

## Seed and Fertilizer Policy in Africa:

### Recommendations to the African Union Commission, Regional Economic Communities, and Country Decision-Makers from an Expert Technical Convening, Addis Ababa, December 5-7, 2013<sup>1</sup>

- 1. Beyond the Abuja Fertilizer Declaration and Regional Seed Harmonization:** The Abuja and regional harmonization agendas have been critically important continental and regional policy frameworks during the first ten years of CAADP through which to draw government, private sector, and donor attention and commitment. The Abuja fertilizer goals and regional seed harmonization goals should be completed as they are essential for Africa's agricultural growth. At the same time, since the development of these continental and regional policy frameworks, a major body of evidence, knowledge, and experience has built up, providing new evidence and approaches available to policy-makers to make improved seed and more appropriate fertilizer widely available to Africa's farmers now.
- 2. Practical policy models are available with proven impact on scaling up seed and fertilizer use:** Africa already has numerous examples of seed and fertilizer policies that rapidly increase availability and/or lower cost for farmers to access high quality, profitable and appropriate seeds and fertilizer (noted in more detail in the Proceedings and its Annexes). Additional details are provided in Annex 1. The Technical Convening's very specific, practical recommendations were initially informed by several compelling examples, including:
  - Kenya: fertilizer market liberalization in the 1990s and later agro-dealer development cut in-country marketing margins by more than two thirds, reduced by half farmers' distance to agrodealers, and dramatically expanded fertilizer availability in remote areas.
  - Zambia: business friendly and effective regulatory environment led to many more seed varieties released and available per year than any other African country outside of South Africa.
  - East Africa: Serious government engagement of private seed companies and associations at every step of regulatory development created strong regulatory and harmonization framework; Kenya, Uganda, and Tanzania accept varieties already registered in one of the other countries, without waiting for REC harmonization to be completed.
  - West Africa/ECOWAS: New regional fertilizer regulation is providing assurance to private fertilizer dealers that they can sell across borders.
  - Ethiopia: Recognition of inadequate nationwide NPK recommendations led to major investment in soil mapping and analysis to develop new fertilizer formulations, which are resulting in new in-country blending industry and higher fertilizer response rates and profitability.
- 3. Seed Policy: Beyond Regional Harmonization:** Implementing the longstanding ECOWAS and more recent EAC, SADC, and COMESA seed harmonization policies at

national level is a complex but urgent task demanding political commitment, expert technical and legal support, and strong communication to key actors in each country's public and private sector. At the same time there are essential country actions which – if undertaken now even in parallel or prior to completion of the regional harmonization agendas – could lead to major increases in improved seed availability to achieve national CAADP goals. For both the regional harmonization and unilateral national decisions, an overarching principle should be to lower costs to the private sector so that the pace of variety release (which is currently among the lowest in the world for most African countries) rapidly increases so farmers have a wider range of more productive seed choices. This means highly streamlined variety testing, accepting varieties already tested in neighboring countries, and minimizing government or NGO provision of free or subsidized seed. In particular, high priority practical policy actions that decision makers could take now include: Revamping regulatory processes so that they are transparent and that private seed companies and associations are an integral part of the discussion from beginning to end (as in Kenya and Zambia); one stop shop dealing with breeding/ variety testing/release, catalogue, certification, phytosanitary/quarantine; easier licensing of public varieties for private firms; self-regulation and certification by responsible private firms and associations; demand - driven seed breeding with clear delineation of crops where government will be involved; clearer and more predictable access to breeders' seed by private seed enterprises (local - MNCs); harmonized cross-border variety testing and release regulations (for example: EAC); officially defined categories of seed systems (certified/QDS) and support to increase awareness so that farmers can make informed choices, including recognition of role of informal seed systems and networks; following the models of certification systems that work (e.g. South Africa, Turkey, India, Thailand, OECD).

- 4. Fertilizer Policy: Beyond the Abuja Declaration:** Practical policy actions can be taken now to increase farm level demand and profit from fertilizer use by a) reducing in-country costs in the fertilizer value chain; and b) increasing fertilizer response rates. While world market fertilizer prices are beyond the control of any one country or region, many African countries' in-country fertilizer distribution costs are the highest in the world. Poor infrastructure is only one factor in these high in-country costs faced by farmers. Lack of competition in the sector, few actors, and unpredictable competition from public sector fertilizer distribution all raise fertilizer prices considerably. Lowering in-country costs requires a competitive private sector distribution system by: a) liberalizing private distribution of fertilizer; b) expanding access to finance and technical advice by distributor and dealers at all levels in the fertilizer value chain; c) reducing the costs of licensing and other regulatory compliance in consultation with private sector and farmer representatives; d) managing any government involvement in the fertilizer value chain so as to limit both government competition with the private sector and government identifying one or a handful of private firms as favored actors. (E.g., in the case of subsidized fertilizer schemes this would mean moving away from tenders and towards vouchers redeemable through any licensed dealer to maximize competition and private sector incentives that lower costs to the farmer.) The Kenya example from the mid-1990s, even with the more recent unpredictability created by renewed government involvement in distribution, provides a compelling example of almost immediate positive effects on price and on farmer access, even in remote regions.

But increasing private sector competition and as a result lowering farm level costs will have far greater impact if fertilizer response rates are improved. Fertilizer use efficiency of current recommendations and formulations is limited in many African farming situations because the recommendations are inappropriate and/or soil health and organic matter are so poor as to limit fertilizer response. A decision to tackle low fertilizer response rates is a policy choice, and to date most African countries' policy is – by default – to do nothing, concentrating instead on short-term fixes like subsidizing NPK. Identifying soil needs and gaps by agro-ecological zone and/or crop and the specific fertilizer recommendations and formulations to meet that gap, and getting that information to private dealers, extension agents, and farmers is as important in raising profitability, use, and productive response to fertilizer as is bringing down in-country costs by expanding the private distribution network. Ethiopia provides an example of identifying and tackling the abysmally low response rate to a blanket nationwide NPK recommendation that ignored site specific micronutrient gaps, and then developing a blending industry to produce the much more responsive location-specific fertilizer blends.

5. **Finance and Investment policy:** While neither subsidies nor investment policy were planned as an explicit part of the agenda, national investment policy and priorities came out as key policy choices in almost every session, with calls for allocation of set percentages of a country's CAADP investment funding to a) make operational the African Fertilizer Finance Mechanism – and other fertilizer finance – as called for in the Abuja Declaration; b) build the infrastructure that would help bring down in country fertilizer distribution costs; c) fund the soil analysis and mapping required to recalibrate fertilizer recommendations to they are more accurate and location specific; and d) expand funding to small and medium scale seed companies. With approximately \$1 billion per year being expended by African governments on fertilizer subsidies, inadequate infrastructure and finance continuing to impede developing robust seed and fertilizer value chains, and with soil analysis and mapping waiting to be done to improve fertilizer response rates, the Technical Convening identified some serious high level policy choices for the AU and its member states, in terms of most effective use of government resources in agriculture to achieve CAADP's growth, poverty, and food security targets. A practical call for greater investment in soil health and better fertilizer recommendations – coming out of the AU March meetings on seed and fertilizer policy – could help push countries to identification of high priority uses beyond subsidies to move the seed and fertilizer value chains forward in Africa.
  
6. **Public-Private Dialogue on Seed and Fertilizer Policy:** The Technical Convening elaborated a few broad approaches to public-private engagement that are critically important to a sound policy environment and policy dialogue on seed and fertilizer, including the following:
  - Government facilitates, private sector executes, development partners help catalyze
  - Shared Public-Private vision is essential
  - Farmer choice and access is critical
  - Strengthening private sector capacity is critical
  - All commercial (including farmers) activities must have profit potential

## 10. Addressing Administrative and Political Economy Barriers to New Policy Models and Approaches:

- Focus on implementation of policies (with milestones and identification of who is responsible)
- Distinguish between high, middle and low level policy barriers, and determine what commitment (political financial and technical) is needed at each level
- Identify changes that are appropriate across a wide range of country situations.
- Conduct analysis of political economy on decision making processes
- At country level, prepare detailed policy plans for implementing input and seed policies, as part of CAADP process
- Need for more structured process on consultation of all stakeholders
- Have mechanisms in place to move agendas from the regional to national level with existing platforms
- Innovative approaches to excite and get the attention of policy-makers with clear and compelling messages

## 11. Next steps:

The Technical Convening Steering Committee and participants propose supporting the AUC by advancing key seed and fertilizer policy issues at the request of policy makers at AUC, REC and country level in the first two quarters of 2014 and beyond through the following initial steps:

### AU/continental level:

- January meeting with Commissioner at her request to suggest approaches and avenues of technical advice.
- If requested, participation in Policy/Institutions AUC steering committee to provide technical advice in AUC preparation of (a) note for seed/fertilizer meeting in March; (b) options/focus for inputs wording in overall AU Year of Agriculture declaration.
- If requested, follow-up refinement of the above during Feb 13-15 AUC stocktaking meeting

### At REC level:

At the request of ECOWAS and/or of the combined SADC/EAC/COMESA secretariats, assist in meeting two purposes during the first quarter of 2014: moving ahead on appropriate seed and fertilizer policies and implementation in each sub-region and also feed policy ideas/needs/urgent policy actions to AUC for March meetings

- ECOWAS input policy meeting: IFDC, Coraf, CILSS (as technical agencies assigned by ECOWAS) are likely to identify timing, venue and provide leadership with whatever technical advice is sought from the Technical Convening Steering Committee or participants.



- Facilitate a technical level joint COMESA/SADC/EAC joint input policy meeting prior to March AU Ministerial

At country level:

The Technical Convening's participants are willing to respond to the needs of policy champions in select countries and better coordinate at country level among policy advisory groups in getting actionable, practical advice to policymakers on input policy change especially beginning in the first half of 2014.



## ANNEX 1: DETAILED RECOMMENDED POLICY APPROACHES AND ACTIONS

### Seed Policy: Practical Policy Steps Beyond Regional Harmonization:

Implementing the longstanding ECOWAS and more recent EAC, SADC, and COMESA seed harmonization policies at national level is a complex but urgent task demanding political commitment, expert technical and legal support, and strong communication to key actors in each country's public and private sector. At the same time there are essential country actions which – if undertaken now even in parallel or prior to completion of the regional harmonization agendas – could lead to major increases in improved seed availability to achieve national CAADP goals. For both the regional harmonization and unilateral national decisions, an overarching principle should be to lower costs to the private sector so that the pace of variety release (which is currently among the lowest in the world for most African countries) rapidly increases so farmers have a wider range of more productive seed choices. This means highly streamlined variety testing, accepting varieties already tested in neighboring countries, and minimizing government or NGO provision of free or subsidized seed. In particular, high priority practical policy actions that decision makers could take now include: Revamping regulatory processes so that they are transparent and that private seed companies and associations are an integral part of the discussion from beginning to end (as in Kenya and Zambia); one-stop shop dealing with breeding/ variety testing/release, catalogue, certification, phytosanitary/quarantine; easier licensing of public varieties for private firms; self-regulation and certification by responsible private firms and associations; demand - driven seed breeding with clear delineation of crops where government will be involved; clearer and more predictable access to breeders' seed by private seed enterprises (local - MNCs); harmonized cross-border variety testing and release regulations (for example: EAC); officially defined categories of seed systems (certified/QDS) and support to increase awareness so that farmers can make informed choices, including recognition of role of informal seed systems and networks; following the models of certification systems that work (e.g. South Africa, Turkey, India, Thailand, OECD).

Specific, implementable, practical policy actions and models in the seed sector include:

- Transparency process in policy formulation and implementation, e.g., COMESA Seed Trade Harmonization Regulations. These can use the FAO published guidelines in place (draft Guide for National Seed Policy formulations)
- Designated entity to implement (independent body) in country:
  - A **One stop shop** dealing with:
    - Breeding/release/variety testing
    - Variety Release /catalogue
    - Seed Certification
    - Phytosanitary/Quarantine
  - Governance of the seed sector:
    - Action plan for implementation – timelines – indicators linked to policy vision
    - Self-regulations (e.g. private association)
    - Public sector codes that can be implemented by National Seed Boards plus advocacy group / pressure groups (e.g. in Ghana)
  - Action plan for stakeholders involving:
    - Operational funds for the action plan (transparent manner)
    - Include all country priority / preferred crops given minimal resources

- Awareness creation strategies (through Videos / CDs, community radios, seed demonstration / seed fairs, etc.
- Documentation of policy in local languages
- Sensitization regional meetings
- Dialogue and outreach to parliamentarians
- Demand - driven seed breeding with clear delineation of crops where government will be involved
- Clearer and more predictable access to breeders' seed by private seed enterprises (local - MNCs)
- Harmonized cross-border variety testing and release regulations (for example: EAC)
- Technical Committee role in simplifying/making transparent varietal release etc.
- Seed trade association self-empowerment to share info/enforce agreements
- Officially defined categories of seed systems (certified/QDS) and support to increase awareness so that farmers can make informed choices
- Follow certification systems that work (e.g. South Africa, Turkey, India, Thailand, OECD)
- Action plan for all Stakeholders involving:
  - Public sector
  - Private Sector association
  - Civil society association
  - Consumer advocacy
  - Farmers/cooperatives association
- Review periodically by National Seed Boards (and lobby groups)
- Transparent operational funds for the action plan: Government budget (political will – “Buy in”) and should be core activity of government. In line with NAIP after signed National CAADP compact signed, and support to Private sector “buy in”
- Government provide guarantee for loans / credit for seed breeding and production, in case farmers defaults
- Include all country priorities / preferred crops given minimal resources
- Official recognition of the pluralism, understanding farmers as stakeholders (formal/informal) of the seed sector
- Other crossing issues:
  - Transparency in subsidies: SMART subsidies where the private sector is involved
  - Transparency in tendering
  - Improved dialogue
  - Strengthen seed information systems to provide
  - Supply/Demand (forecasts)
  - Quality
  - Subsidy



## Fertilizer Policy: Practical Policy Steps Beyond the Abuja Declaration

Practical policy actions can be taken now to increase farm level demand and profit from fertilizer use by a) reducing in-country costs in the fertilizer value chain; and b) increasing fertilizer response rates. While world market fertilizer prices are beyond the control of any one country or region, many African countries' in-country fertilizer distribution costs are the highest in the world. Poor infrastructure is one contributing factor but also lack of competition in the sector, few actors, and unpredictable competition from public sector fertilizer distribution all raise fertilizer prices considerably. Lowering in-country costs requires encouraging a competitive private sector distribution system by: a) liberalizing private distribution of fertilizer; b) expanding access to finance and technical advice by distributor and dealers at all levels in the fertilizer value chain; c) reducing the costs of licensing and other regulatory compliance in consultation with private sector and farmer representatives; d) managing any government involvement in the fertilizer value chain so as to limit both government competition with the private sector and government identifying one or a handful of private firms as favored actors. (E.g., in the case of subsidized fertilizer schemes this would mean moving away from tenders and towards vouchers redeemable through any licensed dealer to maximize competition and private sector incentives that lower costs to the farmer.) The Kenya example from the mid-1990s, even with the more recent unpredictability created by renewed government involvement in distribution, provides a compelling example of almost immediate positive effects on price and on farmer access, even in remote regions.

But increasing private sector competition and as a result lowering farm level costs will have far greater impact if fertilizer response rates are improved. Fertilizer use efficiency of current recommendations and formulations is limited in many African farming situations because the recommendations are inappropriate and/or soil health and organic matter are so poor as to limit fertilizer response. A decision to tackle low fertilizer response rates is a policy choice, and to date most African countries' policy is – by default – to do nothing, concentrating instead on short-term fixes like subsidizing NPK. Identifying soil needs and gaps by agro-ecological zone and/or crop and the specific fertilizer recommendations and formulations to meet that gap, and getting that information to private dealers, extension agents, and farmers is as important in raising profitability, use, and productive response to fertilizer as is bringing down in-country costs by expanding the private distribution network. Ethiopia provides an example of identifying and tackling the abysmally low response rate to a blanket nationwide NPK recommendation that ignored site specific micronutrient gaps, and then developing a blending industry to produce the much more responsive location specific fertilizer blends.

***Reduce costs across the value chain using multiple approaches, most of them less costly than subsidies***





- i). Reducing costs implies maximizing roles for competitive private sector. This requires:
  - 1). Maximizing space/lowering costs for private sector
  - 2). Real competition;
  - 3). Financing
- ii). Pay as much attention to increasing fertilizer use efficiency/technical response as reducing cost:
  - Fertilizer response/Fertilizer use efficiency are key to expanding fertilizer use:
  - Farm profitability key to expanding fertilizer use
- iii). In-country blending: Ethiopia example:
  - 1). Eliminates costs of importing “filler” – two thirds of import volume
  - 2). Registration of ingredients (instead of blends).
  - 3). Clear role of producer groups, companies in reducing cost
- iv). Reducing distance to agro-dealers as highlighted in the Kenya example through the creation of more space for private sector
  - The State to provide public infrastructure e.g. rail, roads and ports that reduce costs
  - Prioritize setting rules/registration to allow free movement of fertilizers across borders –e.g. ECOWAS fertilizer registration
  - Harmonization of policies: (Market entry (import/wholesale/retail), Product approval/labeling)
  - Subsidies are only one approach to increase use of fertilizer

***Reducing costs in the fertilizer value chain means maximizing roles for competitive private sector***

- a) Make it easy for many private firms to participate in the fertilizer value chain
  - Certify/regulate ingredients rather than fertilizer blends to encourage blending activities
  - Create environment for private investment
  - Free movement of fertilizers across borders - prioritize working out rules/regulations to allow this
  - Design subsidies to maximize private sector role: competitive, transparent way
- b) Increase access to finance
  - Establish financing mechanism with banks, public sector, development partners, other stakeholders
  - Out of 10% CAADP budget commitment for agriculture, dedicate 2% into the African financing mechanism or other country specific fertilizer financing mechanisms – to drive fertilizer business investments
  - AFFM/development financing for private fertilizer and seed value chains
- c) Fertilizer crop response rates key to expanding fertilizer use: Soil fertility management: -- Ethiopia example
  - 1). Move away from gross NPK uniform recommendations across multiple agro-ecologies and crops (Ethiopia ATA)
  - 2). Build on what farmer knows
  - 3). Important key is soil analysis and mapping
  - 4). Advocate for capacity building of key stakeholders; agro-dealers, extension, farmers.
  - 5). Pass down to farmers so they can use, and the private sector can provide seed kits and soil fertility data; do yield trials and demonstrations

6). Incorporate an integrated soil fertility and crop management approach

***Major underinvestment in soil fertility, which can be costly - implications for alternative uses of funds***

- Farmer profitability is the key to expanding fertilizer use:
  - Farmer responses to fertilizer – how they operate and how do they behave. What is the rationale behind farmer behavior; how they react (research community, extensionists)
  - Organic fertilizers: how to invest in this alongside chemical fertilizers in an integrated approach
  - How to bring insurance into the picture
  - Output market costs and efficiency are crucial to farm profits – market integration
  - Other approaches/investments, e.g. irrigation

## ANNEX 2: PARTICIPANTS

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### ANNEX 3: NOTES

<sup>i</sup> A Technical Convening of 57 technical experts in seed and fertilizer policy met in early December 2013 and identified practical, proven policy changes that policy-makers can adopt now to rapidly expand agricultural technology and productivity to achieve the Maputo declaration goals of 6% agricultural growth and reduction of poverty and hunger. Many of the policy changes build on and go well beyond current continental and regional goals in fertilizer usage and seed policy, as enunciated in the 2008 Abuja declaration and the harmonization agendas of Regional Economic Communities. One broad parameter guiding the Technical Convening was the necessity of taking account of constraints and incentives facing policy-makers: Finding policy champions for more effective seed and fertilizer policies requires providing policy-makers what they need, which includes policies that not only are technically and financially sound but which are also practical to implement and which can excite the policy-maker within the day-to-day incentives he or she faces, which include meeting their constituents' needs and aspirations. Participants committed to coordinate together – and engage civil society -- as technical policy experts in advising those national, regional, or continental decision-makers seeking more effective and practical policy models and actions to expand profitable, sustainable seed and fertilizer availability and use in Africa.

Conveners and sponsors: The meeting was co-convened by the Regional Network of Agricultural Policy Research Institutes (ReNAPRI) and the Africa Fertilizer and Agribusiness Partnership (AFAP), with sponsorship from the International Fertilizer Development Center (IFDC), the African Seed Trade Association (AFSTA), the Bill and Melinda Gates Foundation, the World Bank and USAID. The 57 expert participants came from East, West, Central and Southern Africa, as well as from the US, Europe and Canada, and represented a broad range of policy researchers (think tanks and universities), the private sector, NGOs, business associations, and development partners, with some participation from regional economic communities and government. The purpose of the meeting was to achieve consensus on policy actions and models that work and that policymakers can understand, accept and implement. There was full commitment by the 57 participants, and the Steering Committee for the Technical Convening, to stay engaged on these issues and provide coordinated advice to those policy-makers at the level of the African Union, RECs, and countries who sought the policy advisory assistance from this group. A separate detailed document includes full proceedings from the Technical Convening, slide presentations, and a detailed review of each presentation.

Purpose and participants: The purpose of the meeting was to achieve consensus among the broadest and most diverse range of policy experts regarding policy actions and models that work and that policymakers can understand, accept, and implement. Fifty-seven participants (from private, public, donor, and NGO sectors; researchers and practitioners; with national, regional or continental focus; from African and beyond Africa<sup>1</sup>) met around three thematic areas: (a) reviewing current input policy successes and shortfalls, (b) achieving expert consensus on policies could meet the development and

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political needs of African policy-makers; and (c) identifying next steps in which closer coordination among inputs policy experts can help shape policy discussions and decisions at the continental (AU/African Year of Agriculture), REC, and country level. The Technical Convening identified principles, actions and approaches in seed and fertilizer policy, as well as effective models of public-private dialogue and approaches to address policy barriers.

Why now? A convergence of factors provides a *unique opportunity now* to improve the policy environment for faster and more sustainable agricultural growth, with inputs at its base. This includes a strong interest by many African countries to improve input policies; several years of African commitment to better seed and input policies (through the 2008 Abuja Declaration on fertilizer, and more recent regional seed policy harmonization agreements); a large body of evidence on what works and what doesn't since the Abuja Declaration and the regional seed harmonization commitments; the fiscal concern driving many Ministries of Finance to call for a rethinking of input subsidy programs; and the 2014 Year of Agriculture and CAADP@10 call for more effective policies and institutions to drive faster achievement of CAADP goals.

Companion documents include full proceedings of the Technical Convening, including agenda; summary of all presentations; and a file of all slides used in presentations.