



Access to Seeds
Index

A Farmers' Perspective on the Access to Seeds Index 2016 And The Way Forward

Report informed by farmer consultations in Goma (DR Congo), Hanoi (Vietnam), Ouagadougou (Burkina Faso) and Johannesburg (South Africa).

Amsterdam, January 2017



AGRICORD



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Agency for Development
and Cooperation SDC



Kingdom of the
Netherlands

BILL & MELINDA
GATES foundation

The Access to Seeds Index is published by the Access to Seeds Foundation, an independent organization supported by the Bill & Melinda Gates Foundation and the Ministries of Economic and Foreign Affairs of the Kingdom of the Netherlands. The farmer consultations were made possible through additional financial support from AgriCord and the Swiss Agency for Development and Cooperation (SDC).

Introduction

The first Access to Seeds Index was published in February 2016. It provides a unique insight into current efforts by seed companies to make quality seeds available to smallholder farmers. The objective of the Index is to identify best practices and leadership, to provide an evidence base to the conversation on where and how companies can play a role and to encourage companies to step up their efforts.

To guide the seed industry in a direction that meets the needs, demands and capabilities of smallholder farmers, an active participation by smallholder farmers and farmers' organization in the process of developing the Access to Seeds Index and discussing its findings, is critical. Therefore, the Access to Seeds Foundation was pleased with the decision by AgriCord and SDC to support four consultations with farmers' organizations in 2016.

The Access to Seeds Foundation was invited to participate in a conference organized by regional farmers' organizations in the African Great Lakes Region in Goma, Democratic Republic of Congo in July 2016. In August, the foundation was invited by the Vietnam Farmers Union, AsiaDHHRA and the Asian Farmers' Association for Sustainable Rural Development to organize a workshop as part of their annual meeting in Hanoi, Vietnam.

In addition, the Access to Seeds Foundation organized two roundtable conferences on the Access to Seeds Index in Western Africa and Southern Africa respectively, in close cooperation with regional farmers' organizations. In October 2016, ASPRODEB and ROPPA hosted a roundtable conference in Ouagadougou, Burkina Faso. And SACAU hosted the roundtable conference in Johannesburg, South Africa in November 2016.

In total 35 farmers' organizations from 26 countries participated in these four events, with over 135 participants. This report contains a combined overview of the main outcomes of these events as well as separate regional workshop reports.

We would like to thank all participants for their active participation in the discussions. It provided valuable feedback for refining the next edition of the Access to Seeds Index. Also, we would like to thank the hosting organizations in Goma and Hanoi for allowing us to present and discuss the Access to Seeds Index at their meetings. And we thank the organizing partners of the roundtables in Ouagadougou and Johannesburg for an excellent organization of these meetings.

A special thank goes to the Ambassador of the Kingdom of the Netherlands in Mali for opening the Roundtable in Ouagadougou and the Agricultural Counselor of the Embassy of the Kingdom of the Netherlands in South Africa for opening the roundtable in Johannesburg. Finally, our thanks go to AgriCord and SDC for enabling us to have these consultations.

Amsterdam, January 2017,



Ido Verhagen
Executive Director
Access to Seeds Foundation

Table of Contents

Introduction	2
Executive Summary / Main Outcomes	4
Report Farmers' Consultation Great Lakes Region	7
Report Farmers' Consultation South and Southeast Asia	11
Report Farmers' Consultation Western Africa	16
Report Farmers' Consultation Southern Africa	23

Executive Summary / Main Outcomes

The findings of the first Access to Seeds Index 2016 were discussed with farmers' organizations at four occasions in Goma (DR Congo), Hanoi (Vietnam), Ouagadougou (Burkina Faso) and Johannesburg (South Africa). In total 35 farmers' organizations from 26 countries participated in these four events, with over 135 participants.

A tailored agenda for each meeting

The four meetings differed in approach and design, also the outcomes of the consultations during each of these events vary.

- In Goma, the Access to Seeds Index was invited to present its findings at a conference focusing on the role of farmers' organization in improving access to seeds for smallholder farmers. The presentation therefore focused on the cases identified by the first Regional Index for Eastern Africa in which the assessed companies cooperate with farmers' organizations. It illustrated how the Index can provide an evidence base to discussions on improving access to quality seeds.
- The meetings in Hanoi and Ouagadougou mainly focused on familiarizing the farmers' organizations with the Access to Seeds Index and discussing support for developing a Regional Access to Seeds Index for Asian countries and West Africa. In both meetings, the consultations focused on identifying the access to seeds challenges in each region and the potential role farmers' organizations see for the private sector to tackle these.
- The Roundtable in Johannesburg went one step further, looking at the methodology of the Access to Seeds Index, inviting farmers' organizations to shine their light on where and how the methodology could be refined based in the baseline measurement of the first Index. This event therefore marked the start of the actual revisiting of the methodology which is on the agenda for the Access to Seeds Foundation in 2017.

Climate change drives access discussion

A striking difference between the 2016 consultations and the farmers' consultation the Access to Seeds Foundation organized in 2013, was the attention given to the impact of climate change. Since 2013, farmers have seen and experienced how changes in weather conditions are having an impact on growing seasons and growing conditions. Most notably in Hanoi and South Africa, the impact of climate change was mentioned as a reason why farmers' organizations are interested in the Access to Seeds Index as an instrument to facilitate the discussion between farmers and the seed industry. Farmers need access to climate resilient varieties and they see the private seed sector as an important channel to supply these.

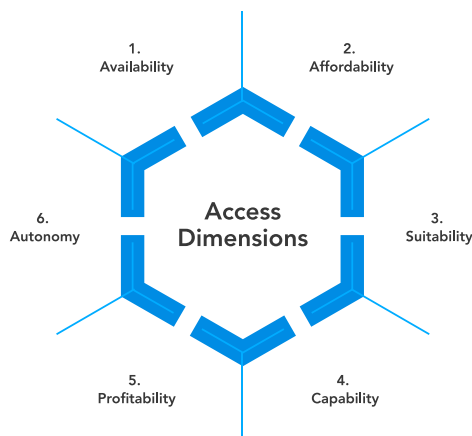
A critical role for farmers' organizations

In all discussions, participants underlined the need for the Access to Seeds Index to acknowledge the role of farmers' organizations and cooperatives. The farmers' system of saving, multiplying and distributing seed is often overlooked and lacks recognition in policy frameworks and regulations. Whereas – as was most prominently discussed in Goma – the so-called formal system should not be seen as a replacement of the traditional farmer system, nor should both systems be seen as competitors. From the perspective of farmers and access to seeds it would be valuable to see both as complementary systems. Farmers' systems play a critical role in areas not reached by the formal channels or in supplying seeds for crops that lack commercial interest for companies. The meeting in Ouagadougou concluded that it would like to see the feasibility of a Regional Access to Seeds Index for Western Africa explored. But is also underlined that for this region it should include the role of farmers' organizations, cooperatives and community seed enterprises in its assessment.

Definition of 'access to seeds' reconfirmed

An earlier farmer consultation roundtable in Addis Ababa in 2013 resulted in a definition of 'access to seeds' which forms the basis of the methodology of the Access to Seeds Index.

Following the discussions in Hanoi, Ouagadougou and Johannesburg on access to seeds challenges in each region, the definition with six dimensions was reconfirmed. Although the discussion pointed out that the most prominent challenges can be grouped under the first four dimensions: availability, affordability, capability and suitability.



Availability

In the discussion on availability at all events, the issue of the availability of foundation seed was raised. Lack of foundation seed hampers seed production which subsequently leads to a lack of seed used for food production. Also, adverse effects of subsidy schemes were discussed. Due to a late launch of subsidy programs, companies start late with seed production which affects quantity and quality of seed available. It was acknowledged that both topics relate to the role of governments rather than the role of the private sector.

Affordability

Affordability does not always relate to price. Insurance schemes and loans can provide ways to improve affordability for smallholder farmers. Mainly during the discussion in Johannesburg it was discussed that affordability also relates to value. 'Good seeds don't cost, they pay', was said. Helping farmers to see the value of the use of good seed should be addressed in training programs.

Capability

The capacity levels of farmers, knowledge and information remain an important aspect that affect access to seeds. Discussions in Goma, Ouagadougou and Johannesburg focused on the examples of seed companies working together with seed companies to help raise capacity levels of farmers. Interestingly, many of the participating farmer organizations acknowledged that to date they do not work or engage with seed companies in this respect.

Suitability

The emphasis on suitability as a dimension affecting access to seeds links mainly to climate change. Fluctuating weather conditions negatively impact productivity. This raises the demand for climate resilient seed varieties and therefore the need to address this in dedicated research and development activities.

An increased role for seed companies and its potential adverse effects

Although compared to discussion in 2013 there seemed to be more support for a growing role of the formal seed sector among farmers' organizations, many organizations are also cautious about potential adverse effects. These should be addressed in the Access to Seeds Index according to the farmers' organizations.

Loss of diversity

Farmers' organizations in Hanoi and Ouagadougou stated that they have seen preferences of farmers change to using seeds supplied by seed companies over traditional varieties. This in turn leads to less diversity in the fields and a potential loss of varietal diversity. This could cause future problems as saving this diversity for future generations is necessary to conserve a broad genepool available for breeding.

Farmers rights

Also, many farmers' organizations, most notably in Hanoi stated that increased company activity can impact farmers' rights. A complaint, both heard in Hanoi and Goma, was that government regulations seem to favor the interests of companies and lack recognition of farmers' rights and knowledge.

Priority setting for measurement areas and indicators

During the roundtable conference in Johannesburg participants were invited to provide feedback on the current topics addressed by the Access to Seeds Index. For four areas, priorities for indicator development were identified.

Area	Indicator topic
Research & Development	<ol style="list-style-type: none">1. More focus on regional consumer market-oriented research (breeding informed by local consumer preferences)2. Include neglected/local crops in breeding programs3. Include biological control in breeding programs (i.e. less pesticides)4. Focus on breeding for climate resilient varieties and crops.
Marketing & Sales	<ol style="list-style-type: none">1. Adopt adequate seed packaging and labeling.2. Increase distribution to remote villages (number of seed outlets needs to expand outside of urban centers).3. Improve quality assurance standards.4. Incorporate a larger diversity of hybrids and OPVs in portfolio.
Capacity Building	<ol style="list-style-type: none">1. Provide extension services based on good agricultural practices (GAP), including an emphasis on building knowledge on environmental conservation (such as intercropping) and health issues related to use of chemicals and fertilizers.2. Improve storage facilities of seed products and focus more on post-harvest management.3. Invest in education for youth/next generation farmers and empower them to be successful farmers.
Production	<ol style="list-style-type: none">1. Improve quality management of seed production and maintenance programs.2. Comply with and monitor fair labor conditions and international social standards.3. Increase the involvement of smallholder farmers in the seed value chain (i.e. production) to transfer knowledge and build capacity.

The way forward: involvement of farmers' organizations in Index Cycle

The Access to Seeds Index is produced in a so-called two-year Index Cycle. In the first year, based on stakeholder consultations, the methodology is developed. With this methodology in the second year the Access to Seeds Index is developed. After publication the Index Cycle starts again by discussing the findings and insights of the published Index that informs methodology development. As such, the Access to Seeds Index is an ongoing learning process.

The productive farmers' consultations and their valuable outcomes have strengthened the ambition of the Access to Seeds Foundation to engage farmers' organizations (via AgriCord) in the Index Cycle in a more structural way. This could take place at various moments such as by (1) providing input for and validating of landscape studies that inform methodology development; (2) representing the farmers' perspective in expert review committees that evaluate the methodology (3) discussing the Index' findings in farmers' roundtables after each Index and (4) representing the farmer's perspective in dialogue meetings with the seed industry and other stakeholders.

Report Farmers' Consultation Great Lakes Region

Goma, 12-14 July, 2016

Introduction

In close cooperation with farmers' organizations from the Democratic Republic of Congo, Rwanda and Burundi, CSA, Praepard and AgriCord organized a seminar in Goma on improving access to seeds for smallholder farmers in the Great Lakes Region. Specific attention was given to the role of farmer cooperatives in the production of quality seeds.

The event was opened by His Excellency Christophe Ndibeshe, Provincial Minister of Agriculture of Nord Kivu. The Access to Seeds Index was invited to present the findings of the Regional Access to Seeds Index for Eastern Africa which partly covers the Great Lakes Regions.

The following report highlights the main results of this consultation:

- A. General topics addressed in the conference
- B. Presentation of the Access to Seeds Index
- C. Photo Report



Participants	Representatives from FOPAC (Fédération des organisations des producteurs agricoles du Congo Nord et Sud Kivu), LOFEPACO (Ligue des organisations des femmes paysannes du Congo), IMBARAGA and INGABO from Rwanda and CAPAD from Burundi.
Organizers	FOPAC, LOFEPACO, IMBARAGA, INGABO, CAPAD, CSA
Supported by	AgriCord, Swiss Agency for Development and Cooperation



A. General topics addressed in the conference

In the Great Lakes Region, 80% of the population earns a living in agriculture. Looking at seeds, two systems work in parallel: the farmer system in which farmers and cooperatives save, produce and sell seeds and the so-called formal system which supplies certified seeds.

- **Inadequate supply of seeds by formal system**

Certified seeds are supplied by companies and government bodies. Quantities do not meet the demand of farmers. Also, seeds are not available at the right time, during the planting season, and at the right place. It lacks harmonization of legislation between countries to get seeds from across the border.

- **Farmer seed system lack recognition**

According to research presented at the conference, 90% of the seed used in the region comes from the farmers' system, whereas only 10% of the seed used is supplied by the formal system. Notwithstanding the relevance of the farmers' system, it is not recognized by formal policies and legislation.

- **Lack of foundation seed hampers access to seeds**

Most notably in DR Congo, farmer cooperatives producing seeds for peanuts, beans and maize have difficulties obtaining foundation seeds. Varieties that are registered are not supplied by government agencies. This results in reusing grains as seeds which has an impact on yields.

In its closing statement the conference called for a recognition of the farmers' seed system. Through recognition of its role it could strengthen working relations with actors in the so-called formal system. Recognition should also lead to the possibility of registering seed varieties from the farmers' system in the seed catalogue and to support by the government in the form of financing, information and training.



Conference report

A full report of the conference can be found on our website (in French):

<http://www.accesstoseeds.org/index-regional-de-laces-aux-semences-dans-la-region-des-grands-lacs-rwanda-burundi-congo/>

B. Presentation of the Access to Seeds Index

Ido Verhagen, executive director of the Access to Seeds Foundation presented the objectives and approach of the Access to Seeds Index and the findings of the first Regional Access to Seeds Index for Eastern Africa. Verhagen stated that the research showed that companies originating in the region play an important role in many topics addressed at this conference, such as reaching remote villages, addressing specific needs of women farmers, supplying seeds for local crops and working with farmer cooperatives.

The presentation included various examples in which companies work together with farmer cooperatives. Such as the two Ugandan companies, Victoria Seeds and NASECO, which state that 80 to 90% of the seed they supply is produced by local farmers' cooperatives. Another example is a research program by the Kenyan company, East African Seeds, in which it works together with local farmer unions to select seeds for its breeding programs on local crops. A third example showed a partnership by East West Seed in capacity building.



Production

NASECO and Victoria Seeds work together in seed production with farmer cooperatives. These companies state that more than 80% of their seed is produced by smallholders. Not only is this a way for farmers to earn a living, it also assists in growing their capacity.



Breeding

East Africa Seed works together with local farmers and cooperatives in their breeding program for local vegetable crops such as amaranth, spider plant and jute mallow.



Capacity Building

East West Seed works together with farmer cooperatives in projects to strengthen the capacity of local farmers.

In the discussion, it became clear that one of the challenges in the region is the quality of the enabling environment, especially in DR Congo. Successful companies from neighboring countries decide it is too difficult or impossible to build a business in DR Congo, however presence of companies is obviously a condition for the Access to Seeds Index to measure and compare their performance. Therefore, including DR Congo in the scope of the next Regional Index is probably problematic.

C. Photo report



Opening statement by the Minister of Agriculture of the Province of North Kivu



Conference hall



Ido Verhagen presenting the Access to Seeds Index



Break out session DR Congo delegation



Break out session Burundi delegation



Break out session Rwanda delegation



Conference banner



Closing session

Report Farmers' Consultation South and Southeast Asia

Hanoi, 6 August 2016

Introduction

Farmers' organizations from seven countries in South and Southeast Asia met on Saturday 6 August in Hanoi to discuss challenges farmers in the region face with access to quality seeds. After a presentation by Ido Verhagen and Sanne Helderman of the goals and main findings of the Access to Seeds Index, the participants from the farmers' organizations started off with a presentation of each country's characteristics and specific challenges. In the subsequent workshop input was provided for the Regional Access to Seeds Index that will assess the performance of regional seed companies in improving access to quality seeds.

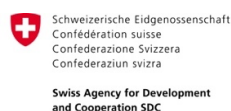
The forum was organized by the Vietnam Farmers Union (VNFU), AsiaDHRRA, the Asian Farmers' Association for Sustainable Rural Development (AFA) in cooperation with the Access to Seeds Foundation. The workshop was organized at the occasion of the 7th General Assembly meeting of the Asian Farmers' Association (AFA) in Hanoi, Vietnam on August 6, 2016.

The following report highlights the main results of this consultation:

- A. Central topics in country presentations
- B. 'Access to Seeds' Workshop outcomes
- C. Priorities for the development of the Regional Access to Seeds Index for Asia
- D. Photo impression



Participants	Representatives from AgriCord (farmer/member) organizations: Bangladesh (KKM), Nepal (NLR), India (SEWA), Cambodia (FNN), Indonesia (API), Philippines (PAKISAMA), Mongolia (NAMAC), Vietnam (Yen Bai Provincial Cooperative Alliance, Vietnam Cooperative Alliance), Belgium (CSA), Action Aid (Bangladesh), AVRDC (Thailand) and organizing parties
Organizers	Vietnam Farmers Union (VNFU), AsiaDHRRA, Asian Farmers' Association for Sustainable Rural Development (AFA) in cooperation with the Access to Seeds Foundation (ASTF)
Supported by	AgriCord, Swiss Agency for Development and Cooperation



A. Central topics in country presentations

Farmers' organizations from India, Bangladesh, Nepal, Myanmar, Vietnam, Cambodia, The Philippines and Indonesia presented challenges regarding access to seeds in their countries and activities the organizations have undertaken to tackle these.

Costs

Most country presentations dealt with access to rice seed, as rice is the main staple crop in the region. As an example, 80% of the population in Cambodia is active in farming. Most select and save their seeds in a traditional way simply because it is cheaper. Not only because of the costs of purchasing but also the use of purchased seeds from companies is costlier, as these improved varieties generally require more other inputs such as water and fertilizer. As selection and storage of seeds requires expertise most seed saving and production is done in farmers' groups while individual farmers tend to buy their seeds from shops, the representative of Cambodia stated.

Loss of diversity

Costs are not the only reason why these organizations appreciate seed saving by farmers themselves. As a presenter of the Philippines showed, companies tend to market a limited amount of seed varieties, compared to the amount of varieties made available by the farmers' system. Future reliance on a small amount of varieties could pose a challenge for climate resilience. Conservation and availability of the varieties currently used by farmers should be a main priority. Changing preferences from farmers results in a loss of diversity in the fields. Losing the mother seeds of local varieties was a risk mentioned by speakers from various countries.

Farmers' rights

There is a huge fear about the impact increased company activity has on farmers' rights. Most companies in Cambodia do not produce themselves but buy the seed they sell from farmers, the speaker from Cambodia explained. Who owns the property rights to those seeds? The speaker from Bangladesh added that farmers have been more heavily impacted by lost rights to save seeds for breeding with seeds they buy from companies. According to a farmer from Indonesia, farmers are criminalized by law when producing or reproducing seeds that were bought from companies. A huge complaint was that government regulations seems to favor the interests of companies and lack recognition of farmers' rights and knowledge.

Access to quality seeds

The farmers' organization from India explained it became active in procurement of seeds. Quality was an issue in terms of fake seed or a low germination rate but also with access to varieties with specific qualities such as organic seed or climate change resilient seeds. By working together, farmers ensured the availability of the right quality but also timely delivery, availability in remote areas as well as affordability by cutting out costs of dealers and middlemen.

Other topics addressed in the presentations included:

- *Climate change*, which is negatively impacting productivity and incomes and increases the need for farmers to be able to access climate resilient varieties.
- *Capacity building*: Farmers sometimes lack the capacity to use quality seeds, unaware of specific techniques which are required for ultimate results.
- *The role of women in agriculture* is in some regions overlooked and underestimated, impacting productivity.
- *Attractiveness of agriculture for youth*: Increasingly, youth is moving to urban areas in search for jobs and incomes. To feed the increasing population, Asia needs young farmers to remain in the rural areas and to choose for a future in agriculture.

B. Workshop outcomes

Farmers organizations discussed access to seeds in three groups: South Asia, Mekong countries and Island States. Four questions guided the discussion (1) what are access to seeds challenges (2) what are responses (3) the role of farmers' organizations (4) the role of companies.

Access to Seeds Challenges

1. *Quality seeds*: no quality assurance, no compensation when seeds are of poor quality, lack of access to specific qualities (such as organic or stress tolerant seeds)
2. *Accessibility*: Farmers need seeds at the right time, in the right quantities and at the right place. Especially in remote areas this is a challenge
3. *Conservation of traditional varieties*: due to changing preferences of farmers and lack of capacity and expertise to conserve traditional varieties
4. *Knowledge*: farmers need expertise to use improved varieties as it requires specific planting techniques or use of other inputs
5. *Farmers rights*: with an increasing role of private seed companies, farmers feel that their rights are not well protected or are unaware of their rights.

Responses to challenges

1. *Seed governance*: a strong regulation function by the government, with a certification, checking and monitoring system and compensation for seed failure
2. *Capacity building for conservation*: develop community based seed management and seed banks; build partnerships with FO's, governments, research institutes
3. *Capacity building for seed production*: develop seed producer cooperatives, develop seed business capacities.
4. *Advocacy*: protect, respect and fulfill farmers' rights

Role for farmers' organizations

1. *Business support*: Provide inputs for farmers' seed banks and seed businesses such as storage facilities and business financing
2. *Engage in policy dialogue*: build negotiation capacity to engage with governments to protect seed rights of farmers; ensure subsidies from governments
3. *Provide information to farmers*: on seeds, technologies, market information and other knowledge that farmers need to build their business

Role for seed companies

1. *Guarantee quality*: and compensate farmers in case of seed failure
2. *Provide information*: provide complete and proper information on the use of seeds
3. *Benefit sharing*: share benefits of seed sales with farmers for seed conservation
4. *Partner with FO's*: on research and development and distribution.
5. *Transparency*: be transparent and accountable on policies, operations, products,

C. Priorities for the development of the Regional Access to Seeds Index for Asia

The participants of the workshop were requested to give scores to the outcomes that should have the highest priority in the development of the Access to Seeds Index. The scoring resulted in the following three priorities.

1. Importance of farmer and community-based seed production and conservation

Seed companies can play an important role in improving access to quality seeds, but farmers themselves also play a crucial role in production and conservation. The Access to Seeds Index should take this into account. Increasing company activity should not restrict the seed activities of farmers. Partnerships between companies and farmers' initiatives, for instance in seed production, could benefit both.

2. Farmer as a business partner

Seed companies serving smallholder farmers should place them central in everything they do. Simply making seed available through shops won't do the job. Farmers need information about the seeds that they buy and use. They want quality assurance (and compensation in case of failure). Pre-provision of seeds and payment after harvest could be creative ways to solve affordability.

3. Strong seed governance

For this to work, a strong seed governance, to be developed by governments, is a prerequisite. Systems to ensure and monitor quality and certify seeds. Additionally, regulations that serve not only the interest of companies but also respect and protect the rights of farmers.

D. Photo report



Cambodia delegation



Indonesia delegation



Bangladesh delegation



Nepal delegation



Presentation of outcomes



Phillipines presentation



India presentation



Myanmar delegation



Deliberations in workshop



Scoring priorities

Report Farmers' Consultation Western Africa

Ouagadougou, 18-19 October 2016

Introduction

Farmers' organizations from six West-African countries met in the capital of Burkina Faso, Ouagadougou, on 18 and 19 October to discuss access to seeds challenges and solutions in their region. In addition, the role of the formal seed sector was discussed. The organizing parties used this opportunity to introduce various regional initiatives to create a supportive enabling environment for seed companies, cooperatives and community seed enterprises in the region.

The event was organized by ASPRODEB in cooperation with ROPPA, the regional network of farmers' organizations, AgriCord and facilitated by CPF. The meeting was opened by Mr. Paul R. Tiemtoré, Advisor to the Minister of Agriculture and Water of Burkina Faso and Mr. Jolke Oppewal, the Ambassador of the Kingdom of the Netherlands in Mali. In their opening remarks, they underlined the timeliness of the meeting. West Africa faces significant challenges regarding access to seeds whereby the role of all relevant players should be addressed, including the private sector.

The following report highlights the main results of the conference:

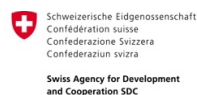
- A. Presentations of relevant regional initiatives and the Access to Seeds Index
- B. Central topics in the country presentations
- C. Main outcomes and next steps
- D. Photo impression
- E. Résumé Executif en français



Participants	Farmer organizations from Bénin, Burkina Faso, Gambia, Mali, Niger and Senegal; representatives of AFSTA, CORAF/WECARD, ROPPA, CILSS, AGRA, INERA; representatives of Agri agencies Fert, Trias, Afdi, ASPRODEB, representatives of the Access to Seeds Foundation (ATSI). Workshop facilitators: Cheikh Mouhamady Cissokho and Patrice Djamen
Organizers	AgriCord, ASPRODEB, ROPPA, ATSI, facilitated by CPF Burkina Faso
Supported by	AgriCord, Swiss Agency for Development and Cooperation



AGRICORD



Access to Seeds Index

A. Presentations of relevant regional initiatives and the Access to Seeds Index

Multiple regional initiatives were introduced during the meeting that focus on improving agricultural productivity of smallholder farmers in West Africa.

ROPPA

ROPPA's objective is to strengthen the capacities of farmer organizations in West Africa, and to defend the interests of their members and to influence the policies linked to agriculture, rural development and food security. ROPPA's membership covers 13 countries of the region: Benin, Burkina Faso, Côte d'Ivoire, The Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Niger, Senegal, Sierra Leone and Togo.

CORAF/WE CARD

CORAF/WE CARD's goal is to expand the use of quality certified seeds by farmers in West and Central Africa. It does so through dedicated projects and research programs in the region. The organization notes that a large majority of seeds in the region are now produced by farmer organizations/cooperatives. The few (multinational) companies emerging do not invest in setting up farms or producing locations in the region, and primarily work with contractors.

ASIWA

ASIWA (Alliance for a Seed Industry in West Africa) is a platform organization and incubator for emerging seed companies. The organization also strives to improve the governance and political environment of the sector to spur investments and further develop the structure of the seed market.

CoASEM

CoASEM (Comité Régional des Semences) aims to improve the implementation of appropriate seed regulation related to quality control, certification and marketing of seeds and seedlings in view of contributing to the development of the seed sector in the region.

The Access to Seeds Index

Ido Verhagen introduced the Access to Seeds Index 2016. The Index monitors the activities of global seed companies in four regions: Latin America, Western Africa, Eastern Africa and South and Southeast Asia. The Index also zooms in on the regional seed industry in Eastern Africa, whereby globally operating companies in the region as well as regional and national companies are included.

Regional Access to Seeds Index for Western Africa

For the development of the second Access to Seeds Index, the feasibility of regional Indexes for additional regions will also be explored, including West Africa. As regions differ, a regional Index should be context specific and tailor made, addressing the main challenges of the region. The roundtable conference marked the start of regional consultations in West Africa and formed an important milestone in gaining a better understanding of the main challenges farmers and seed producers in West-Africa face regarding their use and access to seeds. The outcomes will feed into the feasibility and landscaping study foreseen for this region.

B. Central topics in the country presentations

Farmer and producer organizations from Benin, Burkina Faso, Gambia, Mali, Niger and Senegal provided a presentation about the specific challenges in accessing seeds in their respective countries.

The identification of challenges was also part of a questionnaire participants were asked to fill out. Important food crops in the region are, amongst others, dry beans, sorghum, millet, rice and maize. Tomato and onion are listed as most cultivated vegetable crops in the region.

Seeds are mainly obtained through government programs, from (national) research institutes, support institutions and producer organizations/cooperatives. Vegetable seeds are also purchased from seed companies, such as Technisem and Tropicasem.

Participants particularly noted the following issues and constraints in access to seeds:

- Shortage of foundation seed, inflicting the production of certified seed.
- Prices of seeds and other inputs, and lack of (access to) financial and insurance schemes.
- Poor availability of seeds and other inputs, particularly in remote rural areas farmers face an irregular and unreliable supply of inputs.
- Poor seed storage facilities, causing irreversible damage to seeds and their quality.
- Lack of policy harmonization, hampering the further development of a formal seed sector.
- Seeds are not always well adapted to specific (climatic) circumstances, hindering maximum yields.

C. Main outcomes and next steps

The workshop agreed to the following outcomes:

Keep momentum

The workshop on access to seeds and the role different stakeholders play in addressing this issue is timely and important. To not lose momentum, participants are determined to continue this conversation in their countries and with the members of their farmer organizations and cooperatives.

Support of the Access to Seeds Index

The Access to Seeds Index is a relevant initiative that opens further dialogue based on facts, and that may help to promote the issue of access to seeds in Western Africa. The possibility of the development of a regional Access to Seeds Index for Western Africa is strongly endorsed. ROPPA and other organizations will further support the dialogue on the Access to Seeds Index with their members and other stakeholders. The organizations may also provide advice and assistance where needed moving forward.

Landscaping study to determine feasibility of Regional Index for Western Africa

This process should be preceded by a feasibility study to determine whether a regional Index can have an added value in the region. The regional context needs to be mapped, gathering relevant country data on the current state of the formal seed sector, notably the current role and activities of private seed entities. Based on these studies, the Index' stakeholders will determine whether a regional Index can be developed, measuring and comparing the efforts of private seed entities in providing access to seeds for smallholder farmers in the region.

Role of farmers' organizations, cooperatives should be addressed in Regional Index for West Africa

Farmers' organizations and cooperatives are the region's main supplier of seeds. Few global seed companies have (substantial) business activities in the region, although the number of regional/national companies is increasing. This situation differs strongly from other Index regions, such as Eastern Africa (for which a regional Index was developed for the Index 2016 edition), which have a growing number of (multinational) seed companies investing in the region. These differences underline the importance of the development of a tailor-made regional Index, based on a landscape study and stakeholder consultations.

D. Photo report



Opening by Dutch Ambassador Oppewa



Roundtable conference



Benin delegation



Burkina Faso delegation



Senegal delegation



The Gambia Delegation



Niger delegation



Mali delegation

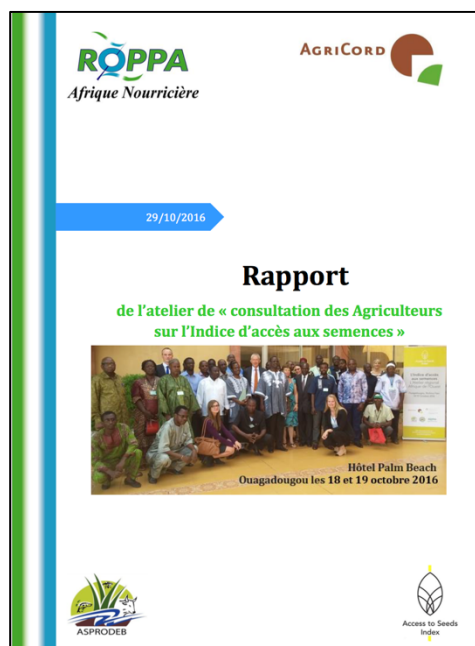


Seed industry presentation



Closing ceremony

E. Résumé Executif en français



Rapport de l'atelier en français

Un rapport complet en français est disponible sur le site Web de la Fondation Accès aux Semences.

<http://www.accesstoseeds.org/west-african-farmer-organisations-discuss-access-seeds-index-ouagadougou/>.

Le résumé est fourni ci-dessous.

L'objectif de l'atelier était d'échanger avec les OP ouest-africaines sur l'initiative Indice d'accès aux semences et d'engager la mobilisation de leur contribution au processus sur l'élaboration éventuelle d'un indice sous-régional pour l'Afrique de l'Ouest.

L'atelier s'est déroulé du 18 au 19 octobre à Ouagadougou (Burkina Faso). Il a réuni une quarantaine de participants dont : des représentants des OP (du Bénin, Burkina Faso,

Gambie, Mali, Niger et Sénégal), d'entreprises et OP semencières, des organisations régionales (CORAF/WECARD), du Ministère de l'Agriculture et des Aménagements Hydrauliques du Burkina Faso et des agri-agences (FERT, TRIAS, AFDI, ASPRODEB).

L'atelier était articulé une série de présentations et d'échanges en sessions plénières notamment sur : l'Index d'accès aux semences avec un accent sur les déterminants de cet accès, les critères pris en compte, les résultats de son application en Afrique de l'Est. Le contexte du secteur semencier en Afrique de l'Ouest a été rappelé à travers une série de trois présentations faites sur ASIWA, le PSAO/WASP et le PPAAO ; le Comité ouest-africain des semences (COASem) et les implications de la problématique semencière pour le ROPPA. Les différents pays représentés ont donné un bref aperçu de l'état de leur secteur semencier national. Les premiers résultats du dépouillement du questionnaire pour l'enquête exploratoire sur l'index d'accès aux semences en Afrique de l'Ouest ont été présentés et discutés. Une table ronde a été animée sur le rôle des différents fournisseurs de semences, leurs complémentarités et les différents services connexes qu'ils offrent aux producteurs en plus des semences. Les participants ont été invités en session plénière à se prononcer sur la pertinence de l'index pour l'Afrique de l'Ouest. Les observations majeures et les suggestions ont été synthétisées sous forme de recommandations à prendre en compte dans la suite du processus.

L'atelier a permis de souligner une fois de plus le rôle central des semences dans la productivité agricole et de revisiter les principaux défis, mais aussi d'avoir un aperçu des initiatives en cours pour développer le secteur semencier en Afrique de l'Ouest. Il est apparu que les difficultés du secteur semencier sont multiples, systémiques et assez communs aux pays représentés à l'atelier. Ces difficultés portent notamment sur : l'insuffisance et les difficultés d'accès aux semences de prébase et de base, l'inefficience instances de gouvernance, la faible performance de la sélection variétale, le manque des infrastructures de stockage des semences ; l'insuffisance des moyens (ressources humaines et matérielles) des services en charge de l'inspection et de la certification ; le manque de financements adaptés aux différents maillons des chaînes de valeur semencières. Quelles pistes de solutions à capitaliser et mettre à l'échelle en tenant compte des spécificités de chaque contexte ont été discutées. Il est apparu qu'il existe actuellement un engagement croissant des partenaires internationaux et des pouvoirs publics (niveaux pays et régional) pour développer l'industrie semencière, la mobilisation d'une approche régionale pour résoudre la question semencière et

l'existence des acquis importants que le processus de construction de l'index d'accès aux semences devra considérer.

Les différentes présentations et les échanges au cours de l'atelier ont permis aux participants d'avoir une meilleure connaissance de l'index d'accès aux semences et de la contribution potentielle de cet outil dans le pilotage plus efficient de la demande et de l'offre de semences. Si l'utilité de l'Index d'accès aux semences a été reconnue par tous les participants, il est également apparu que son développement doit tenir compte des initiatives aussi bien au niveau national que régional à travers notamment le PSAO et le PPAAO. Cet outil doit aussi s'adapter au contexte local marqué par une fragmentation du marché et la prédominance caractéristique des OP semencières et des entreprises plutôt de petite et moyenne taille. La diversification des fournisseurs de semences offre potentiellement plus de possibilités pour les producteurs, mais elle pose aussi le défi de la coordination et d'une bonne valorisation des atouts spécifiques de chaque fournisseur. Les services connexes offerts par les différents fournisseurs en plus de la vente des semences sont un atout pour le développement du secteur et doivent être pris en compte dans les critères de calcul de l'index d'accès aux semences.

La totalité des acteurs présents à l'atelier ont reconnu unanimement la pertinence et l'importance de l'index comme outil pour le pilotage de l'offre et de la demande de semences en Afrique de l'Ouest. Les recommandations suivantes ont été formulées pour que le processus de développement de l'index se déroule bien et aboutisse à un résultat pertinent et adapté au contexte local : (i) utiliser une approche inclusive en prenant en compte notamment le rôle crucial de l'État et de la recherche agricole dans l'accès aux semences; (ii) prendre en compte les spécificités de la région Afrique de l'Ouest; (iii) commencer d'abord par établir une cartographie des acteurs et (iv) mettre l'accent plutôt sur les liens entre les sociétés semencières et les coopératives semencières et leurs unions/réseaux

Les étapes séquentielles suivantes ont été retenues pour poursuivre le processus enclenché à travers l'atelier : (i) le ROPPA adresse à AgriCord une lettre pour manifester son intérêt pour l'index et solliciter la continuation du processus engagé; (ii) sur la base de la réponse d'AgriCord qu'on espère rapide, le ROPPA met sur pied un groupe de contact constitué des acteurs régionaux clés dont le CORAF, AFSTA, Fondation ATSI, Agricord, FAO, le ROPPA coordonnera les activités de ce groupe et (iii) élaboration et validation de la démarche méthodologique et d'un calendrier pour le développement de l'index ; (iv) mise en œuvre de la démarche méthodologique avec une approche inclusive et progressive.

Report Farmers' Consultation Southern Africa

Johannesburg, 28-29 November 2016

Introduction

The goal of this workshop were to discuss the findings of the 2016 Index and start the review the current methodology (scope and measurement areas) for the Regional Access to Seeds Index for Eastern Africa. Representatives from countries in the Southern Africa region, including from countries that are currently not included in the Regional Index, participated in the workshop.

The meeting was co-organized by the Southern African Confederation of Agricultural Unions (SACAU) and the Access to Seeds Foundation (ASTF). SACAU brought together most of their member organizations which make up a large proportion of Eastern and Southern Africa, including Botswana, Lesotho, Madagascar, Malawi, Mozambique, Namibia, Seychelles, Swaziland, Tanzania, Zambia, and Zimbabwe. The workshop was made possible by AgriCord, the Swiss Agency of Development and Cooperation (SDC) and the Embassy of the Kingdom of the Netherlands in South Africa.

The following report highlights the main results of this consultation:

- A. Introductions
- B. Smallholder farmer access to seeds challenges in the SACAU region
- C. Elaboration on access dimensions
- D. Reviewing the methodology and measurement areas
- E. Main observations and outcomes
- F. Photo report



Participants	Representatives farmers' organizations: Botswana Agricultural Union, Lesotho National Farmers Union, Coalition Paysanne du Madagascar, Fekritama (Madagascar), Farmers Union of Malawi, National Smallholders Farmers Association of Malawi, Cotton Producers' Association in Mozambique (FONPA), Namibia National Farmers Union, Seychelles Farmers Association, Swaziland National Farmers Union, Tanzania Seed Trade Association, Commercial Farmers Union (Zimbabwe) and Zimbabwe Farmers Union.
Other	Dr. Bellah Mpofu (USAID Feed the Future Program), Jack Vera (Netherlands Embassy of the Kingdom of the Netherlands in South Africa), Ishmael Sunga and Fhumulani Mashau (SACAU), Ido Verhagen, Sanne Helderma and Shelby Matevich (ASTF).
Organizers	SACAU and ASTF
Supported by	AgriCord, SDC, Embassy of the Kingdom of the Netherlands in South Africa

A. Introductions

The contributions by Mr. Jack Vera, Mr. Ishmael Sunga, Dr. Bellah Mpofu and Mr. Ido Verhagen set the scene for the two-day workshop: all three emphasize the strong links between food security, eliminating hunger, and access to seeds as well as the importance of a strong dialogue and understanding of and between the key players, including the seed industry.

Ishmael Sunga, CEO SACA

Mr. Ishmael Sunga, opened the workshop by highlighting the need to establish a more sustainable food system. “We need more planning and strategic thinking for the future generations of agriculture,” Sunga emphasized. Access to seeds is an essential factor. He noted that the variability of climate change will make access to seeds even more important. He welcomed the Access to Seeds Index as a relevant instrument that incorporates regional realities. SACA undertakes advocacy efforts on multiple issues that affect (smallholder) farmers, including access to seeds and other agricultural inputs. Currently, the perception of farmers about the seed industry in the region is reserved. Therefore, the role of the Index is crucial for helping to determine how farmers’ organizations, seed companies and other stakeholders can increase mutual understanding and collaboration, Sunga said. SACA and its members should endeavor to find ways to support the initiative, which will start by gaining a better understanding of the activities and strategies of the industry.



Mr. Ishmael Sunga, CEO of SACA

“We must start with a good seed and this is fundamental. As well as access to this seed at the right time, at the right cost, at the right place, and with the right quality.”

Mr. Jack Vera, Agricultural Counsellor, Embassy of the Kingdom of the Netherlands in South Africa

Jack Vera highlighted the Dutch support for the Index, as it meets policy goals toward increasing smallholder farmer productivity and fostering the dialogue on the role of the private sector. He reiterated the challenge we face in feeding 9 billion people in 2015 and the important role of smallholder farming in this regard.



Mr. Jack Vera, Agricultural Counsellor of the Kingdom of the Netherlands in South Africa

“Engagement is needed to improve access to seeds for smallholder farmers”

Dr. Bellah Mpofu, Policy Development Specialist for the USAID Feed the Future program

In an address by Dr. Bellah Mpofu, she provided an overview of the activities on seed harmonization in the region, noting the specific complexities from a policy point of view. Notably, she highlighted the challenges in implementing seed harmonization at a regional level, such as the varying degrees of seed sector development at state level, and which conditions are crucial for success, emphasizing the need for all stakeholders to be involved, including the private sector.



Dr. Bellah Mpofu, Policy Development Specialist, USAID Feed the Future South Africa

"Private sector participation is crucial to the development of harmonized seed markets in Africa"

Ido Verhagen, Executive Director of the Access to Seeds Foundation

The main findings of the first Access to Seeds Index were introduced by Mr. Ido Verhagen. He elaborated on the process that led to the release of the first Index and the crucial input from farmers and farmers' organizations therein. The Regional Index for Eastern Africa shows the important role regional seed companies play in access to seeds, outpacing global peers. Subsequent Indexes will require continued input from farmers that should enable the development of a tailored methodology. In this regard, an in-depth review of the current methodology is essential.



Mr. Ido Verhagen, Executive Director of the Access to Seeds Foundation

"It is important for farmers to be included in the conversation."

B. Smallholder farmer access to seeds challenges in the SACA region

The first topic of the consultation was an assessment of the main challenges regarding access to seeds in Southern Africa.

Prior to the workshop, organizations were asked to complete a questionnaire to collect basic information on the main crops/seeds produced in each region and which models farmers use to obtain seeds. Each organization also provided an overview during the workshop in which the main access to seeds challenges were addressed. This resulted in a longlist of challenges. These challenges were prioritized by voting.

The five main challenges per the participants are listed below. These were used to select the access dimensions and measurement areas to be discussed in the subsequent rounds.

1. Affordability

Seed prices are too high, although during the workshop participants also discussed about smallholder farmers having wrong perception of the value of quality seeds.

2. Climate change

Fluctuating weather conditions negatively impact productivity. This has an impact on available seeds but leads to changes in seed demands that need to be met.

3. Availability

Seeds are often not available at the right place at the right time (every season).

4. Capacity levels of farmers

Low levels of capacity/knowledge to utilize new varieties and technologies.

5. Research and development

A lack of dedicated research and development activities addressing local (climatic) conditions.

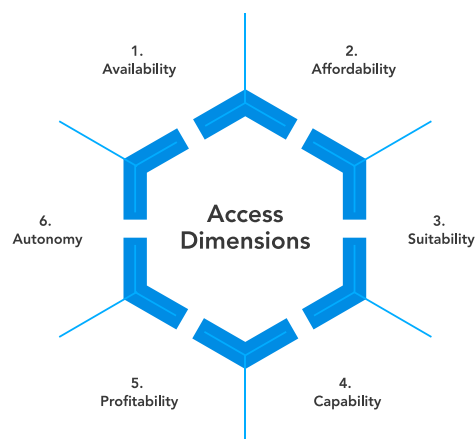
Other challenges that were mentioned in the discussion, but received less votes were (order of received votes):

1. **Poor infrastructure:** Poor distribution infrastructure adversely impacts availability of seeds and other inputs in remote areas.
2. **Lack of seed laws and policies:** Seed laws and policies are not in place or not implemented, deterring seed companies and other private entities from exploring business opportunities.
3. **Seed quality:** The quality of seeds sometimes fluctuates mainly because large shares of counterfeit seeds are currently on the market.
4. **Lack of data/information** at the farm level on products and company activities.
5. **Lack of foundation seeds** impacts the general availability of seeds.
6. **Market distortion** sometimes takes place because of inadequate government subsidies.
7. **Storage:** Lack of seed storage facilities impacts seed quality.
8. **Monopolies:** monopolies of cartels seed companies dominate markets and possibly impact on the diversity of available varieties.
9. **Local crops:** a lack of business interest results in a lack of seeds for indigenous crops.

D. Elaboration on Access dimensions

An earlier farmer consultation roundtable in Addis Ababa in 2013 resulted in a definition of ‘access to seeds’ which forms the basis of the methodology of the Access to Seeds Index.

Following the main access challenges identified in the previous round, four dimensions were selected for further elaboration in a ‘World Café’-workshop format: availability, affordability, capability and suitability. For each dimension participants were asked to identify (1) underlying causes; (2) solutions and (3) where companies can play a role.



Availability	
Underlying causes	<ul style="list-style-type: none"> • The chronic lack of foundation seed undermines certified seed production. • Contamination of seeds because of improper storage. • Scarcity of seeds due to adverse weather conditions. • Inadequate policy structures. • Available seeds are often unsuitable for (local) agricultural climatic zones (e.g. there are six to consider in Madagascar). • Limited capacity of farmers and seed producers to produce seeds. • Inadequate marketing strategies whereby farmers are largely unaware of supply. • Products rarely reach remote locations: lack of shops in rural areas. • Fewer (and mainly small) clients in rural areas do not meet business targets. • Uncomprehensive forecasting of seed needs versus supply. • Relatively small demand for hybrid seeds makes it an unattractive market for companies to invest in. • Late supply due to late subsidy programs: quality is compromised (no testing) and traders will not start before.
Solutions	<ul style="list-style-type: none"> • Farmers should be provided the opportunity to learn how to utilise more advanced agricultural practices. • Appropriate packaging sizes should be adopted. • Increase resources/capacities for the production of seeds.
Where companies can play a role	<ul style="list-style-type: none"> • Produce seeds locally instead of importing them from abroad to ensure local availability and suitability of seeds in the region. • Invest in distribution infrastructure and marketing (legible promotions, more extension services and neutral trials). • Incorporate crops other than maize as well as OPVs in company portfolios. • Train agro-dealers and invest in storage distribution systems. • Strengthen and institutionalize company-farmer relationship.

Affordability	
Underlying causes	<ul style="list-style-type: none"> • Inadequate and costly channels of distribution and transportation. • In some countries, seed prices are too dependent on currency fluctuations. • Seed prices are high as a result of the need to import seeds due to low production in-country. • Low productivity and failing harvests, for example as a result of climatic conditions or inability to use quality seeds, affects the ability to buy seeds next season. • Small supply and high demand for foundation seed increases price. • In some countries, relatively high government taxes are imposed on seeds. • In some countries, the high poverty rates strongly impact farmers' purchasing power. • Seed packages/quantities are too large and costly for small farmers.
Solutions	<ul style="list-style-type: none"> • Seed providers should be incentivized to reach farmers in remote regions. • Introduce better irrigation systems for farms, and other climate smart agricultural practices as well as access to high quality seeds to improve incomes. • Balanced government subsidies could positively impact the affordability of seeds. • Implement adequate policies and regulations creating an enabling environment for farmers. • Increase the opportunities for "group buying" which may allow farmers to buy seeds at affordable prices. • Adopt smaller package sizes. • Implement price harmonization between countries. • Explore the opportunities for contract farming. • Harmonize the standardization of seed quality assurance throughout the region to reduce risk and costs.
Where companies can play a role	<ul style="list-style-type: none"> • Support harmonization of seed laws and regulations. • Facilitate "group buying" also to reduce distribution and transport costs for the company. • Invest in R&D which addresses for example longer shelf life. • Invest in distribution infrastructure. • Explicitly note expiry and manufacture dates on seed packages. • Implement high standard quality assurance standards throughout all the countries companies are active in. • Strengthen the collaboration with farmers. • Implement thorough after sales services. • Participate in policy formulation efforts, for example through seed trade associations.

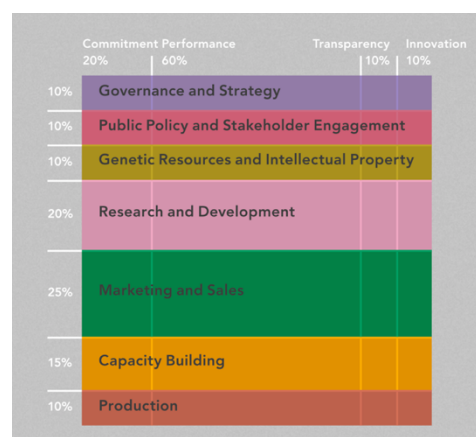
Capability	
Underlying causes	<ul style="list-style-type: none"> • Farmers lack access to information which results in on farm information gaps and a lack of knowledge on existing products and technologies. • Farmers are sometimes reluctant to adopt modern agricultural practices. • Unclear/inadequate labeling on seed packages (e.g. to reach illiterate farmers). • Lack of skills and resources to apply new technologies. • Lack of access to other agricultural inputs. • Inadequate access to finance or insurance at the farm level. • Uncomprehensive/incomplete farm input supply systems.
Solutions	<ul style="list-style-type: none"> • Implement robust awareness campaigns. • Implement capacity building activities. • Support the development of farmer organizations. • Adopt the labeling in local languages on seed packages. • Increase ways to access affordable finance or insurance schemes. • Implement innovative ICT solutions (i.e. voicemail instructions). • Scale-up adult literacy programs in rural areas.
Where companies can play a role	<ul style="list-style-type: none"> • Create awareness of products available (i.e. training and demo and field days). • Adopt more comprehensive labeling on seed packages (i.e. local languages, pictograms). • Explore opportunities to collaborate with other input suppliers to create attractive bargains for farmers. • Invest in ICT solutions that are accessible at the farm level.

Suitability	
Underlying causes	<ul style="list-style-type: none"> • Lack of information to the farmer about the specificities of new varieties. • Lack of resources/capacity of seed companies to develop varieties that meet local (environmental) conditions. • Limited initial research to test certain varieties. • Inadequate farmer feedback mechanisms are in place. • Climate change adaptation at the farm level is slow and sometimes inadequate. • Farmers lack market knowledge resulting in the fact that consumer demand is not always taken into account in crop production. • Inadequate extension systems that support the adoption of new varieties. • Conflict of interest between the farmer, consumer and the seed supplier
Solutions	<ul style="list-style-type: none"> • Improve the quality of product information systems (including face-to-face interaction with the farmer). • Invest in characterizing varieties in a way that farmers are able to adequately choose between available seed options. • Invest in breeding activities to improve crop tolerance/resistance to diseases and adverse weather conditions.
Where companies can play a role	<ul style="list-style-type: none"> • Strengthen market research and information outreach to the farmer on, for example, consumer preferences, geographic information. • Implement robust farmer feedback mechanisms. • Scale up extension activities, feedback mechanisms and participatory variety selection. • Invest in building trust and lasting relationships with the product end-users. • Adopt more comprehensive labeling on seed packages (i.e. local languages, pictograms). • Explore opportunities to collaborate with other input suppliers to create attractive bargains for farmers. • Invest in ICT solutions that are accessible at the farm level.

D. Reviewing the methodology and measurement areas

The Access to Seeds Index measures seed company activity in seven areas that are considered key for increasing access to quality seeds of improved varieties for smallholder farmers. These measurement areas will be reviewed to re-evaluate the indicators that make up each area. During the workshop, participants were asked to review all the current indicators as well as to consider which indicators may be missing, which indicators they consider a priority, and what company performance on these indicators should look like.

The discussion focused on the four measurement areas linked to the main access to seed challenges that were identified in the first part of the round table conference: research & development, marketing & sales, capacity building, and production.



Research and Development	
Priority indicators	<ol style="list-style-type: none"> 1. More focus on local/regional consumer market-oriented research. 2. Include neglected/local crops in breeding programs. 3. Include biological control in breeding programs (i.e. less pesticides). 4. Focus on breeding for climate resilient varieties and crops.
Other indicators suggested	<ol style="list-style-type: none"> 1. Focus on adoption of new varieties in company portfolios for this region. Focus on breeding for specific agro-ecological zones and local adaptations. 2. Incorporate biofortification targets to increase nutritional value of crops. 3. Collaborate with public research institutes to develop and distribute locally-adapted varieties/crops. 4. Establish breeding/testing stations within regions. 5. Increase product transparency: disclose potential health risks of new products. 6. Engage smallholder farmers in breeding and testing to incorporate local knowledge. 7. Improve capacity of local and regional gene banks. 8. Increase agronomical/production research related to smallholder farmer use of varieties. 9. Adopt biodegradable packaging.

Marketing and Sales	
Priority indicators	<ol style="list-style-type: none"> 1. Adopt adequate seed packaging and labeling. 2. Increase distribution to remote villages (number of seed outlets needs to expand outside of urban centers). 3. Improve quality assurance standards. 4. Incorporate a larger diversity of hybrids and OPVs in portfolio.
Other indicators suggested	<ol style="list-style-type: none"> 1. Improve product infrastructure, such as good storage facilities. 2. Invest in relationships/collaboration with farmers. 3. Measure number of participants present at field days to monitor impact. 4. Track volume of seed sold and how many farmers benefited. 5. Support insurance schemes and access to (micro-)finance. 6. Improve company interaction with agri-agencies and agrodealers. 7. Support public research institutes. 8. Invest in tailored advertisement and awareness campaigns of available products.

Capacity Building	
Priority indicators	<ol style="list-style-type: none"> 1. Provide extension services based on good agricultural practices (GAP), including an emphasis on building knowledge on environmental conservation (such as intercropping) and health issues related to use of chemicals and fertilizers. 2. Improve storage facilities of seed products and focus more on post-harvest management. 3. Invest in education for youth/next generation farmers and empower them to be successful farmers.
Other indicators suggested	<ol style="list-style-type: none"> 1. Focus on the role of female farmers and include them in general business strategies. 2. Increase ICT-related interventions, for example to inform clients on product use. 3. Invest in linking farmers to output markets. 4. Develop training programs for agrodealers and seed transporters.

Production	
Priority indicators	<ol style="list-style-type: none"> 1. Improve quality management of seed production and maintenance programs. 2. Comply with and monitor fair labor conditions and international social standards. 3. Increase the involvement of smallholder farmers in the seed value chain (i.e. production) to transfer knowledge and build capacity.
Other indicators suggested	<ol style="list-style-type: none"> 1. Establish seed production activities in the region.

E. Main observations and outcomes

Main observations and outcomes

Smallholder agriculture is a strong driver of the economies in Southern and Eastern Africa. The workshops' discussions reaffirm that the success of this sector depends strongly on access to seeds. The involvement of the private sector is crucial, particularly as public spending in the sector has been declining over the past decades. However, it is apparent that the relationship between farmers (organizations) and seed companies within the region is poor. This underlines the importance of the Access to Seeds Index in bridging this gap between the smallholder farmer and the private sector. This disconnect between farmers and companies was also voiced as a concern for SACA, which will further explore the opportunities to support engagement between their member organizations and seed companies.

Considerable progress is made during this regional workshop with regard to how the methodology for the next Access to Seeds Index can better evolve to represent the current needs of smallholder farmers. In-depth discussions on several themes and indicators which represent the access dimensions and measurement areas will feed into the review of the methodology. Lack of foundation seed, insufficient storage capacity, inadequate ICT solutions, and limited packaging options are just a few examples of issues that emerged. Addressing such challenges could improve company behavior across multiple measurement areas or access dimensions, to the benefit of smallholder farmers.

Climate change plays a much more prominent role than it did in earlier consultations. Participant remarks underline that farmers are currently bearing the heavy weight of climate-related impacts and that swift action is required. Further discussion on the access dimensions and measurement areas makes clear that farmers expect to see company participation in addressing this obstacle. Breeding programs, enhanced irrigation systems, and more general climate-smart agricultural practices were emphasized as ways to move forward on this.

The regional workshop provided broad perspectives on access to seeds in the region as presented by farmers, producers, trade associations, and companies from across the SACA region. Enabling continued conversation outside of the workshop is an objective for all the member organizations that were represented. This will support the dialogue with stakeholders in and around the seed industry about its role regarding access to seeds. The Access to Seeds Index is instrumental in this dialogue as it provides an evidence base on company activities and behavior in the region.

Way forward

The input and feedback provided during the workshop will feed into the development of the second Access to Seeds Index. As such, the following issues were discussed and agreed:

- In 2017, the methodology for the Regional Index for Eastern Africa will be reviewed to address and incorporate feedback from stakeholders, including feedback from the discussions during the workshop. This process also includes a thorough assessment of the current scope of the Index in terms of countries, companies and crops included. SACA and its member organizations may be contacted by the Access to Seeds Index team to invoke specific input.
- To support the development of the second Index, a landscaping study will be undertaken in the region to provide a comprehensive overview of the issues with regard to access to seeds on a country level in the region.

SACA and its member organizations will increase its engagement with the seed industry and other stakeholders to set up or continue ongoing conversations about its role and how to improve access to seeds. ASTF will support and facilitate these activities where possible.

F. Photo report



Opening statement by Ishmael Sunga, CEO of SACAU



Opening by Jack Vera, Agricultural Councilor of the Embassy of The Netherlands in South Africa



Ido Verhagen presenting the Access to Seeds Index



World Cafe Workshop to provide input for the Access to Seeds Index



Voting to prioritize



Workshop Panel 1: Diane Sibanda, Botswana Agricultural Union; Leuta Matete, Lesotho National Farmers' Union; Freddy Mahefatiana Heriantenaina, Confédération des Agriculteurs Malagasy (Madagascar); Navalona Andrianjanahary, Coalition Paysanne de Madagascar; Ibrahim Benesi, Farmers Union of Malawi.



Workshop Panel 2: Rose-Marie Vidot, Seychelles Farmers' Association; Elena Kalundu, Namibia National Farmers' Union; Vincente Sando, Cotton Producers' Association in Mozambique; Frazer Mataya, National Smallholders Farmers' Association of Malawi.



Workshop Panel 3: Ruramiso Mashumba, Zimbabwe Farmers' Union; Baldwin Shuma, Tanzania Seed Trade Association; Aselly Mwanza, Cotton Association of Zambia; John MacRobert, Commercial Farmers' Union Zimbabwe



Sibusio Gule from Swaziland National Agricultural Union