**Expert Consultation Workshop - Measuring Seed Sector Performance in Africa**

**(Seeking synergies, matching supply and demand for information)**

**Palm Court Hotel, Abidjan, Cote d’Ivoire, 25-26 October 2016**

**Workshop Summary**



**Action Points**

* On the basis of the Workshop outcomes, The Indices groups will continue to refine their methods and review their coverage and portfolios.
* The demand or information user side will build up better awareness of what they should pursue and how that helps them to enhance their seed activities.
* AfricaSeeds and ISSD Africa will:
* Continue building on the momentum and knowledge gathered during the workshop, to develop a package that will be suitable for use as a unified seed sector monitoring and evaluation system as soon as possible..
* Provide an appropriate indicators package in time for use in the current Review Mechanism before the door is closed.
* Build up necessary capacity to provide a coordination function as well as provide a platform, in collaboration with ISSD Africa, for facilitation of activities at the national level.
* Build on initial ideas for mechanisms and agendas for the further elaboration on matching supply and demand measuring seed sector performance in Africa
* Develop their collaborative efforts to facilitate and coordinate the way forward, starting with the publication of a comprehensive Proceedings of the Workshop and, push for the implementation of capacity building interventions at national level
* Assist national authorities to enhance their use of seed sector performance tracking and measuring indicators in their M&E processes.
* Build alliance and collaboration with Indices for coordination, facilitation of field activities.

1. **Background and Meeting Objectives**

The *Expert Consultation Workshop on Measuring Seed Sector Performance in Africa; Seeking synergies, matching supply and demand for information*, was held in Abidjan, Cote d’Ivoire, on 25-26 October 2016. This event, which was co-organized by AfricaSeeds[[1]](#footnote-2) and the Integrated Seed Sector Development Africa Program (ISSD Africa)[[2]](#footnote-3) with support from Centre for Development Innovation (CDI) of Wageningen University and Research (Wageningen UR), Deutsche Gesellschaft für Internationale Zusammenarbeit (GiZ), the Bill & Melinda Gates Foundation (BMGF) and the African Union Commission (AUC). The workshop was embedded in the wider contextof seed sector development related to the Comprehensive Africa Agriculture Development Programme (CAADP)process of the AUC[[3]](#footnote-4) and its *Malabo Declaration on Accelerated Agricultural Growth and Transformation for Shared Prosperity and Improved Livelihoods[[4]](#footnote-5).*

The objectives of the Abidjanworkshop were to:

* Contribute in the provision of measuring instruments with respect to seed sector performance linked to the CAADP Results Framework
* Promote the understanding in terms of demands for information on seed sector performance in Africa for the CAADP Results Framework, and specific demands for national governments, regional economic communities, private sector, development and donor organizations (‘information users’)
* Promote the understanding of a diversity of initiatives measuring key aspects of seed sector performance in Africa (‘information suppliers’)
* Identify variations, duplication and gaps among initiatives measuring aspects of seed sector performance in Africa
* Contribute to the development of mechanisms and agendas for further elaboration in terms of matching supply and demand for information on seed sector performance

Expected Deliverables of the Workshop were as follows:

* Insights and overview on initiatives measuring seed sector performance
* Matching supply and demand in terms of measuring seed sector performance
* Communication opportunities on the diversity of indicator initiatives
* Initial ideas for mechanisms and agendas for the further elaboration matching supply and demands measuring seed sector performance in Africa.
  1. **Participants**

Some fortyspecialistsattended the *Expert Consultation Workshop on Measuring Seed Sector Performance in Africa*. They included representativesof ten leading continental and regional organizations: African Union Commission,New Partnership for Africa’s Development Planning and Coordinating Agency (NEPAD NPCA),Common Market for Eastern and Southern Africa (COMESA)/Alliance for Commodity Trade in East and Southern Africa (ACTESA),Economic Community of West African States (ECOWAS), West and Central African Council for Agricultural Research and Development (CORAF/WECARD), African Seed Trade Association (AFSTA), Forum for African Seed Testing (FAST), African Biodiversity Conservation and Innovations Centre (ABCIC),and AfricaSeeds. In addition, representatives from eightnational seed stakeholders and seed programs contributed to the deliberations,including: Ministries of Agriculture,National Seed Quality Control Bodies, and bodies acting as Agricultural Transformation Agencies and National Agricultural Research Systems.Eleven international research and development organizations with activities in the seed sector were also represented, including:the International Seed Federation (ISF), International Institute for Tropical Agriculture (IITA), Bioversity International, International Fertilizer Development Center (IFDC), Centre for Development Innovation (CDI) of Wageningen University and Research (WUR),Royal Tropical Institute (KIT) and Future Agricultures Consortium (FAC)/Institute for Development Studies (IDS).Also present were officers of major donor agencies, African Development Bank (AfDB),Bill & Melinda Gates Foundation,GiZ, and the US Agency for International Development (USAID). Participants came from16 African countries (Benin, Burkina Faso, Burundi, Cameroon, Cote d’Ivoire, Ethiopia, Gambia, Kenya, Mali, Mozambique, Nigeria, Sierra Leone, South Africa, Tanzania, Zambia and Zimbabwe), as well as several EU countries and the USA. Finally, representatives of five organizations engaged directly in designing and implementing indices for measuring the performance of seed sector played a key role in the workshop. These were:Enabling Business in Agriculture (EBA)/World Bank, The African Seed Access Index (TASAI)/Market Matters Inc., Access to Seeds Index (ASI), the Agrobiodiversity Index (Bioversity) and Bill & Melinda Gates Foundation (and its National Seed Dashboard).

**2. Setting the Scene**

The organizers of the workshop, AfricaSeeds and ISSD Africa, stressed the need for measuring seed sector performance to support the CAAPD Malabo process andits Results Framework, while assuming a critical role facilitating a process in which the needs of other national and regional stakeholders in the seed sectorwere addressed. The idea behind the *Expert Consultation* grew out of the *10th CAADP Partnership Platform Meeting* (CAADP @ 10) in Durban, South Africa, in March 2014, where a set of high-level indicators for measuring seed sector performance were initially discussed by a group of regional specialists. These weresubsequently updated and refined at the *ISSD Africa Action Research Planning Workshop* in Entebbe, Uganda, in February 2015, which then formed the basis for conceptualizing the Abidjan workshop.

During the opening session, representatives ofthe African Union Commission’s Department of Rural Economy and Agriculture (DREA) and the NEPAD Planning and Coordinating Agency outlined the vision and objectives behind the CAADP Malabo process,stressing the importance of increasing the understanding of the continental perspective on measuring the performance of the seed sector at national and regional levels. They highlightedthe opportunity to link the workshop outcomes to the Malabo commitments toimprove the implementation of the *CAADP Results Framework*, which sets out the goals, priority actions and targets of theAUC’s agricultural transformation agenda[[5]](#footnote-6). They also indicated that similar processes are required among the various sectors captured under CAADP and emphasizedthe importance of this initiative and the valuable role AfricaSeeds and ISSD Africa are playingin facilitating this process.

**3. Analysis of the Supply Side**

Adopting a strategy based on tracing demand and supply of seed sector information, the workshop strategy aimed at establishing a meeting point between supply and demand.This was done through plenary presentations to establish positions and further deliberations on those positions, through working groups.The first step in this strategy was a session in which the five initiatives engaged in measuring seed performancewere introduced to show the extent of their coverage and relevance to the various angles of the African seed sector. It was pointed out that there is already a demand for seed sector performance indicators – and there have been initiatives established to respond to this demand. However, there is a need now for indicatorsto meet the specific demands of CAADP andforothers such as national programs, regional economic communities, private seed sector, developing partners etc. Consequently, the workshop aimed to map and share the initiatives and where possible match initiatives, as suppliers, to demand. The current active initiatives on the supply side were presented as follows:

* **Enabling Business in Agriculture/Seed component/World Bank (EBA/WB)**– as global context - the focus is on monitoring legal and regulatory issues to improve business performance. This Index is not just about seed sector, but improving the enabling environment for agriculture more broadly. The aim is to inform national and regional planning and policy making.
* **Access to Seeds Index/Access to Seeds Foundation (ATSI/ASF)** – Has global context, but also has an East African Regional component. The focus is on the private sector – seeking to improve access to quality seed.
* **The African Seeds Access Index (TASAI)/Cornell University & Market Matters Inc.** – The focus is Africa-specific and is 100% about seed and the seed sector. It looks specifically at seed sector performance at country level, from the enabling environment to specific indicators in the formal seed sector.
* **Agrobiodiversity Index/Bioversity(ABDI)**– Has global focus; seed is only about one quarter of the focus, more generally about Agro-biodiversity. Still under development, but the focus will be at country level.
* **National Seed Dashboard**/**Bill & Melinda Gates Foundation (NSD/BMGF)**– Mainly focuses on the national level to inform Bill Gates and his Ag Team when engaging with Heads of State and senior policy makers.

The Indices are compared with each other in Table 1 below:

**Table 1:**

**A Comparison of the Seed Sector Indices**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Characteristics** | **Seed Indices** | | | | |
| **EBA/**  **World Bank** | **ATSI/ASF** | **TASAI** | **ABDI** | **NSD/BMGF** |
| **Objectives** | Examines and monitors key regulations that govern the agribusiness sector. By focusing on key elements of the food production and distribution value chain, EBA hopes to promote regulatory systems that enable sustainable and inclusive agribusinesses to take root and thrive. | Seeks to create transparency on current activities of companies to clarify and understand the role of the seed industry. ATSI provides an evidence base to the conversation on where and how the seed industry can play a role. It aims to encourage seed companies to step up their efforts guided by a multi-stakeholder agenda and inspiration from peers. | Promotes the creation and maintenance of enabling environments for competitive seed systems serving African farmers. It is this enabling environment that TASAI seeks to measure, track, and compare across African countries. | The entry point is diversity. The ABDI is a consistent, long-term monitoring system for agrobiodiversity. The purpose is to measure and manage agricultural biodiversity in food systems and to guide and stimulate public and private sector policies and investments in food systems – e.g., green bonds. | The National Seed Dashboard seeks to:   1. Inform BMGF’s own smallholder farmer (SHF) Strategy 2. Foster transparency and accountability in the agriculture sector 3. Begin to harmonize agricultural measurements across sectors 4. Support governments to better diagnose their underlying system challenges by identifying where performance is lacking |
| **Regional / Country Focus** | Covers 40 countries worldwide; plan to scale up to 62 countries. In Africa, countries include:   * Burkina Faso * Burundi * Cote D’Ivoire * Ethiopia * Ghana * Kenya * Mali * Mozambique * Niger * Rwanda * Sudan * Tanzania * Uganda * Zambia   Future countries from 2016:   * Liberia * Benin * Malawi * Cameroon * Senegal * Zimbabwe * Nigeria | The Access to Seeds Index focuses on 48 countries in four regions with a strong smallholder presence; food security challenge; and agricultural potential:   1. South and Southeast Asia (12 countries) 2. Latin America (12 countries) 3. Eastern Africa (12 countries):  * Burundi * Ethiopia * Kenya * Madagascar * Malawi * Mozambique * Rwanda * South Sudan * Tanzania * Uganda * Zambia * Zimbabwe  1. Western Africa (12 countries):  * Benin * Burkina Faso * Cote d’Ivoire * Gambia * Ghana * Guinea * Guinea-Bissau * Liberia * Mali * Niger * Nigeria * Sierra Leone * Togo | Four pilot countries (2013-14; 2015:   * Kenya * South Africa * Uganda * Zimbabwe   Expanding to cover COMESA countries under COMSIS initiative (in partnership with ISSD Africa and ReSAAKS):   * Burundi * Egypt * Kenya * Madagascar * Malawi * Rwanda * Swaziland * Uganda * Zambia * Zimbabwe | Global in focus. Specific countries to be determined.  ‘Pioneer countries’ for first phase (2017) - Ethiopia, Peru, Nepal and Italy | Applied to BMGF countries in 3 countries in Africa - Ethiopia, Nigeria and Tanzania and 3 states in India |
| **Methods** | * Focus on 6 topics on various aspects related to production inputs and market enablers = improve agricultural production and marketing (Seed, Fertilizer, Machinery, Finance, Transport and Markets * Use secondary data from WB and governments * Not measuring the Seed System – but focusing on the Legal and Regulatory Environment * Raw data is presented by country with each data point used to score countries * Country profiles are created with scores in each topic for each indicator: - score in one topic are broken down by indicator + time and cost | * Ranks seed companies by measuring and comparing their efforts to improve access to quality seeds of improved varieties for smallholder farmers in developing countries. The methodology was developed through a process of extensive stakeholder consultation and expert review. The *ATSI 2016* focuses on global seed companies and regional companies in Eastern Africa. * Seven measurement areas Each with four types of indicators  1. Commitment 2. Performance 3. Transparency 4. Innovation  * Weighted Scorecard approach - Total score is sum of weighted indicator scores in all areas * Relative ranking - Comparing companies with  each other, not to an ideal state | * Built on in-depth country studies conducted by academics and seed industry experts * Focus on top 4 crops that are important to food security * Use secondary data, primary data from industry surveys, key informants and expert knowledge * Emphasis on formal sector | * Elaborating indicators in 4 areas:  1. Access 2. Quality/Regulation 3. Supply 4. Innovation  * Enabling environment – Score Card * ABD Index and Tracker Tool – circular linkages between:   Food systems 🡪 Conservation systems 🡪 Seed systems 🡪 Farming Systems   * Genetic diversity for major crops * Species diversity * Functional diversity e.g. soil fertility, nutrition, climate change adaptation * Social diversity * Plan to reuse and layerdifferent secondary datasets – (‘big data’): e.g. FAO genetic resources + fill in some gaps with ‘crowd-sourced’ data (directly from farm-level) * Outputs will be produced for two key stakeholder groups: Public and private investors and Consumers and civil society | * Working on 10 ‘Dashboards’ across 10 Geographies – limit each to 10 indicators (assembled by small groups of Gates’ staff and a few externals) * Recognize that these are only starting points * Learning from other successful Score Cards and Dashboards – start simple, evolve over time, add new ones gradually over time: * Agricultural Transformation * Agricultural Productivity * Livestock * Fertilizer * Extension Systems * Gender * Food Security * Nutrition * Policy * Land (planned) * Infrastructure (planned) * R&D (planned) and * *Seed Systems* * Adapted Logic Model from Gates’ PHCI initiative * Focus on Logic Model Framework for Assessing Seed Sector – like Logframe on surface |
| **Indicators** | 16 seeds indicators clustered into 3 categories:   1. Encouragement of plant breeding 2. Seed registration 3. Seed development and certification | The Index assesses company activities in seven areas with in total 73 indicators:   1. Governance & strategy 2. Public policy & stakeholder engagement 3. Genetic resources & intellectual property 4. Research & development 5. Marketing & sales 6. Capacity building 7. Local seed sector advancement (Global index); Production (Regional index) | 16 indicators divided into 5 categories:   1. Research & development 2. Industry competitiveness 3. Service to smallholder farmers 4. Seed policy and regulations 5. Institutional support | * Focus on four dimensions of sustainable food system dimensions:   + 1. Nutritious, diverse diets     2. Productive and resilient farms and landscapes     3. Farmers’ access to quality, diverse seeds (seed specific dimension)     4. Integrated conservation of ABD * The third dimension on ‘Farmers’ access to quality, diverse seeds’ includes: * Diversity in seed systems * Diversity in production * Diversity in markets and consumption * Diversity in conservation efforts * It also emphasizes the links / interactions between these elements | * Developed Logic Model for Assessing Seed Sector across the five dimensions along chain with 12 indicators:  1. System - Policies and regulation (national); Systems and processes (national) 2. Inputs - Financing (national); Infrastructure and institutional resources (national), Human resources (national) 3. Delivery - ‘The missing middle’ – hard to get to this level of granularity – but need to link the system and inputs and delivery to the outputs and outcomes – Multiplication (by crop/crop type/geographies), Quality (by crop/crop type/geographies); Distribution (geography), Promotion (extension – by Geography) 4. Outputs - Availability, Financing 5. Outcomes - SHF Use (by crop/crop type/geography)  * Each of these areas has a set of indicators behind them |
| **Governance** | EBA is a partnership within the WBG between the Agriculture Global Practice and Development Economics Global Indicators experts.  Support from several donors includes: the Bill & Melinda Gates Foundation, the UK Department for International Development, the Danish Ministry of Foreign Affairs, the United States Agency for International Development and the Government of The Netherlands. | The Index is published every two years by the Access to Seeds Foundation, an independent organization supported by the Bill & Melinda Gates Foundation and the Dutch Ministries of Economic and Foreign Affairs. | TASAI is a collaborative initiative between Cornell International Institute for Food and Agricultural Development and Market Matters Inc. In-country partners include local agricultural universities, seed traders’ associations, relevant government departments as well as NGOs working in seed sector development. | Governance arrangements are still being sorted out. It may require different governance structures for the country and investor audiences / stakeholders | Managed by the Agriculture Development Program of BMGF |
| **Next Steps** | * Production and distribution of *EBA 2017* * WB country offices engaging with governments: integration in policy dialogue * Engaging more with CSOs, private companies and research community – make sure EBA data are relevant * Refining indicators – there won’t be an *EBA 2018*; will be gathering feedback from users and collecting data for *EBA 2019* | * Using Company scorecards to inform individual companies * Next ASTI report will be produced in 2018; will be collecting data and extending the analysis during 2017 * Regional Indexes will be developed to focus on leading seed companies in each of the focal regions | COMESA Seed Information Systems (COMSIS) - ISSD Africa, TASAI and ReSAKSS Partnership - Plan to combine existing tools to set up comprehensive seed information system for COMESA | * Launch event at CBD event in Mexico in December 2016 * Jan 2017 – launch of Feasibility study in pioneer countries – Ethiopia, Peru, Nepal, and Italy – and with private partners * Developing investment instrument with private sector stakeholders * Rolling out to additional locales and companies * Periodic reporting | * Planning to |

It was noted that the five Index Initiatives are relatively young and some are in the roll-out stage. Mostleanon the policy and business side of the spectrum of indicators but virtually all remain weak on measuring actual outcomes that are measured as access to and use of quality seed of improved varieties by smallholders at farm level that result in increased productivity, income increase and poverty reduction. This is notably problematic for the Biennial Review Mechanism as there is a huge gap in data availability and given the priorities and funding constraints of the above initiatives, it seems highly unlikely that this gap will be closed in the medium term.

**4. Matching Supply with Demand**

**4.1 Focus on Variations, Duplication and Gaps**

In a group work, participants conducted an exercise to analyze the dimensions of current supply (from the perspectives of the six main user stakeholders), focusing on variations, duplication and gaps. The exercise, which yielded the matrix shown in Table 2 below,was considered as a very useful output especially as a guide to aid the Indices in further developing their initiatives.

**Table 2:**

**Matching Supply with Demand: Focus on Variations, Duplication and Gaps**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Focus of Analysis | Private Sector | Development Organisations | Regional Economic Commissions | National | Donors | African Union/ NEPAD/CAADP |
| 1. Variations |  |  |  |  |  |  |
|  | Methodology  sources  processing  Interpretation | Target beneficiaries – variations on the end-users targeted by the indices | Focus on the private sector – but from very different perspective | Methodologies | Different levels and measuring different things | Company vs. country focus |
|  | Regulatory or Sector or Company | Focus on field and vegetable crops |  | Stakeholders | Potential complementarities between EBA (regulations) and TASAI (marketing metrics) and possibly ABD (some aspects of informal sector | Low vs. high country coverage |
|  | How to use?  Productivity  Pressure  Monitoring impact | Differences in coverage of market enablers |  | Coverage |  | Strong vs. weak governance structure (related to ownership over indexes) |
|  |  |  |  |  |  |  |
| 2. Duplications |  |  |  |  |  |  |
|  | requests to provide information made too often | Same sources of data for some indicators | Duplication of some indices – e.g.  Varietal release;  Policy and regulatory environment;  Quantity, volume and yield data | WB – NADB both advising governments |  | EBA and TASAI both focusing on policy environment |
|  | TASAI/EBA – both focus on regulation | Multi-stakeholder consultation |  | All addressing formal sector |  | ATSI and TASAI both focusing on and collecting data from private companies |
|  | Too many metrics – kills the power of indices | Most indices are on field crops |  |  |  |  |
|  |  |  |  |  |  |  |
| 3. Gaps |  |  |  |  |  |  |
|  | CAADP – language not clear | Lack of value chain approach | Missing regional dimension – e.g.  Import-export of seed; supply and demand across the region; harmonisation; PPPs | Linkages with the informal sector | Difficult to say whether the seed sector is really serving smallholder farmers – need to drill down (e.g. DNA finger-printing) | Ownership and interpretation of data – not demand driven |
|  | Markets are regional; Has implications on national indices | Largely missing focus on informal seed systems | Access and transparency related to data on seed sector performance for regional planning and policy making | Linkages with existing information systems missing / not clear | Inclusion of informal seed sector – lack of indicators in each index | Weak focus on West and Central Africa. Much better coverage in East and Southern Africa region |
|  | Insights into market size, behaviours, preferences, values | Quality control in the seed value chain (e.g. vegetatively propagated seed) |  | Linkages with research and development organisations missing | Economic indicators – e.g. farm gate price, seed affordability, yield performance | Quantity and quality of seed for all crops |
|  | Info on user / public on various indices / no confusion |  |  | Consultations with national stakeholders | Generally lack of actionable indicators – quantify certain indicators to drive action | Performance of informal seed sector not addressed |

**4.2 Requirements of the Six Demand Stakeholder Groups**

To properly appreciate the process of matching supply and demand, the BMGF Conceptual Framework for Measuring Seed Sector Performance was presented and discussed to be used as basis for the subsequent group exercise of recording the main stakeholders’ requirements for information from the supply side, shown in Table 3 below.

The presentation of the BMGF Conceptual Framework highlighted the five key ‘domains’ for monitoring the entire seed sector, as follows:

* 1. ***Systems***
  2. ***Inputs***
  3. ***Delivery***
  4. ***Outputs***
  5. ***Outcomes***

The matrix in Table 3resulted from group work using the BMGF Conceptual Framework to illustrate main elements of information demands, within the five key domains, by the key stakeholders: the private sector, development organizations, regional economic commissions, national governments, donors and AU/CAADP/NAEPAD.

**Table 3**

**Composite Table of the Information Requirements on Seed Sector Performance**

**by the Six Stakeholder Groups**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | A. Systems | B. Inputs | C. Delivery | D. Outputs | D.+E. Outputs / Outcomes | E. Outcomes |
|  | Enabling policies | No. of accessions in crop improvement progs | Continental/ regional Coordination | Number of local / regional priority crops with certified seeds available |  | Seed system meets demand of agro-value chain |
|  | Status of Seed policies/regulations |  | ICT utilisation in the seed sector | Number of varieties released in last 3 years |  | Utilisation of quality seed by farmers |
|  | Quality of seed regulatory system | Access to publicly released varieties | Knowledge transfer and capacity building (e.g. ICT) | Farmers choices of seed bred for their particular needs |  | Percentage of farmers using quality seed |
|  | Variety protection / | Info on germplasm and modalities for (exclusive) access | volume of seed imports / exports under REC label | Performance of improved crop varieties |  | Farmers knowledge on end use of new improved varieties |
|  |  | Number seed companies / |  | Agroecology adaptation of new varieties |  | Demand of use of improved crop varieties |
|  | Extent of certification process | Geospatial mapping – abiotic/biotic; | Tailored financial products and services for seed businesses | Crop variety development |  | Utilisation of GMOs in Africa? |
|  | Variety catalogue release and registration processes | Organised small-scale, domestic private breeders | Financing opportunities for seed entreprises | Seed sales parameters (price, credit, cash) seeds are affordable for farmers |  | Adoption levels of new or improved crop seeds for specific crops |
|  | Implementation of regulations – QA; variety mgmt. | Up to date seed catalogue of released varieties | Seed company uptake and promotion of new public varieties | True-to-type, genetic purity of seed (binary) |  | Seed variety renewal rate in farmers’ fields |
|  | Extent of management – number and composition seed system decision-body | Registry of local varieties and list of CWR protected areas | Current private sector operations – e.g. number of seed companies active | Seed prices, especially relative to productivity potential |  | Area weighted average number of years since purchase of officially released seeds (recycling) |
|  | Vision and strategy for public expenditure | Crop forecast analysis | Seed entreprise development – | Quantity of seed sold |  | Average age of varieties |
|  | Budgetary allocation to seed sector dev’t | Human resources capacity | Availability and efficiency of EGS | Intra-African seed trade |  | Percentage of annual crop area planted |
|  | Level and distribution of public expenditure | Membership of international seed organisations | Average distance from agro-dealers |  |  | Yield productivity, data (land, labour), on-farm use (LSMS), ) |
|  | Recognition of STAs in agric agenda | STA governance change and membership | Mechanisms available to farmers to access seeds |  |  |  |
|  | Public sector investment in seed | Quality of Seed Traders Associations |  |  | Availability of seed at farmer level | Productive African seed sector – impact! |
|  | Investment in the seed sector |  |  |  | Affordability of seed, |  |
|  | Phytosanitary issues |  |  |  | Quality of seed as required by end-user |  |
|  |  |  |  |  |  |  |

‘Coding by colour:

* National
* RECs
* CAADP
* Private Sector
* Dev’t Orgs
* Donors
  1. **Clustering of Emerging Themes Systems**

On the basis of the matrix in Table 3, the following theme systems emerged:

* Seed policy and regulation implementation

– being addressed by EBA and TASAI

* Public expenditure relevant to seed sector

– a lot of question marks about how this will be addressed and work to be done – looking at National Agricultural Investment Plans and commitment to seed sector development

* Inputs

R&D / breeding / crop improvement – to some degree, measured already – especially publicly bred varieties

* Information management

– statistics / data for monitoring – still lacking - inadequate capacity development – both public sector and private (STAs)

* Delivery

Quite diverse – many topics / information requirements

Coordination of delivery systems – at different levels

* Outputs

Much emphasis on number and type of preferred varieties

Some specific issues

* Outcomes

Whole cloud on use of quality seed of farmer-preferred varieties

Understanding of availability, affordability, quality and accessibility (both output/outcome)

**4.4 Points of Emphasis – Interests of Stakeholders**

The differing interests of the Stakeholders were noted as follows:

* National – more focus on Systems, Inputs and Delivery
* RECS and Donors – more on Outputs and Outcomes
* CAADP, Development Organizations and Private Sector–interests are spread across the spectrum

**4.5 Important Observations from the matrix matching supply with demand**

* From left to right across the matrix (i.e. from Systems e.g.Regulatory to Outcome), both the ease and cost of data collection increases
* It is logical that the indices presented tend to skew to the left
* To solve the data issues on the right side, there is need to think about how to tap into other data collection systems – e.g. LSMS (only 8 countries), other agricultural statistical surveys, etc.
* At present, one must rely on qualitative data through expert consultation and farmer engagement until there is built up capacities in quantitative data collection.
* Issues on Outputs on quality of seed used by farmers, etc. can be collected, but can be a challenge to gather
* On Outcomes – a pure accountability question, if we’re investing so much in the system we need to know it is having a positive impact on the farmer.

**4.6 Reflections from the Discussions: Matching Supply and Demand**

Representatives from the private sector, as well as from the national, regional and continental level, presented their needs or information demands as follows:

* **View of Index Groups**

Considered the workshop as opportunity for improving the indicator initiatives and for working together to address gaps. The workshop also presented opportunity to learn and begin a process of stakeholder engagement which, among others, will enable the Index groups to update their methodologies.

* **Government perspective:**

Main interest of the Government side is to make sure that seed indicators interact with and align with the national statistical agencies to ensure they work closely together .It was recognized that the Government side has to pursue identification of the indicators that are important from their perspective and how they go about collecting the required data to inform their seed sector planning.

* **View of African Union**

In the context of the **CAADP biannual review process**, it is important to develop high-level indicators for tracking seed sector performance across the entire continent – a big challenge for governments

* **View of CAADP/NEPAD:**

Indicators are partly about accountability; at the same time, they are about informing decision-makers to know that the job is being done right – improved efficiency and effectiveness. Further, from the perspective of CAADP, the workshop served as a helpful process for informing the design of the seeds component for the Results Framework, informing the CAADP Results Framework process going forward anddeepening understanding on the seed sector.

* While the CAADP Results Framework sets out the vision/goals, what is missing is the package of indicators to measure progress being made, not only in the formal but also the informal sector.
* **Private Sector:**

**ISF and AFSTA** representing the private sector perspective

* Noted that indicators provide the basis that evidence is being brought to bear to make better decisions and investments
* Stressed the need to keep focus on the objective behind the data collection process.
* Stressed the need to recognize that seed is only a part of the wider agricultural system and therefore there is a need to establish a between the performance of the seed sector and the wider system.
* Expressed the willingness of the private seed sector to engage and dialogue on this agenda
* Reminded that strengthened national seed trade associations are critical for the next steps.
* ISF identified several information gaps for the private sector and advocated for stronger property rights, national seed trade associations and easier market access.
* **ACTESA, TASAI and ISSD Africa (**Representing the Regional perspective)
* Elaborated on their joint indices activities in Eastern Africa and announced that the COMSHIP team was learning from the workshop discussions to enrich the experiences so far chalked.

COMESA, presented their Seed Information System (COMSIS) that evaluates seed systems in COMESA countries and influences both national and COMESA-level improvements in seed trade harmonization and seed sector performance.(This is a collaboration with TASAI and ISSD Africa, and is also be first effort to include informal seed systems within national index, implemented over several countries annually).

In discussions, Participants agreed that:

* Deciding on appropriate indicators should continue to be a multi-sectoral and multi-stakeholder process,
* Should aim at a level below the high level indicators specific to seed in the CAADP Results Framework.
* Stressed the importance of synergy which is currently missing!
* The public sector and private sector have different indicator requirements; there will be indicators needed to address the diverse data requirements by crop, agro-ecology, country contexts etc.
* Given the complexity of the seed sector, rankings generally give a ‘snapshot’ for comparison between, for example, countries; but it is the underlying Dashboards and indicators that give the necessary details.
* There is need to determine the main objective of the performance measuring exercise, aiming, for example, to encourage companies to do better – improving access to quality seed for small farmers.
* There is need to help small farmers to make good use of the data and urged enhanced data collection with the aim of improving decision making.

**5. Conclusions and Way Forward**

Stacking the ‘demand’ against the ‘supply’, it was clearthat significant gaps exist;most crucially, the insufficiency relating to indicators for measuring a “conducive” environment and the lack of data on the output and outcome stages of the seed value chain. Given the institutional set-up of the indices, this gap will be very difficult to close keeping in mind that outcome data are generally more difficult and expensive to measure and more dependent on detailed and field-based activities. The workshop deliberationsalso showed the different interests of the various stakeholders (e.g. development partners and continentalinstitutionsfocus on outcomes while the private sector focuses on policies) and therefore the need to look beyond the needs of CAADP Results Framework.

In the areas that are covered, data collection efforts need to be coordinated. For that, it is envisaged, as a next step, to systematically arrange the proposed indicators and to assign roles and responsibilities to the contributing institutions.AfricaSeedsand ISSD Africa have the responsibility forcoordinating this process. They will to link it up to the continental CAADPagendaand Biennial Review Mechanism, while also continuing collaborating with the different indices within this context.

**6. Key Action Points:**

**6.1 Enhancing Cooperation and Coordination:**

All Indices expressed a willingness to exchange information and learn from each other, especially to improve their products. AfricaSeeds will build up necessary capacity to provide a coordination function as well as provide a platform, in collaboration with ISSD Africa, for facilitation in activities at the national level. AfricaSeeds will also develop capacity to assist Index groups in their processes to bring about change of focus, methodology or product etc. While ISSD Africa can provide the Indices some elements of their work which require to be done together, AfricaSeeds can form a link between Indices and CAADP and between Indices and national seed programs, providing the Indices with the legitimacy within formal CAADP.

**6.2 Developing Indicators for the CAADP Biennial Review Mechanism:**

Although only a short period remains available, efforts will be made, based on consensus from the Workshop, to assemble reliable outcome data for the current reporting cycle of the CAADP Review Mechanism. The absence of such data will hamper the Biennial Review Mechanism (at least from the seed perspective). Beyond the short term effort, work will be continued, building on the momentum and knowledge gathered during the workshop, to develop a package that will be suitable for use as a unified seed sector monitoring and evaluation system as soon as possible..

**6.3 Meeting the Immediate Needs of the Biennial Review Mechanism:**

The technical note and concept of the CAADP Biennial Review Mechanism has been mostly developed and was aimed to be finalized two weeks after the workshop. Concerned stakeholders were urged to rush to have a final batch of indicators from the seed stakeholders to be used in theReview Mechanism. One of the key successes of the Workshop is that AfricaSeeds and ISSD Africa have obtained adequate material from the workshop deliberations to be able to provide an appropriate indicators package in time for use in the current Review Mechanism before the door is closed to further entries.

**6.4 Advancing the Interests of the Stakeholders:**

Much interest exists to continue the process initiated by the workshop.

* The Indices groups: will continue to refinetheir methods and review their coverage and portfolios.
* The demand or information user side will build up better awareness of what they should pursue and how that helps them to enhance their seed activities, while also understanding that several measuring tools exist that can contribute to enhancing accountability(CAADP) and measuring impact.
* AfricaSeedsand ISSD will develop their collaborative efforts tofacilitate and coordinate the way forward, starting with the publication of a comprehensive Proceedings of the Workshop and, pushing for the implementation of capacity building interventions at national levels,
* AfricaSeeds and ISSD will assist national authorities to enhance their use of seed sector performance tracking and measuring indicators in their M&E processes.
* AfricaSeeds and ISSD will build alliance and collaboration with Indices for coordination as well as facilitation of field activities with Indices.

**7. Impact of the Variation of Participants:**

The wide diversity in the stakeholder representation is worth noting since it contributed to making available a wide range of expertise and resources which enhanced the achievement of the workshop objectives. In summary, the following are mentioned:

* **The group of donors**, mentioned above who co-sponsored the workshop financially as well as made available key experts who acted as facilitators and resource persons
* **The five Indices Initiatives** who served as source of current knowledge on Indicators and assisted to navigate the topic to arrive at useful recommendations
* **International research and development organizations** who contributed specialized knowledge on seed sector development.
* **The Continental Organizations**(represented by AU, CAADP and NEPAD and others) who provided the overarching ambiance within which the Indicators must be operated and who must provide the needed legitimacy for key actors.
* **The Regional Organizations** (Represented by RECS) who must rapidly gain current knowledge on the Indicators topic as well as be in a position to lead in related efforts at regional and national efforts
* **The Private Sector** (represented by ISF and AFSTA) who brought on board the commercial dimensions of the indicators platform and showed also a differing basis for seeking indicators other than for CAADP purposes,
* **Governments**(represented by senior policy makers) shared with the workshop shortfalls and needs at the national level and in turn took home an enhanced awareness of the need of relevant indicators in their countries’ M&E systems for seed
* **National seed programs** (represented by their leaders) contributed practical knowledge relevant to the field to ensure that recommendations from the workshop fit in with national requirements. As well, their participation has laid a good foundation for the post-workshop processes that are likely to go on at the national level.

1. AfricaSeeds (originally called the African Seed Network) was established in 1988 by the Food and Agriculture Organization of the United Nations (FAO). The mandate is based on its institutional relationship with AUC and the African Seed and Biotechnology Programme for which it acts as Lead Implementer and Coordinator. See: <http://africaseed.jimdo.com/> [↑](#footnote-ref-2)
2. The ISSD Africa Program was launched in 2014 with support from BMGF and the Government of The Netherlands. It aims to support the development of a market-oriented, pluralistic, vibrant and dynamic seed sector in Africa for providing both female and male smallholder farmers access to quality seed of superior varieties. The Program uses the ISSD approach, which has been endorsed by the AUC as contributing to the implementation of the ASBP and the seed agenda of CAADP. See: <http://www.issdseed.org/issd-africa> [↑](#footnote-ref-3)
3. CAADP is Africa’s policy framework for agricultural transformation, wealth creation, food security and nutrition, economic growth and prosperity for all. In Maputo, Mozambique in 2003, the African Union Summit made the first declaration on CAADP as an integral part of the New Partnership for Africa’s Development (NEPAD). The principles and values that informed the implementation of CAADP in its first decade (2003-2013) continue to guide the implementation modalities in its second decade (2015-2025), namely: African ownership and leadership; accountability and transparency; inclusiveness; evidence-based planning and decision making and harnessing regional complementarities. See: <http://www.nepad-caadp.net/> [↑](#footnote-ref-4)
4. *The Malabo Declaration* is the African Union’s recommitment to the principles and values of CAADP which sets out a ten year agenda for accelerating agriculture growth and transformation. See: <http://tinyurl.com/h9o4o9s> [↑](#footnote-ref-5)
5. *The CAADP Results Framework* establishes expected results and impacts, and is therefore a guide to developing, planning and implementing investment programs in the second decade of CAADP. It also ensures the tracking, monitoring and ongoing formative evaluation of existing programs. It provides specific benchmarks and milestones for Africa’s agricultural development agenda as well as the basis for aligning and harmonizing programs at country and regional level. *The Framework* combines a logical flow of three levels of results setting outthe WHY (Level 1), WHAT (Level 2)and HOW (level 3) of consolidating and stepping up CAADP implementation. See: <http://tinyurl.com/jyx3qrr> [↑](#footnote-ref-6)