ENABLING THE BUSINESS OF AGRICULTURE

Federica Saliola
ICABR Conference
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Global focus on agriculture

ENABLING ENVIRONMENT FOR BUSINESS IN AGRICULTURE
Enabling the Business of Agriculture has been inspired by the WBG Doing Business report, which has a recognized track record in measuring laws and regulations in 189 economies and leveraging reforms.
Genesis and timeline of EBA

- **2012**: EBA Kick-off
- **2013-14**: Pilot data collection in 10 countries
- **2014-15**: Data collection in 40 countries
- **2016**: Data collection in 62 countries
A tool for improved policymaking

EBA can inform policymaking and **trigger reforms** based on cross-country benchmarking

Identify legal barriers for the business of agriculture

Quantify transaction costs of dealing with government regulations for 40 countries around the world
Type of indicators

**De Jure**

LEGAL INDICATORS
All public regulations, other legal texts of general application, judicial decisions and administrative rulings

**De Facto**

PROCEDURES, TIME & COST
Processes as experienced by the private sector in complying with legal and regulatory requirements
EBA benchmarks markets associated to activities along the agribusiness value chain.
EBA: regulatory areas benchmarked (1)

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<th>Operations</th>
<th>Quality control</th>
<th>Trade</th>
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<tbody>
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<td>Seed</td>
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<td>Fertilizer</td>
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<td>Machinery</td>
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<td>Finance</td>
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<td>Transport</td>
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</table>
## EBA: Regulatory Areas Benchmarked (2)

<table>
<thead>
<tr>
<th></th>
<th>Operations</th>
<th>Quality Control</th>
<th>Trade</th>
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</thead>
</table>
| **Seed** | Seed registration (0-100)  
Procedures, time & cost  
Seed certification (0-100) |                  | Fertilizer import requirements (0-100)  
Cost of import permit and importer registration |
| **Fertilizer** | Fertilizer registration (0-100)  
Procedures, time & cost | Fertilizer quality control (0-100) |                  |
| **Machinery** | Tractor dealer requirements | Tractor standards & safety (0-100) | Tractor import requirements (0-100)  
Cost of import permit and importer registration |
| **Finance** | Microfinance institutions (0-100)  
Credit unions (0-100)  
Agent banking (0-100)  
E-money (0-100)  
Warehouse receipts (0-100) | | |
| **Markets** | Production & sales (0-100) | Plant protection (0-100) | | Agricultural exports  
Documents, time & cost |
| **Transport** | Truck licenses (0-100)  
Time, cost & validity of company licenses, truck permits and vehicle inspections | | Cross-border transportation (0-100) |
### MALI

<table>
<thead>
<tr>
<th>Industry</th>
<th>Mali Score</th>
<th>Sub-Saharan Average</th>
<th>Low Income Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEED</td>
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<td>FERTILIZER</td>
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<tr>
<td>TRANSPORT</td>
<td>67.9</td>
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</tr>
</tbody>
</table>

#### Key Indicators:

- **Seed Registration (0-100)***
- **Fertilizer Registration (0-100)***
- **Tractor Requirements (0-100)***
- **Tractor Sales and Services (0-100)***
- **Microfinance Institutions (0-100)***
- **Credit Unions (0-100)***
- **Agent Banking (0-100)***
- **Warehouse Receipts (0-100)***

### NIGER

<table>
<thead>
<tr>
<th>Industry</th>
<th>Niger Score</th>
<th>Sub-Saharan Average</th>
<th>Low Income Average</th>
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</thead>
<tbody>
<tr>
<td>SEED</td>
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<td>FERTILIZER</td>
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</table>

#### Key Indicators:

- **Seed Registration (0-100)***
- **Fertilizer Registration (0-100)***
- **Tractor Requirements (0-100)***
- **Tractor Sales and Services (0-100)***
- **Microfinance Institutions (0-100)***
- **Credit Unions (0-100)***
- **Agent Banking (0-100)***
- **Warehouse Receipts (0-100)***

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**EBA: regulatory areas benchmarked (3)**
EBA indicators are based on identified good practices and are actionable.

Fertilizer score 53

Adopting good-practices already in place in other countries:

- Catalogue online  +6 points
- Import permit 12 months +3 points
- Penalties mislabeled bags +5 points

Fertilizer score 67

WORLD BANK GROUP
## Country coverage

### Sub-Saharan Africa
- Burkina Faso
- Burundi
- Cote D'Ivoire
- Ethiopia
- Ghana
- Kenya
- Mali
- Mozambique
- Niger
- Rwanda
- Sudan
- Tanzania
- Uganda
- Zambia
- Liberia
- Benin
- Malawi
- Cameroon
- Senegal
- Zimbabwe
- Nigeria

### EAP
- Cambodia
- Laos
- Myanmar
- Philippines
- Vietnam
- Malaysia
- Thailand

### OECD
- Chile
- Denmark
- Greece
- Poland
- Spain
- Italy
- Korea
- Netherlands

### LAC
- Bolivia
- Colombia
- Guatemala
- Nicaragua
- Haiti
- Mexico
- Peru
- Uruguay

### MENA
- Jordan
- Morocco
- Egypt

### ECA
- Bosnia-Herzegovina
- Georgia
- Kyrgyzstan
- Russia
- Tajikistan
- Turkey
- Ukraine
- Armenia
- Romania
- Serbia

### SA
- Bangladesh
- Nepal
- India
- Sri Lanka
- (subnational)
Data collection

Public Sector

- Ministries of Agriculture, Transport, Environment, Trade and Commerce, Information and Technology
- Central Bank, Financial Supervisory Authorities
- Customs, State Inspectors, Land Registries, Cadasters, Agricultural Research Institutes and others

Private Sector

- Agricultural Input Companies (Fertilizer, Machinery, Seed, Irrigation)
- Trucking companies
- Freight forwarders
- Cooperatives and Farmers’ associations
- Agricultural Holdings
- Mobile Network Operators
- Lawyers
- Commercial Bankers and Microfinance Institutions
Enabling the Business of Agriculture

Fertilizer

The Enabling the Business of Agriculture fertilizer indicators measure laws and regulations related to registration, import, and quality control of fertilizer products. They address factors important to both importing and selling fertilizer products, farmers using quality fertilizer products to increase their yields, and governments pursuing regulations that ensure the quality of products and effectiveness of fertilizer use.

<table>
<thead>
<tr>
<th>Economy</th>
<th>Topic Score</th>
<th>Fertilizer registration (0-100)</th>
<th>Number of procedures to register a new fertilizer</th>
<th>Time to register a new fertilizer</th>
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## EBA 2016 Report

### Country scores

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<th>FERTILIZER</th>
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</table>

- **Topic score > 85**
- **Topic score > EBA average**
- **Topic score < EBA average**
- **Topic score < 30**
Average score of EBA topics (0-100)

The score averages the scores of Fertilizer, Sees, Mechanization, Finance, Markets and Transport.
Countries with smarter regulations on operations also promote quality control and trade.
Regions with similar rules show different costs for registering a new seed variety.
• Regulatory discrimination **against the private sector** (e.g. eligibility of private companies to import machinery, register fertilizer, produce breeder or foundation seeds and be accredited in seed certification).

• Regulatory discrimination **against foreign companies** (e.g. the possibility for foreign companies to import fertilizers or perform transport activities in the country)

• Regulatory obstacles for **small players** (e.g. minimum capital requirement to start a farmers’ cooperative or a minimum number of trucks to establish a trucking company).
Number of good practices related to non-discrimination:

- Greece: 18
- Denmark: 17
- Georgia: 17
- Poland: 17
- Spain: 17
- Zambia: 17
- Myanmar: 10
- Lao PDR: 9
- Ethiopia: 8
### EBA 2016 Report

#### Information

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of good practices related to access to information</th>
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<td>Denmark</td>
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<tr>
<td>Spain</td>
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<tr>
<td>Poland</td>
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<td>2</td>
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<td>Ghana</td>
<td>2</td>
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<tr>
<td>Rwanda</td>
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</table>

**Number of good practices related to access to information**
LOWER COST
Russia (free - up to 5 registration a year)
Chile (6%)
Poland (7%)
Denmark (8%)
Greece (9%)
Spain (10%)

HIGHER COST
Nicaragua (834%)
Sudan (722%)
Vietnam (426%)

Cost to register a new seed variety (% income per capita)
Register a fertilizer product: time and cost

<table>
<thead>
<tr>
<th>COST TO REGISTER A NEW FERTILIZER (% OF GNI PER CAPITA)</th>
<th>TIME TO REGISTER A NEW FERTILIZER (DAYS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The cheapest...</td>
<td>The fastest...</td>
</tr>
<tr>
<td>Spain 0.0%</td>
<td>Vietnam 15</td>
</tr>
<tr>
<td>Jordan 0.3%</td>
<td>Sudan 29</td>
</tr>
<tr>
<td>Guatemala 0.4%</td>
<td>Nicaragua 30</td>
</tr>
<tr>
<td>Denmark 0.4%</td>
<td>Bosnia and Herzegovina 31</td>
</tr>
<tr>
<td>Bosnia and Herzegovina 0.5%</td>
<td>Ghana 89.2%</td>
</tr>
<tr>
<td></td>
<td>Denmark 31</td>
</tr>
<tr>
<td></td>
<td>Uganda 691</td>
</tr>
</tbody>
</table>
Time to obtain per-shipment export documents

Average time (calendar days)

- Tanzania: 12 days
- Cambodia: 6 days
- Burundi: 4 days
- Mali: 2 days
- Niger: 2 days
- Burkina Faso: 2 days
- Mozambique: 2 days
- Nepal: 2 days
- Zambia: 8 days
- Ghana: 8 days
- Kenya: 8 days
- Tajikistan: 4 days
- Georgia: 4 days
- Ukraine: 4 days
- Myanmar: 4 days
- Sri Lanka: 4 days
- Lao PDR: 4 days
- Philippines: 4 days
- Vietnam: 4 days
- Bolivia: 4 days
- Kyrgyz Republic: 4 days
- Nicaragua: 4 days
- Bangladesh: 4 days
- Guatemala: 4 days
- Colombia: 4 days
- Turkey: 4 days
- Bosnia and Herzegovina: 4 days
- Jordan: 4 days
- Russian Federation: 4 days
- Chile: 2 days
- Denmark: 2 days
- Greece: 2 days
- Poland: 2 days
- Spain: 2 days

Legend:
- Low income
- Lower middle income
- Upper middle income
- High income
Many countries impose overly strict regulations on microfinance institutions and lack regulations to ensure the financial stability of credit unions.
Few countries are truly open to international competition coming from their largest trading partner. Only a few countries allow cabotage.
What is next?

- New report Jan. 2017
- 62 countries covered
- New topics scored (water, land, livestock)
ENABLING THE BUSINESS OF AGRICULTURE

WORLD BANK GROUP

Thank you
EBA METHODOLOGY: SEED, FERTILIZER MACHINERY, FINANCE, TRANSPORT, AND MARKETS
Seed indicators

Seed cycle

Seed development → Registration → Quality control

Seed indicators

Encouragement of plant breeding → Evaluation and registration of new varieties → [New in EBA17 Survey] Seed quality control and assurance
Seed indicators

- Protection of plant breeders’ rights
- Availability of initial classes (breeder/pre-basic seed and foundation/basic seed) of seeds and conserved germplasm to the private sector
- Variety release committees should also include non-governmental representatives
- Existence of an up to date national variety catalog
- Self-accreditation and third-party accreditation for the performance of certification activities
- Availability of official fee detailing costs of certification performed by the public authority
Seed indicators

**Respondent types**
- Seed companies
- Seed associations
- Government authorities (*Ministry of Agriculture, National agricultural research institute*)

**Data collection**
- Remote
- Country visits
Markets indicators

- Phytosanitary Protection
- Producers Organizations
- Domestic licenses and food safety
- Contract Farming
- Dispute Resolution
- Export

[New in EBA17 Survey]
Markets indicators

• Pest surveillance, reporting and risk analysis; pest database and pest list publicly available.

• Non-discriminatory and commercially driven producers organizations.

• Low time and cost to obtain domestic licenses to produce, sell and purchase agricultural products.

• Contract farming rules that balance the interests of farmers and buyers.

• Dispute resolution mechanisms tailored to enforce agricultural production contracts.

• Transparent, efficient, and low cost procedures to export major agricultural products.
Respondent types

Agribusinesses
Producers organizations
Chambers of Commerce
Lawyers
Plant Protection Agencies

Data collection
Remote
Country visits
Fertilizer indicators

- Registering products
- Importing fertilizer
- Quality control
- Distributing fertilizer
- Subsidies
- Extension services

(New in EBA17 Survey)
Fertilizer indicators

- Efficient & affordable fertilizer product registration.
- Official catalog accessible online.
- Private companies allowed to import.
- Import permit without time limitation.
- Import permit affordable.
- Labeling of fertilizer required.
- Sale of mislabeled fertilizers prohibited.
Fertilizer indicators

Respondent types
- Fertilizer companies
- NGOs
- Industry associations
- Government authorities

Data collection
- Remote
- Country visits
Finance indicators

Microfinance Institutions (MFIs) → Credit Unions → Agent banking → Electronic money → Warehouse Receipts

**EBA17: More agricultural finance related policy questions are added:**
- Lending quota to the agricultural sector
- Credit guarantee systems for agricultural loans
- Interest rate cap for agricultural loans

**EBA17:** Expanded to Movable Collateral Indicator
Finance indicators

- Require financial institutions to disclose the full cost of credit to loan applicants
- Establish prudential requirements that are appropriate to MFIs’ risk and characteristics
- Allow both banks and non-banks to issue e-money
- Require e-money issuers to safeguard customer funds
- Require warehouse receipt operators to file a bond with the regulator or pay into an indemnity fund to secure performance of obligations
Finance indicators

Respondent types
- Commercial banks
- Microfinance Institutions (MFIs)
- Financial cooperatives
- Lawyers specializing in finance
- Central Banks/Financial supervisory authorities

Data collection
- Remote
- Country visits
Agricultural Machinery indicators

- Tractor Import Requirements
- Tractor Registration and Operation
- Tractor Testing and Standards
- Tractor Hire Services and Financing
- Increasing Women’s Use of Tractors

[New in EBA17 Survey]

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Agricultural Machinery indicators

- Streamlined import procedures to facilitate timely availability and delivery of agricultural tractors.
- Affordable and process efficient tractor registration.
- Availability of after-sales services and statutory provision of warranties to improve tractor durability,
- Appropriate testing and streamlined type-approval procedures of agricultural tractors to ensure imported tractors suit country conditions.
- Enforcement of safety standards such as roll-over protective structures and seatbelts.
- Availability of hiring (contracting) services, and access to special financing arrangements for the purchase of agricultural tractors
Agricultural Machinery indicators

**Respondent types**
- Tractor manufacturers
- Tractor importers and dealers
- NGOs
- Government authorities

**Data collection**
- Remote
- Country visits
Transport indicators

Domestic truck licensing

Pricing and freight allocation

Access to information

Cross border transport

[New in EBA17 Survey]
Product-specific transport regulations

[New in EBA17 Survey]
Cross border licensing

WORLD BANK GROUP
Good Practices

- Require licenses to access the sector and provide truck services
- Remove discriminatory requirements for licenses
- Establish quality criteria to obtain a transport license, preferably by implementing a company-level license
- Make licensing requirements transparent and accessible
- Promote market-based price-setting mechanisms and freight allocation systems
- Promote cross-border competition by granting additional transport rights to trading partners
Transport indicators

**Respondent types**
- Truck companies
- Truck associations
- Transport lawyers
- Government authorities

**Data collection**
- Remote
- Country visits
EBA METHODOLOGY: GENDER, ENVIRONMENTAL SUSTAINABILITY, WATER, ICT, LIVESTOCK
How can EBA indicators be used to regulate agribusiness inclusively?

**Land:** Improving regulations on tenure security and easing restrictions on land right transfers would lead towards more inclusive and efficient land markets.

**Water:** Legal frameworks that enable water user associations to make decisions can affect all users of water and irrigation in the country.

**Seed, fertilizer and tractors:** Easing the regulatory burden on importers and dealers of agricultural inputs can make their products more readily available and affordable in remote regions, and thus more accessible to women farmers. Improving the quality control of fertilizer, seeds and machinery is also key to ensuring that increased input use boosts women’s productivity.

**Finance:** Strengthening laws which enable microfinance institutions, credit unions, branchless banking and alternative sources for movable collateral, such as warehouse receipts can increase the access women have to financial resources.

**Transport:** Removing or reducing the constraints on transport operators could benefit women by reducing costs of transport and increasing the availability of transport services in a country.

**Markets:** Reducing the transaction costs of obtaining the documents required for export can help resource-constrained producers, especially female farmers. Lowering the fees to join professional organizations can also facilitate female producers’ access to social capital and marketing opportunities. And enabling regulations for cooperative creation and growth can help women leverage collective action in agricultural production and marketing.
Collect new data on constraints faced by women across the EBA topic areas:

- Availability of sex-disaggregated data
- Restrictions on women’s employment and activity
- Women’s participation and leadership in collective groups
- Government and private sector initiatives to include and empower women
Access to Water indicators

Water Abstraction and Use Permits

Water User Organizations (WUOs)

Water Resources Management

[New in EBA17 Survey]
Access to Water indicators

- Permit system for allocating water.
- Public notice for water permit applications.
- Permit duration to promote investment security.
- Promoting water conservation and efficiency through measures such as resource pricing.
- Clearly defined functions and powers for water user organizations (WUOs).
Access to Water indicators

Respondent types

- Lawyers
- Government authorities
- Academic experts
- Water users (farms)
- Irrigation services providers

Data collection

- Remote
- Country visits
Environment indicators

Diversity of Plant Genetic Resources

Sustainable water resources management

[New in EBA17 Survey]

Soil health +
Economic incentives for sustainable practices
Environment indicators

- Promote sustainable use of plant genetic diversity
- Systematic monitoring and conservation *in situ* and *ex situ* of landraces and crop wild relatives through national agrobiodiversity inventories and genebanks
- Facilitation of fair and greater access to germplasm through transparent and streamlined procedures
- Management of water resources in an integrated approach through watershed-level institutions and plans, underpinned by robust monitoring systems [*moved to the water topic*]
- Creation and enforcement of surface and groundwater quality standards
- Development of land use plan and monitoring of agricultural soil
- Creation of reward or compensation-based system/economic incentives to support sustainable practices
- Institutionalization of good agricultural practices that limit water resource deterioration
Environment indicators

Respondent types
- NGOs
- Water Basin authorities
- Lawyers in water/environmental law
- Government authorities (*Ministry of Agriculture, Ministry of Environment, Ministry of Water*)

Data collection
- Remote
- Country visits
Land indicators

EFFECTIVENESS
Cost of conducting a survey
Freedom and security of contracting

TRANSPARENCY
Procedural safeguards in case of expropriation
Relevance of land records
Public/state land management

INCLUSION
Registration of group rights
Gender disaggregation of land records
Land indicators

Good Practices

• Low-cost “fit for purpose” approaches to registering land with a legally valid description of its location area available.

• Short/Long term leasing of agricultural land is possible without restrictions.

• Expropriation limited to provision of true public goods and ensure a fair process of compensation (at market value even if land is not registered).

• Mortgages, private court cases, and public encumbrances (e.g. acquisition orders) relating to a specific parcel of land are reflected in the record and automatically updated in case of any change.

• All public land that is suitable for agricultural use is mapped and information on its location is publicly accessible.

• A process to monitor and deal with encroachment on public land is available.

• Common land for cultivation of crops is legally recognized and can be registered.

• The group of owners/users or its representatives can transfer use rights to outsiders or engage in joint ventures without restrictions.

• Registry information on land ownership and transfers is gender-disaggregated.
Land indicators

Respondent types
- Land Governance and Administration Experts
- Registry and Cadaster Directors
- Surveyors
- National Remote Sensing Centre

Data collection
- International Steering Committee
- Expert investigators & link to admin. data
- Reform case studies
- Link to household survey data
ICT indicators

Licensing regimes

Government strategies

Agricultural e-extension services

[dropped in EBA2017]
ICT indicators

- General authorization regime for licenses.
- Transparent licensing costs.
- Infrastructure sharing between operators.
- Voluntary spectrum trading to efficiently use spectrum resources.
- Operational and transparent universal access funds.
- Government strategy/policy to promote ICT access and use in rural areas.
Respondent types

Mobile operators
Telecommunications lawyers
Government authorities (Telecommunications Regulatory Authorities, Ministries of Telecommunications)

Data collection
Remote
Country visits
Livestock Medicinal Products indicators

Registering Livestock Medicinal Products

Importing

Labelling & Sale

[New in EBA17 Survey]
Livestock Medicinal Products indicators

- Clearly defined institutional structure.
- Efficient product registration system.
- Quality control testing laboratories accredited under international standards.
- No discriminations against private importers and distributors.
- Border checks of imported products required.
- Appropriate labeling required.
Livestock Medicinal Products indicators

**Respondent types**
- Companies dealing with livestock medicinal products, including manufacturers, importers, wholesalers, distributors, etc.
- Government authorities
- Lawyers

**Data collection**
- Remote
- Country visits