Terms of Reference

Title: Indonesia Ruminants Sector Development: A Roadmap to Sustainable and Competitive Growth
Department: Regional Hub Indonesia
Reports To: Operations Team Leader
Corporate Objectives: Improving Relationship with Member Countries

Timeline: 4 months (starting September 2024)

Background

- The Indonesian ruminant sector, encompassing cattle, goats, and sheep, is a vital pillar of the national economy, contributing to GDP, employment, food security, and rural livelihoods. However, the sector faces multifaceted challenges, including low productivity, high input costs, disease outbreaks, limited access to finance and markets, and environmental sustainability concerns. To address these challenges and harness the sector's potential, the Indonesian government has implemented various policies and regulations, including subsidies, financial support mechanisms, animal health and welfare regulations, environmental regulations, and import/export policies. However, achieving self-sufficiency has been a longstanding challenge. In line with this, there is a need for an integrated comprehensive policy framework and a roadmap for sustainable ruminant production in Indonesia.
- This framework should focus on enhancing productivity and sustainability through investments in breeding programs, feed development, animal health management, and sustainable land management practices. It should also strengthen market linkages and value chains by developing market infrastructure, empowering farmer organizations, and promoting value addition and processing.
- Creating an enabling policy environment is crucial for attracting investment, fostering innovation, and ensuring fair trade practices. This involves reviewing and updating existing policies, providing financial incentives to farmers, investing in research and technology development, and strengthening the capacity of government agencies and farmer organizations.
- The roadmap to cattle-beef and dairy self-sufficiency in Indonesia requires coordinated efforts across multiple sectors, investment in infrastructure, and continuous support for farmers. By adopting a holistic and evidence-based approach, Indonesia can transform its ruminant sector into a sustainable, productive, and competitive engine for economic growth, food security, and rural development.
- The Deputy Minister of National Development Planning (Bappenas) for Maritime and Natural Resources has requested IsDB to mobilize experts to conduct analytical work to support the development of a roadmap and action plan to accelerate the achievement of this target by 2026.

Objectives

The main objectives of the assignment are to analyze the current state of ruminant production in Indonesia, which includes:

- Reviewing current ruminant policies and regulatory frameworks, including analyzing the status of the current roadmap to identify gaps, inconsistencies, and areas for improvement in achieving self-sufficiency in beef and dairy production.
- Identifying key challenges and opportunities for sustainable beef and dairy cattle production, including but not limited to issues related to feed availability, breeding practices, animal health, environmental impact, and market access.
- Reviewing existing literature and data on Indonesia's beef and dairy industry, including government reports, academic studies, industry publications, and international best practices.
- Consulting with a wide range of stakeholders, including government agencies (Bappenas, Ministry of Agriculture, Ministry of Trade, etc.), industry experts, farmers' associations, research institutions, private sector actors, and international organizations.
- Facilitating stakeholder engagement and collaboration by conducting a series of Focus Group Discussions with all relevant stakeholders.
- Developing a detailed roadmap with specific milestones, action plans, and key performance indicators (KPIs) to track progress toward self-sufficiency.
- Recommending policy interventions to support the sustainable development of the ruminant sector.
- Identifying potential IsDB-supported initiatives in the sector, potentially to be undertaken under the Bank's Food Security Response Program (FSRP).

To support this initiative, the Government of Indonesia requests the Islamic Development Bank to provide necessary support to recruit a Policy Analyst specializing in the ruminant sector, a Ruminant Value Chain Expert, and an Animal Husbandry/Livestock Specialist. The Policy Analyst will support Bappenas and the Ministry of Agriculture in reviewing, analyzing, and developing policies, strategies, and regulatory frameworks to support the ruminant self-sufficiency roadmap. The Livestock Specialist will provide technical expertise in cattle breeding, nutrition, health, and overall farm management, while the Ruminant Value Chain Expert will identify and analyze the ruminant value chain, encompassing production, processing, marketing, and consumption.

Scope of Work

The analytical work will involve the following activities:

- Reviewing existing literature and data on Indonesia's ruminant industry (meat and dairy).
- Engaging closely with Bappenas and other relevant government agencies, industry experts, farmers, and other stakeholders to identify challenges and opportunities for a vibrant and sustainable ruminant sector.

- Defining measurable targets and indicators for evaluating progress and ensuring accountability throughout roadmap implementation, in consultation with the Government of Indonesia (GoI).
- Analyzing relevant policy frameworks for sustainable and efficient ruminant production.
- Facilitating stakeholder engagement and collaboration by conducting a series of Focus Group Discussions and working discussions with all relevant stakeholders.
- Developing a detailed roadmap with specific milestones and action plans.
- Presenting the findings and recommendations in a comprehensive report.

Specific Tasks of Consultants

1. **Policy Analyst Specializing in the Ruminant Sector:**
   - Assess current policies and identify gaps in the ruminant industry, including a review of the current roadmap.
   - Develop policy recommendations to enhance ruminant productivity.
   - Draft regulatory frameworks to support sustainable and efficient cattle farming.
   - Liaise with government agencies, industry stakeholders, and international experts.
2. **Animal Husbandry/Livestock Specialist, in coordination with the Policy Analyst:**
   - Conduct extensive literature reviews and data analysis to understand current challenges in productivity.
   - Analyze current breeding programs and provide technical input to improve cattle genetics as part of the roadmap strategy.
   - Provide input specifically on improving nutrition and feeding programs to enhance cattle growth and health.
   - Establish best practices for animal health, welfare, and disease prevention.
   - Analyze capacity and technology gaps and provide input on training and extension services required to improve productivity (including climate-smart farming).
3. **Ruminant Value Chain Expert, in coordination with the Policy Analyst and Livestock Specialist:**
   - Conduct extensive literature reviews and data analysis to understand current trends, challenges, and opportunities within the Indonesian ruminant sector.
   - Collect and analyze data related to production systems, market dynamics (including demand patterns), and socio-economic aspects of the value chain.

Qualifications

1. **Policy Analyst Specializing in the Ruminant Sector:**

- Master's degree in public policy, agricultural economics, or a related field, preferably with experience in the ruminant sector.
- Minimum of 10 years of experience in policy analysis and development.
- Knowledge of agricultural policies and the livestock industry.
- Strong analytical and communication skills.
- Excellent oral and written communication skills in English.
- Ability to interact effectively with personnel at all levels, both inside and outside the organization.

2. **Ruminant Value Chain Expert:**
   - Advanced degree (Master's or PhD) in animal science, agriculture, economics, or a related field.
   - Minimum of 10 years of experience working in the ruminant sector, with a strong understanding of the Indonesian livestock value chain.
   - Demonstrated expertise in livestock production systems, livestock processing, and marketing.
   - Capability in conducting market analysis and understanding consumer trends in the ruminant sector.
   - Excellent communication, interpersonal, and analytical skills.
   - Excellent oral and written communication skills in English.
3. **Livestock Specialist:**
   - Master's degree in animal science, veterinary medicine, or a related field.
   - Minimum of 10 years of experience in livestock management and cattle farming.
   - Demonstrated expertise in livestock production systems, including breed selection, nutrition, and management.
   - Experience in developing strategies for sustainable agriculture and livestock production practices.
   - Excellent oral and written communication skills in English.
   - Ability to interact effectively with personnel at all levels, both inside and outside the organization.

Deliverables and Timeline:

The key deliverables and timeline for this works include:

Item	Deadline
A detailed report outlining the current state of ruminant in Indonesia (policy analysis).	15 September 2024
1st FGD workshop	20 September 2024

Preliminary (final draft) roadmap of sustainable ruminant development to achieve meat and dairy self-sufficiency, including proposed measurable targets and strategies – with GoI approval	25 September 2024
2nd FGD workshop: discussion on preliminary draft	30 September 2024
General Policy recommendations to support sustainable ruminant development in Indonesia (input to RPJMN/Renstra)	15 October 2024
Final Roadmap – GoI Approval and Presentation of Final Roadmap	15 November 2024
Identification of project initiatives to be supported by IsDB Final report to IsDB	December 2024