

**Topical Synthesis Paper**

# **Enabling Seed Policies & Regulations**



## **ISSD Africa Topical Synthesis Paper**

**Title:** Enabling Seed Policies & Regulations

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This report discusses learning and insights from the action research and dialogue activities conducted under the Integrated Seed Sector Development in Africa (ISSD Africa) programme, 2019-2023.

More information: [www.issdafrica.org](http://www.issdafrica.org)

Under the ISSD Africa topic “Enabling Seed Policies”, IFPRI and partners conducted activities in Ethiopia, Ghana, Kenya, Rwanda, Nigeria and Uganda.

## 1. Introduction

The key problem that action research under this topic sought to address is the lack of coherent, effective policy design, articulation, and execution across many countries in Sub-Saharan Africa. Activities conducted under the topic sought to influence public policy formulation and implementation on seed system and seed market development through policy reviews, collaborative research, and knowledge-sharing.

### Learning questions

This ISSD Africa topic has focused its work in this area on three critical learning questions with a particular emphasis on six countries—Ethiopia, Ghana, Kenya, Nigeria, Rwanda, and Uganda—where variations on these questions are at the centre of national and local discourse on seed sector development.

1. What are the gaps in the design and implementation of national policies for seed sector development?
2. How can national seed policies incorporate and benefit from regional and global initiatives?
3. What types of innovative mechanisms can accelerate the implementation of seed policies?

## 2. New insights & perspectives for enabling seed policies

Concluding the third phase of ISSD Africa, 170 seed professionals met in Kigali from 17 to 19 October 2022 for the ISSD Africa Conference, where they shared and discussed outcomes of the CoP's action research activities. This took place over the course of eight sessions, corresponding with ISSD Africa's eight topics, and was complemented by seven additional sessions on topics proposed by other continental and regional initiatives.

The main conference output, the Third Communiqué on ISSD in Africa, presents relevant insights that summate the various findings and conclusions of action research under this topic.

### **2.1 Perspective: Gaps in the design and implementation of national policies for seed sector development require more discussion, innovation, and evidence to ensure that seed policies, investments, and regulations are effective and inclusive.**

The policy environment in Africa south of the Sahara greatly influences the availability, quality, and use of well-adapted crop varieties and quality planting materials, with significant consequences for agricultural productivity growth, rural livelihoods improvement, and resilience to climate change. However, many countries are struggling to design and implement appropriate policies and regulations for seed sector development that are firmly grounded in data and evidence. And in the handful of countries that have introduced policy reforms in recent years, there is often a sense that implementation had not led to demonstrable outcomes in the uptake of new varieties or the use of quality seed.

This persistent challenge is partly due to the lack of clear implementation strategies—national plans and roadmaps for seed sector development that are sufficiently sensitive to heterogeneity in crops, agro-ecologies, markets, and farmers themselves—for those policies and regulations that have been introduced. Implementation failures can also be attributed to a lack of awareness of the trade-offs inherent in any policy change, for instance, between stricter seed quality assurance regulations and seed market growth, between an extension system focused on seed replacement rather than varietal turnover, or between a more open trade regime and domestic seed enterprise development.

Beyond implementation challenges, there are also gaps in the content of seed policies and regulations. For example, seed policies may not adequately recognize the need to manage agro-biodiversity to maintain local sources of genetic diversity, or the requirements of regional, continental, and global agreements pertaining to trade. Further, they may fail to recognize the social and economic benefits of informal seed systems that are based on trust, exchange, and sharing.

Attempts to address these issues have focused almost singularly on the problem of stagnant yields, with policymakers and development partners often pursuing a strong market-led approaches built around a limited number of crops. However, in most countries, there is still much to be done in to expand the crop coverage of seed policies and regulations, and to improve their context specificity. This means strengthening the complementary role of the public sector through a range of mechanisms: incentives that encourage public breeding programs to make their products widely available to farmer organizations, seed entrepreneurs, and companies; rural services that promote uptake and adoption more effectively and equitably; and regulatory efforts that better integrate informal and formal seed systems.

### **2.1.1 Insight: Seed policy is hotly contested, but increasingly pragmatic.**

Seed sector policies matter greatly to a wide range of actors with diverse interest. These interests shape debates over how to breed, produce, distribute, and market well-adapted varieties and quality seed to small-scale, resource-poor farmers in Africa south of the Sahara. While debates still rage on at the global level on genetic resources policy and biodiversity conservation, there is now a lot more conversation about the nuts-and-bolts issues of seed sector development—issues such as appropriate tolerance thresholds for pest and disease presence in seed, alternatives to costly varietal registration and seed certification processes, exit strategies for fiscally constraining seed subsidy programs, and market mechanisms to deliver better information across seed value chains.

As countries move towards deepening reforms in the seed sector, it is critically important that resulting policies and regulations engender trust and cooperation between farmers, seed companies, regulatory agencies, and other stakeholders, and that national policies are harmonized with regional and global agreements that stand to benefit these same stakeholders.

### **2.1.2 Insight: Better analysis is critical to the policy change processes.**

A key ISSD learning outcome is the need for greater analysis of policy change processes in our focal countries—analyses that encourage greater multistakeholder dialogue in the policy space and bring high-quality data, evidence, and voices to the table. This includes not only the analysis of varietal adoption and turnover rates or seed replacement rates, but also analysis of the [political economy of Kenya's seed sector](#), the [policy landscape in of Uganda's seed sector](#), the [policy drivers and consequences for the global exchange of crop genetic resources](#), and [business perspectives on seed value chains](#).

### **2.1.4 Insight: Stronger global efforts are needed to champion seed policy reforms.**

Another ISSD learning outcome is the recognition of that more efforts are required at the global level to champion seed sector development and appropriate policy and regulatory reforms. In an effort to create spaces for policy analysis and dialogue at this level, ISSD helped CGIAR and its partners to extend support to national seed policy change processes through CGIAR's [2030 Research and Innovation Strategy](#), which situates the global research-for-development network within the evolving global context that demands a systems transformation approach for food, land, and water systems.

Seed systems development—including policy and regulation—are now squarely on the CGIAR agenda. Multiple initiatives in the CGIAR portfolio engage directly in addressing policy and regulatory issues in seed systems development, including the [Seed Equal Initiative](#) under the [Genetic Innovation Action Area](#) and [Nature-Positive Solutions Initiative](#) under the [Resilient Agri-Food Systems Action Area](#). Together, these initiatives are building a community and amplifying partners' voices to ensure that the path forward is balanced between delivering genetic gains to farmers, conserving agrobiodiversity, serving the needs of value chain actors, and ensuring that policies provide a conducive environment for all of these goals to be realized. This represents a major shift in CGIAR's outlook strategy resulting partly from the work the [CGIAR Community of Excellence \(COE\) for Seed Systems Development](#), an effort that was anchored in ISSD Africa, the Netherlands-CGIAR Seed Systems Development research program ([NL-CGIAR SSD](#)), the CGIAR Research Program on Policies, Institutions, and Markets ([PIM](#)).

### **2.1.4 Insight: Seed subsidy programs have a role to play, but must be treated carefully.**

Input subsidy programs can be useful in introducing farmers to new varieties and quality seed, particularly where farmers face credit constraints or are averse to the risks of varietal change. However, subsidies are often costly fiscal interventions for governments, tend to be difficult to remove after sustained periods of implementation, and rarely produce their intended productivity and welfare outcomes. There is a wealth of ideas to make subsidy programs more effective through more precise targeting, greater private sector engagement, digitalization of services, and more strategic bundling with extension, advisory and financial services. But each of these strategies requires careful, on-the-ground assessment to justify the investment. This is especially the case if input subsidies are expanded beyond major cereal staples to support farm diversification into a broader range of nutrient-dense and climate-resilient crops.

### **2.1.5 Insight: Seed sector actors need a level playing field.**

The growing emphasis on private sector investment in seed sector development bring with it several difficult policy issues. Many countries in Africa south of the Sahara still support state-owned seed companies and seed production units in national research organizations. While there are often good reasons for these types of state interventions in seed markets, they can also crowd out private sector participation, create barriers to entry, and sustain anti-competitive behaviors. By the same token, nascent seed markets in certain countries fall prey to anti-competitive behaviors when only a small number of companies exist or secure exclusive rights over specific markets and populations. The design and implementation of regulations that ensure market competition in the seed sector demands greater attention from all policy actors.

