

**ECOWAS RICE ROADMAP DEVELOPMENT
TECHNICAL SUPPORT
FINAL REPORT**



Technical
Support ECOWAS
Rice Roadmap
Development

Final Report

June 18th, 2024

ECOWAS Rice Observatory (ERO)



Produced by the Experts team: Dr Fadel Ndiame, Dr Bashir Jama & Mr. Robert Dovlo

1. Executive Summary:

This final Report is to confirm the achievement of the mission's objective and thus finalization of ECOWAS Rice Roadmap Development Process. The report also triggers the payment of the third installment of the fees as per the contracting terms with the Experts Team engaged to support the ECOWAS Rice Roadmap Development project. The team formed complementary and matching group with BCG team to facilitate the successful formulation of the Rice Road Map and development of the implementation plan for the rice roadmap, aligning with the strategic objectives of ECOWAS towards achieving a high regional Self-Sufficiency Ratio (SSR) by 2030.

2. Context

Rice is an important staple food crop of most ECOWAS countries; however, it is a major food crop with demand far surpasses supplies from local production. Imports have exceeded over US\$ 3.0billion annually, scarce foreign exchange which otherwise could be deployed by ECOWAS countries for their socio-economic development. Rice is a sensitive crop with any shortfalls in its supply often leading to political crises.

There are, however, enormous opportunities to reverse the current situation and get local production to close, relatively fast the demand-supply gap. The ecologies of most countries are the right ones for rice production, and at levels that are comparable to similar regions in the world. One wonders then what is the problem? The answer is not simple though. Many strategies at both national and regional levels have been developed in the past and implemented with equal mixtures of successes and failures.

Taking a cue from the lessons learned from the past, the ECOWAS Rice Road Map provides probably the most comprehensive strategy for moving forward with a mission to support the countries achieve rice self-sufficiency by 2030. It rightly focused on facilitating, aligning and harmonization of strategies and interventions across various stakeholders, operating in vastly different contexts. A key assumption in framing our assignment is that a successful delivery of the rice offensive agenda will require at least the following:

- ✓ A shared understanding of challenges and opportunities of the rice sector in West Africa.
- ✓ A shared vision of success, which considers the specific circumstances of the rice value chain players and stakeholders.
- ✓ Effective alliances among actors across the value chain and geographic jurisdictions
- ✓ Concerted action horizontally and vertically along the value chain
- ✓ Clear and effective mechanisms for the various stakeholders to work together around the shared objectives and hold each other accountable.

These strategic requirements of an effective delivery on the vision of the Rice Road Map will inform the engagements and facilitation processes and roles that would be spearheaded by ERO and ECOWAS. It is with such an understanding that we have outlined the approach

to the assignment and the respective roles to be played by other partners (BCG, GIZ, National Chapters, and ERO).

The delivery on the rice development agenda, therefore, requires a roadmap, and one with perhaps a difference. It must be one that understands well and is informed by the core barriers to success for each of the strategic partners (government and its public institutions, private sector, including smallholder farmers, and development partners). Otherwise, there is a danger of falling into the ‘business-as-usual’ pitfall. The focus of the technical team of experts guiding the ECOWAS Rice Roadmap development will, therefore, be on the key barriers that are deemed critical to success.

3. Key achievements:

In close collaboration with BCG, ERO and the larger team the Expert group provided expertise and technical assistance to the development of the roadmap:

- **Rapid diagnostic at the regional level:** This was achieved through a situational assessment and analysis of challenges and the quantification of the challenge and what it will take to reach SSR. The experts team working as a group under FSTS led the consultations with the country and private sector stakeholders.
- **Evidence sourcing:** the FSTS sourced and brought to the knowledge of BCG and the ERO Secretariat successful development practices in various countries within and outside Africa that could be used to inform rice roadmap’s development and its implementation.
- **Preliminary regional roadmap framework:** This was a key milestone to be ready for the London meeting. It enabled ambition setting, identifying the key levers, enablers and actions required to reach overarching ambitions for Rice self-sufficiency & the required investment opportunities. The FSTS worked on identifying the high-level constraints that the thematic interventions of the SSR will be anchored on.
- **Nigeria and Côte d'Ivoire deep-dives:** In both countries, the group worked with BCG team to conduct a detailed deep dive situational assessment and identify the production potential & main levers to activate, investment opportunities. The sessions were co-chaired by the FSTS team with BCG.
- **Nigeria rice millers-out-grower and aggregation models use case:** This enables to review the optimization of intervention levers around a single mill and carry out an assessment of impact on miller economics. The FSTS team engaged and helped draw insights on how the model could be replicated elsewhere within and outside the country.
- **Ghana case study - engagement of the private sector:** The FSTS team led this task that generated valuable insights from private sector aggregators. This will feed well into the SSR
- **Engagement of ERO Board and Technical Committees:** The FSTS team guided the presentations and discussions with the Board on the approach SSR consultancy will

adopt. The team also participated at the ERO Annual Board Meeting (27-30 May) and contributed significantly to its deliberations and outcomes.

- **Initial landscape of active/committed investments:** The group guided the engagement with key DFIs which allowed to get a clearer view on available commitments to the implementation of the Rice Self Sufficiency Road map.
- **Hosting of London convening:** The group contributed to the preparation of London convening through the mobilization of participants, the agenda and content development.

During the 2 days of meeting among ERO partners and key stakeholders in the Rice sector, the group facilitated and led some critical sessions. The meeting gave key insights to move forward. It also assisted with engaging DFIs in getting their participation at the event as well as getting data on the level of investments (current and planned) in the ECOWAS region.

The team provided BCG with two critical reviews and feedback written documents on the various drafts of the roadmap.

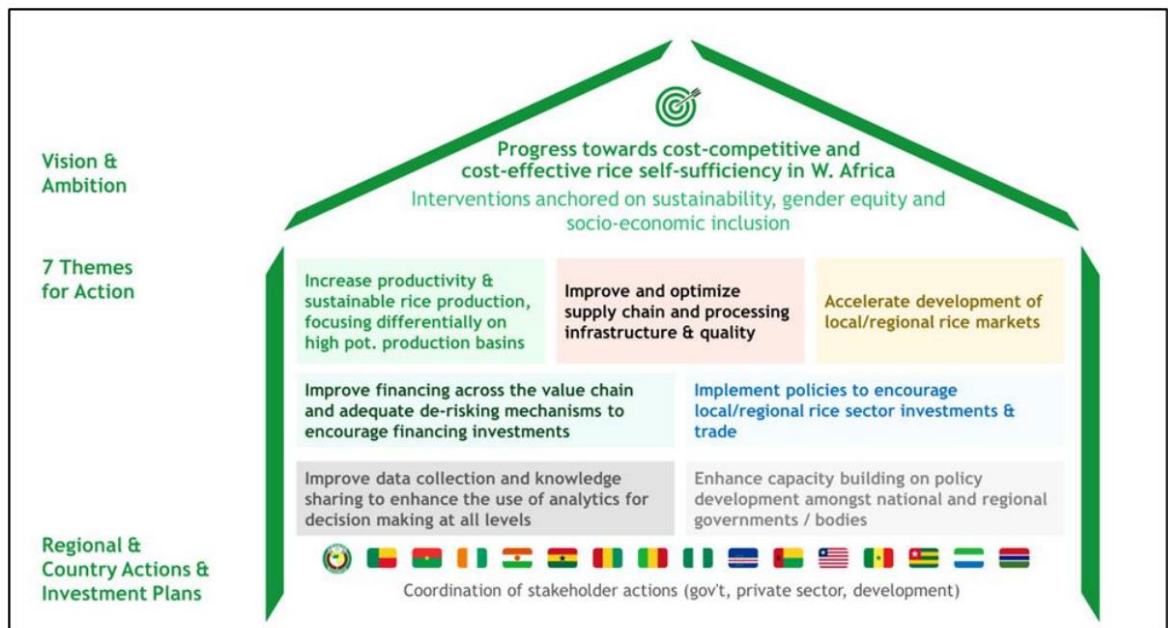
- Over the period of the mission the team participated to more than 40 conference calls with BCG and around 15 with BMGF team and some other several other with ERO's board.
- The team participated to ERO board General Assembly from 21st to 22nd of May 2024 in Abuja. This was the final and landmark support of the FSTS to the roadmap's development process was at the Annual General Meeting of ERO (21-22 May) where the roadmap was discussed and ratified by the representatives of the governments, private sector, development partners, farmers organization among others. The roadmap's development process, including ratification, is scheduled to be finalized in the next 2-3 months. Meanwhile, the initial implementation action will kick off simultaneously given no many changes are expected from the ratification process.

4. Recommendations:

- ECOWAS is working with its partners to develop a new road map for the Rice in the region towards rice self-sufficiency by 2030. The roadmap as regional framework must translate or aligned with the individual country programs or national strategies including the Food Security and Sovereignty strategies.
- The outcomes of the roadmap development have identified and/or re-affirmed priority areas (Big 5s) we must all focus with dedication for success to scale by 2030. Five areas stand out. These are:
 - ✓ Creating an enabling policy environment that sustains actions at country and regional levels,
 - ✓ Fostering a strong and active private sector engagement in the value chain,
 - ✓ Increasing access to financing for all actors along the value chain
 - ✓ Strengthening the human and institutional capacities needed at both county and regional levels, and

- ✓ Strengthening the monitoring, evaluation, learning and communication processes; making them live and evidence driven.
- The delivery of the rice roadmap (2024 – 2030) thus requires strong technical and institutional support if the expected outcomes are to be achieved. The support is required in all the priority countries and regional institutions given the complexity of the issues to be addressed and the need to carry along effectively all relevant institutions. The Food Systems Transformation Solution (FSTS), a multi-disciplinary consultancy firm is poised well to provide the support required to deliver the roadmap well. It has already provided good insights on this during the recent ERO Annual General Meeting (21-22 May) at Abuja, Nigeria. The team also shared concept notes on the same with the development partners supporting development of the roadmap.

Annex 1: ECOWAS Rice Roadmap Framework



Annex 2: Roadmap Implementation Plan

	1	2	3
	Phase 1 Short Term	Phase 2 Mid Term	Phase 3 Long Term
Streams	Year 1 - Year 2	Year 3 - Year 5	Year 6 - Year 10
Mobilize working teams at all levels and cascade actions	<ul style="list-style-type: none"> 1.1 Strengthen regional platforms and finalize setting up national multi-stakeholder platforms to coordinate the execution of actions 1.2 Finalize the refreshment of country NRDS targets based on the Regional Roadmap 	<ul style="list-style-type: none"> 2.1 Launch the execution of actions under themes 1 to 3 in priority basins 2.2 Launch regional policy reviews under theme 5 to foster an improved enabling environment 	<ul style="list-style-type: none"> 3.1 Re-prioritize (where necessary) key actions needed to achieve self-sufficiency ambition based on mid-term review results 3.2 Launch coordinated efforts for large scale infrastructural projects having impact beyond the rice value chain
Deep-dive Theme 4: Funding deploymt. & tracking	<ul style="list-style-type: none"> 1.3 Set up a collaborate process to track available funding and coordinate investment programs across various funding partners 	<ul style="list-style-type: none"> 2.3 Mobilize financial resources from existing programs to fund priority projects per basin and collaborate on developing new investment programs intended to finance the rice value chain 2.4 Coordinate on-going investments and re-align them with the Roadmap where necessary 	
Deep-dive Theme 6: Progress reviews, tracking & monitoring	<ul style="list-style-type: none"> 1.4 Conduct a holistic review of progress made under prior strategies 1.5 Develop monitoring and tracking tools / mechanisms using the Results Framework 1.6 Develop a communication strategy to highlight trends in rice sector and progress made 	<ul style="list-style-type: none"> 2.5 Continue tracking and monitoring by mobilizing actions under Theme 6 2.6 Commence mid-term review cycle in Year 5 of the progress of the roadmap 2.7 Consolidate data on rice value chain at the most granular level 	<ul style="list-style-type: none"> 3.3 Leverage mid-term review report to structure the implementation path for 2nd term of the Roadmap 3.4 Conduct end-of-term review and potentially develop a renewed Roadmap targeted at sustaining regional rice self-sufficiency
Stakeholder participation & roles	<ul style="list-style-type: none"> 1.7 Finalize the operationalization of ERO and empower National Chapters 1.8 Secure commitments from key implementing partners 	<ul style="list-style-type: none"> 2.8 Initiate round-table discussions amongst regional actors to aid the implementation of large-scale projects not restricted to rice sector 	