BUILDING ON LEARNINGS
ENABLING THE BUSINESS OF AGRICULTURE
GROWTH OF FOOD DEMAND
ROLE OF GOVERNMENT POLICIES & REGULATIONS

- Inclusive Value Chain
- Enabling Environment
- Policies, Laws & Regulations

Government Policymakers
You [Socrates] have discovered the reasons why some farmers are so successful that husbandry yields them all they need in abundance, and others are so inefficient that they find farming unprofitable. I should like to hear the reasons in each case, in order that we may do what is good and avoid what is harmful.

Xenophon, 4th Century BC
Enabling the Business of Agriculture aims to identify and monitor policies and regulations that can foster an enabling environment for the local and regional business of agriculture and encourage and inform policy changes that support inclusive participation in agricultural markets.

- Comparable and actionable indicators
- Identify good practices
- Motivate reforms
TIMELINE

- **Concept development, consultations & preparation**
  - **2013-2014**

- **10 pilot countries**
  - 6 core topics
  - **2014-2015**

- **10 pilot + 30 new countries**
  - 6 core topics + 6 new topics (2 cross cutting areas)
  - **2015-2016**

- **40 countries + 40 new countries**
  - 12 topics (2 cross cutting areas)
TIMELINE

Concept development, consultations & preparation

10 pilot countries

Initial data for 6 topics

40 countries

Initial indicators for 10 topics and 2 cross cutting areas

80 countries

Refined indicators for 10 topics and 2 cross cutting areas

PILOT PHASE

Research

Preparation

Data Collection

Data Coding & Analysis

Pilot reporting

Feedback

2014-2015

2015-2016
THEMATIC COVERAGE

Access to Agricultural Inputs (Seeds, Fertilizer, Machinery)

Access to Agricultural Finance

Access to Transport & Storage

Access to Agricultural Land

Access to Markets (Domestic, Regional, Contract Farming)

Access to Water

Rural Electricity & ICT

Enabling the Business of Agriculture
THEMATIC COVERAGE

CORE TOPICS

LAND  AG FINANCE  SEED  FERT  AG TRANSP  MARKET

INITIAL TESTING

ICT  RURAL ELECTR  AG MECHAN  CONTR FARM
INDICATOR AREAS /
DATA POINTS
QUESTIONNAIRES
CONTRIBUTORS

- Government institutions
- Companies
- Associations
- Academia
- Research institutions
- NGOs/farmer organizations
<table>
<thead>
<tr>
<th>Date</th>
<th>Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2013</td>
<td>Guatemala</td>
</tr>
<tr>
<td>December 2013</td>
<td>Morocco, Ukraine, Rwanda</td>
</tr>
<tr>
<td>February 2014</td>
<td>Ethiopia, Philippines, Mozambique</td>
</tr>
<tr>
<td>March 2014</td>
<td>Nepal, Uganda, Spain</td>
</tr>
</tbody>
</table>
DESIGN TO ANALYSIS

Jan–Jun 2013
Research and consultation on key constraints in enabling environment for agriculture

Jun–Oct 2013
Consultation with technical experts to develop questionnaires

Nov 2013
Round 1 data collection in Guatemala

Dec 2013
Round 2 data collection in Morocco, Rwanda and Ukraine

Jan 2014
Refinement and review of questionnaires

Feb–Mar 2014
Round 3 data collection in Ethiopia, Mozambique, Nepal, Philippines, Spain and Uganda

Mar–May 2014
Data verification through follow-up and extensive research

May–Jul 2014
Data analysis and report writing

Aug–Sep 2014
Consultations on main findings and methodology

Oct–Dec 2014
Implementation of suggestions on report analysis and methodology for second-year data collection
DATA COLLECTION CHALLENGES

- **Unavailability** of data (laws, regulations, metrics)
- Statistical **unreliability** or weakness of data
- **Incomparability** of data (varying collection methodology)
- **Reluctance** to provide certain information
- **Limited contributor base** to verify data (time & motion)
- Specific **case study assumptions** need to be refined for time and motion indicators
- **Extensive follow up** to obtain data
LEARNINGS

VOLUME OF DATA POINTS

The important vs. the most important
LEARNINGS

ROBUST AND COMPARABLE MEASUREMENTS

Leaders heights and average height over the last 40 years

- 6'10
- 5'10
- 5'9
- 5'7
- 5'10
- 6'1
- 6'0
- 6'1

- Average German leader
- Angela Merkel, Germany
- Average French leader
- François Hollande, France
- Average UK leader
- David Cameron, UK
- Average US leader
- Barack Obama, US

GUARDIAN RESEARCH
LEARNINGS

DATA COLLECTION WISDOM

- Interaction/relationship with contributor
- Length of questionnaire
- Prepopulating surveys
## LEARNINGS: AG TRANSPORT
(Trucking Services)

<table>
<thead>
<tr>
<th>Topic</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting trucking company</td>
<td>✓</td>
</tr>
<tr>
<td>Licensing requirements/procedures</td>
<td>✓</td>
</tr>
<tr>
<td>Market structure</td>
<td>✗</td>
</tr>
<tr>
<td>Pricing regulation &amp; freight allocation</td>
<td>✓</td>
</tr>
<tr>
<td>Transport prices and costs</td>
<td>✗</td>
</tr>
<tr>
<td>Axle-load regulation and inspections</td>
<td>✓</td>
</tr>
<tr>
<td>Road blocks, tolls and fees</td>
<td>✗</td>
</tr>
<tr>
<td>International agreements</td>
<td>✓</td>
</tr>
<tr>
<td>Foreign trucking competition</td>
<td>✓</td>
</tr>
<tr>
<td>Accessing appropriate vehicles</td>
<td>✗</td>
</tr>
<tr>
<td>Road quality, access and density</td>
<td>✓</td>
</tr>
<tr>
<td>Rural roads financing</td>
<td>✗</td>
</tr>
<tr>
<td>Agricultural storage</td>
<td>✓</td>
</tr>
</tbody>
</table>
LEARNINGS: AG TRANSPORT
(TRUCKING SERVICES)

- Licensing of truck operations
- Pricing regulation/freight allocation
- Axle load regulations
- Foreign trucking competition
- Monitoring of road access, density and quality
# FOCUS OF DATA AREAS

<table>
<thead>
<tr>
<th>LAND</th>
<th>FINANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ First-time registration processes</td>
<td>▪ Branchless banking</td>
</tr>
<tr>
<td>▪ Process safeguards</td>
<td>▪ Non-traditional collateral</td>
</tr>
<tr>
<td>▪ Legal structure of the land registry</td>
<td>▪ Warehouse receipts</td>
</tr>
<tr>
<td></td>
<td>▪ Prudential regulation</td>
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</table>

<table>
<thead>
<tr>
<th>FERTILIZERS</th>
<th>SEEDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ Registering fertilizers</td>
<td>▪ Evaluation and registration of new</td>
</tr>
<tr>
<td>▪ Importing fertilizers</td>
<td>varieties</td>
</tr>
<tr>
<td>▪ Quality control</td>
<td>▪ Seed quality control requirements</td>
</tr>
<tr>
<td>▪ Fertilizer use and soil health</td>
<td>▪ International and regional seed trade</td>
</tr>
</tbody>
</table>
FOCUS OF DATA AREAS

TRANSPORT
- Licensing
- Pricing
- Cross-border trucking competition
- Axle-load
- Monitoring road access and quality

MARKETS
- Government plan and cooperative action
- Cross-border exports
- Phytosanitary regulation

CONTRACT FARMING
- Legal framework
- Contract specifications
- Procedural requirements
- Dispute resolution mechanisms
Toward a regulatory framework for a thriving seed sector
A critical regulatory focus — efficient and timely release of new varieties
Opportunities in regional and international cooperation

Regional Certification
- Members: 3
- Non-Members: 7

International Certification
- Members: 4
- Non-Members: 6
CONSULTATIVE/FEEDBACK PROCESS

- Methodological approach
- Analysis of indicators
- Contributor strategy

Report review

- Peer reviewers
- Country offices
- Donors

Donors

CSOs

June 2014

Technical experts

Sept 2014

Technical experts

Technical experts
**LOOKING FORWARD**

### Scale Up

<table>
<thead>
<tr>
<th>TOPICS</th>
</tr>
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<tbody>
<tr>
<td>LAND</td>
</tr>
<tr>
<td>AG FINANCE</td>
</tr>
<tr>
<td>SEED</td>
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<tr>
<td>FERT</td>
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<td>AG TRANSP</td>
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<tr>
<td>MARKET</td>
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<tr>
<td>ICT</td>
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<tr>
<td>ENVIRON SUSTAIN</td>
</tr>
<tr>
<td>WATER</td>
</tr>
<tr>
<td>MECHA-NIZATION</td>
</tr>
<tr>
<td>GENDER</td>
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<tr>
<td>LIVE-STOCK</td>
</tr>
</tbody>
</table>
LOOKING FORWARD

BUILD & REFINE INDICATORS

Challenge of choosing indicators that are:

- most relevant in determining “enability” of environment
- measurable and statistically robust
- fully comparable
- relevant to market linkages/constraints/opportunities for smaller farmers
LOOKING FORWARD

ADDITIONAL DIMENSIONS

PERFORMANCE/OUTCOME METRICS

46% with 4 hours

69% with 4 hours
LOOKING FORWARD

AGRICULTURAL TRANSFORMATION FRAMEWORK

Agriculture VA as % of GDP

Economically Active in Ag as % of Total Economically Active Population
AGRICULTURAL VA AND AGRIBUSINESS VA
(AS % OF GDP, AND THEIR RATIO TO ONE ANOTHER)

1 : 0.56
1 : 0.87
1 : 1.06
1 : 1.17
1 : 1.90

Ratio of Ag to Ag biz

Ag Based  Pre Transition  Transition  Urbanising  Developed

Ag VA as % of GDP  Ag biz as % of GDP  Remaining of Other Sectors as % of GDP
BUILDING ON LEARNINGS
BENCHMARKING THE BUSINESS OF AGRICULTURE

Thank you