



Access to Seeds Index

**REPORT OF THE FARMERS' ROUND TABLE**

Addis Ababa  
23 & 24 Sept 2013

Farmers' perspective on bridging the gap between the  
smallholder farmers and leading seed companies



## Access to Seeds Index

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## BACKGROUND AND DESIGN OF THE ROUND TABLE CONFERENCE

On 23 and 24 September the first Access to Seeds Index Round Table conference was organized in Addis Ababa. Goal of the Round Table was to collect input from farmers' representatives for the development of the Index. After earlier phases of desk research, surveys and expert consultation, this Round Table was the first dialogue meeting on the Access to Seeds Index. Jeroen de Lange, former World Bank economist, former Dutch diplomat in Uganda and Rwanda and former Member of Parliament of The Netherlands, chaired the meeting.

The aim of the conference was threefold: (1) to discuss and identify the daily challenges that farmers face in access to quality seed, (2) to develop a common understanding of the concept of 'access' as input for the theory of change of the Index and (3) to identify what farmers expect from leading seed companies in light of their daily challenges and the common understanding of 'Access to Seeds'.

In close cooperation with Agriterra eleven representatives of farmers' organizations from Latin America (2), West Africa (2), East Africa (4) and Asia (3) were invited to participate in the conference. To prepare for this conference they were asked to consult their organisations on the three main questions addressed. Also representatives of four NGO's, two research institutes, four local seed companies and participants with a seed industry background were invited to enrich the dialogue in the conference with insights from their respective backgrounds.

**Photo 1** *Participants of the Farmers' Round Table in Addis Ababa, 23-24 september 2013*



As the Round Table was hosted in Ethiopia, it started off with opening speeches by an official of the Agricultural Transformation Agency of Ethiopia, a representative of the Ethiopian Seed Association and the Agricultural Counsellor of the Netherlands Embassy to Ethiopia. In a second round of presentations, the initiative to develop the Access to Seeds Index was introduced, a senior researcher of Bioversity presented an overview of the challenges in global food security and climate change and Fair Planet gave a presentation of a concrete project in Ethiopia bridging the gap between global seed companies and the smallholder farmer.

After the presentations the participatory part of the Round Table started consisting of four rounds of plenary in-depth interview with the farmers' representatives on their daily challenges, a plenary prioritizing of the identified challenges, two rounds of rotating group discussions to create a common understanding of 'access to seeds' and a brainstorm on initiatives that leading seed companies can take to bridge the gap with small holder farmers in the developing world.

To bridge this Round Table with the Round Table to consult the seed industry in Washington DC on 23 October, Julian Kinderlerer, emeritus professor of the University of Cape Town was invited to participate in the conference and report its findings in Washington DC. Orlando de Ponti, former president of ISF and chair of the Industry Round Table also participated in the Ethiopia Round Table.

## INTRODUCTORY SPEECHES

The introductory speeches all underlined the need of partnership in improving access to seeds for the smallholder farmer. There is no golden bullet. Making a sustainable change in agriculture, as Mr. Mirafe Marcos put it, is a complex task that cannot be done by governments alone. Nor by the national seed industry alone, as Mr. Melaku Admassu, explained. National seed companies can benefit from the knowledge and expertise of global seed companies. At the same time the national seed industry can be a bridge to reach out to the smallholder farmers. Mr. Hans van den Heuvel underlined that promoting access to seeds is not alone about strengthening the formal sector, also the informal sector has an important role to play. For instance, as Carlo Fadda claimed, in increasing the diversity of crops used for food production. The current small bases of three crops globally responsible for 60% of the energy intake is very vulnerable in times of climate change. Ido Verhagen explained that the Access to Seeds Index draws its inspiration from the Access to Medicine Index, but acknowledges that the Seeds Index should be fully tailored to the specifics, needs and challenges of the Seed Sector. Finally Shoshan Haran presented an existing model in which her organisation makes varieties available to smallholder farmers that are already available on the shelves of seed companies and by doing so they also create access to germplasm for improving local varieties.



*Mr. Mirafe Marcos, Agricultural Transformation Agency of Ethiopia*

***“Partnerships are key to unlock sustainable change in agricultural production.”***

The event is opened by Mr. Mirafe Marcos, of the Agricultural Transformation Agency of Ethiopia, an agency of the Ministry of Agriculture. Through his agency the Ethiopian government is working on sustainable change in agricultural production. A complex task that cannot be done by governments alone. Improving the Ethiopian seed sector demands for partnerships. Partnerships with companies, community based companies and initiatives, international donors and research institutes. The Agricultural Transformation Agency is a catalyst for making these partnerships work. To build an enabling environment for the private sector, a certification system for seeds is being developed with all stakeholders. Likewise the value chains of maize, wheat and teff are being improved with infrastructure development, bringing in the right varieties, raising the production of seeds and connecting the seed value chain to output markets. In the model advocated by the agency, there is room for the informal seed sector, the intermediate seed sector, community based small commercial companies, national companies and the international seed sector. He welcomes the Access to Seeds Index as an initiative that could encourage international seed companies to invest in public-private or private-private partnerships in Ethiopia. As an example he highlights the public private partnership with Pioneer to introduce new varieties in the Ethiopian seed sector.



*Hans van den Heuvel, Agricultural Counsellor of the Netherlands Embassy*

***“For stake of food security parties have to work together to mobilize knowledge and experiene to make improved seeds available in developing countries.”***

Hans van den Heuvel, Agricultural Counsellor of the Netherlands Embassy in Ethiopia underlines the importance of improved seed for the sake of food security. To feed the ever growing world population, we urgently need to increase farmers' productivity and the production per unit land, water and other inputs. To meet these challenges it is important to actively promote both the formal and informal seed sector. Van den Heuvel was personally involved in the initial meetings on developing the Access to Seeds Index. Motivated by the success of the Access to Medicine Index the initiator believed that the basic principles of an Index could be equally applicable for the seed sector. Acknowledging the differences between medicine and seeds, tailored strategies have to be developed for the Access to Seeds Index on how it is going to persuade seed companies to have an optimal outreach for their improved seeds and generally how they are going to do business with empathy, especially placing themselves in the position of potential buyers who are producing for local and less demanding markets with often associated limited profit margins. He hopes that seed companies from all continents will compete in a race to the top of the Access to Seeds Index and with that show their corporate social responsibility. To align three agenda's, inclusive economic development in developing countries, enhancing food security in the world and development of new markets, there is a need to work together to mobilize knowledge and experience to make improved seeds available to the end-user.



*Mr. Ato Melaku Admassu, chairman of the Ethiopian Seed Association*

***“Great opportunities for the Ethiopian seed sector through partnerships and sharing experiences with international seed companies.”***

Mr. Melaku Admassu ends his speech with a picture of a smallholder farmer. Because that is what he and his organisation work for: “we want to improve his livelihood”. The seed sector in Ethiopia holds great opportunities, because of Ethiopia's stable economic environment, increasing demands for improved seeds and agricultural outputs, increased numbers of farms and agro industries. But at the same time there are serious challenges to tackle, like the absence of effective seed distribution channels, low seed price, an inadequate promotion of varieties, dominance of rain-fed agriculture. The Ethiopian Seed Association consists of 13 registered private seed companies and nine registered public seed companies. All produce maize and only five produce other crops like teff, soya, beans, wheat and cereals. International companies like Dupont Pioneer and SeedCo have their own varieties, national seed companies depend on publicly bred varieties. To improve the seed sector in Ethiopia capacity building, quality control and investment in infrastructure like machinery is needed. He sees great value in sharing experiences and partnering with the international seed sector.



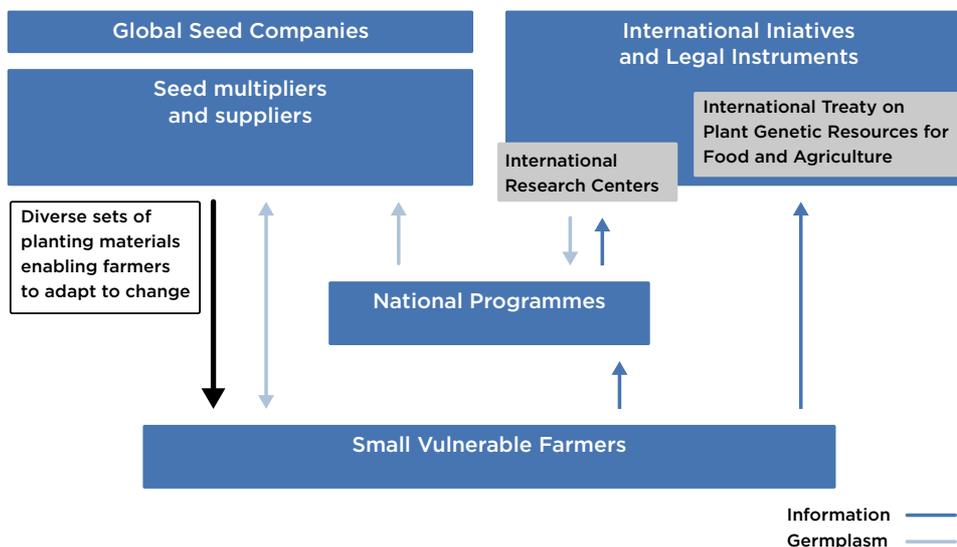
Carlo Fadda, senior researcher at Bioversity International:

### **Raise crops genetic diversity to tackle food security and climate change challenges.**

Almost 1 billion people suffer from hunger. The world's population is expected to surpass 9 billion by 2050, Creating increasing pressure on already scarce natural resources to meet the growing demand for food. Already today about 40% of children under the age of five in sub-Saharan Africa (SSA) are underdeveloped due to malnutrition. Additional challenges like climate change, soils losing productivity, scarcity of water, urbanization encroaching on fertile agricultural land, destruction

of ecosystems and increased demand for biofuels and animal fodder create a 'perfect storm' in which global food security has to be ensured. The road forward has to be about raising agricultural production in resilient food systems, whilst minimizing environmental burdens like pollutions, emissions and biodiversity loss. In this light the heavy reliance on a narrow diversity of crops of the current agricultural system put future food and nutrition security at risk. Agricultural biodiversity, which has been used by generations of farmers, is in danger of disappearing. Only three crops currently provide 60% of the world's food energy intake, making food production extremely vulnerable in times of climate change. Promoting 'Access to Seeds' of only the seeds and crops currently available is not the solution that will bring global food security. Therefore Bioversity International advocates a model in which a higher level of crops genetic diversity is made available to small family farmers to increase productive gains while at the same time maintaining resilience against the probability of crop and ecosystem services losses in the future due to external shock. In developing countries the capacity and diversification of seed suppliers, institutions and other stakeholders are enhanced to enable the provision of local crop genetic diversity planting materials in large enough population sizes to minimize risk for smallholder farms in fragile environments. In his presentation Carlo Fadda introduced a model used by Bioversity in which global seed companies could be direct suppliers of their quality seed to smallholder farmers but more importantly could support national seed programmes and national seed multipliers and suppliers with their knowledge and expertise through partnerships, enabling them to supply diverse sets of planting materials empowering farmers to adapt to change.

**Figure 1** *Linking the diverse seed systems (source: Bioversity)*





*Ido Verhagen, project manager Access to Seeds Index*

**“Improving access to quality seed is an important piece of the puzzle called global food security, to which the Access to Seeds Index aims to contribute.”**

Creating a food secure world is a complex puzzle, with no silver bullet. But improving access to quality seed of improved varieties for smallholder farmers living in food insecure areas is an important piece of the puzzle, Ido Verhagen explains. This is where the Access to Seeds Index draws inspiration from the Access to Medicine Index which successfully leveraged the contribution of the pharmaceutical industry to increase access to medicine in the developing world. The basic philosophy is (1) facilitating multi-stakeholder dialogue on a common understanding of the way forward (2) shining a light on good practice, to learn from it and promote emulation (3) giving credit to companies that show leadership and create innovative practices with impact. The Access to Seeds Index has to be fully tailored to the specifics of the seed sector and the seed challenges. Therefore the Access to Seeds Index is developed in dialogue with stakeholders and the seed sector itself. This Round Table marks the start of the dialogue, providing input for the proof-of-concept of the Index to be published by the end of 2013.



*Shoshan Haran, FairPlanetSeeds:*

**Objective evaluation makes already existing varieties of global seed companies accessible for the smallholder farmers.**

The global seed industry owns thousands of seed varieties for all types of agro-climatic conditions worldwide but these are not accessible to smallholder farmers in resource-poor areas. Shoshan Haran, owner and co-founder of Fair Planet Seeds (FPS) gave a presentation on how FPS tests available improved varieties of high-quality vegetable seeds from three leading seed companies for local conditions, and makes them accessible and affordable for local farmers in Ethiopia. Fair Planet forms a joint aid platform for the seed industry - allowing sharing of costs - for introducing high quality seeds into developing countries. It focuses on vegetables as cash crops, generating high

**Figure 2** *The operational concept of Fair Planet Seeds*



income from small plots and providing means for economic independence. In order to ensure sustainability FPS works with minimal interference in crop practices. Big advantage of the Fair Planet activities is that not only new varieties become available, but also new germplasm for further breeding with local varieties.

The Fair Planet concept is based on five elements (1) Evaluation of all possible relevant varieties (both Hybrids and OPV's) and present the advantages and disadvantages of both, thus providing freedom of choice for the farmers; (2) Objectivity in the evaluation of the varieties' performance, with no bias or commercial view point; (3) Competition from day one - no fears from monopoly regarding seed distribution and pricing, thus providing further freedom of choice for the farmers; (4) Variety trials using agricultural practices that are readily available and affordable to smallholder farmers - to enable sustainable adoption of high quality seeds; (5) Focus on training and capacity building - to ensure transfer of know-how and seed technology to our local partners for long term implementation.

## SEED CHALLENGES OF SMALLHOLDER FARMERS

In four rounds of plenary in-depth interviews all participating farmers' representatives were interviewed on the daily challenges in access to seeds in their perspective regions. The results are a good overview of various challenges, some similar in all regions and some specific. The conference was organized under Chatham House rules, therefore the comments are anonymized.

The representatives from Asia indicated that ensuring global food security comprises more than increasing production. Cultural and ecological values should be taken into account as well. Seed quality also relates to local consumer preferences. They currently notice a huge gap between local farmers and large seed companies. There is no interaction and hence little knowledge in large seed companies of the problems and needs of smallholder farmers. Engaging with local communities, farmer participatory breeding and improving local varieties and indigenous crops are key for providing smallholder farmers with seeds tailored to their needs. All interviewed indicate that freedom of choice for farmers is essential. When global seed companies start playing a bigger role in developing countries, farmers might lose control of their seeds and lose freedom of choice. Seed is power. That is a very sensitive issue. The seed supply from companies is too often not accompanied with extension services or advices. Many farmers re-use hybrid seeds simply because they do not have a choice. There is little knowledge among farmers about why this leads to lower yields. This lack of knowledge leads to reluctance to buy quality seeds again. Farmers, national institutions and other local parties could benefit a lot from the knowledge and expertise of global seed companies. Preferably international seed companies partner with those organisations instead of only bringing in seeds that were produced outside the country. Producing seed locally can reduce the price.

The farmer representatives from Latin America confirm that bridging the gap with the smallholder farmer by leading seed companies should start with getting to know local varieties, local demands and local tastes. It is not only seed companies bringing in quality seeds and germplasm. There are hundreds of varieties in the field that need to be conserved and built upon. Relying only on imported seeds would cause the diversity base to become too small and fragile. They are working now on local seed banks. But recognition of local variety breeds is a problem. UPOV seems a Western invention, however

not very helpful to get local varieties recognized. This requires national laws to adjust standards on a particular country. The question is how can we accommodate our diversity and how can the international community help with that? In Bolivia last year the government brought in improved maize varieties in the Santa Cruz region. They did not produce as promised. It became a complete disaster. Crops failed. It was found out that the seeds were not tested beforehand for the local conditions and climate. What's more, the seeds were maize seed for feed, not for food, although

**Photo 2** *Farmer representatives from Latin America*



they were sold as such. The government should have shown responsibility for both issues: it should have tested the seeds for local conditions and it should have provided the right information. But also the company that sold the seeds should have taken its responsibility not to sell varieties that were not properly tested. In Bolivia there is quite a bit of ecological production. For this ecological production it is important to keep seeds natural, not getting contaminated by imported seeds with GM. Companies should take more responsibility to prevent contamination of nature by their products.

The biggest problem for a large majority of farmers in Africa is that they do not make enough revenues, due to bad quality seeds. Some even fail to feed themselves because yields are too low, let alone that there is surplus to save seeds for the next year. Quality seeds, often not available due to bad distribution systems, are too expensive for these farmers. Government lacks funds and motivation to support agriculture and to setup good extension services. They lack dedication. Companies are hesitant to enter the market because regulation is weak.

Some countries in Africa suffer heavily from climate change. They need to improve their varieties to become more resilient to changing weather, often increasing draughts. Just bringing in imported varieties would not work, first of all because farmers do not have the means to afford imported varieties. There are no facilities to buy seeds on credit. Secondly there is a strong preference for improving the quality of local seeds.

Not only availability and accessibility of quality seed is a challenge but even more so the adoption by farmers. Farmers are conservative when it comes to adopting new varieties. They lack information about these varieties and they are not trained to use these varieties. We need to fill this gap in the training of farmers.

The demand for improved varieties is increasing in some countries but the supply is too low. Partnerships are key to improve this. We all have to accept the value of working together. It is happening, but not on a large scale. The international seed companies are solely focussing on getting their seeds to the farmer through traders. They are hardly reaching out themselves to the smallholder farmers to provide extension services or to get feedback on the use of their seed. If they would, they would find out that the traders they rely on are not doing a good job. To ensure that their quality seed actually reaches the farmer in the right condition, they should cooperate with local parties to improve quality of distribution. Cooperatives can also play a vital role in extension services. Of course it is impossible for global seed companies to reach out to all smallholder farmers. They could partner with, train or support cooperatives to play this role. All interviewed agree that if leading seed companies would come on a larger extent to developing countries, it would be best to focus on building up national capacities rather than just importing their existing seeds.

**Photo 3** *Farmer representatives from West Africa*



**Photo 4** *Farmer representatives from East Africa*



# PRIORITIZING THE CHALLENGES

Throughout the interviews the Access to Seeds team kept track of the challenges mentioned. This resulted in a total of 17 clusters of challenges (see below). All participants were invited to vote for their priority in this list, which could be one of the clusters or one of the challenges mentioned within a cluster. This resulted in the following top 10 priority challenges, phrased by the participants:

## Top 10 Priority Challenges

- 1 **Recognition of local seed systems:** in improving access to seeds, farmers should not only be seen as end-users but also be empowered as producers of seeds.
- 2 **Freedom of choice for farmers:** to ensure access to seeds freedom of choice is vital, between multiple varieties, multiple suppliers and multiple systems (formal and informal).
- 3 **Need for seeds that meet local demand:** just importing quality seeds will not do the job. Local breeding, involvement of farmers and feedback systems are needed.
- 4 **Lack of access to credit:** access to credit should be accompanied by access to insurance, in case crops fail.
- 5 **Introduce improved varieties in local markets:** farmers need quality seed that show good germination results, are harnessed against climate change, produce better crops (shelve life, fit for transport).
- 6 **Need for seeds that are ecologically sound:** fit for local conditions, little inputs and no contamination effects on other crops.
- 7 **Enhance niche markets for local products:** creating markets for indigenous crops and breeding quality seeds, for it could open new business opportunities
- 8 **Ethics in business:** companies are accountable for the results and impact of their seed, especially when introducing new seeds to new markets
- 9 **Need for capacity building:** by partnering with national companies and institutions, leading seed companies can play a vital role improving the quality of national seed systems
- 10 **Need for extension services:** distribution of quality seeds should be accompanied with agronomical advice and extension services.

## Seed challenges identified in the farmer interviews

- 1 Development of **improved local varieties /indigenous crops**
  - **Poor seed quality** of local varieties
  - Improve seed quality of **indigenous crops**
- 2 **Climate change** affects crops → need for other seeds
- 3 Seeds that meet local demands
  - **Participatory breeding** to include local preferences and knowledge
  - LSCs should **produce seed locally** instead of import
  - Seeds for crops that match **consumer preferences**
  - Breed varieties for specific **local conditions**
  - **Local variety testing**
  - Seeds that **empower farmers**
  - **Lack of foundation** seed available to farmers
- 4 Seeds that are **ecological sound**
  - **Preserve biodiversity**, local varieties, local seed cultures
- 5 **Freedom of choice** for farmers
  - Ensure **multiple seed suppliers**
  - Empower local seed systems and **support local seed banks**
  - **Not outcompeting** local seed systems
- 6 Because of hunger, seeds are **used as food**
- 7 **Distribution systems** to smallholder farmers fail
  - Distribution: **distance** to seeds outlet
  - **Lack of efficiency in distribution** systems
  - Counterfeit and **fake seeds**, or expired seeds
  - Institutions to **control quality**
- 8 Introduce available quality seeds /improved varieties in local markets
  - Seed companies have **millions of varieties on the shelf**
  - **Test for local use** in local conditions
- 9 **Affordability**, price of seeds is too high
- 10 Lack of **access to credit** for farmers: takes too long
  - Lack of **finance** and support to improve agriculture
- 11 **Insurance systems** to compensate when crops fail due to weather
- 12 **Extension services** for farmers are lacking or of poor quality
  - Lack of **technical capabilities** and help
- 13 **Capacity building** of farmers
  - Improve **knowledge** of farmers
  - **Illiteracy** is barrier for using improved seeds
  - **Lack of knowledge** among farmers that improved seeds are available
  - **Age of farmers** relates to new technology production and adaptation
- 14 Bad quality seeds → bad yields → **low revenues** for farmers
  - Even **quality of improved seeds** is not good according to farmers

- 15 Access to **output markets**
  - Seeds producing crops with **longer shelf life**, able to transport
  - Ensure continuous supply of seed to **meet demands food producers**
  
- 16 **Better state regulation**
  - **Regulations that recognize** formal and informal seed systems
  - **Harmonization** seed laws
  - Improving seed quality needs better **state regulation** and strong national institutions
  
- 17 **Ethics** in business
  - **Accountability** of companies for result & impact of their seeds

## COMMON UNDERSTANDING OF 'ACCESS TO SEEDS'

When talking about Access to Seeds we need a definition of what we consider to be access. Inspired by Nobel prize winner Amartya Sen, we took off stating that access at least contains the dimensions of availability, accessibility and affordability. Is the seed that farmers need available at all, in other words does it exist? Can farmers actually get hold of this seed, also at the moment when they need it? And can they afford to buy this seed? In the preparation for the conference, the dimensions of utilization and rentability were added to this definition. Utilization in the case of smallholder farmers means do they have the knowledge and the means to use the seed properly. Rentability is about whether farmers can make a reasonable profit and living when growing this seed.

During the conference in Addis Ababa, a sixth dimension was added as a result of in-depth discussion with the farmers' representatives. It is the dimension of autonomy. With autonomy, the farmers brought into perspective the farmer not only as an end-user but also as a producer of seed. Important in this aspect are the community based seed systems, for which currently legal recognition does not exist. The following sections further explain the different dimensions of access.

### **Availability**

The essence of the dimension of availability refers to the development of high quality varieties that are suitable for needs, preferences and local conditions of smallholder farmers. These preferences are more than only achieving better yields. Farmers would like to have a wider choice of varieties. From the perspective of biodiversity, a wider choice is not only a preference but also a necessity for sustainability and resilience. There is a strong appeal for improving local varieties: when breeding for local demands, it is important to check what is already locally available. In many parts of the world there are local varieties of essentially good quality that have adapted to local circumstances. Participatory breeding is one of the ways to breed for local demands and to really become demand oriented.

### **Accessibility**

Accessibility is strongly related to efficient and reliable distribution systems. Is the seed supply secure, is the seed of guaranteed quality, is it available at the time that the farmers need it? Too often seeds appear to be fake or contaminated. One way to ensure these aspects is partnering with reliable suppliers and investing in capacity building of the distribution systems in order to get good quality control systems, storage facilities etc. in place. Other aspects of accessibility are a free choice of seed supplier(s) – indicating that the market allows for multiple seed suppliers – and the desire for local seed multiplication in order to minimize risk of suppliers being out of stock.

### **Affordability**

Affordability is a very straightforward dimension. It refers to a fair and affordable price, access to credit to buy seed up front and insurances to make sure that loans can be paid back also if hazards happen on the way.

## **Utilization**

Utilization refers to a diversity of extension services and capacity building. Important aspects in this sense are agronomic advice, capacity building in the field of integrated farm management, and aftersales and feed back systems about the experiences with the use of seed and with the distribution system. Participants indicate that cooperation with local partners is essential for knowledge transfer and sustainability of the solution.

## **Rentability**

Profitability refers to the profitability of the crops that farmers can grow with the seed. Can they make a profitable business with their seed? Do they have access to output markets? Although leading seed companies cannot influence all of these parameters directly, they can give themselves notice of the most important characteristics of the market for which they sell seed: does the climate require crops with long shelf life, robustness etc.? These are characteristics that seed companies can select and breed for. Another aspect of rentability is to work with as minimal middlemen as possible in order to keep costs low for both farmers and companies, hence creating better chances for a decent rentability.

## **Autonomy**

As mentioned before, the representatives of farmers have explicitly added autonomy to the dimensions of access from the different regions of developing countries. Autonomy refers to farmers not only being end-users but also being producers of seed. Crucial in this aspect are the community based seed systems, for which currently legal recognition does not exist. In the current legal systems – both in the international framework and in the many local frameworks – only the public and private seed systems are recognised. Farmers indicate that breeders' rights, access to germplasm for further breeding and strengthening and conservation of local varieties need to be officially recognised as a precondition for enhancing the access to quality seed of leading seed companies.

## STRATEGIC PHILANTHROPY AS A SOLUTION TO BRIDGE THE GAP?

*The conference ended with an impassioned plea by emeritus professor on IP, Patents and Biotechnology Julian Kinderlerer, who will voice the Addis Conference's results at the Industry Consultation that takes place in Washington at the end of October.*

“What we are talking about is the joint responsibility of government, companies, farmers and consumers. We cannot neglect any of these parties. If we change something at one point, it will influence the other parts of the chain. There are a few reasons why we are doing this and why we should do this. First of all we want to improve the lives of subsistence farmers and lift them out of poverty. Secondly we need to increase the produce of semi-commercial farmers and increase their profitability.

Whilst doing so, we have to take into account a number of things. We need to recognise that local varieties of food are crucially important. Food is not just food for the stomach but also food for the culture and the soul. However, food habits are changing. In China more meat is eaten nowadays than rice. This is happening because people have more money to spend. We also should recognise the demographics that we have to deal with. The population is increasing rapidly in the developing world, but decreasing in the developed world. We do not only need to have enough food, but in the places where we need it. Urbanisation is an issue in this sense as well. Finally we need to take into account the harm that we do to our environment. We have to hand it over better, or at least no worse, than how we received it from our parents. We have to think out a concept of integrating agriculture: it's not just the plant, but also what happens before and after.

What are we going to do to help the smallholder farmer? The essence is to do more than just provide seed. We have to find a way to ensure that the best seeds are available on their farms that they see as part of their culture, but that enable them to grow crops that feed them, their families and their local markets. If that means that we have to import varieties from outside then cross them with local varieties, so be it. We have to provide them with independent advice and support. You can't just give seed. Provide the seed and pay me back when you can afford it. In order to do so we also have to provide insurance.

Then IP, a sensitive but crucial topic. Not everyone realises how much time, effort and money is put into developing new varieties. There is no way that companies are going to do this if they receive no return on investment. So how are we going to combine the needs of companies to do so and the needs of the smallholder farmers who cannot afford the expensive seeds? My suggestion is: the big companies have to provide their germplasm for specific purposes only in developing countries. Exactly in the same way as we have asked pharmaceutical companies to do in AIDS medicine. As I once heard a senior of one of the leading seed companies say “we have to think of a concept of strategic philanthropy”. First I thought it to be horrible. But later I realised that he is right: we have to give it away now, so that they can buy our seeds in 10 years' time. I do believe that this index provides a way to stimulate that what can be done also must be done.”

## OBSERVATIONS BY THE ACCESS TO SEEDS TEAM

What was clearly underlined by this Round Table, is that 'access to seeds' is a two-way process. Not just securing the supply of quality seeds to the smallholder farmer as end user but also reaching out to farmers, their cooperatives and other local and national institutions to ensure the availability of quality seed tailored to their needs; Seeds that are suitable for local conditions and requirements, fit for local ecological demands or addressing local preferences and tastes.

In line with this, access to seeds is about partnerships. National seed companies, national research institutes and other actors can benefit from partnerships or engaging with global seed companies, learning from their expertise and knowledge. In reaching the smallholder farmers with agronomical advice and extension services also partnerships with cooperatives, NGO's or distributors are mentioned. Bridging the gap with the smallholder farmer is not a task to complete by international seed companies alone; there is a multitude of actors to engage with. Also partnering with financial institutions to provide access to credit and insurance is an interesting field to investigate.

From a cultural point of view but even more because of the need to support resilience against climate change, the need to provide and preserve a diversity of varieties is essential. Current business models seem to converge to a very select number of crops and varieties, which is illustrated by the presentation on the Ethiopian seed companies who are in majority focussing on the production and supply of maize seeds.

Lack of knowledge among smallholder farmers is a point to address. Not only to realize that improved varieties are available that can enable them to raise their yields or in the field of capacity building. There also seems a misperception on the space farmers have to breed with improved varieties even when IP law in place. IP is essential, as one of the participants underlined, to create business cases for innovation but it does not need to be a barrier for further breeding as many perceive.

It is often said that developing varieties fit for the conditions of new markets is a capital intensive and long-term process. The example of Fair Planet illustrated that this does not need to be the case. Many - some said millions - of varieties are available on the shelves of seed companies that are known to be suitable for the climate, altitude and day lengths of the currently untapped markets. This might be low hanging fruits to start with.

An important point that was made is the relevance of informal seed systems for access to seeds. The lack of recognition of the value of informal seed systems by international and national regulation makes them vulnerable. Farmers should have a choice when it comes to access to seeds. Many farmers currently do not have access to quality seeds meeting the standards common in agriculture in the developed world. Increasing access to those seeds should not imply reducing the possibility to choose for seeds provided by the informal system.

Governments do have an important role to play in creating the enabling environment for the formal seed sector to play its role. As became clear when discussing the daily seed challenges, many governments currently fail in putting the right regulations and institutions in place. The Access to Seeds Index is not about assessing the performance of governments, but creating transparency on how and where seed companies are able to play their role will also provide insights on which countries have their enabling environment in place.



**APPENDIX**

# APPENDIX

## LIST OF PARTICIPANTS

	<b>Titel</b>	<b>First Name</b>	<b>Surname</b>	<b>Organisation</b>	<b>Stakeholdertype</b>	<b>Country</b>
1	Mr.	Yehasab	Ashalew	Solidaridad Ethiopia	NGO	Ethiopia
2	Mr.	Shamiran	Biswas	Christian Commision for Development in Bangladesh (CCDB) (NGO)	NGO	Bangladesh
3	Mr.	Philip Kipkulei	Cherono	Cooperative Alliance of Kenya (CAK)	Farmer organisation	Kenya
4	Mr.	Boba Abel Nego	Dakouo	Association des Organisations Professionnelles Paysannes	Farmer organisation	Mali
5	Mr.	Lemma	Dessalegne	Ethiopian Seed Association	Local Seed Company	Ethiopia
6	Mr.	Carlo	Fadda	Bioersity International - Kenya (CGIAR)	Academia/NGO	Italy
7	Mr.	Berhanu	Gebremedhin	Ethiopian Seed Association	Local Seed Company	Ethiopia
8	Mr.	Fekade	Glmeskel	Ethiopian Seed Association	Local Seed Company	Ethiopia
9	Mr.	Gadisa	Gobena	Ethiopian Seed Association	Local Seed Company	Ethiopia
10	Mr.	Alon	Haberfeld	Fair Planet Seeds Ethiopia	NGO (with Seed Industry background)	Israel/Ethiopia
11	Mrs.	Shoshan	Haran	Fair Planet Seeds Ethiopia	NGO (with Seed Industry background)	Israel/Ethiopia
12	Mr.	Fasil	Kelemework	Self Help Africa	NGO	Ethiopia
13	Mr.	Tewolde	Kiflemarim	Cooperative Farmers Union/ Vegetables and Fruit Growers Cooperative Union Ltd. (Meki Batu)	Farmer organisation	Ethiopia
14	Mr.	Julian	Kinderlerer	University of Capetown and TU Delft	Academia	South Africa
15	Mr.	Ssekabiito Joseph	Kitayimbwa	Uganda National Farmers Federation (UNFFE)	Farmer organisation	Uganda
16	Mr.	Tesfane	Kumsa	Anno Agro Industry	Local Seed Company	Ethiopia
17	Mr.	Giovanni	Mita Ticona	Asociacion de Organizaciones de Productores Ecologicos de Bolivia (AOPEB)	Farmer organisation	Bolivia
18	Mr.	Justus Mochache	Monda	Pyrethrum Growers Association/Kenfap (PGA)	Farmer organisation	Kenya
19	Mr.	Orlando	de Ponti	Independent Seed Industry Specialist, Former President of the ISF	Seed Industry	Netherlands
20	Mr.	Renato	Salazar	Former executive director SEARICE Philippines, Oxfam-Novib Network	NGO	Philippines
21	Mr.	Jonjon	Sarmiento	Pambansang Kilusan ng mga Samahang Magsasaka (Pakisama)	Farmer organisation	Philippines
22	Mrs.	Ruth Murtiasih	Subodro	Serikat Paguyuban Petani Qaryah Thayyibah (SPPQT)	Farmer organisation	Indonesia
23	Mr.	Nassirou	Talatou	Fédération des Coopératives Maraichères du Niger (FCMN)	Farmer organisation	Niger
24	Mr.	Jorge Irán	Vasquez Zeledón	Unión Nacional de Agricultores y Ganaderos de Nicaragua (UNAG)	Farmer organisation	Nicaragua
25	Mr.	Christiaan	Biamond	Seed specialist, senior researcher	Access to Seeds	Netherlands
26	Mr.	Deniz	Horzum	Researcher, business administration	Access to Seeds	Netherlands
27	Mr.	Jeroen	de Lange	Chair of the conference , Former worldbank economist, Former MP of the Dutch Parliament	Independent	Netherlands
28	Mr.	Jaap	Satter	Ministry of Foreign Affairs	Steering Group ATSI	Netherlands
29	Mr.	Ido	Verhagen	Projectmanager	Access to Seeds	Netherlands
30	Mrs.	Joke	Vroegop-de Bruijne	Stakeholder manager and event organiser	Access to Seeds	Netherlands

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