and maintain) their tariffs. Second, export subsidies in agriculture have to be reduced by certain percentages, both in terms of financial outlay and quantities subsidized. New export subsidies are prohibited. Third, the Agreement specifies reductions in domestic support for agriculture. Other aspects of the agreements include the use of science and risk assessment in applying sanitary and phytosanitary food safety

measures to imports and a change in dispute settlement procedures to eliminate the possibility that a country can block a decision of the dispute settlement panel

Since 1967, developing countries have been subject to special treatment. Although they must comply with the commitments of the Agreement, they have a longer period of time to phase in changes. The eight least developed countries have to bind their tariffs, but make no other commitments under the Agreement.

The rules developed as part of the Agreement set the stage for future agricultural trade liberalization in the next round in 1999. U.S. participation may be hampered unless the President gets the so-called fast track authority to negotiate. One of the issues on the U.S. agenda is to establish rules for biotechnology products that base any restrictions on science and risk assessment, as with food safety measures.

In 1995, both the U.S. system of deficiency payments and the European Union's system of compensatory payments to farmers were excluded from the calculation of aggregate domestic support. With the passage of the 1996 Farm Bill, the United States is now WTO-legal. The European Union's policies remain outside the WTO and will be under pressure during the next Round. Developing countries will be interested in market access, especially for their processed agricultural and manufactured foods and in bringing state trading enterprises, both export and import, into conformity with GATT rules for commercial enterprises. Developing countries will also be concerned with the margin of preferences they receive and the issue of food security, for example, the Marrakech decision to give special attention to the food aid needs of the least developed countries.

For USAID, these ongoing efforts mean opportunities to assist developing countries with trade policymaking, trade policy administration, and technical assistance in agriculture and agricultural policy.

The impact of the Uruguay Round and Marrakech Agreement on food security was negative in the short-term, from the point of view of developing countries. Developed countries reduced direct support to agriculture, reduced or suspended export subsidies, and shifted from direct production control to farmer income support. As a result, excess supplies and food stocks were reduced and world prices increased.

Markets seem to be adjusting to the lower food stocks. In the long term, the expectation is that the Uruguay Round will lead to a more efficient reallocation of resources across production activities, increased agricultural production and trade, and, over time, a decrease in world prices.

Developing countries have expressed concern about the effects of the Uruguay Round on world prices, world price variability, and even food aid. But research has demonstrated that actual price effects are minimal. Increased trade openness leads to increases in economic growth which

reduces poverty For most countries, food is secure when their economies are integrated to the fullest extent possible into the world economy

USAID's policy agenda should encourage recalcitrant developing countries to push on with their liberalization efforts and provide incentives to prevent backsliding In the next Round developing countries need to pursue three strategies First, they need to push developed countries to reform their own agricultural sectors in order to reduce the exportation of world price variability Second, they need to encourage developed countries to increase market access for agricultural and manufactured exports from developing countries Third, they need to promote greater liberalization in developing countries to encourage continued reform and discourage policy backsliding

The Marrakech Agreement specified remedies for developing countries that experienced significant negative effects due to price increases The least developed countries are becoming increasingly marginalized from the process of growth Technically, food security is not a problem, but morally, it deserves attention

Although price bands were excluded by the Uruguay Round, they have not been challenged in Latin America As a sort of modified variable levy, price bands allow quite a bit of transmission of world price variability and limit the upside and downside of that variability For the least developed countries, food security may be more important than transmitting price variability

Trade liberalization is related to food security The most food secure countries are those that are integrated into the world economy Developing countries have a strong interest in trade liberalization Developed countries have a strong responsibility to create the conditions that enable developing countries to participate in trade liberalization First, developed countries need to be reliable suppliers Second, developed countries need to curb their own use of trade distorting mechanisms, such as export subsidies and domestic supports Third, developed countries need to address food aid issues so that developing countries are reassured that their legitimate food security concerns will be taken into account

In developing countries, domestic policies merit attention As trade policies put constraints on what a country can do outside its borders, pressures build to modify domestic policies—how to make the agricultural sector more efficient, how to reduce the costs of production, how to increase total factor productivity

In Latin America, agriculture is ready to take off Agricultural policies have changed enormously and Latin America and the Caribbean have become net exporters of agricultural products, especially fruits and vegetables and coffee Agricultural trade is increasing within the continent, with assistance from several regional trade agreements Investments in technology development, human capital development and rural infrastructure are needed to sustain the momentum

Macroeconomic policies deserve attention because they may dominate trade policies in affecting agricultural trade. Changes in exchange rates or monetary policy can make a big difference to exports and imports.

For the next Round, Latin American countries are interested in market taxes, domestic support, export subsidies, and food aid. Also of interest are the relationships between trade and labor, environment, and property rights.

Developing countries need technical assistance to prepare for the next Round. In Africa, technical assistance should promote regional trade agreements because they seem to be a building block for agricultural trade liberalization. Asian Pacific countries need help in conforming their processes and products to sanitary and phytosanitary safety measures and in using science and risk assessment to determine what measures apply.

Many developing countries face severe human resource constraints as they try to muddle through the plethora of trade negotiation obligations. South Africa, for example, has regional negotiations, bilateral negotiations with important partners, and global negotiations. Most Ministries of Agriculture lack the human resource capacity to manage the individual commodity-specific and theme-specific dossiers required of complex negotiations. The technical assistance required to help countries develop negotiating strategy and analyze the impact of various negotiating positions is vast.

USDA has proposed that excess funds from the Export Enhancement Program (export subsidies) be shifted to food aid uses. Funds would be available for grants, concessional loans, or for purchasing stocks to replenish the food commodity security reserve. Funds would not be available for local purchase in developing countries. The idea is to increase the offtake in the United States so export subsidies are not needed.

Multinational corporations can contribute to both technical cooperation and institution building. In Russia, when McDonald's first began opening restaurants, almost all the food was imported. After three or four restaurants were operational, McDonald's began obtaining some food domestically, especially potatoes. They established agreements with local farms to help them produce the quality needed. Now there is a balance between domestically produced and imported food.

In Mexico, American food processors played an important role in upgrading the quality of grain produced. Essentially, they contracted farmers to produce grain to the specifications required under the North American Free Trade Agreement (NAFTA). And they contributed heavily to the extension and varietal research of the publicly-supported agricultural research system. Commercial farmers upgraded their production in the process.

Increasingly, market access requires a higher standard and that higher standard is often transmitted by multinationals with contractual approaches. For example, the U.S. Food and Drug

Administration is working with USDA on Guatemalan raspberries establishing good agricultural and manufacturing practices

USAID is concerned that small growers and small businesses participate in what increasingly is an information-intensive expensive process of certification. Bringing smallholders into the world economy is the issue, and the concerns apply to manufacturing as well as agriculture. In manufacturing, global production networks include a system of suppliers and contractors in developing countries and wholesalers and retailers in consumer countries. Economies of scale and globalization are leading to additional trade without much direct foreign investment. The proposed Africa Growth and Opportunity Act would attract more direct foreign investment into Africa.

Panel V World Food Summit Follow-Up U S Government and Donor Coordination

Chair	Emmy Simmons, USAID
Presenter	Ray Love, Abt Associates Lisa Smith, IFPRI Dirck Stryker, AIRD
Panel	Lynne Lambert, US State Dept Avram Guroff, USDA

Coordinating U S policy and donor assistance to promote food security is a special challenge in sub-Saharan Africa. The United States contributes only 5 or 6 percent of donor resources. Influencing what happens in food security requires coordination with other donors who provide the remaining 95 percent.

Before trying to coordinate internationally, the United States needs to develop an agreed strategy and policy within the U S government. The Interagency Working Group established before the World Food Summit continues to coordinate among the Department of State, Treasury, and USAID and is a possible vehicle for continuing coordination. If each part of the U S government develops its own policy positions, they may be contradictory. Coherence of policy and strategy is imperative.

Getting agriculture back on the agenda is a major development priority. In international financial institutions, the allocation of development resources to agriculture has dropped substantially. Over the 10 year period from 1986 to 1996, the percentage of resources allocated to agriculture declined from 29 to 12 percent in the World Bank, from 21 to 8 percent in the Inter-American Development Bank, 41 to 15 percent in the Asian Development Bank and 37 to 13 percent in the African Development Bank. Agriculture and food security have been given little attention in analyses such as the OECD's report, *Shaping the 21st Century: The Contribution of Development Cooperation*, a consensus of Development Ministers of OECD member countries that is based on the results of all the world summits that have taken place.

The United States now ranks fourth among donor nations in development assistance in absolute terms and last in terms of aid as a percentage of GNP. But the United States has a substantial impact on development strategies at the country level and throughout the world because it has a high caliber staff doing excellent analysis and a strong overseas mission complement that interfaces with host country personnel and other donors. As the United States cuts back on professional staff and withdraws from country presence, its influence is diminishing. These various factors undermine U.S. intellectual leadership.

The United States can take an active role in coordinating the diverse donor community, especially in Africa, and can help donor countries achieve more leadership on development strategies and policies.

IFPRI's 2020 vision and projections on food security provide a stimulus for action. The International Food Policy Research Institute's (IFPRI) has a vision of a world in 2020 where every person has access to sufficient food to sustain a healthy and productive life. Malnutrition is absent. Food originates from efficient, effective, and low cost food systems that are compatible with the sustainable use of natural resources.

The World Food Summit (WFS) goal is that by 2015, the numbers of people who are undernourished are cut in half—from the current estimated 841 million to 420 million. IFPRI's plan of action is fully compatible with the WFS plan of action. IFPRI is contributing to the WFS follow-up by providing timely and relevant information about effective policies for improving food security and nutrition.

A recent IFPRI study examined child malnutrition in 64 developing countries, looking at food availability, female education, women's status and health, environment, and services. The study looked at income growth, poverty, and democracy, too, as contributing factors. The findings indicate that food availability has contributed a large part of the reduction in child malnutrition over the last 25 years—almost 30 percent of the total from 1970 to 1995. Agricultural productivity, food aid, and food trade have contributed to this availability.

Reducing malnutrition to about 12 percent of all children by 2020 would require a 40 percent increase in investments in agriculture. At the same time, investments in other areas would need to be expanded—women's education by 65 percent, women's status by 40 percent.

In September, IFPRI plans to initiate a study designed to strengthen the empirical bases for estimates of the prevalence of food security, using new and currently existing household survey data in state-of-the-art extrapolation techniques. Current estimates vary from FAO's 841 million to USDA's 1.1 billion, but neither estimate is based on survey data. IFPRI has methodologies that improve the accuracy of current estimates. The IFPRI study will provide more accurate regional and country-level estimates for taking action to improve food security.

Identifying strategies for achieving the World Food Summit goal of reducing the undernourished by half by 2015 is a daunting task. Existing knowledge helps identify the variables associated with malnutrition and clarifies that it's a poverty problem, not a production problem. Developing a strategy requires an understanding of anticipated changes in the global food system over the next 17 years, especially the effect those changes will have on price. Also needed are ways to increase economic growth in nation states and policy interventions that alleviate poverty, especially in rural areas. The strategy may include many different kinds of interventions including health, education, and agricultural research. Interventions may be different in different regions. For example, in sub-Saharan Africa, availability is an issue, but in south Asia, distribution is a problem. And the criteria for choosing countries for particular interventions need to be specified.

One idea is to target food aid to countries that are conforming to certain policy standards, to monetize the food aid, and put the funds made available into smart cards for targeted groups. This may be an effective way to target assistance, deal with food surpluses in the United States, and use evolving information technology.

Working on food security in the inter-agency and international context is challenging. Policy is the easiest part. The commitments of Marrakech emphasize achieving the right policy mix, policies that address trade and investment and intellectual property rights, but also domestic macroeconomic policies and social policies, especially gender. Working with other donors to leverage the right policy mix is a long-term commitment. Ensuring the safety net element of food aid is important.

The practical aspects of how to coordinate to achieve these policies are a challenge. Food security is about everything—development, property, women, building roads—so it's hard to find one's niche. Since U.S. foreign policy is organized regionally and food security is a global issue, the work is labor intensive. One has to find out who is traveling and whether food security can get on the agenda, and food security must compete with other priorities.

The Inter-Agency Working Group was established to prepare for the World Food Summit, a reflection of the multi-faceted nature of food security and the many departments of government that have a stake in this issue. After the summit, the group decided to stay together to provide policy-level oversight to follow up activities. Further, the group decided to establish a domestic target of reducing undernutrition by half no later than 2015 and set up a sub-group to oversee this effort. Also, the group decided to prepare a U.S. Action Plan to strengthen commitments on world food security both at home and abroad. Until now, the group has addressed common interests and has not had the challenge of dealing with competition for research dollars or programs. It depends on the people who are in it. Having a senior official committed to food security helps advance the agenda. Although the Department of State, USAID and USDA have been very active, participation from Treasury and Commerce would also be valuable.

A lot of the work has been done. The task is to synthesize and develop the ammunition needed to defend food security within the Administration and in Congress. The Food Security Advisory Committee is available to support the interagency process. The Advisory Committee includes 30 captains of industry, academia and foundations and has a charter that calls for outreach. What is needed is a saleable message that addresses both national and international food security.

*Agricultural Policy Reform, Growth and Food Security
Preparing for the 21st Century*

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Panel Members

John Becker
Team Leader, Broad Based Economic
Growth
LAC/RSD-DBEG
USAID
1300 Pennsylvania Avenue NW
Washington DC 20523
P (202) 712-0761
F (202) 216-3262

Eugenio Diaz-Bonilla
Visiting Research Fellow
IFPRI
2033 T St NW
Washington DC 20006
P (202) 862-5662
F (202) 467-4439
Email ediaz-bonilla@cgnet.com

Colin Bradford
Chief Economist
AA/PPC
USAID
1300 Pennsylvania Avenue NW
Washington DC 20523
P (202) 712-0732
F (202) 216-3426
E-mail cbradford@usaid.gov

Derick Brinkerhoff
Senior Social Scientist
Abt Associates, Inc
4800 Montgomery Lane
Suite 500
Bethesda MD
P (301) 913-0691
F (301) 652-3839
Email derrick_brinkerhoff@abtassoc.com

Cheryl Christensen
Deputy Director for International Programs
US Department of Agriculture
1800 M Street NW
Suite 5118
Washington DC 20036-5831
P (202) 694-5203
F (202) 694-5792

Gary Ender
Senior Agricultural Economist
Abt Associates
7 Nadi El Seid Street
15th Floor
Dokki Cairo
Egypt
P (202) 337-0592
(202) 335-8879
F (202) 349-9278
Email gender@agpolicy.com

Christian Foster
Agribusiness Advisor for Russia-NIS
G/EGAD/AFS
USAID
1300 Pennsylvania Ave NW
Washington, DC 20523
P (202) 712-5073
F (202) 216-3010
Email cfoster@usaid.gov

Richard Fraenkel
Chief Agricultural and Food Division
USAID
1300 Pennsylvania Avenue, NW
Washington DC 20523-2110
P (202) 712-0129
F (202) 216-3010
Email rfraenkel@usaid.gov

Chris Goldthwait
General Sales Manager
Foreign Agricultural Services
U S Department of Agriculture
14th & Independence Ave , SW
Room 5071 South
Washington DC 20250-1001
P (202) 690-2159
F (202) 690-2159
Email cgoldthwait@usda.fas.gov

Avram "Buzz" Guroff
National Food Security Coordinator
USDA Foreign Agricultural Service
1200 Independence Ave , SW
Washington DC 20250-1081
P (202) 690-0855
F (202) 720-6103
Email guroff@fas.usda.gov

Charles Hanrahan
Senior Specialist
Agricultural Policy
Congressional Research Service
Library of Congress
LM-423

Washington DC 20540
P (202) 707-7235
F (202) 707-3342

Nicolas Kulibaba
Senior Associate
Abt Associates Inc
4800 Montgomery Lane
Suite 500
Bethesda MD
P (301) 913-0669
F (301) 652-3839
Email nick_kulibaba@abtassoc.com

Lynne Lambert
Special Representative for Food Security
Department of State
Room 5332, 10/T
Washington DC 20520
P (202) 647-1044
F (202) 647-8902
Email lotz@erols.com

Bill Levine
Former APAP Project Director
Abt Enterprise LLC
Garden City Building
9-Abd El Kadr Hamza Street
Apr 401
Garden City Cairo Egypt
P 011 202-594-3085
F 011 202 594-3087
Email wlevine@egyptonline.com

John Van Dusen Lewis
Director
Office of Agriculture and
Food Security
G/EGAD/AFS
USAID
1300 Pennsylvania Avenue NW
Rm, 2 11-003 R R B
Washington, DC 20523-2110
P (202) 712-5118
F (202) 216-3010

Ronald Trostle
Chief Trade Analysis Branch
Economic Research Service
1800 M St NW , Room 5020
Washington, DC 20036-5831
P (202) 694-5280
F (202) 694-5822
Email rtrostle@eson ag gov

Michael T Weber
Professor of Agricultural Economics
Michigan State University
216 Ag Hall
E Lansing, MI 48824
P (517) 353-8639
F (517) 432-1800
Email webermi@pilot msu edu

David Wilcock
Senior Economist
FAO/DAI
Room C-344
Viale Terme di Caracalla
Rome Italy 00100
P 39-6-570-52848
F 39-6-570-55522
Email david wilcock@fac org

Jerry Wolgin
Director of the Office of Sustainable
Development of the Bureau for Africa
USAID
1300 Pennsylvania Ave
Washington DC 20523
P (202) 712-1803
F (202) 216-3373
Email Jerry@usaid gov

Email jvdl@usaid.gov

A Ray Love
7202 Solitude Road
St Michaels, MD 21663
P (410) 745-5305
F (410) 745-9342

Tim Mooney
Senior Associate
Abt Associates, Inc
4800 Montgomery Lane
Suite 500
Bethesda MD
P (301) 913-0678
F (301) 652-3839
Email tim_mooney@abtassoc.com

Mark Newman
APAP III Technical Director
Abt Associates Inc
4800 Montgomery Lane
Suite 500
Bethesda, MD
P (301) 913-0679
F (301) 652-3839
Email mark_newman@abtassoc.com

Ismael Ouedraogo
Agricultural Economist
World Bank
1818 H Street NW
J Bldg Rm J-6-142
Washington DC 200433
P (202) 473-4098
F (202) 473-8229

B Lynn Salinger
Senior Economist
Associates for International Resources and
Development (AIRD)
185 Alewife Brook Parkway
Cambridge, MA 02138-1101
P (617) 864-7770
F (617) 864-5386

G Edward Schuh
Chair Board for International Food and
Agricultural Development/Regents
Professor, University of Minnesota
Hubert H Humphrey Institute for Public
Affairs
155 Humphrey Center
301 19th Avenue South

Emmy Simmons
Deputy Assistant Administrator
G/EGAD/DAA
USAID
1300 Pennsylvania Ave
Washington DC 20523
P (202) 712-1140
Email esimmons@usaid.gov

Lisa Smith
Visiting Researcher
IFPRI
2033 K St , NW
Washington DC 20006
P (202) 862-5600
F (404) 727-1278
Email L_C_SMITH@cgnet.com

Gordon Straub
Project Director APAP III
Abt Associates, Inc
4800 Montgomery Lane
Suite 500
Bethesda MD
P (301) 712-3109
F (301) 652-3839
Email gordon_straub@abtassoc.com

Peter Timmer
Thomas D Cabot Professor of Development
Studies At-Large
Harvard Institute for International
Development
15 Winnetaska Rd
Waban, MA 02168
P (617) 495-9778

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PARTICIPANTS LIST

Tatsushi Adachi
Consultant
The World Bank
1818 H St , NW
Washington DC 20433
P (202) 473-4709
F (202) 473-5454
Email Tadachi@worldbank.org

Carol Adoum
Associate Area Manager
Abt Associates Inc
4800 Montgomery Lane
Suite 600
Bethesda MD 20814
P (301)-718-3177
F (301)-652-3839
Email carol_adoum@abtassoc.com

Gary Alex
Consultant
ESDAR World Bank
1818 H St NW
Washington DC 20433
P (202) 458-5776
F (202) 522-3246
Email Galex@worldbank.org

Rory E Anderson
Project Manager, APAP III
Abt Associates Inc
4800 Montgomery Lane
Suite 600
Bethesda, MD 20814
P (301)-941-0284
F (301)-652-3839
Email rory_anderson@abtassoc.com

Nabil Antoine Aoun
Agribusiness Specialist
IBRD - Rural Development &
Environment
Department- East Europe & Central Asia
H3/201
1818 H St NW
Washington DC 20043
P (202) 473-7227
F (202) 614-0675
Email naoun@worldbank.org

Tracy Atwood
USAID
1300 Pennsylvania Ave , NW
Washington, DC 20523

Charles Bell
Assistant Vice President
Louis Berger International Inc
1819 H St NW Suite 900
Washington DC 20006
P (202) 331-7775
F (202) 293-0787
Email cbell@louisberger.com

Chris Brown
Agribusiness Economist
USAID G/EGAD
1300 Pennsylvania Ave , NW
Washington, DC 20523
P (202) 712-1915
F (202) 216-3579
Email chbrown@usaid.gov

Lynn Brown
Food Policy Consultant
World Bank (Rural Development)
1818 H St NW
Washington, DC 20433
P (202) 458-8175
F (202) 522-1142
Email Lbrown3@worldbank.org

Marion Carter
Abt Associates Inc
4800 Montgomery Lane
Bethesda MD 20814
P (301) 215-5918
F (301) 652-3839
Email marion_carter@abtassoc.com

John P Chudy
Project Officer/PSC
USAID/Honduras
Unit 2927
APO AA 34022
P (504) 236-9320
F (504) 236-7776
Email jchudy@usaid.gov

Eunvong Chung
Nutrition Advisor
USAID G/PHN/HN
1300 Pennsylvania Avenue NW
3 07-075M 3rd Floor RRB
Washington DC 20523
P (202) 712-4786
F (202) 216-3702
Email echung@usaid.gov

Adama Ekberg Coulibaly
Co-Director, FAPRI-AFRIQUE
902 Hope Pl
Columbia, MO 65203
P (573) 882-4586
F (573) 884-4688
Email adama_coulibaly@muccmail.missouri.edu

Ralph W Cummings Jr
Senior Economist
G/EGAD/AFES/FP
USAID
Washington DC 20523
T (202) 712-5567
P (202) 216-3010
Email rcummings@usaid.gov

Dana Dalrymple
USAID, G/EGAD/AFS
1300 Pennsylvania Ave NW
Washington DC 20523

Rebekah Davis
Assistant to the National Food Security
Coordinator
USDA/FAS/ICD
1200 Independence Ave , SW
Washington, DC 20250
P (202) 690-4627
F (202) 720-6473
Email Rebekah.Davis@usda.gov

Sharon Davis
Conference Planner
1001 Connecticut Ave Ste 310
Washington D C 20036
P (202)-822-8405
F (202)-872-4060
Email Davis@IEL.org

Ligia Alvarenga De Luna
Project Manager
USAID/El Salvador
American Embassy Blvd y Urb
Santa Elena, Antiguo Cuscatlan, El Salvador
P (503) 298-1666 ext 1357
F (503) 298-0885
Email lluna@usaid.gov

David Dod
Program Economist
USAID/Africa
1300 Pennsylvania Ave , NW
Washington, DC 20523
P (202) 712-0784
F (202) 216-3373
Email ddod@usaid.gov

David Tardif-Douglin
Development Alternatives Inc
7250 Woodmont Ave
Bethesda MD 20814
P (301) 718-8217
F (301) 718-7968
Email David_Tardif-Douglin@dai.com

Kvung Endres
Analyst
Mendez England & Associates
5550 Friendship Blvd Ste 230
Chevy Chase, MD 21850
P (301) 652-9150 x700
F (301) 652-9350
Email kendres@engl.com

Curtis Farrar
IFPRI
2033 K St NW
Washington DC 20006
P (202) 862-5671
F (202) 467-4439
Email cfarrar@cgnet.com

Flynn Fuller
Food For Peace Officer
USAID/ Dhaka
American Embassy
Madani Avenue Baridhara
Dhaka-1212 Bangladesh
P (880-2) 884700-22 ext 196
F (880-2) 883648
Email FFULLER@usaid.gov

George Gardner
Sr Agricultural Economist
USAID/AFR/SD/PSGE
Ronald Reagan Building
1300 Pennsylvania Ave NW
Washington DC 20523-0089
P (703) 235-3808
F (703) 235-3805
Email ggardner@usaid.gov

Curt Grimm
Social Science Advisor
USAID AFR/DP
1300 Pennsylvania Ave NW
Washington DC 20523
P (202) 712-5016
F (202) 216-3016
Email cgrimm@usaid.gov

Donnie Harrington
Agriculture Development Officer
USAID G/EBAD/AFS
RRB 2 11-041
Washington DC 20523-0804
P (202) 712-0494
F (202) 316-3010
Email dharrington@usaid.gov

John Heath
Evaluation Officer
World Bank
1818 H Street NW
Room G7-038
Washington, DC 20433
P (202) 473-9364
F (202) 522-3123
Email jheath@worldbank.org

Jane C Hopkins
Economic Growth Advisor
WIDST Project Office of Women in
Development, USAID
1000 16th St Suite 810
Washington DC

P (202) 739-0110
Email jhopkins@devtechsvs.com

John D Hyslop
Program Leader
Development Resources Division
Foreign Agricultural Service
USDA
1400 Independence Ave SW
Washington, DC 20250-1087
P (202) 690-1941
F (202) 690-1953
Email hyslop@fas.usda.gov

William James Jr
Program Officer
USAID
1300 Pennsylvania Ave, NW
Washington, DC 20523
P (202) 712-0195
F (202) 216-3465
Email wjames@usaid.gov

T David Johnston
ARD Chief
USAID/ Nepal
AID/ Kathmandu 6190 Dept of State
Washington DC 20521

Mike Kaiser
USAID Peru
1300 Pennsylvania Ave NW
Washington DC 20523
Email mkaiser@usaid.gov

Mamoud Kamara
Consultant
World Bank
1818 H Street NW
Washington, DC 20433
P (202) 473-7566
F (202) 522-3309
Email none

Nora Kaoues
Knowledge Management Analyst
World Bank
1818 H St NW
Washington, DC 20433
P (202) 458-4578
F (202) 522-1164
Email Nkaoues@worldbank.org

Mami Keita
Chief Executive Officer
Foundation Pour L'Investissement (FICA)
USAID, Guinea
P (224) 46-37-84
F (224) 46-36-34
Email fica_gui@eti-bull.net

Rod Kite
Economist
USAID, AFR/WA
1300 Pennsylvania Ave NW
Washington DC 20523
P (202) 712-4151
F (202) 216-3018
Email rkite@usaid.gov

Michael Korin
Deputy Director
USAID/BHR/PPE
1300 Pennsylvania Ave NW
Washington DC 20523

Donald Larson
Economist
World Bank
1818 H St, NW, Rm MC3-549
Washington, DC 20433
P (202) 473-3851
F (202) 522-1150
Email DLarson@worldbank.org

George Like
Agricultural Development Officer
USAID
1300 Pennsylvania Ave , rm 2 11 72
Washington, DC 20523
P (202) 712-1436
F (202) 216-3010

Shelly Maga
Intern- Food For Peace
USAID, BHR/ FFP
Ronald Reagan Building, rm 7 06 143
1300 Pennsylvania Ave , NW
P (202) 712-0664
Email smaga@usaid.gov

Nisha Malhotra
Consultant
World Bank
1818 H St , NW
Washington DC 20433
P (202) 473-1671

Jerre Manarolla
ANE Bureau USAID
1300 Pennsylvania Ave NW
Rm 4 09-020
Washington DC 20523

Jeff Metzel
Senior Economist
AIRD
185 Alewife Brook Parkway
Cambridge MA 02138
P (617) 864-7770
F (617) 864-5386
Email jmetzel@aird.com

Ernestine Mitchell
USAID/G/EGAD/AFS
1300 Pennsylvania Ave , NW
Suite 2 11 RRB
Washington DC
P (202) 712-5197

F (202) 216-3010

Shirley Moncho
Oklahoma State University
Office of International Programs 307 CITO
Stillwater OK 74078-8087
P (405) 744-6535
F (405) 744-7529
Email moncho@okstate.edu

Millie Morton
Sociologist/ Facilitator
ISTI
1655 N Ft Myer Dr #300
Arlington, VA 22209
P 703-807-2080
F 703-807-1126
Email mmorton@istinc.com

Sussana Mudge
Group Manager
Chemonics/International Inc
1133 20th Street NW
Suite 600
Washington DC 20036
P (202) 955-7480
F (202) 955-7550
Email ckolar@chemonics.com

K Linh Nguven
Consultant- Economics
The World Bank
1776 G St NW
Washington DC 20433

Paul Novick
USAID
Rm 5 08-109
1300 Pennsylvania Ave , NW
Washington DC 20523

Albert Nyberg
Senior Agricultural Economist
World Bank

1818 H Street, NW
Washington, DC 20433
P (202) 458-4050
F (202) 522-1675
Email anyberg@worldbank.org

Jonathan Olsson
Geographer
USAID
1300 Pennsylvania Ave, NW
Washington, DC 20523
P (202) 712-5488
F (202) 216-3010
Email jolsson@usaid.gov

Shirley Pryor
Agricultural Economist
ERS/USDA
1800 M St NW
Washington, DC 20036
P (202) 694-5276
F (202) 694-5822
Email SPRYOR@ECON.AG.GOV

Dr Hugo Ramos
Equitable Rural Economic Growth
Activity (CRECER)
91a Av Nte #707 entre 11 y 13 Calle Pte
Colonia Escalon
San Salvador El Salvador
P (503) 264-2009
F (503) 263-2539
Email crecer@es.com.sv

Elida Recl
Mendez England & Associates
5550 Friendship Blvd, Ste 230
Chevy Chase, MD 20815
P (301) 652-4334
F (301) 652-3733
Email tengland@engl.com

Patricia Reyes
Economist Analyst-ESDS/ ANE Bureau
USAID CDIE/DI/ESDS
1311 N Pennsylvania
P (202) 661-5808
F (202) 661-5890
Email preyes@esds.cdie.org

Stacy Roberts
Special Assistant to the Director General
IFPRI
2033 K St NW
Washington DC
P (202) 862-5646
F (202) 467-4143
Email S.Roberts@cgnet.com

Terry L Roe
Professor, Dept of Applied Economics
University of Minnesota, 337 COB
1994 Burford Ave
St Paul MN 55108
P (612) 625-6706
Email troe@dept.agecon.umn.edu

Richard E Rousseau
Team Leader
USAID/ Dhaka Bangladesh
Dhaka Bangladesh- USAID
Washington DC 20521-6120
P 011-880-2-884700
F 011-880-2-884700
Email rrousseau@usaid.gov

Deborah Rubin
Technical Advisor
USAID, G/EGAD/AFS
1300 Pennsylvania Ave rm 2 11-101
Washington, DC 20523
P (202) 712-1307
F (202) 216-3010
Email drubin@usaid.gov

Washington, DC 20006
P (202) 331-7775
F (202) 293-0787
Email sthomas@louisberger.com

Lloyd Toeigen
Senior Program Manager
USDA/ERS/MTIED/TAB
1800 M St NW
Washington, DC 20036
P (202) 694-5282
F (202) 694-5822

Robert Townsend
Consultant
World Bank
AFTRI Rm J6-30
701 18th St NW
Washington, DC 20433
P (202) 458-8270
F (202) 477-0515
Email Rtownsend@worldbank.org

Thomas Vollrath
Senior Program Manager
USDA/ERS/MTIED/TAB
1800 M St NW
Washington DC 20036
P (202) 694-5282
F (202) 694-5822

Thomas R Ward
Economist
The World Bank
1818 H St NW Rm H3-191
Washington, DC 20433
P (202) 473-2642
Email tward@worldbank.org

Keisha Washington
Abt Associates Inc
4800 Montgomery Lane
Bethesda MD 20814
P (301) 718-3150

F (301) 652-3839
Email keisha_washington@abtassoc.com

Rikki S Welch
Abt Associates Inc
4800 Montgomery Lane
Bethesda MD 20814
P (301) 215-5924
F (301) 652-3839
Email rikki_welch@abtassoc.com

William Whelan
Senior Food Security Advisor
AFR/SD/CMR
Ronald Reagan Bldg--4 06-074
P (202) 712-5001
F (202) 216-3381
Email wwwhelan@usaid.gov

Glenn Whiteman
Assistant Deputy Administrator
FAS USDA
Rm 4077 South Agriculture Bldg
Washington DC 20250
P (202) 720-4274
F (202) 690-0727

Pamela Wyville-Staples
El Salvador Desk Officer
USAID- LAC/CEN
Ronald Reagan Building
1300 Pennsylvania Ave Rm 5 08 083
Washington DC 20523
P (202) 712-1639
F (202) 216-3402
Email pwyville-staples@usaid.gov

Tami Halmrest Sanchez
Division Chief
Crisis Mitigation & Response Division
AFR/SD/CMR
RRB-4 07-105
P (202) 712-0213
F (202) 216-3381
Email thalmrest-sanchez@usaid.gov

Ina Schonberg
Sr Program Analyst
Mendez England & Associates
5550 Friendship Blvd
Chevy Chase MD 20815
P (301) 652-9150 ext 706
F (301) 652-9350
Email inas@engl.com

Dr Jeanne Schwaller
International Consulting and
Business Training
1926 Hayselton Drive
Jefferson City, MO 65109
P (573) 635-3788
F (573) 635-3788
Email mopepina@aol.com

Matthew Shane
Senior Program Manager
USDA/ERS/MTIED/TAB
1800 M St NW
Washington, DC 20036
P (202) 694-5282
F (202) 694-5822
Email MSHANE@ECON.AG.GOV

Charlie Stathacos
Senior Associate
Abt Associates Inc
4800 Montgomery Lane
Suite 600
Bethesda, MD 20814
P (301)-913-0681
F (301)-652-3839

Email charlie_stathacos@abtassoc.com

Theresa Stoll
Program Examiner
Office of Management and
Budget
725 17th St NW
Washington DC
P (202) 395-4605
F (202) 395-5770
Email stoll_t@al.eop.gov

J Dirck Stryker
President
Associates for International Resources
Development
185 Alewife Brook Parkway
Cambridge MA 02135
P (617) 864-7770
F (617) 864-5386
Email dstryker@aird.com

Peter A Thatcher
Senior Economist
USAID ENI/ED/AG rm 5 08-131
1300 Pennsylvania Ave NW
Washington DC 20523
P (202) 712-1682
F (202) 216-3172
Email pthatcher@usaid.gov

Dawn Thomas
Division Chief AEMD
USAID, G/EGAD/AFS/AFMD
1300 Pennsylvania, NW
Washington DC 20523
P (202) 712-5108
F (202) 216-3010
Email dathomas@usaid.gov

Scott Thomas
Senior Economist
Louis Berger
1819 H St NW