Seed Sector Governance

Proceedings of the workshop

20-21 April 2018, Bishoftu, Ethiopia

Programme on Integrated Seed Sector Development in Ethiopia

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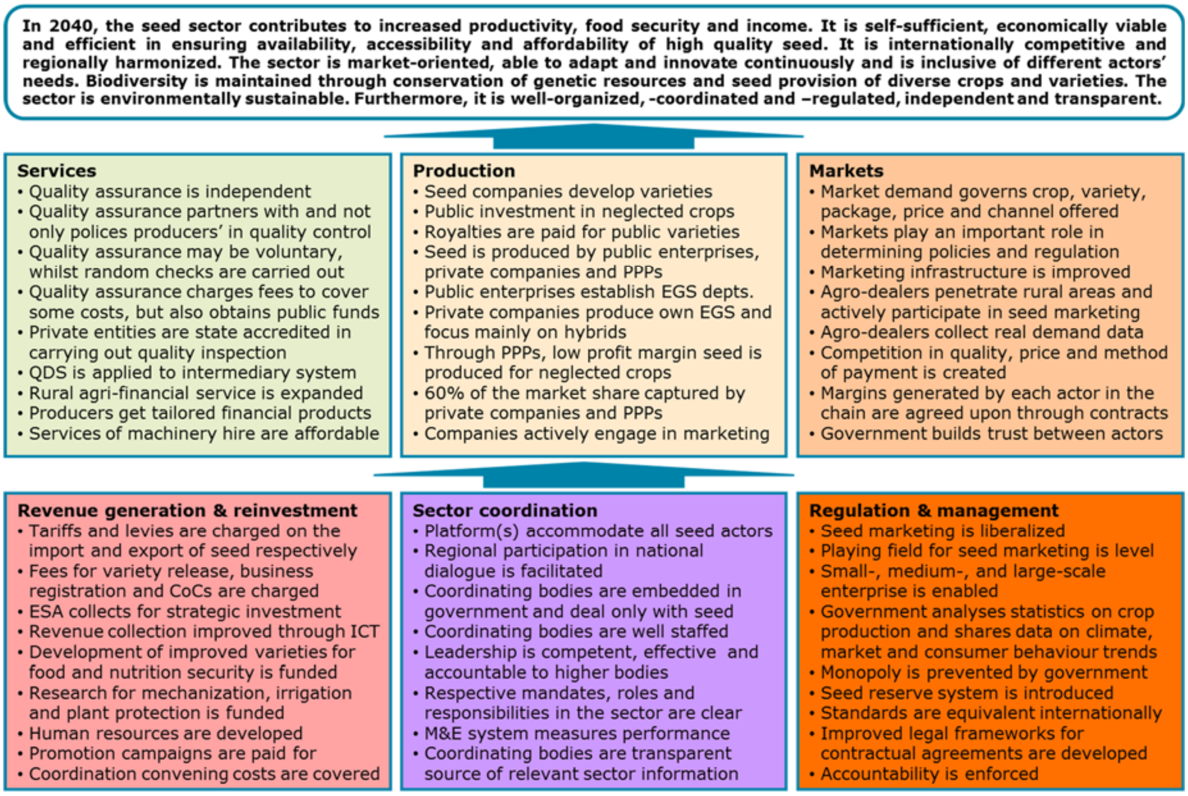
Executive Summary

On April 20th and 21st, 2018, 28 participants including officials from the Ministry of Agriculture and Natural Resources (MoANR) and the regional state Bureaus of Agriculture in Amhara, Oromia, SNNPR and Tigray; managers, directors and/or their deputies of regional input regulatory authorities, research institutes, and public seed enterprises; and a regional coordinator for the Agricultural Transformation Agency (ATA) participated in a workshop on Seed Sector Governance. The workshop aimed to achieve three objectives: 1. Develop a shared vision for the transformation of the Ethiopian seed sector; 2. Support representatives of seed core groups to revise strategies on how best to transform and govern the seed sector in each of their regional states; and 3. Reflect on differentiated roles and responsibilities in governing and coordinating the seed sector.

The workshop followed a highly interactive approach, engaging participants in in-depth discussions through group work and plenary discussion. Outputs included: vision for the seed sector in 2040 (Chapter 2); presentation of a framework for sector transformation (Chapter 3); outcomes targeted for each building blocks of the framework (Chapter 4); regional strategies to achieve these outcomes (Chapter 5); proposed governance structures for each region (Chapter 6); and differentiated roles and protocols in seed sector governance in each region (Chapter 7). Chapter 8 concludes the report with notes on the way forward. The vision for the seed sector in 2040 with corresponding outcomes targeted for each of the six building blocks is shared in the figure on the next page.

Chapter 5 presents an incomplete roadmap for seed sector transformation in each region. It is incomplete as the workshop achieved just a start to the process, which should be completed in each region in consultation with more stakeholders. Although strategies are developed in parallel in each region, many of the solutions proposed and identified conditions that need to be in place for the success of interventions are similar. This reinforces the need for national coordination and regional participation in national dialogue and experience sharing.

Chapters 6 & 7 present the governance structures outlined in each region and division of tasks among constituent bodies in these structures respectively. In all regions, it was acknowledged that the seed sector poses many complex challenges requiring competent, effective and accountable leadership in coordination. It was argued that coordinating bodies should be embedded within government structures. With the exception of Tigray, which advocated the establishment of an autonomous agency in the regulation and coordination of the seed sector in the region, all other regions made the case for the establishment of a seed unit separate from the existing input directorates of the Bureau of Agriculture. Seed units would coordinate all issues of strategic importance to the seed sector and advise other directorates, including input, extension and marketing, on the way forward. Further, other tasks identified under the oversight of these seed coordinating bodies were: providing overall leadership and coordination; identifying systemic challenges; developing a shared vision and strategy for transformation; making decisions on seed sector strategy; steering stakeholders in follow-up strategies and implementation; and monitoring and evaluating performance.



Vision for the Ethiopian seed sector in 2040

A number of follow up actions have been suggested, including: discussing the workshop outcomes within regional core groups; revisiting the outcomes of the group work with core group members, agreeing on a shared vision and elaborating strategy; analysing the advantages and disadvantages of different governance structures and selecting the most appropriate for each region; clarifying and strengthening the mandates of regional core groups and seed units in relation to decision making and ensuring implementation of decisions; sharing the outcomes of the two above activities with national seed unit for their consideration and presentation to the minister; developing the governance structure at national level; ensuring alignment between different regions and integration into a national framework for governing and coordinating the sector; following-up on terms of references for regional platforms, core groups and the seed units by submitting advice to the heads of each bureau for comments and endorsement; and lastly, developing key performance indicators for M&E of seed sector performance, coordination and the institutional embedding of governance structures in Ethiopia. Chapter 8 indicates responsible parties against each one of these actions.

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1 Introduction to the workshop

A workshop on Seed Sector Governance

The Programme on Integrated Seed Sector Development in Ethiopia (ISSD Ethiopia) organized a two-day workshop on Seed Sector Governance, on April 20th and 21st, 2018. Twenty eight participants including officials from the Ministry of Agriculture and Natural Resources (MoANR) and the regional state Bureaus of Agriculture in Amhara, Oromia, SNNPR and Tigray; managers, directors and/or their deputies of regional input regulatory authorities, research institutes, and public seed enterprises; and a regional coordinator for the Ethiopian Agricultural Transformation Agency (ATA) were present. In addition, staff members of ISSD Ethiopia attended the workshop. The workshop was organized at the Pyramid resort hotel in Bishoftu, Ethiopia, and was facilitated by team members of ISSD Ethiopia from Wageningen Centre for Development Innovation (WCDI) and the Programme Management Unit (PMU) based in Addis Ababa.

Objectives of the workshop

The workshop aimed to achieve three objectives:

1. Develop a shared vision for the transformation of the Ethiopian seed sector
2. Support representatives of seed core groups to revise strategies on how best to transform and govern the seed sector in each of their regional states
3. Reflect on differentiated roles and responsibilities in governing and coordinating the seed sector.

As a result, outputs of the workshop include a shared and eclectic (non-consensus) vision for the seed sector in 2040; the beginnings of a roadmap for the transformation of the seed sector in each of the participating four regional states; and a tentative proposal for the governance structure to coordinate transformation in the seed sector in each of these regions.

Workshop process and structure to this report

The workshop followed a highly interactive approach, engaging participants in in-depth discussions through group work and plenary discussion. The workshop was organized in six parts, which have determined the structure to this report:

- An opening session with word of a welcome from ISSD Ethiopia programme manager Dr Amsalu Ayana, introduction to the workshop programme, and an exercise to get to know each other;
- In small groups, participants engaged in brainstorming exercises for defining a vision for the transformation of the Ethiopian seed sector, which was synthesized later in plenary (**Chapter 2**);
- A presentation was given on sector approaches, sector governance and a framework for sector transformation including six building blocks, namely: production, services, markets, revenue generation & re-investment, sector coordination, and regulations & management (**Chapter 3**);
- Participants worked in groups to translate the vision into directions and/or outcomes targeted for each of the six building blocks, which were shared and discussed in plenary (**Chapter 4**);
- Representatives of each of the four regions worked together in developing strategies to achieve these outcomes for each of the six building blocks (**Chapter 5**);
- Regional group discussions then zoomed in on sector coordination with the objective of outlining the structure through which coordinating bodies in the sector are governed (**Chapter 6**);
- For each related task in governance, regions had to determine, “who is: responsible, accountable, consulted, and informed?”, thereby establishing roles and protocols to be followed (**Chapter 7**);
- Proposed governance structures were presented by each region in plenary and in the presence of staff of the recently established Seed Unit at MoANR to reflect on the choices made.

Chapter 8 concludes the report with notes on the way forward, which were taken during the final plenary discussion of the workshop.

Time was managed carefully in the process to enable participants to share, discuss and debate different ideas, perceptions, beliefs and values in seed sector transformation. Appendix 1 shares a list of participants and Appendix 2 describes the workshop programme in more detail.

2 Vision for the seed sector in 2040

Participants were divided into four groups and defined the features/elements they would like to see in the Ethiopian seed sector approximately 20 years from now, by 2040. First, participants brainstormed individually and wrote different ideas on separate cards. Then, participants exchanged their thoughts and discussed key common and unique features with their peers in small groups. Similar ideas were clustered and shared in plenary thereafter.

The collective vision has been captured in the photo to the left and is written out below. This is a non-consensus effort to capture all the features mentioned, acknowledging that some disagreement in perspective may very well exist.

"In 2040, the seed sector contributes to increased productivity, food security and income. It is self-sufficient, economically viable and efficient in its delivery of high quality, whilst ensuring availability, accessibility and affordability to the farmer. It is competitive internationally and harmonized regionally. The sector is market-oriented, able to adapt and innovate continuously and is inclusive of different actors' needs. Biodiversity is maintained through the sector's conservation of plant genetic resources and provision of a diverse range of crops and varieties. The sector is environmentally sustainable. Furthermore, the seed sector in Ethiopia is well-organized, -coordinated and –regulated, and is independent and transparent in its dealings."

3 Guiding sector transformation

Gareth Borman, WCDI, presented a rationale for sector approaches, provided some background to and made the distinction between value chain and sector approaches, shared a framework for sector transformation and emphasized the importance of sector governance in this framework using two examples and one case study from Kenya, Ivory Coast and Costa Rica for tea, cocoa and coffee respectively. The framework was used throughout the remainder of the workshop as a tool for strategic planning.

Sector governance is the coordinated management of a sector as a whole which can include rules, stakeholder engagement, innovation processes and investments in addressing structural weaknesses.

Why sector governance? Based upon the realization that: there is a need for a more coordinated approach to drive transformation at scale; structures and institutions that used to develop and govern markets and sectors have endured policy reform and have adapted to fit new political and economic contexts; and examples of new models of (collaborative) governance have emerged as well to the success of many sectors.

Key takeaway messages from the presentation of the framework for sector transformation were:
- Take the future vision as the point of departure, not today's problems
- The whole is greater than the sum of its parts
- Transformation is a complex challenge requiring systems' thinking
- Building blocks are integrated, so look for complementarities
- A bird's eye view on the sector can help in seeing things holistically
- Governance is an essential part of the picture
- The aim is to create seas of change as opposed to islands of success

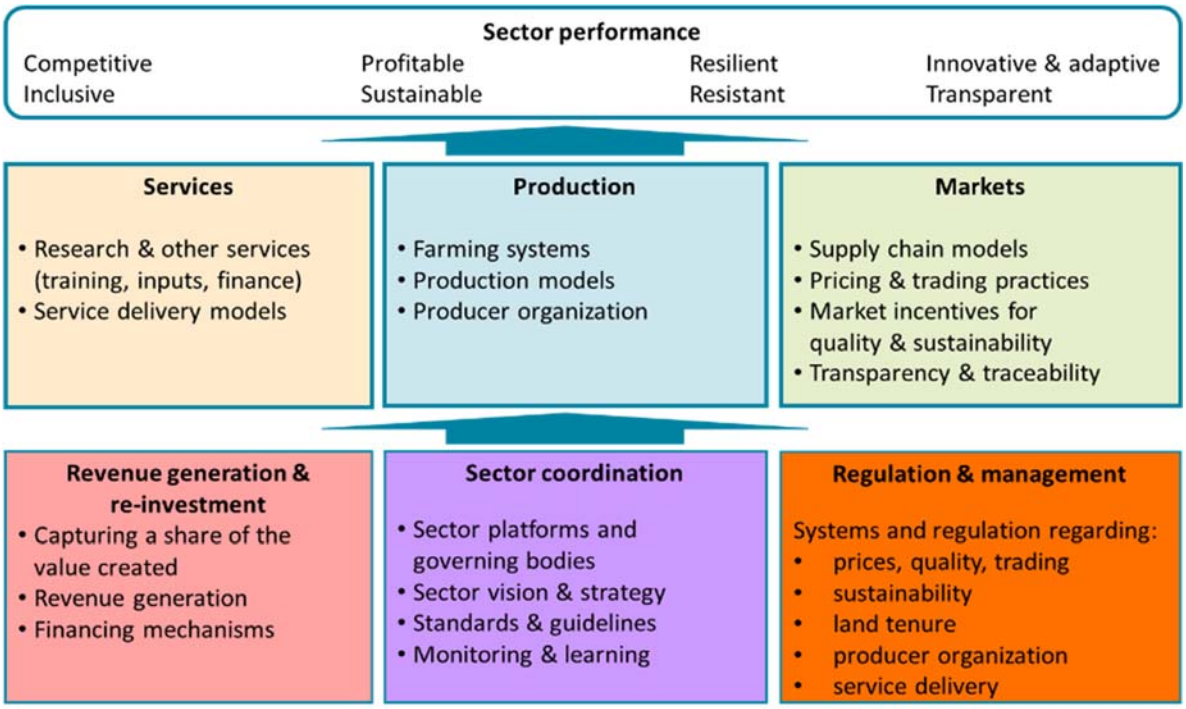


Figure 1: Framework for sector transformation and its six building blocks

4 Outcome visioning per building block

Following the presentation of the framework, participants divided into six groups, one assigned to each of the building blocks, namely: production; services; markets; revenue generation and re-investment; sector coordination; and regulation and management. Each group (and building block) was provided a number of questions to guide their visioning of outcomes to transformation in their respective building block.

The vision for outcomes to transformation in each building block was presented in plenary. The following sections present those for each one of the six building blocks.

4.1 Production

Vision for Production

In 2040, who will be involved in: (i) variety development; (ii) EGS production, and (iii) seed multiplication? Distinguish between hybrid varieties and OPVs. What will be the market share of these actors? What will be the role of seed producers in marketing?

In 2040, who will be involved in variety development?

- Public institutes including research institutes, universities and public seed enterprises
- Public investment in germplasm and variety development is necessary because there are many staple and food security crops that are not attractive for the private sector
- Private seed companies will also be engaged in variety development
- Private sector investment is necessary to have a pluralistic and competitive seed industry
- Private sector will invest mainly in the maintenance of germplasm and development of varieties of hybrids, including maize and vegetables,
- With these varieties they can obtain significant margins of profit

In 2040, who will be involved in early generation seed (EGS) production?

- Breeder seed will be produced by breeding institutes
- Breeder seed production and maintenance of released variety is universally the task of the breeder/breeding institute that developed and registered the variety
- Pre-basic and basic seed production needs to be done by:
    - o Public seed companies need to set up foundation seed (pre-basic and basic seed) production department within their organizational structure, which is well staffed and resourced
    - o Private seed companies will produce and maintain pre-basic and basic seed of the varieties that they have developed and released themselves

- Public-private partnerships (PPPs) can undertake pre-basic and basic seed production of publically released varieties, where privates can attract good margins of profit

Questions/comments raised in plenary:

- *PPPs produce seed of varieties from public sector, therefore privates need to pay royalty fees to the breeder and/or institute for the varieties they are using*

In 2040, who will be involved in seed multiplication?

- Seed multiplication of hybrid varieties can successfully be undertaken by private seed companies and though PPPs (for publically released varieties upon payment of royalty fees)
- These are profitable as farmers have to replace their stocks every season
- Seed production of self-pollinated and clonally propagated crops can feasibly be undertaken by public seed enterprises and by seed producer cooperatives (SPCs).

Questions/comments raised in plenary:

- *What about the potential role of SPCs in hybrid seed production?*
- *They are doing it already for maize*
- *This is the exception rather than the norm, and many may evolve into private seed companies*

In 2040, what will be the market share of these actors?

Private:

- The market share of the private sector will be 40% of the total marketed volume of seed
- This is largely for hybrid varieties that are developed and released by the private sector

Public:

- The market share of the public sector is estimated to be 40%
- This is given that many of the cultivated crops in Ethiopia are self-pollinated

PPPs:

- PPPs are expected to take 10% of the market share
- This refers to privates that use public varieties upon payment of royalty fees

SPCs:

- Although the market share may be higher today, we assume that it will be around 10% in 2040
- Private sector will capture the greatest proportion of this segment's share of the market

Questions/comments raised in plenary:

- *Why the low share for SPCs? It depends on the crop/variety, whether it is hybrid or OPV*
- *It appears that hybrids will account for an almost 40% share of the market, is that realistic?*
- *OPVs are very common in developed economies elsewhere*
- *Will seed allocation and distribution by the public sector still be so important in 2040?*
- *These PPPs that you speak of substitute public investment in seed multiplication and distribution, therefore an increased share of the market by PPPs seems likely?*
- *Suggestion was to revise the proportions as follows: private 40%; public 30%; PPPs 20%; and SPCs 10%*

In 2040, what will be the role of seed producers in marketing?

- By 2040, all aspects of seed marketing will be almost entirely the role of the private sector, including agro-dealers, stockists or sales agents
- Activities include demand creation, demand forecasting, market segmentation, promotion, sales and distribution, and after-sales service

Questions/comments raised in plenary:

- *How much will be exported? Being regionally/internationally competitive is part of our vision*
- *What do you estimate will be the extent of use of improved varieties and certified seed?*

4.2 Services

Vision for Services

In 2040, what will quality assurance mechanisms look like for different seed producers? How will different seed producers access new varieties from public research? How will seed producers easily access credit? And lastly, how will seed producers access EGS?

In 2040, what will quality assurance mechanisms look like for different seed producers?

The seed quality assurance system will be well organized independent, accountable and accessible.

Questions/comments raised in plenary:

- *Will regulatory authorities be seen as police or partners in seed quality assurance?*
- *The regulatory authorities should partner with the seed producers by advising them on how best to ensure quality*
- *Inspection is the final stage in their service*
- *Their services should be to explain and instruct in order to avoid that seed is rejected*
- *The seed quality assurance system is expected to cover all seeds produced by the formal and intermediary seed systems*
- *Though, the seed that will be produced by the intermediary seed system is expected to reduce in volume over time, the system will not completely disappear*
- *It continues to operate for crops and varieties that are not attractive for seed companies*
- *QDS can be applied to seeds produced by the intermediary seed system whilst full certification prevails in formal seed system*
- *Having an independent seed quality assurance system does not mean privatizing or fully commercializing the service*
- *It is about having an institution that is autonomous in its functioning and generation of revenue from its service*
- *State funding will still be needed to ensure viability*
- *The institution can be public or private and accredited to provide its service*

In 2040, how will different seed producers access new varieties from public research?

- The research system will incentivize breeders to develop, maintain and supply superior varieties of crops to seed producers
- This implies establishing a system of royalty fees payment
- Royalties should be paid to the research centre and breeder by seed companies using the varieties developed, registered and maintained by that specific research centre and/or breeder

In 2040, how will seed producers easily access credit?

- Accessible and efficient financial products serve the needs of seed producers
- This calls for the development and implementation of rural financing strategies that encourage the establishment of rural financial institutes that serve the specific needs of agricultural sectors
- These include the likes of agricultural banks, micro-financing institutes and crop insurance co.'s

In 2040, how will seed producers access EGS?

- The system of EGS production and supply is well-coordinated, accessible, accountable and differentiated in its service to different seed producers

In addition, the establishment of machinery hiring services that give, for example, affordable access to farm implements and seed cleaning for those seed producers that lack these capital is important for the near future.

4.3 Markets

Vision for Markets

In 2040, how will the seed market function? How will it be ensured that the seed market is responsive to demand; is efficient; is transparent; is inclusive; distributes value; has mutually beneficial relationships between actors; incentivizes continuous improvement of business; and is fair in competition? What will the marketing system look like?

In 2040, how will the seed market function?

- It will be market oriented
- The market will govern:
  - What type of crop and variety is produced and in what amount
  - The price of seed, the mechanism and channel through which it is delivered to the farmers
  - Which seed system operates
  - Which operators are involved
  - Their relationships with others including service providers
- The market will determine how well the enabling environment functions and will play an important role in determine policies and regulation
- The seed price will be affordable for farmers whilst still attractive for producers
- Through increased productivity, improved market efficiency and appropriate competition, the seed price will be low enough to the extent that smallholder farmers are able to use the seed they desire without hesitation
- Through the absence of unnecessary government interference in price setting, the participation of more diverse operators in seed business will be encouraged
- Equal and fair opportunity will be created for every operator
- Existing privileged support by government to public enterprises will be eliminated
- This includes the preferential provision of land, finance, storage and transport facilities to public enterprises and promotion of their sales
- The seed price will be settled on the basis of the cost of production
- Production will be demand driven
- Key operations of the seed value chain, namely variety development, EGS production, seed multiplication and seed marketing, will be guided by the demands of seed users
- Each seed value chain operator will give due attention to the specific needs of diverse users
- The seed value chain should serve the interests of women and men farmers, rich and poor farmers, large and small landholders, and subsistence and commercial farms

Questions/comments raised in plenary:

- *Demand forecasts should be as close to actual as possible*

How will it be ensured that the seed market is responsive to demand?

- The producer will be responsible for demand estimation
- In the existing system, the regional BoANR pushes the amount, crop and also variety of seed to be produced based on the five year Growth and Transformation Plan (GTP)
- BoANRs also allocate seed to different zones and woredas according to their share given by the GTP and by demand collected by the government structure, which incorporates extension
- This system fails to satisfy demand whilst paradoxically carrying over high volumes of seed
- This situation harms both farmers and seed producers as well as the country’s economy
- In the future, the actual seed demand should be estimated by the seed producers
- Every seed producer has to study actual demand in its market segment
- Research and development of demand forecasting techniques needs to take place

- Seed demand is dynamic and fluctuates, so demand estimation should be carried out by taking into consideration all important factors and based on actual data collected from relevant sources
- This requires adequate, compatible, scientific and easy to use tools
- Universities and research centres should work on the development of such data collection and analysis tools
- A convenient database through which seed producer can access necessary data on weather conditions, agricultural production, market trends and consumer behaviour should be established

How will it be ensured that the seed market is efficient?

- Agro-dealers will participate as much as possible in seed marketing
- To improve the efficiency of seed marketing farmers should have convenient access to seed
- The involvement of many agro-dealers in seed business who operate in the vicinity of farmers improves access
- The presence of many agro-dealers creates a competitive environment through which farmers get access to seed of their preference in terms of quality, price and method of payment
- Apart from this, the presence of many agro-dealers enables seed producers to make use of alternative channels to deliver their product to farmers and maximize their sales
- The presence of agro-dealers who operate near to farmers generates for accurate data on demand
- Marketing infrastructure will be improved
- Currently the seed sector lacks marketing infrastructure
- Storage facilities are rare in rural or peri-urban areas
- Even if stores exist, they are used to store fertilizer and do not meet the minimum quality standards to store seed
- Standard stores need to be built in rural and peri-urban areas
- The private sector should be involved in delivering storage service
- Financial services should be made accessible and convenient to seed value chain operators
- In these regards, government has to create a conducive enabling environment and make the necessary investments to build infrastructure

How will it be ensured that the seed market is transparent?

- All relevant actors will play a role in determining price
- The value added throughout the seed value chain is meant to fulfil the needs of seed users and be paid for by these users
- So the seed users should get adequate information about the cost of the seed they buy
- Similarly, every operator that participates in the seed value chain should have adequate information and say on their share of the price obtained for the final product
- Prices and costs will be communicated openly

Questions/comments raised in plenary:

- o *Ultimately the market determines the price, so so-called price setting is a thing of the past*
- o *Margins generated by each actor in the supply chain should be agreed upon through contracts*
- o *All relevant actors should be informed about market prices*

How will it be ensured that the seed market is inclusive?

- Seed will be packaged in appropriate sizes
- The seed sector needs to serve all seed users equally and fairly
- So the preferences of women and men farmers, large and small landholders, also in terms of the amount of seed they require, should be met by different varieties and package sizes
- Inclusion will be accommodated in policy and regulation
- As different seed systems have a complimentary role in serving the diverse need of farmers, the seed sector needs to be inclusive of formal, intermediary and informal seed systems
- In addition to this, different types of operators serve different market segments and customers, so the seed sector should be inclusive of small, medium and big operators
- There needs to be an appropriate enabling environment which encourages the co-existence of different seed systems and operators of different sizes and orientations

How will it be ensured that the seed market distributes value?

- Small producers and other actors will be empowered

- To ensure fair distribution of value among seed value chain operators, small operators have to be supported by policy and they have to be strengthened institutionally
- Their voice needs to be heard and they should ask for fair reward for the value they add
- The market will be effectively regulated
- The free market favours powerful operators
- Small operators need to have legal protection from unfair monopoly

How will it be ensured that the seed market has mutually beneficial relationships between actors?

- Trust between actors will have been built
- The rivalry mentality has been eliminated and trust is developed among value chain actors through dialogue and open communication

Questions/comments raised in plenary:

- *Identifying and clarifying different roles will aid in building trust*

- Multi-stakeholder partnerships will have been established
- Platforms of value chain actors should be facilitated by the concerned development partners
- Through platforms, value chain actors can work together to solve common problems
- Besides achieving a bigger clearer picture of the sector in which they operate and its challenges, they may share a vision towards achieving goals for sector

How will it be ensured that the seed market incentivizes continuous improvement of business?

- Premiums for superior quality will be generated
- To bring about continuous improvement in seed business, a mechanism through which seed users will pay additional price for better quality needs to be established
- For this purpose, the quality assurance system has to award grades according to quality
- The seed sector will be professionalized in general
- To ensure a continuous improvement in the seed sector, professionals should participate in seed business
- A supportive enabling environment and labour market has to encourage professionals, like retired agricultural researchers, academics and graduates of seed technology, to engage in seed business

How will it be ensured that the seed market is fair in competition?

- Unnecessary government intervention will be eliminated
- The government needs to gradually withdrawn its involvement in seed allocation, in seed price setting and in commanding the seed production
- The government needs to focus on creating an enabling environment which encourages the participation of diverse operators and service providers in seed value chains
- Government needs to focus on properly regulating the sector, on seed infrastructure development, on enhancing service provision and on capacity building
- The government may also work in building trust and partnership among actors
- Unnecessary subsidy will be avoided
- The government should refrain from providing unnecessary and disruptive subsidy like providing land free of lease and providing logistic and financial support to public seed producers
- Government has to treat every operator equitably and fairly

Questions/comments raised in plenary:

- *However, where necessary, subsidy can make seed of neglected crops and varieties available and high quality seed in general affordable to those with low purchasing power*
- *Public investment will continue to exist, but where the private sector is not interested*
- *The reasons for public investment in the seed sector should be transparent and justified*

In 2040, what will the marketing system look like?

- Import and export features more in the future
- In 2040, the potential of the seed sector in terms of seed production and use will increase
- For some specialized crop types, surplus seed will be produced and exported

- At the same time, to satisfy the increased and diverse demands created in the country, seed will be imported from other countries
- Private investment in marketing will take place considerably more
- Through a conducive enabling environment, improved infrastructure and services, as well as an increased demand for quality seed, the seed sector will attract private investment
- Accordingly, a significant amount of domestic and foreign investment will be made on seed
- Different actors will actively participate in marketing
- The number and diversity of operators and service providers in the seed value chain will increase
- Different kinds of actors will engage in seed business during different operations in the chain
- This situation will enhance competitiveness, the effectiveness and the efficiency of the seed sector
- This enables the sector to deliver the most desired crop, variety, quantity and quality of seed at a better price, at the right time, at the right place
- Government intervention will be minimized
- Through increased awareness of policy makers and improved capacity of the private sector, the role of government in the seed sector will gradually reduce
- The market share of the public seed enterprises will gradually diminish whereas the share and the role of private and cooperative enterprise will increase

Questions/comments raised in plenary:

- *Government's role and responsibilities in marketing first needs to be clarified*

4.4 Revenue generation & re-investment

Vision for Revenue generation & re-investment

In 2040, how will the seed sector generate significant revenues? In 2040, for what purpose will revenues generated be used in developing the seed sector?

In 2040, how will the seed sector generate significant revenues?

- Tariffs on the import of seed will be charged
- A levy on the export of seed will be set
- A fee for variety registration will be charged
- Public investment will be substituted by increased private investment making more funds available for strategic sector investments
- Seed businesses will be taxed 30% of their income
- 15% VAT on seed sales will be collected

Questions/comments raised in plenary:

- *These percentages may vary in actual reality*
- *The Ethiopian Revenues and Customs Authority collects corporate and value added tax, but budget should be allocated proportionally to revenues generated by different sectors*

- Members of the Ethiopian Seed Association will pay fees for strategic sector investments
- State-owned advisory/extension services will be provided and will generate income
- Royalties will be paid to breeders and their institutions for varieties in the public domain
- Loans and grants from development partners will also fund investments

Questions/comments raised in plenary:

- *The actual proportion of the funds invested in the sector from development partners is unknown, but the intention should be to ween off dependency*

- State-owned processing, packaging, transport and storage facilities will be rented for a fee that generates revenue

Questions/comments raised in plenary:

- *Public services should no longer be offered for free*

- Renewal fees for obtaining a certificate of competence and licensing and registration fees from businesses will be collected by regulatory authorities and/or government

In 2040, for what purpose will revenues generated be used in developing the seed sector?

- Investment in public breeding for neglected, orphan and food security crops, and for expression of unique traits for adaptability, drought and disease tolerance and nutrition will take place
- Research for mechanization, irrigation, and plant protection, particularly integrated pest management, will be funded
- Human resources development will be funded
- Training and accreditation of private seed inspectors will be funded
- Working capital will be provided to seed testing laboratories and regulatory authorities
- Investment in improving revenue collection and recording and financial management of publically funded services will be made
- Campaigns, domestic and abroad, for creating awareness of and promoting Ethiopian seed products will be funded
- Value addition for small-, medium- and cooperative-seed producers will be funded
- Funding for convening and facilitating meetings of coordinating bodies will be given

4.5 Sector coordination

Vision for Sector coordination
In 2040, what will effective seed sector coordination look like?

In 2040, what will effective seed sector coordination look like?

- It will have a platform which accommodates all seed value chain actors, all with their own roles and responsibilities and accountability
- The coordinating body will only deal with seed (as a separate sector)
- The coordinating body will be embedded in government structures, it will be institutionalized and it won't be an ad-hoc structure anymore
- The coordinating body will have a dialogue on strategic emerging issues related to policies, regulations, investments, etc.
- The coordinating body will scale the identified strategic issues to higher level bodies for follow-up, action and decision-making
- There will be clarity on the roles and responsibilities and the accountability of different actors and coordinating bodies active in the seed sector
- The seed sector will be coordinated by effective and quality leadership
- The coordinating body will keep the overview and coordinate the sector
- The coordinating body will have a clear shared vision, strategies and action plans
- An M&E system will be in place to monitor and evaluate both sector performance, as well as sector governance/coordination (the collaborative process)
- The coordinating body will be transparent and share information openly
- The coordinating body will be a source of information and have a database
- The seed sector will have a national seed sector coordinating body under MoANR with a secretariat
- This secretariat will employ sufficient permanent staff and be directly accountable to the Minister
- At regional level, the seed sector coordination body will be under BoANR, also consisting of a secretariat and representation/membership of all value chain actors
- Regional representation at national level will be ensured

Questions/comments raised in plenary:

- *Do we still need a separate seed platform in 2040, or will we have commodity platforms in which seed is addressed?*
- *In 2040, there might also be commodity platforms (for some crops a commodity platform might work), but for the sector in general we need a sector platform*
- *Could ESA take on this coordinating role in 2040?*
- *Indeed it could be an association, a council, or other*
- *If the ESA is strong, it could also serve the advisory role to the council*
- *What is important is that there needs to be a national body that coordinates the sector, in which value chain actors are represented, with a secretariat office to implement and to execute daily work activities that is accountable to the Minister*
- *The national body should focus only on strategic and systemic issues of seed, and if there would only be commodity platforms, seed-specific institutional issues may not emerge*
- *The secretariat for institutional embedding follows the example of ARDPLAC*

4.6 Regulation & management

Vision for Regulation & management

In 2040, what will be the role of government in regulating production planning? In 2040, what will be the role of government in regulating standards and practices in quality assurance? In 2040, what will be the role of government in market regulation?

In 2040, what will be the role of government in regulating production planning?

- Government will have established a seed reserve system

Questions/comments raised in plenary:

- *Is the purpose of the reserve system to store surplus seed or conserve plant genetic resources?*
- *Can government keep the market in check using these reserves?*
- *Government will collect seed that is not sold, store it and distribute to the market in case of need*
- *Public enterprise should keep reserves, not government*

- Government will provide demand forecasts for different crops, as opposed to current annual production demand

Questions/comments raised in plenary:

- *How would this forecast work in the case of vegetable seed?*
- *Vegetable seed is well regulated by the market, so should the government worry about the production of these seeds?*
- *The forecast is provided as a service to give indication on the expected demand*
- *Statistics will be used to project seed demand, purely to inform and attract investment*

In 2040, what will be the role of government in regulating standards and practices in quality assurance?

- Government sets quality standards that fulfil international requirements

Questions/comments raised in plenary:

- *Standards need to be revised*

- While the market regulates seed quality, government randomly checks quality in the market

Questions/comments raised in plenary:

- *Quality assurance check should be an effective system, what happens to seed certification and are you talking about truth in labelling as an alternative system?*
- *External quality assurance may be a voluntary service like in the U.S. and South Africa, and trust is placed in the markets being developed enough to reward or punish superior and inferior quality*

In 2040, what will be the role of government in market regulation?

- Government will tax highly profitable crops and subsidize commercially neglected crops

Questions/comments raised in plenary:

- *Will subsidies in the distributing of seed take place?*
- *Direct seed marketing may not work for low profit margin crops and therefore may need subsiding*

- Government will make sure that the seed market is not monopolized
- This will be achieved by instructing public seed companies to produce certain crops, when monopoly becomes a threat

Questions/comments raised in plenary:

- *Monopolies can also be controlled by laws, how susceptible are public enterprises to politics and elite-capture?*
- *The idea is to move away from state control and to liberalize the seed market, but government keeps the mandate to intervene in case there is a need to balance seed demand in the interests of the people*

In addition, the group recommended clear roles and an accountability system to be put in place in the seed sector. Services to seed sector should be based on viable business models.

5 Strategizing for transformation

In regional groups, participants discussed the key changes that need to happen in order to achieve the vision for each building block, what is already being done, by whom, and the conditions that need to be in place for change to be successful. Conditions that need to be in place relate to other building blocks. The objective of the exercise was to encourage systemic and holistic thinking in transforming the seed sector.

5.1 Amhara

	What needs to change? What else needs to be done?	What is currently being done? By whom?	What conditions need to be in place?
Production	Participating private and public seed companies develop varieties and multiply breeder seed	Public research centres engage almost exclusively in this activity	Access to germplasm
	Mandate for public, private and PPPs to produce pre-basic and basic seeds is given	Public seed enterprises and public research centres are currently the only ones engaged	Defined role of public, private and PPPs in the seed proclamation and regulations
	Encourage public and private seed companies to promote products and provide after sales' service	Promotion is done by government	Exclusive user rights agreements on public varieties in place
Services	Create access to finance for seed producers	Government brokers loans for public seed enterprises only	Developed credit scheme and specific financial products for seed producers
	Invest in seed quality assurance infrastructure and capacity building	Government and projects (e.g. ISSD, ATA seed program) make insufficient contribution	Revenue collected through service fees for seed inspection and testing
Markets	Enforce contractual seed production	Either weak/loose contractual agreements are formed or frequent default occurs	Strengthened legal framework for contractual agreements
	Encourage quality based seed pricing	Government and seed producers agree to prices for different seed classes	Seed quality clearly labelled on the bag and accountability ensured
Revenue generation & re-investment	Enforce re-investment of revenues to strengthen the seed regulatory service	Revenue is collected by government, but not efficiently and effectively reinvested in seed regulatory bodies	Awareness raised and directives implemented
	Collect membership fees from members of the regional seed producers' association	The association is established but no membership fee is collected at present	Membership increased
Sector coordination	Embed seed coordination body with own staff within the government structure (at BoANR)	An ad hoc committee has been established by BoANR	Structure developed and approved
	Strengthen and institutionally embed the regional seed core team	Insufficiently strengthened and not institutionally embedded by BoANR and ISSD	Core team guidelines reviewed and commitment enhanced
Regulation & management	Encourage seed producers to forecast demand	Seed demand is estimated by BoANR	Seed demand forecasting strengthened by government
	Develop accountability and responsibility mechanisms for all services of the regulatory body	Limited/weak accountability is shown by government	Seed proclamation and regulations implemented

5.2 Oromia

	What needs to change? What else needs to be done?	What is currently being done? By whom?	What conditions need to be in place?
Production	Public and private seed producers engage in variety development	Variety development and EGS production are almost exclusively done by public research	Roles clearly differentiated in the production of different seed classes
	Promote seed villages	Seed production is clustered	Private sector engagement incentivized
	Invest in irrigated seed production	Rain-fed seed production is being practiced	
	Seed marketing carried out by seed producers	Marketing is facilitated by government	
	Seed producers are capable	Crop and variety portfolios are narrow	PVP is in place
	Diversify crop and variety portfolios through variety development and seed production	Variety development and seed production focusses mainly on high potential areas	
Services	Quality assurance is a fee-based service	Seed quality assurance is offered for free	Regulatory frameworks are strengthened
	Seed quality inspection is partially privatized/ outsourced		
	Inspector accreditation system is put in place		
	Award CoC without land as a prerequisite to support out-grower schemes	Land is a requirement in obtaining a certificate of competence (CoC)	Revoke regulation that demands land for CoC
	Promote/introduce different financial products and/or schemes for seed production	Seed producers' access to credit from financial institutions is limited	
Markets	Let seed producers and agro-dealers do seed marketing	Distribution is predominantly done by government allocation	An enabling policy environment for more private sector engagement is created
	Ensure that seed production is demand driven	Seed production is based on government plan (projection)	Develop ICT seed database on supply and demand
	Create different platforms/dialogue to build trust among actors	Mistrust among actors, particularly between the private sector and government, is high	Organize commodity platforms with due consideration to seed
Revenue generation & re-investment	Increase ESA membership commitment, size and fee	Membership contributions are currently low	Enforcement of the implementation of relevant policies and laws
	Offer services of quality assurance; variety registration; and extension on cost recovery base	Though started, inspection fees are too low and variety registration is free of charge	
	Collect royalty fees through exclusive user rights	Access to public varieties is free	Introduce royalty fee collection system

Sector coordination	Institutionally embed a similar seed coordinating unit to that within the Ministry of Agriculture and Livestock (MoAL) within the government structure at regional level	Regional seed core group have been operating since 2010	Platforms are strengthened and commitment to policy implementation is enhanced
		Seed unit was recently established at regional level within the Input Directorate	
		Input coordination takes place within this directorate at BoAL	
Regulation & management	Make national variety release system independent	National variety release committee makes recommendation to MoAL	Policy support for an independent national variety release system generated
	Establish seed regulatory body	Regulatory body is currently embedded within the BoAL	Proclaim establishment of independent seed regulatory body in Oromia
	Strengthen technical and institution capacities in regulatory function	Seed related laws and regulation are loosely implemented	Policy commitment

5.3 SNNPR

	What needs to change? What else needs to be done?	What is currently being done? By whom?	What conditions need to be in place?
Production	Engage public and private producers in EGS production	EGS production is carried out by public seed enterprises and research centres	Roles clarified among EGS producers with accountability (Sector coordination)
	Capacitate seed companies to develop new varieties	Variety development is only undertaken by research centres	Capacity building services are offered (Services)
Services	Capacitate the regulatory body to improve its efficiency and accessibility	Independent regulatory body has been established, but strives to provide minimum	Capacity building services are offered (Services)
	Involve accredited private parties in quality assurance service	There is the intention to accredit private quality assurance providers	Accreditation requires legal framework (Regulations & management)
	Introduce royalty fees for breeders and breeding centres to stimulate breeder seed maintenance	Plant breeders right proclamation has recently been enacted	Guidelines for plant breeders' right law developed (Regulations & management)
	Design compatible financial products/services that fit the seed sector	Cooperatives are able to get credit through government guaranteed loans, whilst private companies access credit conventionally	Rural financing strategy developed (Regulations & management)
	Establish rural/agribusiness financial institutions		
Markets	Develop marketing infrastructure	Direct seed marketing (DSM) is piloted in 32 woredas	Officially endorse DSM and prepare implementation Guidelines (Regulations & management)
	Train producers on principles and practices of marketing		
	Gradually withdraw government from seed allocation		
Revenue generation & re-investment	Collect fees for seed quality assurance services for reinvestment in the sector	The regional regulatory agency has begun collecting fees for its service, but revenues are transferred to government treasury	Regional government decides to allow regulatory agency to collect revenue (Regulations & management)
Sector coordination	Establish responsible body within BoA and assign permanent staff members	Seed unit is established as an ad hoc committee	Approve the structure for seed unit (Regulations & management)
	Clarify the roles and responsibilities of the seed unit and regional seed core group	Seed technical committee partially undertakes the foreseen activities of the seed unit	
Regulations & management	Develop a roadmap for regional seed sector development	Drafting of a regional seed sector strategy is underway	Regional BoA committed to the strategy (Sector coordination)

5.4 Tigray

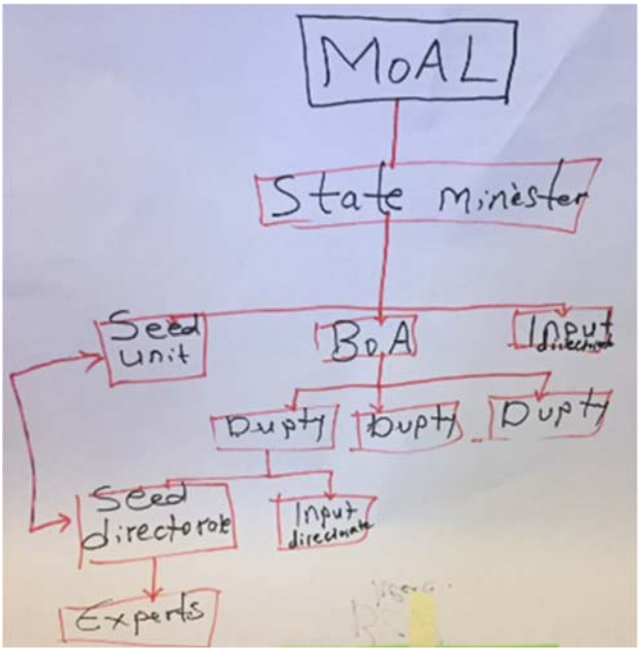
	What needs to change? What else needs to be done?	What is currently being done? By whom?	What conditions need to be in place?
Production	Establish and strengthen regional public seed enterprise	A pre-feasibility study and experience sharing have been conducted	Government should allocate budget and commit e.g. land for the enterprise
	Increase the contribution of private seed companies	Capacity building in terms of training, grant allocation, facilitation in obtaining CoC and access to finance is given	Access to credit for seed producers
Services	Upgrade the regulatory case team to an authority	One seed lab and a case team are established	Government is committed and budget allocated
	Facilitate easy access to credit	A revolving fund for cooperatives is in place	Partnerships created to diversify financial products, build financial institutes' capacity and increase financial literacy
Markets	Improve efficiency of farm service centres (FSCs), agro-dealers and multipurpose cooperatives in seed marketing	Piloting direct seed marketing has started, cooperatives are selling seed, and a few agents have established (three private FSCs)	FSCs, agro-dealers and coops engage in seed marketing
Revenue generation & re-investment	Balance investment of private and public sectors in seed	Private companies and seed producer cooperatives (SPCs) are supported in infrastructural investments	Operationalize – Public variety user's agreements, plant breeders' right and farmers' right operationalized
Sector Coordination	Establish regional seed coordinating agency and platform	Regional seed core group and technical team (seed unit) are operating	Decision makers are committed and partners' capacities in advocacy are strengthened
Regulation & management	Transform the regulatory case team into and independent regulatory authority	Regulatory function is performed under limited and centralized structure	Renewed structure of governance supported

6 Seed sector governance structures

Participants continued in their regional groups and discussed the structure through which the seed sector is governed at regional level. They were asked to build on the strategies shared above by drawing the structure and respective governing bodies through which developments in the seed sector will be coordinated in their region.

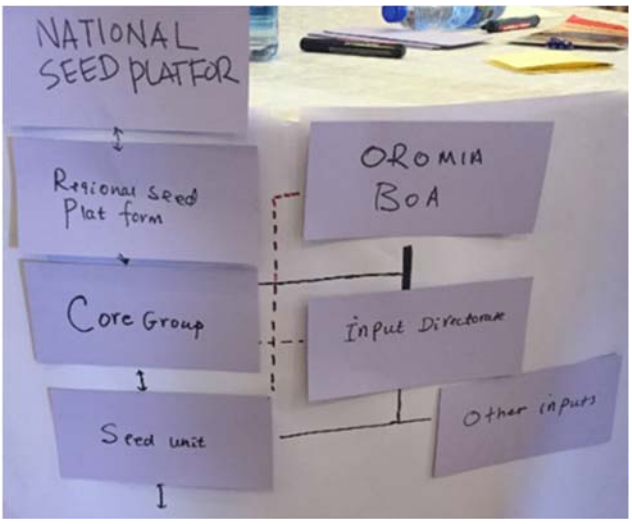
Amhara

- Proposed new body, the seed directorate, operating independently of existing input directorate
- There needs to be a new coordinating body, specialized from other activities that BoA is accountable for
- *The line between the ministry and bureau is not solid, there is no line management as the regions are autonomous, relationship is technical*
- *Will seed need a directorate in 2040?*
- This model is an intermediate step
- The seed directorate is accountable to the deputy bureau head and input director



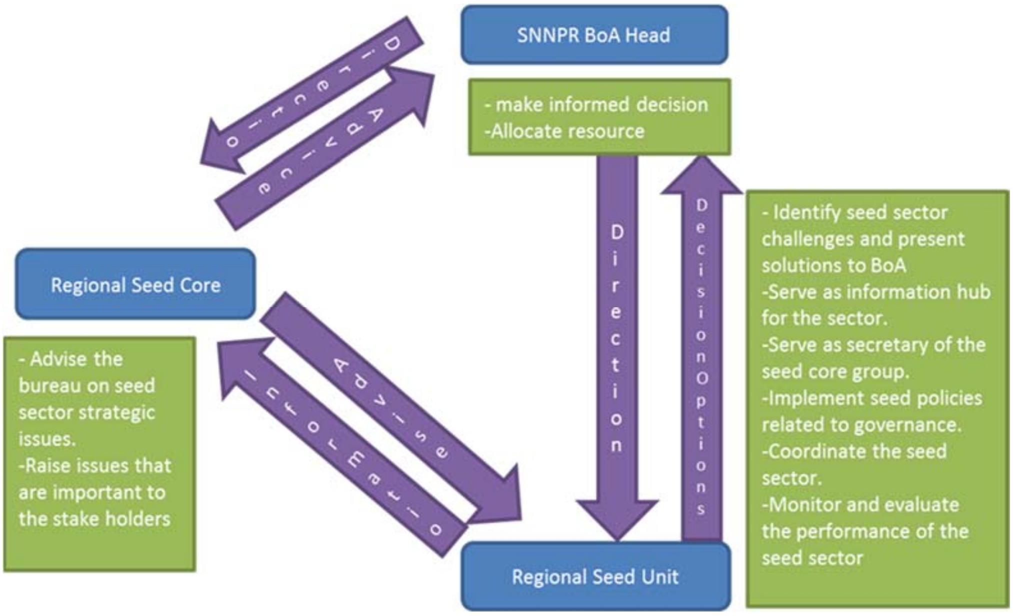
Oromia

- Split input directorate into a seed unit and other inputs
- Core group advises seed unit
- Core group also communicates directly with BoA input directorate
- *Does line between seed unit and bureau head mean that communication by-passes input director?*
- *Do you expect seed unit to contribute to other tasks of input directorate? Is the distinction clear?*
- Seed unit advises on strategy
- Core group comprises selected stakeholders
- *Concern is that seed is still treated as an ordinary input, whilst seed is biological, has specific policy and property right issues, thus requiring special government attention*
- *Will input directorate exist in the future? Will be companies responsibility*
- *Seed unit has at least to be a parallel structure to input directorate, as is proposed in Amhara*



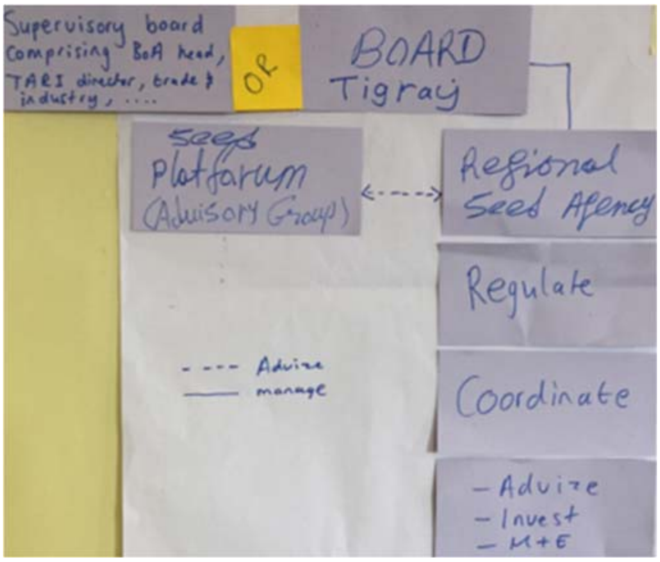
SNNPR

- Activities/role of the seed unit is providing decision options to BoA head in relation to seed
- BoA head gives direction to seed unit, makes informed decisions and allocates resources
- Core group advises BoA and seed unit on seed strategic issues
- Seed unit, through implementation of decisions, provides information to core group
- Seed unit manages several activities, with exception of distribution
- Seed unit is responsible for these activities and accountable to BoA head
- Other directorates operate in parallel to seed unit



Tigray

- Establish independent regional seed agency to coordinate and regulate everything related to seed
- Platform will act as an advisory group and consult with regional agency
- Either BoA or a supervisory board comprising leaders of BoA, TARI, trade and industry, will supervise the agency
- *In what way is the agency independent?*
- It has a mandate, financial autonomy, budget from regional council and own staff, thereby independent in making and executing decisions



7 Role differentiation in seed sector governance

Following the previous exercise whereby participants outlined the structure through which coordinating bodies govern the seed sector in their region, they were asked to define for each task in seed sector governance, "who is: **R**esponsible, **A**ccountable, **C**onsulted and **I**nformed?". This matrix we call **RACI**. Only one person can be accountable, whilst different people may be responsible for a given task.

Amhara

Tasks	Responsible	Accountable	Consulted	Informed
Providing overall leadership and coordination	Seed directorate	BoA (head)	Regional seed core group, ISSD and university	
Identifying systemic challenges	Seed directorate	Seed directorate director	Regional seed core group, ISSD and university	Stakeholders in EGS supply, research, regulatory, …
Developing a shared vision and strategy	Seed directorate	BoA (head)	Regional seed core group, ISSD and university	Key zonal, regional and national stakeholders
Advising on complex issues/challenges	Seed core group	Seed directorate	Stakeholders, incl. experts/ professionals	
Making decision	Seed directorate	BoA (head)	Regional seed core group, ISSD and university	Stakeholders
Steering stakeholders in follow-up strategies and implementation	Seed directorate	BoA (head)	Stakeholders	
Monitoring & evaluation	Seed directorate	Seed directorate	BoA input directorate and regional seed core group	Stakeholders

Oromia

Tasks	Responsible	Accountable	Consulted	Informed
Providing overall leadership and coordination	Regional seed platform, seed unit	BoAL		
Identifying systemic challenges	Seed unit	Seed unit	Core group, input directorate	National seed platform, BoAL
Developing a shared vision and strategy	Seed unit	BoAL	Regional seed platform	MoAL
Advising on complex issues/challenges	Core group	Seed unit	National seed platform, national seed advisory group	BoAL
Making decision	Seed unit	BoAL		MoAL
Steering stakeholders in follow-up strategies and implementation	Seed unit	Seed unit	Regional and national seed platforms	
Monitoring & evaluation	Seed unit	BoAL	Regional and national seed platforms	

SNNPR

Tasks	Responsible	Accountable	Consulted	Informed
Providing overall leadership and coordination	Seed unit	BoA head	Core group	Seed unit
Identifying systemic challenges	Seed unit	BoA head	Core group	Input director and other stakeholders
Developing a shared vision and strategy	Seed unit	BoA head	Core group	Other stakeholders
Advising on complex issues/challenges	Core group	BoA head	Other Stakeholders	Seed unit
Making decision	BoA head	BoA head	Core group	Seed unit
Steering stakeholders in follow-up strategies and implementation	Seed unit	BoA head	Core group	Other stakeholders
Monitoring & evaluation	Seed unit	BoA head	Core group	BoA head

Tigray

Tasks	Responsible	Accountable	Consulted	Informed
Providing overall leadership and coordination	Regional Seed Agency (RSA)	BoARD	Platform (advisory group)	All stakeholders
Identifying systemic challenges	RSA	RSA	Platform (advisory group)	All stakeholders
Developing a shared vision and strategy	RSA	RSA	Platform (advisory group)	All stakeholders
Advising on complex issues/challenges	Platform (advisory group)	RSA	BoARD and platform (advisory group)	All stakeholders
Making decision	RSA	RSA	Platform (advisory group) and experts	All stakeholders
Steering stakeholders in follow-up strategies and implementation	RSA	RSA	BoARD and seed value chain actors	All stakeholders
Monitoring & evaluation	RSA	BoARD	Platform (advisory group)	All stakeholders

8 Next steps and follow up action

Action	Time frame	Responsible
Finalize workshop proceedings and share with participants	May 11th	WCDI and PMU
Discus the workshop outcomes within regional core groups		ISSD value chain experts
Revisit the outcomes of the group work with core group members, agree on a shared vision and elaborate strategy		ISSD value chain experts
Analyse advantages and disadvantages of different governance structures and select the most appropriate for each region		Regional core groups
Clarify and strengthen the mandates of regional core groups and seed units in relation to decision making and ensuring implementation of decisions (refer to RACI matrix)		ISSD value chain experts
Share outcomes of the two above activities with national seed unit for their consideration and presentation to the minister		ISSD value chain experts
Develop the governance structure at national level		National seed unit
Ensure alignment between different regions and integration into a national framework for governing and coordinating the sector		National seed unit
Follow-up on terms of references for regional platforms, core groups and the seed units by submitting advice to the heads of each bureau for comments and endorsement		ISSD value chain experts
Develop key performance indicators for M&E of seed sector performance, coordination and the institutional embedding of governance structures in Ethiopia		WCDI and PMU

9 Closing remarks

“Learning from other regions can help stimulate transformation.”

“Seed requires investment. It should cascade from the ministry to the regions and again from the regions to local levels”.

“We learned a lot of lessons; in particular about strategic and systemic thinking.”

“*The workshop was participatory. Everyone had a role to play, which drives the sense of ownership.”*

“*Interesting points to be taken further. The content of discussions has to be summarized and reviewed, revisited and commented upon, and used strategically in implementation.”*

“Seed is one of the most important strategic issues. The new minister has underlined seed alongside agricultural mechanisation as among the most important points on the agenda.”

“Some organisational structures are merging into one. The ministry will discuss the advantages and disadvantages of the different governance structures proposed for the seed sector by the regions.”

“Each region has its own right to design organisational structures that bring development.”

“When experts understand political leadership, changes may happen. An example is the conservation of natural resources. We can follow this model in the seed sector.”

“Recently there is due attention given for the seed sector. We need to exploit the opportunity. Development partners and private sector are interested to invest.”

“To be marketable, a single innovation will not help. It’s success depends on the system.”

“What is the role of ISSD in this business? We are facilitating the process of bringing you together, brainstorming, revealing your challenges, and identifying opportunities.”

“As long as the ISSD programme exists, ISSD staff, PMU, colleagues from the Netherlands, are here with you.”

Appendix 1 List of participants

Amhara	
Ato Tesfahun Mebgiste	Deputy Head, Bureau of Agriculture
Ato Albachew Aligaz	Director Input Directorate, Bureau of Agriculture
Ato Mulugeta Debassu	Manager, Seed and Other Agricultural Input Quality Regulatory and Quarantine Authority
Dr Dereje Ayalew	ISSD Ethiopia Scientific Coordinator, Bahir Dar University
Ato Mesfin Astatkie	ISSD Ethiopia Value Chain Expert, Bahir Dar University
Tigray	
Ato Gebrehiwot Teklu	Core Process Owner Agricultural Input and Market Development, Bureau of Agriculture and Rural Development
Dr Abadi Girmay	Directorate General, Tigray Agricultural Research Institute
Ato Abebe Tesfay	General Manager, Tigray Branch EAIBC/Ethiopian Seed Supply
Prof Fetien Abay	ISSD Ethiopia Scientific Coordinator, Mekelle University
Ato Yirga Haileselassie	ISSD Ethiopia Value Chain Expert, Mekelle University
Federal	
Ato Abdulsemede Abdo	Advisor to the State Minister, Ministry of Agriculture and Livestock
Ato Abdo Woyema	Expert Seed Unit, Ministry of Agriculture and Livestock
Ato Teshome Lakew	ISSD Ethiopia Business Development & Marketing Senior Expert, BENEFIT Office
Dr Mohammed Hassena	ISSD Ethiopia Deputy Manager, BENEFIT Office
Ato Teshome Hailemichael	Expert Seed Unit, Ministry of Agriculture and Livestock
Ato Mulugeta Enki	Secretariat Officer, Ethiopian Seed Association
Ato Legesse Abate	ISSD Ethiopia Data Management and Analysis Expert, BENEFIT Office
Dr Amsalu Ayana	ISSD Ethiopia Programme Manager, BENEFIT Office
Oromia	
Obbo Abarra Beyene	Input Directorate, Oromia Bureau of Agriculture and Livestock
Dr Fato Ensimo	General Director, Oromia Agricultural Research Institute
Obbo Abebe Diriba	Regional Coordinator, Ethiopian Agricultural Transformation Agency
Obbo Wonduweson Woldeyes	Deputy Head, West Hararghe Zone Bureau of Agriculture and Livestock
Obbo Tafa Jobie	ISSD Ethiopia/General Manager, Oromia Seed Enterprise
Obbo Kidane G/Tsadik	ISSD Ethiopia Value Chain Expert, Oromia Seed Enterprise
Obbo Habtamu Diriba	ISSD Ethiopia Business Development & Marketing Expert, Haramaya University
Obbo Dandena Gelmesa	ISSD Ethiopia Regional Project Manager, Haramaya University
SNNPR	
Ato Tekele Beharu	Director Agricultural Input and Credit Directorate, Bureau of Agriculture
Dr Legess Hidoto	Senior Researcher Seed Technology, Southern Agricultural Research Institute
Ato Amhayesus W/Michael	ISSD Ethiopia Value Chain Expert, Hawassa University

Appendix 2 Workshop programme

Day 1: Friday 20 April

Time	Session
09h00	Welcome and opening speech *Dr Amsalu Ayana, ISSD Ethiopia programme manager*
09h30	Getting to know each other *Karèn Verhoosel, Wageningen CDI*
09h45	Defining a vision for the transformation of the seed sector in Ethiopia *Karèn Verhoosel*
10h15	Presentation of shared vision for the seed sector *Karèn Verhoosel*
10h30	Coffee/tea break
11h00	Introduction to guiding sector transformation *Gareth Borman, Wageningen CDI*
11h30	Defining a vision for the transformation of the seed sector in Ethiopia, per building block *Working groups*
12h30	Lunch break
14h00	Presentation and discussion on the group assignment *Working groups*
15h30	Coffee/tea break
16h00	Strategizing for regional seed sector transformation *Regional core groups*
17h30	Close of day

Day 2: Saturday 21 April

Time	Session
09h00	Recap of Day 1 *Gareth Borman*
09h15	Strategizing for regional seed sector transformation *Regional core groups*
10h30	Coffee/tea break
11h00	Strategizing for regional seed sector governance *Regional core groups*
12h00	Presentations regional core groups and reflections by MoANR Seed Unit *Regional core groups*
12h30	Closing remarks and conclusion *Dr Amsalu Ayana*

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The mission of Wageningen University and Research is "To explore the potential of nature to improve the quality of life". Under the banner Wageningen University & Research, Wageningen University and the specialised research institutes of the Wageningen Research Foundation have joined forces in contributing to finding solutions to important questions in the domain of healthy food and living environment. With its roughly 30 branches, 5,000 employees and 10,000 students, Wageningen University & Research is one of the leading organisations in its domain. The unique Wageningen approach lies in its integrated approach to issues and the collaboration between different disciplines.