

2008年6月6日
JPO 土岐 啓道

国際開発援助動向研究会
第77回 議事録

1. 日 時：平成20年5月27日（火）10：00～12：00
2. 場 所：FASID 第一研修室（千代田会館 5 階）
3. 発表者：Kiichiro Fukasaku（OECD 開発センター，Counsellor and Head of Regional Desks）
Federico Bonaglia（OECD 開発センター，Economist）
Denise Wolter（OECD 開発センター，Economist）
4. 議 題：Measuring the Pulse of Africa 2008
5. 出席者：22 名
6. 議 事：

6.1 開発援助情報システム「DAKIS」(<http://dakis.fasid.or.jp>)

- 最新開発援助動向レポート
 - ・ No. 26 青柳 恵太郎（FASID 国際開発研究センター 研究助手）
「第 2 回 Network of Networks on Impact Evaluation 会合」及び「Making Smart Policy: Using Impact Evaluation for Policy Making」
 - ・ No. 27 土岐 啓道（FASID 国際開発研究センター JPO）
「チェコ、ハンガリー、ポーランド、スロバキア（V4）の援助動向」
- Journal Express
 - ・ 最新の主要援助動向を各種英語新聞・雑誌・シンクタンク情報から抜粋・編集し、簡単な邦訳付き英語で毎週水曜に発信中。

6.2 本日のプレゼンテーション

Introduction

Kiichiro Fukasaku

He introduced two flagship publications the OECD Development Centre released in May 2008. One is *African Economic Outlook (AEO) 2008* – a joint product with African Development Bank and United Nations Economic Commission for Africa. AEO aims to provide policy makers, researchers, and business people with comprehensive and comparative data and analysis of African 35 countries, covering 95 % of Africa's total GDP and 87 % of its total population (<http://www.oecd.org/dev/aeo>). Another publication

is called *Business for Development 2008: Promoting Commercial Agriculture in Africa*. This report was released on the occasion of TIVAD IV in Yokohama. It looks at African agriculture from a business perspective; it highlights the current status of agriculture and agribusiness as well as the emerging opportunities for developing the sector further in both domestic and export markets (<http://www.oecd.org/dev/business>).

The African Economic Outlook 2008 *Measuring the Pulse of Africa*

Federica Marzo

Macroeconomic Outlook: Challenges and Opportunities

The African economy has been steadily growing for the past five years, and the continent's growth rate is expected to reach almost 6 % in 2008-2009. What are the drivers of this growth? They are manifold: a surge in commodity prices, especially oil and metal prices; the increased demand for African commodities from Asian emerging countries, such as China and India; the continued improvement in macroeconomic policies (and as a result, macroeconomic stability); and the strong growth of public and private investment. However, this aggregate picture masks different economic realities in different country groups; for instance, the growth divergence between net oil exporters and importers became wider in 2007 (6.4 % versus 5 %). Moreover, significant food price inflation in recent months risks economic and social stability especially for the latter group, although the degree of vulnerability differs among countries. Two other common challenges are worth noting. One is the energy shortage: the installed capacity remains insufficient to respond to high growth rates and increasing industrial and household demand in sub-Saharan Africa. Another challenge is to diversify production and export base, not only for oil exporters but also for the entire continent. To address this challenge, investment in human resource development is a key, and this leads to the special theme of this year's AEO, namely, technical and vocational skills development.

Skills Development: Investing in African Youth

Technical and vocational skills development (TVSD) means the acquisition of competencies, knowhow and attitudes necessary to perform an occupation in the labour market. TVSD is critically important for sustained growth and diversification in Africa where labour productivity is low (one fourth of world average), youth unemployment is high (20% on average) and the economy is dominated by the informal sector (about 80 % of total employment). However, the rate of enrollment in TVSD is merely 5 % in sub-Saharan Africa, compared with 15 % in East Asia and 18 % in the OECD area. The training system in Africa is largely underfinanced (only 2 to 6% of national education budget) and donors' support to training has been erratic and insufficient to upgrade the quality and access to training. This sober picture is not merely due to the lack of resources; it is also related to the question of how *available* resources are being used. AEO 2008 highlights a number of successful experiences in African countries in terms of 1) strategies, action plans and identification of objectives and resources, 2) increasing awareness about

benefits of TVSD among firms and parents, 3) fostering evaluation and monitoring mechanisms.

Business for Development 2008: Promoting Commercial Agriculture in Africa

Denise Wolter

The future of Africa is closely intertwined with the development of its agricultural business sector. A large share of Africa's population lives in rural areas, and more than 60 per cent of its active labour force earn a livelihood in the agricultural sector. However, Africa's potential with respect to commercial agriculture is largely untapped, and the current status of agriculture is a source of major concern. The sector is dominated by poor smallholders, often solely engaged in subsistence agriculture, while the agri-business sector is in its infancy in most countries. Smallholders face tremendous challenges in accessing input and output markets and find themselves trapped into a vicious cycle of low income, low inputs and low productivity. In 2006, the African average cereal yield was only 40 per cent of the Southeast Asian average. Furthermore, the continent has been lagging behind in adapting to the structural transformation of the international agro-food market which has opened up new business opportunities for developing-country producers, while at the same time increasing competitive pressures. It is in this context that African leaders have agreed on a comprehensive action plan for the sector, emphasising the need to mobilise large resources. The New Partnership for Africa's Development (NEPAD) has been instrumental in bringing up agriculture on the national and international policy agenda in the 2003 Comprehensive Africa Agriculture Development Programme (CAADP) framework. Given the limited financial resources available to most African governments, it has become critically important to mobilise additional resources, including those coming from bilateral and multilateral donors and the domestic and international private sector. Additional resources are clearly needed. Over the last two decades, with few exceptions, public resources to agriculture have shrunk dramatically. Reversing that trend today is as important as ensuring that scarce resources are efficiently allocated to priority, productivity-enhancing investments. TICAD IV provides a unique window of opportunity to provide a fresh impetus to promoting commercial agriculture in Africa.

6.3 Questions & Answers and Comments

Training workers in informal sectors

In Africa, the majority of employment comes from informal sectors and they lack the knowledge of marketing and finance so that governments should recognize the importance of those sectors in designing the strategies for skill development. At the moment, initiatives for training and strengthening of informal sectors are limited to those by donors and NGOs, and governments are mostly investing to formal training.

Public and private investment in Africa

We can observe the increase of both public and private investment in Africa.

1) Public investment: ODA has played an important role in terms of debt relief operations, which allowed governments to free up more resources. Public investment is concentrated in infrastructure sectors, and this allows Africa to grow faster, because good infrastructure provides a foundation for agricultural development as well as for the development of countries in general.

2) Private investment: There are two types of investment – FDI and private portfolio capital flows, both of which are on the increase. Private investment in Africa follows a pattern of high risks and high returns, and it is highly influenced by the stability of political, macroeconomic environment as well as the improvement of business environment. There have been on-going economic reforms in many African countries, like Zambia in which large capital flows take place as a result of liberalization of its economy.

Sustainable economic growth in Africa

Many attempts have been made in the past to promote education and training for entrepreneurship in order to tackle high unemployment problem and huge gaps in skills: for example, in South Africa, a reform program called the ASGISA (the Accelerated and Shared Growth Initiative for South Africa) with the objective of halving poverty and unemployment by 2014. Considering the high drop-out rate of formal education, it is crucial that governments provide the young people with technical and vocational education and training (TVET).

There is another point to make. Even though there were commodity booms in the past, it was always followed by post-boom stagnation. Therefore, this time, we should probably think of something new to tackle this dilemma and to achieve long-term sustained development. What is important is that what will follow after the economic boom and what sort of pictures we can project in terms of the future of Africa. It depends on many factors including;

- how market remains open in OECD countries;
- how OECD countries react to the new commodity market situation by reforming their own agricultural policies;
- how regional integration within Africa will progress;
- how oil money and other commodity money will be circulated within Africa; and
- how economic and political governance in individual countries, particularly in weak states, will be transformed as the current commodity boom comes to an end.

African countries are now in a process of learning from the past. Although it is difficult to visualize pictures of Africa in 10 or 20 years time, education is one of the big factors that can affect Africa's future. High commodity prices will continue for a little while. Therefore cash is around, but the point is how to use it effectively. As far as OECD countries are concerned, soft landing is a very important issue.

Green Revolution in Africa

In Africa, the increase of rice production is important in terms of food security. For example, West

Africa is importing a large amount of rice from Asia which itself has been increasing domestic rice consumption. At TICAD IV, there will be a discussion on doubling rice production in 10 years in Africa through the Green Revolution. And when we think about adaptation of Green Revolution in Africa, it is necessary to look at what kind of technologies are available and how best to put them at productive use.

Relationship between Africa and Europe

The increased awareness in agricultural development is a welcomed movement; however, Africa has to sort out its own food security problem before becoming the kitchen for Europe. To address this challenge, each individual country has to conduct cost-benefit analysis to think about whether they should become self-sufficient in food supply. In fact, international business is already sourcing food from Africa as well as providing necessary training, but making business out of African agriculture is often accompanied with bad images, such as taking food away from hungry people. Considering the long-term potential of agriculture in Africa, it is necessary to move beyond such bad images.

TVET (technical and vocational education and training): collaboration with private enterprises

Now several Japanese enterprises are planning to open factories in Africa. In providing TVET for local populations, collaboration with private enterprises is essential. It is in fact already happening in the oil industry. For example, in Angola, where oil companies are providing training and also financing programs in other sectors related to their industry.