Enabling the Business of Agriculture
Global focus on agriculture

POVERTY

ENABLING ENVIRONMENT FOR BUSINESS IN AGRICULTURE

FOOD DEMAND

Quality of regulations
Strength of institutions
Efficient administrative procedures
EBA: genesis and timeline

2012
EBA Kick-off

2013-14
Pilot data collection in 10 countries

2014-15
Data collection in 40 countries

2016
Data collection in 60 countries

ENABLING THE BUSINESS OF AGRICULTURE | Progress Report

ENABLING THE BUSINESS OF AGRICULTURE | Comparing regulatory good practices

DANIDA
USAID
Department for International Development
Bill & Melinda Gates Foundation
Government of the Netherlands
WORLD BANK GROUP
Inspired by the WBG *Doing Business* report, which has a recognized track record in measuring laws and regulations in 189 economies and leveraging reforms.
A tool for improved policymaking

Identify legal barriers for the business of agriculture

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

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

Topics scored in EBA 2016

- Seed
- Fertilizer
- Machinery
- Finance
- Transport
- Markets

Topics under development

- Land
- Water
- Livestock
- ICT
- Env Sust
- Gender

EBA benchmarks markets associated to activities along the agribusiness value chain
**EBA: regulatory areas benchmarked (1)**

<table>
<thead>
<tr>
<th></th>
<th>Operations</th>
<th>Quality control</th>
<th>Trade</th>
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</thead>
<tbody>
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<td>Fertilizer</td>
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<td>Transport</td>
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<td>EBA: regulatory areas benchmarked (2)</td>
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<table>
<thead>
<tr>
<th>Operations</th>
<th>Quality control</th>
<th>Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Seed</strong></td>
<td></td>
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</tbody>
</table>
| Seed registration (0-100)  
  *Procedures, time & cost*  
Seed certification (0-100) |                 |       |
| **Fertilizer** | Fertilizer quality control (0-100) | Fertilizer import requirements (0-100)  
  *Cost of import permit and importer registration* |
| Fertilizer registration (0-100)  
  *Procedures, time & cost* |                 |       |
| **Machinery** | Tractor standards & safety (0-100) | Tractor import requirements (0-100)  
  *Cost of import permit and importer registration* |
| Tractor dealer requirements |                 |       |
| **Finance** |                 |       |
| Microfinance institutions (0-100)  
  Credit unions (0-100)  
  Agent banking (0-100)  
  E-money (0-100)  
  Warehouse receipts (0-100) |                 |       |
| **Markets** | Plant protection (0-100) | Agricultural exports  
  *Documents, time & cost* |
| Production & sales (0-100) |                 |       |
| **Transport** |                 | Cross-border transportation (0-100) |
| Truck licenses (0-100)  
  *Time, cost & validity of company licenses, truck permits and vehicle inspections* |                 |       |
EBA: regulatory areas benchmarked (3)

<table>
<thead>
<tr>
<th>Cambodia</th>
<th>East Asia &amp; Pacific Low Income</th>
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<tbody>
<tr>
<td>Seed</td>
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<td>Markets</td>
<td>67.9</td>
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<tr>
<td>Transport</td>
<td>57.1</td>
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</tbody>
</table>

### CAMBODIA

#### Seed
- **Seed registration (0-100)**
- **Procedures (number)**
- **Time (days)**

#### Fertilizer
- **Fertilizer quality control (0-100)**
- **Fertilizer import requirements (0-100)**
- **Procedures (number)**
- **Time (days)**

#### Machinery
- **Tractor dealer requirements (0-100)**
- **Tractor standards and safety (0-100)**
- **Tractor import requirements (0-100)**
- **Procedures (number)**
- **Time (days)**

#### Finance
- **Microfinance institutions (0-100)**
- **Credit unions (0-100)**
- **Agent banking (0-100)**
- **Electronic money (0-100)**
- **Warehouse receipt (0-100)**

#### Markets
- **Production and sales (0-100)**
- **Plant protection (0-100)**
- **Export documents per shipment (number)**
- **Time to prepare export documents (days)**
- **Cost of export documents in USD ($ per income per capita)**

#### Transport
- **Truck license (0-100)**
- **Time to obtain company license (days)**
- **Validity of company license (years)**
- **Validity of truck permit (years)**
- **Cost to obtain vehicle technical inspection in USD ($ per income per capita)**
- **Validity of vehicle inspection (years)**
- **Cross-border transportation (0-100)**

---

**World Bank Group**
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
**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 indicators are based on identified **good practices** and are actionable.

**Fertilizer score 53**

- Adopting good-practices already in place in other Asian countries:
  - Catalogue online: +6 points
  - Import permit 12 months: +3 points
  - Penalties mislabeled bags: +5 points

**Fertilizer score 67**
## 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: Fertilizer Indicators

<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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<tr>
<th>Country</th>
<th>Seeds</th>
<th>Fertilizer</th>
<th>Machinery</th>
<th>Finance</th>
<th>Markets</th>
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<td>Bosnia and Herzegovina</td>
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</table>

- **Topic score > 85**
- **Topic score > EBA average**
- **Topic score < EBA average**
- **Topic score < 30**
Countries with smarter regulations on operations also promote quality control and trade
EBA 2016 Report

Administrative procedures

Regions with similar rules show different costs for registering a new seed variety.
Measures of regulatory discrimination

- Greece, Denmark, Poland, Spain and Zambia have the highest number of non-discriminatory regulations in place.

- Ethiopia, the Lao People’s Democratic Republic and Myanmar have the fewest.

- Only a third of countries allow the private sector to carry out the seed certification process.

- While 38 countries allow foreign companies to transport goods into their country from outside, only 4 allow them to transport goods between two locations within the country.
Measures of accessibility of the information

- EBA measures whether Governments make regulatory information available to the public (e.g. licensing requirements, fee schedules, official catalogs).

- Denmark and Spain have the highest number of good practices and Rwanda has the fewest.

- While 75% of the countries have official catalogs listing new registered seeds or fertilizer products, fewer than half make them available online.
EBA 2016 Report

Regional scores

Average score all EBA topics (0-100)

- EAP
- ECA
- OCED
- LAC
- MENA
- SA
- SSA
Score for each EBA topic (0-100)

- Finance
- Fertilizer
- Mechanization
- Markets
- Seed
- Transport

- East Asia & Pacific
- Europe & Central Asia
- High income: OECD
- Latin America & Caribbean
- Middle East & North Africa
- Sub-Saharan Africa
- South Asia
- Global
## Variety release process

Importance of private sector representation and frequency of meetings

<table>
<thead>
<tr>
<th>VRCommittee</th>
<th>Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meets on demand</td>
<td>Bangladesh, Bolivia, Colombia, Côte d'Ivoire, Kenya, Lao PDR, Nepal</td>
</tr>
<tr>
<td>Meets after each cropping season</td>
<td>Chile, Denmark, Ethiopia, Greece, Jordan, Kyrgyz Republic, Mozambique, Myanmar, Nicaragua, Philippines, Poland, the Russian Federation, Spain, Sri Lanka, Sudan, Tajikistan, Tanzania, Turkey, Uganda, Ukraine, Vietnam, Zambia</td>
</tr>
<tr>
<td>Doesn’t meet after each crop season</td>
<td>Morocco</td>
</tr>
<tr>
<td>Established but does not meet</td>
<td>Burkina Faso, Burundi, Georgia, Ghana, Mali, Rwanda</td>
</tr>
<tr>
<td>Not established</td>
<td>Bosnia and Herzegovina, Cambodia, Guatemala, Niger</td>
</tr>
</tbody>
</table>
Open fertilizer bags
Most countries allow their sale

- 22 countries prohibit the sale of opened fertilizer containers/bags
- 17 countries do not prohibit the sale of opened fertilizer containers/bags
- 13 countries establish penalty for the sale of opened fertilizer containers/bags
- 4 countries do not establish penalty for the sale of opened fertilizer containers/bags
Transport license systems
Company road transport licensing promotes better transport operations

Share of total countries (%)

<table>
<thead>
<tr>
<th>Region</th>
<th>No license</th>
<th>Both company and truck licenses</th>
<th>Truck license</th>
<th>Company license</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Asia &amp; Pacific</td>
<td>40%</td>
<td>20%</td>
<td>57%</td>
<td>29%</td>
</tr>
<tr>
<td>Europe &amp; Central Asia</td>
<td>25%</td>
<td>50%</td>
<td>14%</td>
<td>29%</td>
</tr>
<tr>
<td>Latin America &amp; the Caribbean</td>
<td>20%</td>
<td>50%</td>
<td>25%</td>
<td>40%</td>
</tr>
<tr>
<td>OECD high income</td>
<td>20%</td>
<td>80%</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>South Asia</td>
<td>100%</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Sub-Saharan Africa</td>
<td>14%</td>
<td>71%</td>
<td>14%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Transport rights for foreign companies
Limited openness to international competition

High income OECD
Sub-Saharan Africa
Europe & Central Asia
Latin America & Caribbean
Middle East & North Africa
East Asia & Pacific
South Asia
Warehouse receipts
Few countries regulate warehouse receipts systems

Score on warehouse receipts (0–100)

- Ethiopia
- Turkey
- Uganda
- Ukraine
- Zambia
- Philippines
- Tanzania
- Colombia
- Bolivia
- Guatemala
- Nicaragua
- Bangladesh
- Georgia
- Kyrgyz Republic
- Bosnia and Herzegovina
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%)
Time of variety registration

Days

Bangladesh, Bolivia, Chile, Côte d'Ivoire, Colombia, Denmark, Spain, Ethiopia, Georgia, Ghana, Greece, Guatemala, Kenya, Kyrgyz Republic, Cambodia, Sri Lanka, Morocco, Myanmar, Mozambique, Nicaragua, Nepal, Philippines, Poland, Russian Federation, Sudan, Turkey, Tanzania, Uganda, Ukraine, Vietnam, Zambia
### Registration of 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>
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<tr>
<td></td>
<td>Uganda 691</td>
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</tbody>
</table>
EBA 2016 Report

Fertilizer

Time validity of fertilizer import permit (in months)

<table>
<thead>
<tr>
<th>Country</th>
<th>Time Validity</th>
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<tbody>
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<tr>
<td>Mali</td>
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<tr>
<td>Mozambique</td>
<td>1</td>
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<td>Nicaragua</td>
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<td>Vietnam</td>
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</tr>
<tr>
<td>Guatemala</td>
<td>3</td>
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<tr>
<td>Lao PDR</td>
<td>3</td>
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<td>Sri Lanka</td>
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<td>Uganda</td>
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<td>Burkina Faso</td>
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<td>Sudan</td>
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<tr>
<td>Niger</td>
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</tr>
</tbody>
</table>
Time to obtain per-shipment export documents

Average time (calendar days)

- Low income
- Lower middle income
- Upper middle income
- High income

Income group average
Domestic plant protection frameworks

Strong frameworks correspond with low time and cost to obtain a phytosanitary certificate
Developing topics

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
Developing topics

Water

- Water Abstraction and Use Permits
- Water User Organizations (WUO)
- Water Resources Management
Developing topics

Livestock

Registering Livestock Medicinal Products

Importing

Labelling & Sale
Developing topics

Diversity of Plant Genetic Resources

Sustainable water resources management

Seed

Water
Livestock
Fertilizer

[New in EBA17 Survey]
Soil health + Economic incentives for sustainable practices

WORLD BANK GROUP
Developing topics

ICT

Licensing regimes

Government strategies

[dropped in EBA2017]
Agricultural e-extension services
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