Enabling the Business of Agriculture:

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Speakers: Federica Saliola, World Bank Group
Farbod Youssefi, World Bank Group

Moderator: Kelley Cormier, USAID

Facilitator: Ashleigh Mullinax, Feed the Future Knowledge-Driven Agricultural Development Project
Kelley Cormier is Acting Division Chief and agricultural economist in the Office of Market and Partnership Innovations in USAID’s Bureau for Food Security, where she leads a team that addresses access to finance, agricultural inputs systems strengthening, risk management, agribusiness enabling environment, and commercialization of technologies in support of the U.S. Government’s Feed the Future Initiative. Before joining USAID, Dr. Cormier led an active research agenda that explored how the evolution of policies and institutions affect agricultural markets and the coping strategies of men and women and agribusinesses.
FREDERICA SALIOLA

Federica Saliola is a Program Manager in the Global Indicators Group at the World Bank Group. Federica is responsible for developing programs that measure regulations and regulatory processes that are critical for private sector companies when entering and operating in the market, and has been leading the Enabling the Business of Agriculture (EBA) program since 2013. Prior to this, Federica Saliola was the Program Coordinator of World Bank Group's Enterprise Surveys project.
Farbod Youssefi is a Program Coordinator at the Agriculture Global Practice of the World Bank. Before he joined the Bank and the Enabling the Business of Agriculture project in 2013, he directed the University of California at Davis’ international programs, served as a consultant for organizations such as the World Food Logistics Organization and Postharvest Education Foundation, and worked closely with Chile’s horticultural industry, focusing primarily on postharvest systems and agribusiness development.
Enabling the Business of Agriculture
Global focus on agriculture

POVERTY

ENABLING ENVIRONMENT FOR BUSINESS IN AGRICULTURE

Quality of regulations
Strength of institutions
Efficient administrative procedures

FOOD DEMAND
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 60 countries
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 UNDER DEVELOPMENT**

- Seed
- Fertilizer
- Machinery
- Finance
- Transport
- Markets
- Land
- Water
- Livestock
- ICT
- Env Sust
- Gender

**TOPICS SCORED IN EBA 2016**

- 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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<tbody>
<tr>
<td>Seed</td>
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<td>Transport</td>
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</table>

The diagram shows the regulatory areas benchmarked by the EBA, with arrows indicating the relationships between different sectors.
## EBA: regulatory areas benchmarked (2)

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

#### Mali
- **Seed**
  - No practice
  - Seed registration (0-100)
  - Cost in USD (% income per capita)
  - Time (days)
- **Fertilizer**
  - No practice
  - Fertilizer registration (0-100)
  - Time (days)
- **Finance**
  - No practice
  - Credit unions (0-100)
- **Markets**
  - No practice
  - Warehouse receipts (0-100)

#### Niger
- **Seed**
  - No practice
  - Seed registration (0-100)
  - Cost in USD (% income per capita)
  - Time (days)
- **Fertilizer**
  - No practice
  - Fertilizer registration (0-100)
  - Cost in USD (% income per capita)
  - Time (days)
- **Finance**
  - No practice
  - Credit unions (0-100)

### World Bank Group

The regulatory scores are averages of seed, fertilizer, machinery, finance, and transport indicator scores. The trade scores are averages of seed, fertilizer, machinery, and transport indicator scores.
### Country Coverage

#### Sub-Saharan Africa
- Burkina Faso
- Burundi
- Cote D’Ivoire
- Ethiopia
- Ghana
- Kenya
- Mali
- Mozambique
- Niger
- Rwanda
- Sudan
- Tanzania
- Uganda
- Zambia

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

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

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

#### MENA
- Jordan
- Morocco
- Egypt

#### ECA
- Bosnia-Herzegovina
- Georgia
- Kyrgyzstan
- Russia
- Tajikistan
- Turkey
- Ukraine

#### SA
- Bangladesh
- Nepal
- Sri Lanka

#### Other
- Armenia
- Romania
- Serbia
- Bangladesh
- Nepal
- Sri Lanka
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 African 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 the registration, import, and quality control of fertilizer products. They address factors important to companies importing and selling fertilizer products, farmers using quality fertilizer products to increase their productivity, and governments pursuing regulations that ensure the quality of products and effectiveness of fertilizer markets.

#### Showing 1 to 40 of 40 results

<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 (days)</th>
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<td>80</td>
<td>2</td>
<td>31</td>
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<tr>
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## EBA 2016 Report

### Country scores

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<th>MACHINERY</th>
<th>FINANCE</th>
<th>MARKETS</th>
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</table>

Colors indicate:
- Green: Topic score > 85
- Yellow: Topic score > EBA average
- Orange: Topic score < EBA average
- Red: Topic score < 30
Average score all EBA topics (0-100)
Average score of EBA topics (0-100)

The score averages the scores of Fertilizer, Sees, Mechanization, Finance, Markets and Transport.
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).
EBA 2016 Report

Discrimination

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

WORLD BANK GROUP
Number of good practices related to access to information

- Denmark: 9
- Spain: 9
- Poland: 8
- Turkey: 8
- Bolivia: 7
- Philippines: 7
- Burundi: 2
- Côte d'Ivoire: 2
- Ethiopia: 2
- Ghana: 2
- Rwanda: 1
EBA 2016 Report

Seed

Overall score  Δ Seed registration score  Green Seed development and certification score
Variety release process

<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>
Cost of variety registration

- Low income
- Lower middle income
- Upper middle income
- High income
Most countries require seed certification and the majority do not allow the private sector to perform it.
EBA 2016 Report

Fertilizer

Overall  Fertilizer registration  Export/import requirements (importing fertilizer)  Fertilizer quality control

Most countries allow the sale of open fertilizer bags.
EBA 2016 Report

Machinery

Overall  Tractor dealer requirements  Tractor import requirements  Tractors standards and safety
Cost to register imported agricultural machinery

Average cost (% of GNI per capita)
Countries where post-sale services are required by law

<table>
<thead>
<tr>
<th>Country</th>
<th>Repair of Tractors</th>
<th>Warranty on Tractors</th>
<th>Supply of Spare Parts</th>
<th>Training on Tractor Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colombia</td>
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<td>✓</td>
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<tr>
<td>Denmark</td>
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</tbody>
</table>

WORLD BANK GROUP
Time to obtain per-shipment export documents

Average time (calendar days)

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

Countries mentioned:
- Tanzania
- Cambodia
- Burundi
- Mali
- Niger
- Burkina Faso
- Mozambique
- Nepal
- Zambia
- Ghana
- Kenya
- Tajikistan
- Georgia
- Ukraine
- Myanmar
- Sri Lanka
- Lao PDR
- Philippines
- Vietnam
- Bolivia
- Kyrgyz Republic
- Nicaragua
- Bangladesh
- Guatemala
- Colombia
- Turkey
- Bosnia and Herzegovina
- Jordan
- Russian Federation
- Denmark
- Greece
- Poland
- Spain
Many countries impose overly strict regulations on microfinance institutions and lack regulations to ensure the financial stability of credit unions.
Few countries regulate Warehouse Receipts

<table>
<thead>
<tr>
<th>Country</th>
<th>Legal Framework</th>
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<tbody>
<tr>
<td>Burundi</td>
<td>No legal framework</td>
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<td>Burkina Faso</td>
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<td>Côte d'Ivoire</td>
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<td>Ghana</td>
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<td>Rwanda</td>
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<tr>
<td>Sudan</td>
<td>No legal framework</td>
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</tbody>
</table>
Transport license systems

Company road transport licensing promotes better transport operations
Few countries are truly open to international competition coming from their largest trading partner. Only a few countries allow cabotage.
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
Good Practices

- 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
Respondent types

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

Data collection
Remote
Markets indicators

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

[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.
Markets indicators

Respondent types

- Agribusinesses
- Producers organizations
- Chambers of Commerce
- Lawyers
- Plant Protection Agencies

Data collection

Remote
Fertilizer indicators

- Registering products
- Importing fertilizer
- Quality control
- (New in EBA17 Survey) Distributing fertilizer
- (New in EBA17 Survey) Subsidies
- (New in EBA17 Survey) Extension services
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
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
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
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
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
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
Transport indicators

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
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)

[New in EBA17 Survey]

Water Resources Management
Access to Water indicators

Good Practices

- 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
Environment indicators

Diversity of Plant Genetic Resources

Sustainable water resources management

Seed

Water
Livestock
Fertilizer

[New in EBA17 Survey]

Soil health + Economic incentives for sustainable practices
Environment indicators

Good Practices

- 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
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
• 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 a 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
- [dropped in EBA2017] Agricultural extension services
• 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.
ICT indicators

Respondent types

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

Data collection
Remote
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
Questions and Answers
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