



Access to Seeds
Index



Main changes in the Index's methodology

Farmers, companies, and governments alike contribute their experience and expertise to review the Access to Seeds Index methodology: five major changes are expected for next time.



Bridging the gap between the
world's leading seed companies
and the smallholder farmer

Five main changes in the Index's methodology

1. Extend coverage of regional seed companies

In improving access to quality seed, the regional seed industry plays a key role, as the first Access to Seeds Index highlighted with its evaluation of the regional seed industry in Eastern Africa. For the second Index, the regional scope extension towards Southern Africa, West and Central Africa and South and Southeast Asia is being considered.

Regional Indexes focus on leading seed companies with an integrated seed business model (breeding, production, distribution, adoption). Selected companies are defined by seed revenues, coverage and peer recognition. In addition, only companies with activities in multiple countries, or a dominant market share in one country, are being considered.

To develop the regional scope, the Access to Seeds Foundation has engaged regional research partners that possess a network of focal points in each country within the scope of the Index. The identification of companies is determined by business intelligence, research and stakeholder consultations.

2. Add categories to global seed company assessment

The first Global Access to Seeds Index focused on two categories of globally leading seed companies: active in field crop seed (up to seed revenues of US\$ 1 billion) and active in vegetable seed (up to seed revenues of US\$ 100 million).

Two additional categories are being considered. The first category is global leaders in potato breeding and potato seed trade. Potatoes are sometimes part of the portfolio of global field crop or vegetable seed companies but are more often the domain of specialized companies.

The second category would incorporate regional leaders with a global presence (e.g. activities on multiple continents) that do not meet the seed revenue threshold above but are too relevant to the objectives of the Access to Seeds Index to leave them out.

3. Remain focused on food crops, potentially add fodder and cotton

Following the Index's aim to evaluate the seed industry's contribution to global food and nutrition security, the Index focuses on field crops and vegetable crops. In addition to activities in global crops - defined as major crops according to FAOstat - the Index also evaluates company activities in local crops, sometimes referred to as orphan or underutilized crops.

One of the questions to be addressed by the landscaping study for the Regional Index focusing on South and Southeast Asia is whether cotton should be included. Although not a food crop, it is a relevant crop for smallholder farmers, particularly in India. Also, it is a dominant crop in the portfolio of many regional seed companies. Excluding this crop could potentially result into a less meaningful evaluation of these companies.

Some companies and stakeholders have advocated to include seed for fodder crops in the Index's scope. A question on fodder crops will be added to the questionnaire to determine current activities of these crops by companies included in the assessment.

4. Sharpen focus of measurement areas and reduce number of indicators

Companies are assessed and ranked using a weighted score card approach. In a total of seven measurement areas, companies are assessed with indicators classified in four categories: Commitment, Performance, Transparency and Leadership. Following an evaluation of the first Index and feedback from companies and stakeholders, a regrouping and reprioritization is proposed.

The measurement area ‘Genetic Resources and Intellectual Property’ will be split into two separate areas in order to sharpen the focus on each subject. In addition, the measurement area ‘Local Seed Sector Advancement’ will be renamed into ‘Seed Production’, which was the most important topic in this area. To maintain a total of seven measurement areas, the areas of ‘Governance and Strategy’ and ‘Public Policy and Stakeholder Engagement’ will be merged.

The results of the first Access to Seeds Index enabled an evaluation of the added value of each indicator. Although stakeholder feedback also produced several new indicators, the total number has been brought down to 57, which is a reduction of 15 indicators.

The indicator category ‘Innovation’, intended to reward activities by seed companies that go a step further than peers or introduce new approaches in the seed industry, was renamed ‘Leadership’. It became evident from company feedback that the label of ‘innovation’ caused misinterpretation of results in this indicator category.

The first Access to Seeds Index gave most weight to performance indicators and the areas of Research and Development and Marketing and Sales. The weights for the second Index are subject to advice by the Expert Review Committee.

5. **Expand market information**

The first Access to Seeds Index focused on a qualitative evaluation of the companies’ business models. Additionally, it provided insights in presence and portfolio of seed companies. Following stakeholder feedback and advice from the Expert Review Committee, the next edition aims to include more information on quality, reach and impact.

An online data platform is currently under development, which enables companies to provide additional information such as age of varieties, package sizes and seed types (OPV or hybrids) per crop and country.



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