

Regoverning Markets

Small-scale producers in modern agrifood markets

Making a difference

**An impact assessment of
the Regoverning Markets
programme**



*Anticipating and managing changes in local and regional
agrifood markets for small-scale farmer inclusion*

www.regoverningmarkets.org

Making a difference

An impact assessment of the Regoverning Markets programme¹

2008

¹ Report prepared by Felicity Proctor, Felicity Proctor Consulting Ltd and Visiting Fellow, International Institute for Environment and Development, UK, and Larry N. Digal, University of the Philippines in Mindanao, Philippines.

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1. Summary

This paper reviews the extent to which the Regoverning Markets (RM) programmes' outputs and activities have contributed directly and indirectly to the wider vision of more secure and enhanced inclusion of small-scale producers and small- and medium-scale entrepreneurs in dynamic modern agrifood value chains. It focuses specifically on domestic and regional agrifood markets within developing and emerging market-economy countries.

Section 2 presents the monitoring and valuation framework which is constructed around the logical framework of the Regoverning Markets programme as agreed between the consortium members and funding agencies at inception. It focuses at two levels:

- the higher or goal level of the wider enabling environment: International and national public and private sector policy and intervention better able to secure more equitable producer and trade benefits in response to the dynamic changes in agrifood market restructuring in developing and transition economies;
- and the more practical action and intervention level: Strategies including policies and interventions by which small-scale producers and small and medium-size enterprise (SME) trade intermediaries can better participate in the dynamic market sector identified and made available for adoption within public and private processes.

Section 1 builds up from the evidence and materials presented in Section 2 and summarizes the key lessons from the programme including the wider findings, giving examples of outcomes and impact as well as presenting lessons of relevance on programme design for similar action research initiatives. Agrifood markets and their implications for small-scale producers' inclusion, poverty reduction and rural economic development are now being considered within domestic and international policy processes and interventions. The weak framework for dialogue between the public and private sectors, including farmers and their organizations, together with a weak evidence base have hampered the capacity of all actors to accompany effectively the change processes. Whilst acknowledging that there has been country and regional variability in outputs, response and uptake of the Regoverning Markets programme activities, the programme has had a substantial impact in some contexts and contributed significantly to the international, regional and national evidence base and policy process. Specific public and private sector actions have taken place as a direct result of the work of the programme.

The governance and structure of the programme with its devolved management to component and regional teams and the combining of research with policy processes and outreach have contributed to the success of the programme and its outreach and impact. This structure has played a key role in building national capacity and has left a legacy of competent research teams and champions in a number of partner countries. These have attracted the interest of public policy makers, development agencies, farmers' organizations and the private sector, as well as other sources of funding to continue relevant and related work and partnerships.

The report is supported with a number of annexes which document written outputs (Annex 1), meetings and other events (Annex 2), numbers of post-graduates trained during the life of the programme (Annex 3), and details the various country-level Reference Groups set up to support and accompany the work of the empirical research component of the programme (Annex 4)

2. The Regoverning Markets programme: making a difference

The context

This paper reviews the extent to which the Regoverning Markets (RM) programme's outputs and activities have contributed directly and indirectly to the wider vision of more secure and enhanced inclusion of small-scale producers and small- and medium-scale entrepreneurs in dynamic modern agrifood value chains. It focuses specifically on domestic and regional agrifood markets within developing and emerging market economy countries.

The programme sought to work with partners from the research community and the public sector, agrifood chain actors, civil society organizations including economic organizations of producers, and development agencies. The RM partners included those whom the programme anticipated it would be able to influence. Among the wider changes sought were that:

- new agrifood business drivers are partners in development
- anticipatory public policy can make a difference
- small-scale producers and their organizations are partners in new business

Within a three-year programme the ultimate change process (impact) may not be observed. However, the steps towards this can be observed and measured.

Some key points that guided an assessment of 'whether we are making a difference' included:

- that RM is about changing attitudes and perceptions informed by evidence and illustrated by policies and practice change
- a focus on changes in behaviour led to such questions as
 - do partners behave or act differently?
 - are institutions doing business differently?
 - have new relationships been formed?
 - have existing relationships changed?
 - are there any surprises?

Such outcomes may have been linked logically to the activities of the programme but may not have been directly caused by them. Within this report in seeking to map the outcomes associated with the RM programme, the programme is not claiming that the development impact or change has been solely attributed to the RM in all cases but that the RM has contributed to its outcome. This approach to measuring and observing change builds on work developed by the International

Development Research Centre (IDRC) on outcome mapping.² It seeks to address some of the challenges of monitoring and evaluation implicit in anticipatory policy-influencing programmes, especially those such as RM, which are set globally and within an environment of dynamic institutional and agrifood market change. In addition to the partial adoption of outcome mapping methods for evaluation, the RM programme also drew on traditional methods of evaluation such as reporting on changes in policy or practice.

For simplification, Part 2 is structured around the monitoring and evaluation indicators³ as set out at the inception of the RM programme and defined in the RM's logical framework. It focuses at two levels. First, the higher or goal level of the wider enabling environment:

International and national public and private sector policy and intervention better able to secure more equitable producer and trade benefits in response to the dynamic changes in agrifood market restructuring in developing and transition economies

Second, at the more practical action and intervention level:

Strategies including policies and interventions by which small-scale producers and SME trade intermediaries can better participate in the dynamic market sector identified and made available for adoption within public and private processes

The report does not intend to be a full audit of the RM programme at the output and activity levels. However, as a place-holder the RM programme outputs are presented in Box 1.1.

Box 1.1: Intended outputs from the RM programme

Output 1: High quality and policy relevant research contributing to public and private sector policy formulation at national and international levels generated and research capacity built
Output 2: Innovative models and interventions that support small-scale producers and processors participation in modern markets validated
Output 3: Structures for policy dialogue between the public sector, private sector and civil society strengthened and supported at national, regional and international levels
Output 4: Guidelines for preemptive and anticipatory policy, and for corrective policy generated and capacity built
Output 5: Capacity of direct and indirect stakeholders in the supply chain strengthened and reflecting a willingness to include small-scale producers and suppliers.

² Earl, S., Carden, F. and T. Smutylo (2001) *Outcome mapping: Building learning and reflection into development programs*. IDRC Canada

³ Proctor F. J. (2006) *Strengthening the Monitoring and Evaluation Framework of the Regoverning Markets programme – September 2006*. Regoverning Markets Programme working paper.

Part 2 has drawn from the various working documents of the RM programme including the programme's annual and quarterly reports, the work of the programme in policy outreach and learning including the country Reference Groups, and the country level multi-stakeholder Policy and Institutional mapping processes (also called chain-wide learning processes).

Finally, and perhaps most critical in the context of the wider vision, key questions for the RM programme and other groups working in this field include:

- are these changes enough to move towards the vision and desired impact?
- what more will it take to fulfil the vision?

Implications of findings – key messages and lessons learnt

The following are the key lessons and findings derived from the question “Is RM making a difference?”

Message 1: National multi-stakeholder task groups/working committees are one key to building understanding between stakeholders, sharing evidence and information and effecting change

In general and at national levels, the relationship between the modern dynamic agrifood business sector, the private sector and the producer including the small-scale farmer is weak or non-existent in terms of policy dialogue, collective learning and discourse on issues surrounding the question of inclusion of small-scale producers in modern markets.

Limited but exciting initiatives exist where the formation of and or support to multi-stakeholder processes have contributed to outcomes aligned to the vision of the RM programme. The programme has contributed to the processes and the associated outcomes.

Examples include:

- The multi-stakeholder Strawberry Council of Michoacán, Mexico utilized outputs from RM in the reformulation of the state strawberry sector plan to ‘promote the inclusion of small and medium scale farmers in restructured markets’;
- Multi-stakeholder national agreement on improved vegetable marketing in the Philippines including smallholder vegetable producers drew on the case study work and dialogue processes supported by the RM; and
- a National Horticulture Charter agreed for Indonesia including composition of a multi-stakeholder committee and creation of a National Horticulture Board following RM work in Indonesia.

Message 2: Creating a neutral space for dialogue between different stakeholders is one step towards building relevant future alliances

The challenge created through the growth of modern agribusiness requires new institutional arrangements if a wider vision is to be realized. In most cases within the RM-sponsored country level multi-stakeholder chain-wide learning meetings on small-scale producer inclusion in modern markets (eight in total), it was the first time that such a national-level debate had taken place that engaged all key actors. The process was welcomed by participants who appreciated the use of national independent and non-aligned moderators, the creation of a neutral space for dialogue and a methodology that began with looking into the future rather than focusing on prevailing challenges, some of which may be contentious.

Some stakeholders do not believe that there is anything to be gained through dialogue. There is often lack of confidence and trust between the public and private sectors and between small-scale producers and the larger-scale commercial operators. Inequality in relations and power imbalance are a central issue. Such issues need to be overcome as part of institutional change. Learning through doing and seeking early wins are examples of means to help overcome barriers to market inclusion and to build confidence and trust between actors.

Different institutional models and arrangements need to be tailored to the particular national situation. The lessons learnt learned from the eight country processes of chain-wide learning have been reported⁴ and a guide for practitioners prepared⁵.

Examples of outcomes and next steps taken arising from these country cases include:

- South Africa – an Alliance formed with Consumer Goods Council in South Africa (CGCSA), Mpumalanga Economic Growth (MPEG) and national bodies
- Bangladesh – proposal to set up a private sector informal network
- Philippines – the processes and outputs from meetings embedded in work of existing structures

⁴ Proctor, F.J. and L. Digal (2007) *Opportunities and options for small-scale producers' inclusion in dynamic markets in developing countries and transition economies: A synthesis of findings from country level workshops*. Regoverning Markets Working Paper

⁵ Vermeulen, S., Woodhill, J., Proctor, F.J. and Delnoye, R. (2008) *Chain-wide learning for inclusive agrifood market development: a guide to multi-stakeholder processes for linking small-scale producers with modern markets*. International Institute for Environment and Development, London, UK, and Wageningen University and Research Centre, Wageningen, the Netherlands.

- Turkey – a platform formed to address trends in restructuring and food retailing
- Pakistan – the establishment of a multi-stakeholder task group

Message 3: Champions of change are a key to moving the agenda forward

National research teams and other professional groups can serve as champions of change and contribute to national and regional-level change processes. The devolved structure of the RM programme combined with a commitment to ensuring that the bulk of the research and policy support was undertaken by national partners has played a key role in building research and policy outreach capacity.

A champion of change or innovator is often a key driver in the change process and in this context a committed individual within an organization can be key.

Message 4: The importance of change in dynamic agrifood markets in developing countries and transition economies is increasingly recognized as a legitimate topic for international, national and regional debate

Over the past three years there has been an increasing number of international, regional or national meetings and conferences held where this topic has been a central or a sub-theme. The RM programme has contributed to these meetings either through papers or support in organizing working sessions. These have been through invitation reflecting the profile of the work and the capacity of the research teams or through pro-active engagement by the RM teams. As such this has raised the profile of the debate and the work of RM contributing to heightened awareness by participants of the issues and increased access to the findings of the RM programme.

Most meetings, however, have not focused specifically on the development impact of these market changes on small-scale producers and the rural labour force nor the means to seek broad-based and pro-poor procurement (i.e. greater small-scale producers and SME participation and inclusion).

Regional networks place this theme on their agenda, for example the Sustainable Development Policy Institute (SDPI) fostered South Asia network; or in sub-Saharan Africa, the Forum for Agricultural Research in Africa (FARA), the Common Market for Eastern and Southern Africa COMESA and as well as the Food, Agriculture and Natural Resources Policy Analysis Network (FANRPAN).

RMs' contribution has been key in getting the issue onto the wider agenda. The international conference organized by RM and entitled 'Inclusive business in

agrifood markets: evidence and action', held on 5-6 March 2008 in Beijing, was seen by many as a turning point within the debate. With representation from some 130 people from all sectors and over 30 countries, evidence was shared and a platform created for generating ideas to move towards action at all levels and by all players.

Message 5: The developmental aspects of changes in dynamic agrifood markets in developing countries and transition economies have been raised within the development and donor communities

The World Development Report (WDR2008) has placed the topic squarely within the 'agriculture for development' agenda informed by working papers authored by members of the RM team.

Members (donor agencies) of the Global Donor Platform have placed 'supermarketization' as one of their key themes for priority action.

The International Fund for Agricultural Development (IFAD), in taking forward their planned Rural Poverty Report 2009, have placed market linkages as central to the strategy for action and has drawn on the work of RM to inform the report. Outcomes of the European Forum on Sustainable Development Berlin 2007 recognize the importance of the role of the private sector in the change process. The Bill and Melinda Gates Foundation created a market linkages programme in 2007. At least one commissioned theme will use the findings from innovation on small-farmer linkages to markets as part of future work on new business models and agrifood market chain development.

Message 6: Entry points for specific policy change and broad-based policy change are multiple and unpredictable. Researchers and development practitioners in this field need to be ready to respond to the prevailing issues at national levels and the demands for evidence that relate to specific issues of the day

The RM teams at national levels have contributed to a number of policy processes including legislative change.

- Examples of specific policies include: regulation of wholesale markets in Turkey; extension reform in China; competition policy in Pakistan; contract and retail market law in Indonesia.
- Examples of broad-based change include: The Vision 2030 task force in Kenya includes support to small-scale producers in dynamic markets; the debate on the Common Agricultural Policy in Hungary and Poland placed the needs of small-scale producers more centrally.

In such cases, evidence was drawn from the RM programme and or the public processes drew upon the experiences/knowledge of the research teams within RM, which themselves have been strengthened through membership of the RM consortium.

Message 7: New public sector (including donor) projects and programmes launched which directly contribute to the vision

There are numerous examples of where material generated through the programme has fed directly into new projects and programmes. This will contribute to the wider intended impact of small-scale producers' inclusion in markets. This includes both research and investment.

- Specific country investment examples include: Indonesia (World Bank - WB), Philippines (The Australian Centre for International Agricultural Research - ACIAR, the Asia Development Bank - ABD), South Africa (national programme), Central and Eastern Europe through FAO, China through FAO
- Multi-country research examples include: the Global Forum for Agricultural Research (GFAR); a policy and action programme of VECO, Cordaid and IIED; and the mainstreaming of market-orientated extension through the work of partners within the Neuchatel Initiative.

Message 8: Private sector's engagement in good procurement practice can be realized, and there is growing interest in the wider issues of pro-poor procurement

Private sector has developed or is developing 'codes of practice in modern retail' in Latin America, namely Argentina, Costa Rica (in development) and Mexico (in development). This is also under consideration in Indonesia. Such initiatives tend to arise where the political pressure or call for change is greatest.

At country level, the private sector is willing to begin exploring the impacts of the changes in fresh produce procurement on farmers and suppliers and/or new business processes e.g. in South Africa and sub-Saharan Africa (Freshmark); Carrefour in China and Indonesia, and national intermediaries or retailers such as Birmandiri in Indonesia and JSGaisano Inc. in the Philippines. The latter adapted a business model which was reviewed and widely shared through the Rmprogramme.

Message 9: The private sector at global and corporate level has been harder to engage in dialogue to date

Until the evidence is generated and populated with case materials the opportunity to launch strategic dialogue with the private sector at international and regional levels is limited.

The international conference in China in 2008 was seen as a turning point of private sector interest. Senior level agribusiness actors and investors from India and Malaysia specifically, as well as financial institutional representatives in the South East Asia region committed to explore new and innovative approaches to support inclusive agribusiness. The CIES Food Business Forum has expressed interest in including the topic in the 2009 Food Business Summit.

Message 10: Producer organizations have demonstrated their capacity to drive the change and take responsibility for encouraging new models of farmer organizations' links with the value chain

In many cases the farmers' organizations lack the capacity, including access to information and ideas, on how to gain and/or secure access to dynamic markets in their own right or on behalf of their members. Some exciting examples exist where the RM programme has also played a supportive role:

- In the Philippines the elaboration of a case study and the sharing of what works has been seen as a very powerful tool and stimulant to further evaluation of the business model. Such actions are reinforced by the lobby agenda of global membership bodies such as IFAP who have placed this issue on their own lobby agenda.
- The RM programme worked closely with the International Federation of Agricultural Producers (IFAP) in sharing ideas and RM outputs. New action-orientated programmes such as the IFAP-led Empowering Farmers in Markets Programme (www.esfim.org) have been launched. The 2008 IFAP Congress called for continued work in this field.

Message 11: The structure and governance of policy-orientated research and outreach can impact significantly on the likelihood of research uptake and policy outcomes

The RM programme had a number of features that enhanced the uptake of research findings and increased the pace of policy change and support compared to more traditional policy research programmes. These features include:

- the devolved structure of the RM programme with nine regional nodes

- the three interlinked programme components of evidence-based research, innovation and learning through case studies, and policy outreach
- co-leadership of the programme's three components by institutions from the North and the South
- a commitment that the empirical and case study research would be undertaken by national institutions working in equitable partnership with northern-based partners
- Research Reference Groups put in place with ring-fenced funding from the outset in countries undertaking empirical research
- a commitment to support policy outreach at country, regional and international levels throughout the programme, with flexibility delegated to regional level on how the funds are used to enable demand led action
- capacity building of national institutions including support to chain-wide learning as a specific programme objective
- a devolved website which enabled regional nodes to input and build local interest sections

3. Mapping and measuring the outcomes from the Regoverning Markets programme

International and national public and private sector policy and intervention **better able** to secure more equitable producer and trade benefits in response to the dynamic changes in agrifood market restructuring in developing and transition economies

1 National public policy documents reflect dynamic market change

Outcome	Measure	Source
National poverty/economic growth strategies; national agriculture, trade and food strategies; public sector action plans		
Strawberry Council of Michoacán, Mexico , utilized outputs from RM in the reformulation of the state strawberry sector plan 'To promote the inclusion of small and medium farmers in restructured markets' building on agreements between the private sector, the state and the federal government for sound guidance of programmes and investments in the value chain	Secretariat for Agricultural Development of the Government of the State of Michoacán (SEDAGRO) reformulates the Michoacán Strawberry Sector Plan, 2007.	Record of one day meeting at the annual conference, September 2007
Kenya Vision 2030 task force includes support to small-scale producers in dynamic markets informed by the RM programme team	The Kenya Vision 2030 task force sets out a vision that integrates small-scale producers into emerging and dynamic markets. To be launched October 2007.	http://www.nesc.go.ke/

2 National public policy documents and support interventions reflect the needs of small-scale producers in dynamic markets

Outcome	Measure	Source
Medium term expenditure frameworks/ public expenditure reflects changed needs		
New investment in Kenya addresses the changes of market linkages for small-scale producers	The Kenya Vision 2030 includes ten flagship projects linking producers through their respective producer business groups to wholesale market hubs and large retail outlets in urban centres	http://www.nesc.go.ke/
Policy and legislative changes		
The regulation of wholesale markets is changed to enable greater private sector vertical integration and new modalities for operation in Turkey	In Turkey a revised wholesale market law was passed in Parliament 2007 to establish the conditions for trading fresh fruits and vegetables. A revised law is under consideration at the Turkish Parliament that permits municipalities to either establish or permit the establishment of private sector-owned wholesale markets	Reference to the law Official Journal May 23 2007 No 26530
Draft law (revision) on organic production in Turkey	RM contributed to the debate on the reform of the law which is currently anti-poor	
Draft law on the regulation of supermarkets in Turkey		Ministry of Commerce and Industry RM provided evidence Lead authors of the law joined RM lead workshop
National Rural Development Plan reflects the needs of small-scale producers' integration in dynamic markets in Hungary .	Special measures are being envisaged by supporting producers' organizations to facilitate smallholders' participation in value chains.	National Rural Development Plan of Hungary, 2007
New contract laws offer greater protection to small-scale producers in Indonesia . Draft of modern retail law in Indonesia takes into account learning from RM	Indonesia contract law drafted and agreed Indonesia modern retail law in preparation	Modern retail law is still at the Parliament and waiting for an approval (at early 2008)
A National Horticulture Charter agreed for Indonesia including composition of	The new charter and structure in place	National FGD and Workshop 7-8 December -8 2007 on the development of

committee and the election of the president of the new National Horticulture Board		National Horticulture Board. In collaboration with DG of Horticulture, CAPAS facilitated the multi-stakeholder meeting with major horticulture producers and associations at the national level. Report of meeting
Contribution to the processes of reform in Pakistan including competition policy and law, horticulture policy, marketing policy, agriculture policy, WTO negotiations, FTAs, RTAs and FDI in retail sector through RM's active engagement within learning platforms at country level	In process in Pakistan, work on competition policy and law, horticulture policy, marketing policy, agriculture Policy, WTO negotiations, FTAs, RTAs and FDI in retail sector.	Sustainable Development Policy Institute (SDPI) preparation of key policy notes, regional industry status reports, documentation of innovation not captured through specific studies
Piloting of extension service reform in 25 counties in China	RM policy brief to the national leaders on how small-scale farmers adopt new technology and adapt to new market environment. The recommendations from this policy brief have been incorporated into the ongoing national extension system pilot reform in 25 counties in China.	National Agricultural Technology Extension Center (NATEC): the leaders from NATEC and Ministry of Agriculture agreed to include farm association and marketing assistance components in China's pilot of extension service reform in 2007 and 2008.
Multi-stakeholder national agreement on improved and more efficient vegetable marketing in the Philippines including smallholder vegetable producers and a framework in place to address issues in the sector in a systematic manner	Resolutions include: <ul style="list-style-type: none"> - strengthen and expand the pilot food lane programme for vegetable to national level - strengthen the application of grades and standards to service as a common language for transaction covering vegetables - urge the government to commit P1 billion in funds from the Agricultural Competitiveness Enhancement Fund to provide incentives and risk management measures for new loan portfolios designed to enhance the productivity and profitability of smallholder vegetable producers 	Submitted as a Policy Resolution in the 5 th National Vegetable Congress, 7-8 March, 2007.

	<p>- enhance the profitability of smallholder vegetable production through a package of integrated technical assistance and promotion of vegetable consumption</p> <p>A single unified national agenda to support the Philippines vegetable industry and strengthen regional agriculture and fisheries councils to ensure that regional concerns are adequately addressed</p>	
In Pakistan budget 2007 and trade policy 2007 was debated for pro-poor domestic commerce	Pre-budget and pre-trade consultation and post trade policy media talk shows	<p>Official consultation by the Ministry of Commerce</p> <p>http://sdpi.org/research_Programme/environment/regoverning_markets.html http://sdpi.org/SDPI_in_the_press/media%20coverage%202007/may_07.html http://sdpi.org/SDPI_in_the_press/media%20coverage%202007/august_07.html</p> <p>TV talk shows at major TV channels including GEO, CNBC Pakistan, AAJ TV, DAWN TV, PTV Pakistan</p> <p>SDPI is a member of the National Steering Committee formed by the United Nations Development Programme(UNDP) and the Ministry of Commerce for the “Trade Initiative from Human Perspectives” programme launched in 2006</p>
Multi-stakeholder national agreement on improved and more efficient citrus marketing in Pakistan	Recommendations for Ministry of Food, Agriculture and Livestock (16 action points) and Ministry of Commerce (9 action points)	Submitted policy resolutions to the Ministry of Commerce and Ministry of Food and Agriculture

Multi-stakeholder dialogue about protection of small farmer's rights in the forthcoming National Trade Policy in Pakistan	National Trade Policy 2007	Citation from Commerce Minister's Speech (http://www.commerce.gov.pk/Tradepolicy.asp)
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3 International public agencies documents reflect dynamic market change and acknowledge the implications for small-scale producers

Outcome	Measure	Source
The WDR 2008 on Agriculture for Development highlights the issues of small-scale producers and modern markets and draws on the RM teams' working paper and two case studies	The WDR 2008 report	WDR2008 chapter 5 www.worldbank.org/wdr2008
The membership of the OECD DAC recognize that changes in market structure are taking place and calls for new relationships in the value chain, contract farming and enhanced support to farmers organizations in the context of new and rapidly expanding global value chains. It recognizes the private sector is emerging as a key player in linking larger-scale commercial producers with markets	The OECD DAC publication is guided by the POVNET donor group and has been developed through consensus	OECD DAC (2006) Promoting pro-poor growth Agriculture
The EC Common Agricultural Policy (CAP) reform process made more aware of the issue of small-scale producers within the CAP reform through the work of RM	The profile of the issue is raised. Positive response to multi-stakeholder seminars and working meetings held in Poland and Hungary on the issues of small-scale producers within the CAP reform process	RM findings provided significant inputs to discussions on CAP reforms organized by the British and Dutch Embassies in Hungary (first half of 2007) Seminar on C2 outcomes in Budapest, Hungary (December 2006).
Alliance for a Green Revolution in Africa (AGRA) includes market access	AGRA reports informed by RM	AGRA reports Focal countries Kenya and Uganda RM fed into process

4 Donor agencies policy documents reflect dynamic markets and support small-scale producers' participation in these markets

Outcome	Measure	Source
Some 30 bilateral donors and international financial institutions have placed 'Value chains and "supermarketization "' as one of ten key themes that require specific focus in order to address the challenges of rural development and of the small-scale farmer in particular.	Global Donor Platform for Rural Development joint agreement made in 2006	Hot topics: Platform consensus on rural development issues of global significance in 2006. http://www.donorplatform.org/
Global Forum on Agricultural Research (GFAR) will focus on "linking smallholder farmers to dynamic markets" It will scale-up good practice from a number of programmes including RM	The governing body and membership of the Global Forum on Agricultural Research (GFAR) has reached agreement to focus on "linking smallholder farmers to dynamic markets" (2007)	http://www.egfar.org/egfar/
Raised awareness in the EU of the challenges facing rural livelihoods in Africa in the face of globalization including call for new relationship between key actors	The second EU meeting on rural development called for new partnerships between farmers organizations and the private sector and for donors to exchange experience, develop a common understanding of the supermarket revolution and establish dialogue with supermarket chains.	Sustainable Growth and Poverty Reduction in Rural Africa: How can Europe be a more effective partner? 18-21 June 2007, Berlin Working group 1 http://www.ruralforum.info/
IFAD planned Rural Poverty Report 2009 to utilize outputs from RM	Outputs shared with IFAD task team	Draft working papers. Report due early 2009

5 Private sector operators working at national and international levels demonstrate interest in and action appropriate for small-scale producers and SME inclusion

Outcome	Measure	Source
JSGaisano Inc, a Philippines -based retailer, seeks to take up a model of small-scale farmer procurement shared through the RM programme	Supermarket chain in Southern Philippines is buying from a cluster of small-scale vegetable farmers. Model is based on the NorminVeggies RM case study. Implementation was assisted initially by the Catholic Relief Service' (CRS) Small Farmers Marketing Program funded by USDA and is now procuring from small-scale farmers without market facilitation support from CRS.	Reference Group meeting (May 25, 2007); JSGaisano Inc, CRS, RM meetings June 2007; and July 2007; on-going buying operations of JSGaisano
Carrefour agree contract with Centre for Agricultural Policy and Agribusiness Studies (CAPAS) of Padjadjaran University to set up learning Laboratory for modern retailing and product handling Indonesia	The new learning laboratory (supply model chain - live fresh kiosk) will seek to train both students and farmers, procurement agents and extension agents in business processes and total quality management systems	Poster presented at the RM international conference March 5-6, 2008, Beijing
World Economic Forum coordinated 30 global companies to plan intervention in 2-3 poor areas of Kenya on market linkages and pro-poor private sector activity as private sector contribution to MDGs.	RM partners contribute to programme	RM provided working paper World Economic Forum "Business Alliance for Reduction of Hunger" work plan and work of the Business Alliance Against Chronic Hunger (BAACH)
Makro Habib are linked with small scale citrus producers in Pakistan	RM Team facilitated the formation of the group of citrus producers working with Makro Habib in October to Nov 2007. Also request from Makro to link with apple producers	CEO of Makro Habib is a member of the advisory committee of RM
The Sustainable Food Laboratory is a community of business (over 24 regional and global agribusinesses) and societal leaders from at least three continents, actively seeking ways to bring real change to the ways food is grown, harvested, bought, and distributed. RM will contribute to that meeting with RM evidence.	Focus on annual meeting of the Sustainable Food Laboratory on Healthy Value Chains: Cases, Methods and Leadership. RM provided working paper	15-18 October 2007 meeting in Guatemala www.sustainablefoodlab.org/

Sustainability Institute draws on RM business model lesson on future work funded through Gates Foundation		
CIES Food Business Forum representative express interest to explore implications and business processes including at 2009 Food Business Summit		Bilateral meetings in margins of the International Conference March 5-6, 2008 China

6 Producers Organizations and their representative bodies at national level are able to identify opportunities and become effective commercial partners

Outcome	Measure	Source
Philippines: Policies developed and informed by policy consultations with over 300 stakeholders and research evidence managed through a partnership between the Federation of Free Farmers, the RM programme and the Catholic Relief Service	Government responded to the resolutions and announced programmes to develop and expand establishment of trading centres, cold chain, infrastructure, information (marketing and technology) and the establishment of agribusiness centres during the 5 th National Vegetable Congress	End of Project Report of the Free Farmers Federation to IFAP Paper on The Philippine Vegetable Industry: Trends, Issues and Policy Implications (Montemayor and Digal 2007) Press releases
IFAP funded Phase 1 of the “Participation of Producers in Dynamic Agrifood Chains: A Program of Support to Producer Organizations (Asia Component)” and piloted in the Philippines to push the NorminVeggies case of RM.	NorminVeggies was presented in the national consultations for the 5 th Vegetable Congress, which impressed many vegetable growers in the country and led to the development of the IFAP phase 2 proposal which focused on the application of cluster development with participation from supermarket chains	Free Farmers Federation end of project report to IFAP
IFAP in partnership with the Free Farmers Federation (FFF) use outputs from RMP’s research in new collaborative programme on “Participation of Producers in Dynamic Agrifood Chains: A Program of Support to Producer Organizations (Asia Component).	IFAP-FFF-CRS-RM developed proposal to include development of a cluster of small-scale farmers, participation of multi-stakeholders in policy initiatives that address issues affecting small scale farmer participation in modern markets and development of learning alliance through information exchange, field visits, etc.	IFAP-FFF-CRS-RM proposal
Pakistan RM team initiated organization of citrus producers through the policy and institutional mapping exercise	Citrus producers are now organized (before there was only an exporters organization composed of big farmers and packers)	Sargodha region. Cooperative started to work immediately after its formation on August 20, 2007 Policy and institutional mapping report-Pakistan

7 Producers Organizations' representative bodies at regional and international levels are able to lobby and support national bodies

Outcome	Measure	Source
IFAP Strategic Plan 2006-2010 recognizes one of the key global trends of relevant to IFAP as the "increasing dominance of agrifood chains by large multinational companies" requiring IFAP to be more active in the area of competition policy, promoting farmers in the market, and in engaging in discussions with retail chains and food companies.	IFAP Strategic Plan 2006-2010 will focus on eight action areas of which one is "strengthening the place of farmers in the food chain" faced with industry concentration	IFAP Executive Committee 26-27 October 2006, Document EX8/06
IFAP increases human resource capacity to work on farmer-market linkages	IFAP employs five regional coordinators with 50 per cent time to be allocated to farmer market linkages	IFAP website and staffing plan

Strategies including policies and interventions by which small-scale producers and SME trade intermediaries can better participate in the dynamic market sector identified and made available for adoption within public and private processes

8 Knowledge generated by Regoverning Markets programme is called for and used when formulating policies and strategies for pro-poor market development

Outcome	Measure	Source
Private corporations		
Private sector respond to need for a 'code of practice in modern retail' in Latin America	Spread of Codes of Conduct <ul style="list-style-type: none"> • Argentina • Costa Rica (in development) • Mexico (in development) 	Component 2 case study write up www.regoverningmarkets.org
Policy makers express particular interest in the above code including Indonesia, Vietnam, Morocco, Turkey and draw upon the case study to inform national multi-stakeholder debate		Records of chain-wide learning meetings <i>Pers comm.</i> – F.J. Proctor
JSGaisano Inc (supermarket) uses RM research for development of fresh produce procurement and possible investment in vegetable processing	Procurement from small scale vegetable producers on going and meetings with Programme Manager for Agribusiness Linkages of International Finance Corporation-Philippines conducted for possible investment in vegetable processing	CRS-Philippines Report RM-SEA Regional Coordinator Report
Private sector (Freshmark) explores the impacts on the changes in fresh produce procurement in South Africa and SSA	New initiative to better understand impacts undertaken by the private sector following the RM workshop and shared outputs	Regional coordinator's report
Farmer organizations and their representatives		
New partnerships formed with Farmers Organization which are able to take forward policy and practice in the Philippines	Regoverning Markets and IFAP through its affiliate the Federation of Free Farmers in the Philippines with Catholic Relief Service FarmCoop (a Cordaid-assisted project in Mindanao, Philippines working with banana growers), Free Farmers Federation,	FFF-RM Report to IFAP – Phase 1 Minutes of the Philippines Reference Group meeting held May 25, 2007

	Vegetable Industry Association in Southern Philippines (VICSMIN), Northern Mindanao Vegetable Association and Philippine Industry Vegetable Board participated in the multi-stakeholder consultations and some committed to be part of the proposed cluster development programme of FFF-IFAP-CRS-RM	
IFAP African Farmers' Committee Meeting, Cotonou, Benin 21-24 March 2007 hold special session on dynamic markets and seek action	RM material used including the five Africa case studies as key resource for the working meeting	Report of the Africa Farmers Committee Meeting www.ifap.org/en/regions/africa.html
Lessons shared between RM and Farmer Organization networks (global)	Collaborated with COOPEUMO in 2007 to support the Global Learning Network of Producer Organizations included information shared and guidance on farmers organization exchange and study tours	
Sustainable Agricultural Group (SAG) in Pakistan is closely involved and engaged in multi-stakeholder consultation. They have taken the inclusion of small producers to dynamic markets as one of their campaign themes	SAG advocacy campaigns include protection of small scale citrus farmers' welfare	http://sdpi.org/research_Programme/environment/regoverning_markets.html
National governments and regional bodies		
New models of support to small-scale producers initiated	Indonesia: Proposal to pilot new profit-risk sharing credit scheme to link small-scale farmers to dynamic markets launched within shariah commercial banking system and in partnership with the Ministry of Agriculture. New funding sources to be mobilized through USAID AMARTA project. Philippines Assistant Secretary of the Department of Trade and Industry and the Agribusiness Marketing Assistance Service of the	Associated website http://www.amarta.net/aboutus.htm

	<p>Department of Agriculture committed to support proposed cluster development projects linked to modern markets</p> <p>South Africa National Agricultural Marketing Council (NAMC) and the Limpopo Department of Agriculture (LDoA) are undertaking feasibility studies on farmers' produce markets LDoA planning formation of a public corporation known as Agro-Processors of Limpopo (APOL) National Department of Agriculture has established a fresh produce agency NAMC is exploring potato supply chains including study on informal markets</p> <p>Sub-Saharan Africa CAADP NEPAD pillar 3 – RM inputs to inform stock-take by NEPAD through COMESA</p> <p>Review of national CAADP processes</p>	<p>Minutes of the Philippines Reference Group meeting held May 25, 2007</p> <p>See Southern Africa coordinators reports. These are outcomes of the Policy and Institutional mapping workshop and the follow up work of the RM South Africa Reference Group</p> <p>Funded through DIE for GTZ and working with IFPRI – the market linkages work will be embedded</p>
Pakistan Horticulture Export Board (PHEB) supports the inclusion of small scale producers in dynamic food markets	RM team conducted a consultation in the citrus supply chain in collaboration with the agribusiness development project (ADP) of the government of Pakistan and PHEB	http://sdpi.org/research_Programme/environment/regoverning_markets.html http://sdpi.org/SDPI_in_the_press/media%20coverage%202007/may_07.html http://sdpi.org/SDPI_in_the_press/media%20coverage%202007/august_07.html
Africa Regoverning Markets Steering Committee (ARMS) formed lead by FANRPAN South Africa to take forward action at SSA level towards moving RM from evidence to action	Network formed, governance agreed	Email and outline of 11 March 2008-03-29 Meeting in margins of the International Conference March 5-6, 2008. P.R. China
Asian Productivity Organization	Coordinator was invited to present lessons learned from RM	http://www.apo-

<p>recognizes the relevance of RM research outputs on development of value chain financing models and in the development of programmes of relevant international/regional organizations and government institutions in the promotion of value chain financing and the profitable integration of small producers, processors, and traders in the value chain.</p>	<p>programme and other related research in the South East Asian Regional Conference on Agricultural Value Chain Financing, 12-14 December 2007 (three days), Kuala Lumpur, Malaysia</p>	<p>tokyo.org/cgi/apo_read.pl?mydb=pns&mymp=pn_venue&end_date%3Etoday&order_by=venue&order=abc</p>
<p>Donors and NGOs</p>		
<p>New donors embed lessons within programme planning</p>	<p>Workshop 15 - 17 May 2007 in Zambia with Sida RRD on 'Linking small-scale producers and processors to dynamic and restructured local, regional and international markets for high value products in East and Southern Africa'</p>	<p>Workshop report www.regoverningmarkets.org/ Southern Africa section</p>
<p>Additional and related studies funded by development partners and donors seeking to take the agenda forward are supported through interaction with RM and use of RM resources</p>	<p>Global ECART- IFAP-IFAD programme entitled 'Farmers Empowerment in Markets'</p> <p>Neuchatel Initiative uses case material from the RM in developing the Market Orientated Advisory Services guidelines (TBC)</p> <p>VECO, Cordaid and IIED develops a joint project launched in April 2008, around inclusion of small-scale producers in markets. The three elements are: capacity building through training and learning alliances; sharing-dissemination of results of RM; advocacy and promotion of enabling environment.</p> <p>SSA: Sida funding country information sheets for Ethiopia, Kenya, Mozambique, Zambia and Tanzania</p> <p>FAO: FAO CEE Sub-regional office fund the presentation of</p>	<p>www.esfim.org</p> <p>www.neuchatelinitiative.net</p>

	<p>additional case studies of models of good and innovative practice</p> <p>FAO: China programme on small-scale farmers and fruit production and marketing study</p> <p>Latin America Following Regional Workshop on “The expansion of supermarkets and their impact on agrifood chains: challenges and opportunities”, October 26-28, Lima, Peru, co-funded between Rimisp and OXFAM International.</p> <p>CEE June 2008 – launch of an e-forum discussion on the future of small-scale farms in CEE in the context of the CAP reform</p> <p>Philippines Australian Centre for International Agricultural Research (ACIAR) expansion of the Agribusiness Supply Chain Project (Phase 2) includes a component on the study of wholesale markets and retail chains which was not in the original proposal. Project implementers include Curtin University of Technology Australia, and University of the Philippines in Mindanao</p> <p>Project on “Enhanced profitability of selected vegetable value chains in the Southern Philippines: Economic Impacts of Technologies and Policy Constraints in the Production of Vegetables in the Philippines and Australia” funded by ACIAR. The project team members include Department of Primary Industries in NSW, Australia, Philippines Institute for Development Studies, UP Mindanao and SEARCA.</p>	
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	<p>The Asian Development Bank is funding a study on the impact of supermarkets upstream (mango and vegetables) and downstream (traditional retailers/wholesalers, processors) in the Philippines involving RM coordinators from Michigan State University and University of the Philippines in Mindanao (January 2008 - October 2008).</p> <p>Indonesia Many participants, especially from the private sector and NGOs, are interested in the RM policy mapping method, including the Horticultural Partnership Supporting Programme (HPSP) sponsored by the Dutch Embassy.</p> <p>Linkage to project on supply chain by the Australian Center for international Agricultural research and SEARCA for the upcoming conference on “The Supermarket Revolution Transforming Food Systems in East and Southeast Asia: Agrifood and Rural Development and Policy Implications.”</p> <p>South Africa: Series of new studies generated from the RM policy dialogue processes:</p> <p>National Agricultural Marketing Council (NAMC) and Limpopo Department of Agriculture (LDoA) are writing reports on the feasibility of establishing fresh produce markets (FPMs) in the province.</p> <p>Limpopo is planning the formation of a public corporation known as Agro-Processors of Limpopo (APOL)</p> <p>National Department of Agriculture (NDA) has established a</p>	<p>ADB TA No. 4920-PHI Strengthening Institutions for Investment Climate and Competitiveness, Strengthening Private Sector Growth and Development in the Distribution Sector.</p>
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	<p>structure for a fresh produce development agency</p> <p>National Agricultural Marketing Council (NAMC) is investigating supply chain for Potato South Africa on markets, supply chain and market issues. Potato South Africa study on informal markets in SA</p> <p>The private sector- Freshmark is interested in investigating the impacts of the changes in fresh produce procurement in South Africa and Africa</p> <p>Pakistan The Horticulture Development and Export Board (PHDEB) will sponsor continued work on value chains with SDPI</p>	
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9 Empirical research findings, action research outputs and policy products are well received by peers and target audiences

Outcome	Measure	Source																														
New realization in the donor community of the need to understand agrifood market restructuring and its implications for rural development	Recommendations included a need to support farmers' organizations in trade dialogue, and for donors to develop a common understanding of the supermarket revolution and establish dialogue with supermarket chains	Second European Forum on Sustainable Rural Development, 18-21 June 2007 Berlin. http://www.ruralforum.info/																														
RM wider consortium invited to and actively participate in academic and non-academic meetings and conferences	<p>RM- led and or invited to national policy events, seminars and workshops for shared learning and debate including Turkey, Philippines, China, Mexico, Poland, Hungary, South Africa</p> <p>National workshops/meetings</p> <table border="1" data-bbox="590 716 1215 1167"> <thead> <tr> <th></th> <th>Meetings</th> <th>Other conference papers</th> </tr> </thead> <tbody> <tr> <td>Central and East Europe</td> <td>11</td> <td></td> </tr> <tr> <td>Turkey and Middle East</td> <td>6</td> <td></td> </tr> <tr> <td>S E Asia</td> <td>16</td> <td></td> </tr> <tr> <td>China</td> <td>6</td> <td></td> </tr> <tr> <td>Sub-Saharan Africa including South Africa</td> <td>13</td> <td></td> </tr> <tr> <td>North Africa</td> <td>1</td> <td></td> </tr> <tr> <td>Latin America</td> <td>2</td> <td></td> </tr> <tr> <td>South Asia</td> <td>13</td> <td></td> </tr> <tr> <td></td> <td>68</td> <td>23</td> </tr> </tbody> </table> <p>Notes: Some national events were of regional and international nature</p> <p>RM invited to regional and international policy events, seminars and workshops for shared learning and</p>		Meetings	Other conference papers	Central and East Europe	11		Turkey and Middle East	6		S E Asia	16		China	6		Sub-Saharan Africa including South Africa	13		North Africa	1		Latin America	2		South Asia	13			68	23	See Annex 1 and 2
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	<p>debate. Sixteen international meetings and conferences including donor workshops</p> <p>Eleven papers/presentations prepared by RM consortium for the end of programme International Conference China March 2008</p>	
<p>Invitations to provide advice and inputs into change processes by interest groups</p>	<p>SSA: RM Regional Coordinator for South Africa joined the FARASsubcommittee on Agribusiness</p> <p>SSA: Alliance formed with Food, Agriculture and Natural Resources Policy Analysis Network (FANRPAN)</p> <p>South Africa: Alliance formed with Consumer Goods Council in South Africa (CGCSA), Mpumalanga Economic Growth (MPEG) and national bodies</p> <p>Pakistan: Alliance formed with Sustainable Agriculture Action Group</p> <p>China: China's regional coordinator was invited three times by Agricultural Trade Promotion Center of Ministry of Agriculture and World Bank to provide inputs and policy recommendations on the small farms adapted to trade liberalization.</p>	<p>Three workshops held by the World Bank (Beijing) and the Ministry of Agriculture in 2006 and 2007.</p> <p>See also Annex 2 – list of meetings and workshops</p>
<p>Papers accepted in peer reviewed journals</p>	<p>Seven papers in peer reviewed journals and further papers to be prepared in 2008</p>	<p>See Annex 1</p>
<p>Demand for resource outputs</p>	<p><i>Website usage</i></p>	<p>Chain-wide learning guide distributed to some 200 contacts with ongoing calls for copies since publication – May 2008. This latter coming mainly from NGOs, national centres of excellence working in developing countries, donor agencies and CGIAR centres</p>

<p>Outputs made accessible to wider stakeholder groups</p>	<p>Demand for information and for RM products continues to increase on a monthly basis including in particular from the south</p> <p>RM products include:</p> <table border="1" data-bbox="592 464 1213 1125"> <tr><td>Synthesis Papers</td><td>6</td></tr> <tr><td>Issues Papers</td><td>5</td></tr> <tr><td>Policy Brief and Information note</td><td>2</td></tr> <tr><td>Component 1 – Meso studies</td><td>9</td></tr> <tr><td>Component 1 – Micro studies</td><td>8</td></tr> <tr><td>Innovative practice</td><td>33</td></tr> <tr><td>Innovative policy</td><td>11</td></tr> <tr><td>Chain-wide learning workshop reports</td><td>8</td></tr> <tr><td>Workshop and Conference reports</td><td>6</td></tr> <tr><td>Regoverning Markets resources: methods and approaches</td><td>6</td></tr> <tr><td>Books and Chapters</td><td>11*</td></tr> <tr><td>Papers in Refereed Journals</td><td>7**</td></tr> <tr><td>Other misc papers and reports</td><td>36</td></tr> <tr><td>Conference and meeting papers and presenatations</td><td>26</td></tr> <tr><td>Theses</td><td>2</td></tr> <tr><td>Videos</td><td>1</td></tr> <tr><td>CD</td><td>2</td></tr> </table> <p>*x4 in preparation **additional papers anticipated in 2008</p> <p>Detailed records of the use of (visits to) the website has been maintained. From the website launch in summer 2006, the number of visitors ramped up sharply to reach 11,404 visitors over the Q2 2007 period and 30,129</p>	Synthesis Papers	6	Issues Papers	5	Policy Brief and Information note	2	Component 1 – Meso studies	9	Component 1 – Micro studies	8	Innovative practice	33	Innovative policy	11	Chain-wide learning workshop reports	8	Workshop and Conference reports	6	Regoverning Markets resources: methods and approaches	6	Books and Chapters	11*	Papers in Refereed Journals	7**	Other misc papers and reports	36	Conference and meeting papers and presenatations	26	Theses	2	Videos	1	CD	2	<p>Annex 1</p> <p>IIED database</p>
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	<p>individual page hits, which equates to 125 visitors per day on average. A steady increase was seen over the following year to reach 1,5022 visitors over Q2 2008 – 165 visitors per day.</p> <p>There is an overall healthy distribution of visitors from across the globe, considering limited Internet access in many developing countries. The largest share of visitors to the website has come from North America, followed by South Asia, with significant increase in activity in India.</p>	
Local demand and interest encourages local language websites to be established	<p>Website financed and operated by Akdeniz University, Turkey, including newsletter</p> <p>Linkage to project website and Hungarian language information on the project on the Corvinus University of Budapest, Hungary, website.</p>	<p>www.akdeniz.edu.tr/ercmc/regoverning.htm</p> <p>www.uni-corvinus.hu/agrar</p>
South Africa RM team appoint Public Relations Officer	4 million outreach through media	
Presentation to Parliamentary Committee – South Africa	RM present work to key parliamentary committees	
UNDP, ABDP, Ministry of Commerce and Makro Habib have realized benefits from shared learning on RM outputs - Pakistan	Formed steering committee with members from UNDP, ABDP, Ministry of Commerce, Makro Habib and RM	<p>www.sdpi.org</p> <p>newspaper clippings</p>
Sustainable Agriculture weekly newsletter on RM circulated to a wider list, electronic version – Pakistan	Increased demand for information and for RM products	www.sdpi.org
Local demand and interest encourage reporting of RM outputs in local language Urdu	Reported in major URDU newspapers	<p>Daily jang; JINAH, Khabrain</p> <p>Newspaper clippings</p> <p>http://www.jang.net/jang_mag/arc_detail_article.asp?id=1698</p>

RM outputs presented to International Conference March 5-6, 2008 and well received by all key sectors (130 participants over 30 countries represented)	Conference proceedings and email evidence of response	www.regoverningmarkets.org conference papers
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10 Broad-based participation in policy and learning platforms creates environment for shared learning

Outcome	Measure	Source																																																																						
Reference Groups																																																																								
Multi-stakeholder groups formed in seven countries demonstrate capacity to consult through multi-sectoral means and accompany the research	<p>Composition of Reference Groups:</p> <table border="1"> <thead> <tr> <th></th> <th>Public sector</th> <th>Private sector</th> <th>Farmers and FO, cooperatives and unions</th> <th>Academia including moderator</th> <th>Others</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>China</td> <td>3</td> <td>2</td> <td>2</td> <td>3</td> <td>0</td> <td>10</td> </tr> <tr> <td>India</td> <td>1</td> <td>2</td> <td>2</td> <td>2</td> <td>0</td> <td>7</td> </tr> <tr> <td>Indonesia</td> <td>4</td> <td>5</td> <td>2</td> <td>1</td> <td>1</td> <td>13</td> </tr> <tr> <td>Mexico</td> <td>2</td> <td>1</td> <td>1</td> <td>1</td> <td>0</td> <td>5</td> </tr> <tr> <td>Poland</td> <td>4</td> <td>3</td> <td>3</td> <td>3</td> <td>0</td> <td>13</td> </tr> <tr> <td>South Africa</td> <td>8</td> <td>6</td> <td>0</td> <td>3</td> <td>1</td> <td>18</td> </tr> <tr> <td>Turkey</td> <td>1</td> <td>4</td> <td>3</td> <td>2</td> <td>0</td> <td>10</td> </tr> <tr> <td>Total</td> <td>23</td> <td>23</td> <td>13</td> <td>15</td> <td>2</td> <td>76</td> </tr> <tr> <td>%</td> <td>30</td> <td>30</td> <td>17</td> <td>20</td> <td>3</td> <td></td> </tr> </tbody> </table> <p>Note: no Reference Group was formed in Zambia</p> <p>A total of 76 senior representatives from across the key sectors in seven countries have participated in country level Reference Groups activities. The sectoral representation has been public sector 30 per cent, private sector 29 per cent, farmers and their organizations 18 per cent, academia 15 per cent, and others 3 per cent</p>		Public sector	Private sector	Farmers and FO, cooperatives and unions	Academia including moderator	Others	Total	China	3	2	2	3	0	10	India	1	2	2	2	0	7	Indonesia	4	5	2	1	1	13	Mexico	2	1	1	1	0	5	Poland	4	3	3	3	0	13	South Africa	8	6	0	3	1	18	Turkey	1	4	3	2	0	10	Total	23	23	13	15	2	76	%	30	30	17	20	3		See Annex 4
	Public sector	Private sector	Farmers and FO, cooperatives and unions	Academia including moderator	Others	Total																																																																		
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%	30	30	17	20	3																																																																			
Empirical research work in seven countries (China, South Africa, Indonesia, India, Poland, Mexico, Turkey) is made more relevant and had better opportunity for uptake of findings through engagement with	<p>Indonesia: See point 8 – new models generated and prepared for piloting</p> <p>Mexico: Reference Group meeting resulted in identification of key issues to be addressed during the last stage of the research. Component 1 in Mexico has been exemplary in building policy linkages</p>	<p>RM report of the work of the Reference Groups</p> <p>Report of 1-day workshop in Michoacán expanded of the Reference Group (over 30 participants, the</p>																																																																						

Multi-stakeholder Reference Groups	<p>into the research from the outset. There, the partnership comprises the Government of the State of Michoacán, Secretariat for Agricultural Development, the Union of Strawberry Producers of Michoacán, the Michoacán State Council of the Strawberry Industry, the Inter-American Institute for Cooperation on Agriculture, the International Center for Tropical Agriculture, Michigan State University, and Rimisp-Latin American Center for Rural Development.</p> <p>Turkey: a platform on restructuring trends of food retailing and its impact on Small and Medium Size Enterprises (SMEs) was organized by Enterprise Association of Antalya (ANSIAD) – a presentation given by the RM team on impact of market consolidation on SMEs given</p> <p>See also Annex 4</p>	majority of them from the private sector)
Multi-stakeholder Chain-wide learning (Policy and Institutional mapping)		
Multi-stakeholder chain-wide learning meetings (Policy and Institutional mapping) generate new partnerships and learning	<p>Awareness of smallholder challenges in dynamic markets raised in eight countries</p> <p>In many of the selected countries, this was the first occasion where the different key stakeholders met to discuss issues and explore options of small-scale producers and their participation</p> <p>615 participants in total from eight countries including from the private sector (143 in total), farmers and farmers’ organizations (221 in total), government and academia (222 in total) and non-government organizations, civil society, and media (29 in total) participated in the policy and institutional mapping workshops. The average per working meeting was: 42 participants for farmers/producers meetings; 14 participants for private sector meetings, and 28 participants for multi-stakeholder meetings. (See table below for breakdown of numbers)</p>	<p>Meeting reports www.regoverningmarkets.org</p> <p>Turkey 22-25 May 2006, Indonesia 31 July – 4 August, 2006 South Africa 30 October – 3 November 2006 Morocco March 14-16, 2007 Philippines May 21-25, 2007 Bangladesh June 12-14, 2007 Pakistan August 2-3, 2007 Vietnam March 19-21, 2008</p> <p>Proctor, F.J. and L. Digal (2007) Opportunities and options for small-</p>

		scale producers' inclusion in dynamic markets in developing countries and transition economies: A synthesis of findings from country level workshops. 35pp
Multi-stakeholder meetings launch new and or re-enforce existing national structures with capacity to follow through actions from the P and I process		ACIAR project proposal on supply chain
Other national and regional networks formed around RM		
Interest networks formed around the RM. New country level ad hoc multi-stakeholder meetings share information	<p>Pakistan. Pakistan Horticultural Development Board, Makro Habib, Hala Milk, Pakistan Institute of Development Economics, Arid Agriculture University, UNDP, Ministry of Commerce, Board of Investment, Sustainable Agriculture Action Group, Actionaid, Ministry of Food , Livestock and agriculture, University of Agriculture Faisalabad, NIAB, Citrus Producers Organizations, UNIDO, Small and Medium Enterprises Development Authority Pakistan, Foreign Trade Institute of Pakistan and Agriculture, and some experts on agrifood business</p> <p>A high level and multi-stakeholder learning alliance has been constituted with three meetings held during 2007-2008. Outcomes also contributed to recommendations for trade policy which were prepared and forwarded to the Government of Pakistan</p> <p>SDPI organized a consultation workshop in collaboration with Ministry of Food, Agriculture and Livestock and FAO on November 29, 2007</p> <p>Uganda. Ugandan Policy Forum group and a workshop with representatives of the supermarkets, Kampala Country Council and growers of pineapples, onions, and dairy farmers to discussed issues of</p>	

	<p>standards and quality of the produce produced and sold through the supermarkets and other retail outlets (2007)</p> <p>Kenya. policy reference group meeting in Kenya with the Kenya National Farmers and producers union (KENFAP)</p> <p>Turkey. A conference on restructuring trend of food retailing and its impact on Small and Medium Size Enterprises (SMEs) was organized by Enterprise Association of Antalya (ANSIAD) 2007</p> <p>Philippines. Organized Reference Group to help champion policy issues and recommendations identified for the vegetable industry. The group includes members from the National Marketing Umbrella Committee, National Business Manager Free Farmers Federation, National Vendors Council, CAFFINORMIN, Univ of the Philippines, Global Learning Network, Vegetable Council of Southern Mindanao, NorminVeggies, and Catholic Relief Service. A number of actions arisen as a result: The Catholic Relief Service and JSGaisano Inc. (large retailer) set up a pro-poor procurement from a cluster of small-scale vegetable farmers assisted by CRS. A proposal was also developed by Free Farmers Federation in the Philippines (a member of IFAP) together with RM and CRS. The Assistant Secretary of the Department of Trade and Industry adopted the policy and institutional mapping concept/approach in their projects namely: Industry Cluster Capacity Enhancement Programme funded by JICA which started last October 2007 and the Single Window for Investment and Trade which is expected to start on January 2008 to be funded by AUSAID.</p> <p>Regional network and informal alliance formed between Turkey, Egypt and Jordan for information exchange</p> <p>Morocco Committee of stakeholders including the private sector formed focussing on the livestock/meat sector and addressing the issues of vertical</p>	
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	integration including quality assurance backed by the Fed Agricole and developed as result of the policy and institutional mapping workshop	
Others		
Farmers organization s from the north and south share experiences enriched with RM resources	<p>Exchange programme between representatives of producers organization s mainly from Africa and Asia focusing on market access organized by UPA Développement International, Canada</p> <p>Market linkages given centre stage at Development Committee Meeting of the International Federation of Agricultural Producers (IFAP) 2008 Congress</p>	<p>Report of meeting Montreal Canada 1-3 October 2007 Forum on Market access mechanisms</p> <p>Congress report www.ifap.org</p>

Multi-stakeholder country meetings on small-scale producers' participation on dynamic markets – meeting participants

	Producers meeting				Modern markets meeting				Multi-stakeholder meeting				Total
	Private sector	Farmers, farmers	Public sector	Others	Private sector	Farmers, farmers	Public sector	Others	Private sector	Farmers, farmers	Public sector	Others	
Turkey	8	25	5	0	6	0	4	0	8	4	3	1	64
Indonesia	9	12	9	0	11	0	5	0	7	0	7	0	60
South Africa									5	0	11	0	16
Morocco	2	12	16	0	8	2	11	4	6	3	14	3	81
Philippines	0	36	36	0	7	0	15	0	5	36	37	0	172
Bangladesh	6	25	1	1	13	0	0	0	7	4	7	5	69
Pakistan	14	40	3	0					2	9	11	8	87
Vietnam	6	13	14	3	7	0	4	2	6	0	9	2	66
Sub total	45	163	84	4	52	2	39	6	46	56	99	19	615

Footnotes:

South Africa programme was a one day meeting only and comprised an expanded national Reference Group

Other includes: media, civil society organizations including consumer organizations, and development organizations

Moderators and staff of host institutions and international resource persons (academia) are not included in the above table – averaged 5persons/meeting/all countries

11 Environment for dialogue and policy debate in place at international/regional levels strengthened

Outcome	Measure	Source
International and regional		
South Asia “network of networks” in place and active in policy debate	<p>The network managed through SDPI Pakistan and with sustainable financing: Lead by SDPI the network covers over 20 members and includes Pakistan, Nepal, India, Thailand, Sri Lanka, Bangladesh Includes: RIS, CUTS, IIMA, TERI, Swaminathan Foundation, FICCI, JNU [India], IPS, LST [Sri Lanka], SAARC Chamber of Commerce and Industries, Pakistan Institute of Development Economics, BOI, PHEDB, SPDC, ABDP [Pakistan] as well as with individuals interested in study of FDI in retail sector.</p> <p>A weekly Regional Newsletter about agrifood marketing is disseminated to identify stakeholders on weekly basis.</p>	http://www.sdpi.org/
COMESA East Africa use findings from the Zambia workshop 2007 to inform their regional markets and trade forward planning process		COMESA business plan
Local-Regional workshop on RM case study results in Hungary , December, 2006.	Positive feedback from farmers’ organization s, processors and locally owned retailers. The importance of small-scale farmer from the point of view of poverty has been emphasized.	Coverage in TV and local media
African agricultural research recognizes the importance of the value chain and agribusiness and seeking means to engage the private sector jointly with the public sector to help smallholders invest in change and manage risk	<p>Forum for Agricultural Research in Africa (FARA) establishes an agribusiness working group on which RM is represented (Andre Louw, University of Pretoria) to form the Pan African Agribusiness Consortium (PanAAC)</p> <p>Food, Agriculture and Natural Resources Policy Analysis Network (FANRPAN) launches follow up group/network following March 2008 China International Conference</p>	<p>FARA meeting 10-16 June 2007 Johannesburg South Africa</p> <p>http://www.fara-africa.org/</p> <p>Follow-up working meeting in Ghana in October 2007 RM participated</p>

		Design for PanAAC completed June 2008
Sustainable Development Conference, Pakistan	Panel on Regoverning Markets organized at SDPI's SDC in Islamabad December 2006 and December 2007	www.spdi.org.sdc
"Inclusive Business in Agrifood Markets: Evidence and Action" International Conference Beijing March 5-6, 2008	130 invited leaders in farming, food and agriculture policy, agrifood business, research and civil society	www.regoverningmarkets.org

12 Capacity built of national research teams and other professional groups

Outcome	Measure	Source										
International research teams have developed better skills and understand research methods to undertake empirical research	Through joint learning and methods development with north and south partner teams – the outputs from the RM are of high quality	Report of workshops Montpellier (for Turkey, Poland, South Africa, Zambia, Mexico teams) June 5-9 2006. Coordinated by MOISA Ahmedabad (for Indonesia, China, India teams) June 12-14, 2006. Coordinated by IIMA.										
International research teams better able to undertake empirical research to international standards and report findings	Publications peer journals Annex – list of papers	Annex 1										
Individual researchers achieve higher academic awards	Summary of post graduates supported <table border="1"> <tr> <td>PhD</td> <td>10</td> </tr> <tr> <td>MSc</td> <td>3</td> </tr> <tr> <td>MBA</td> <td>1</td> </tr> <tr> <td>Post doc</td> <td>3</td> </tr> <tr> <td>Total</td> <td>17</td> </tr> </table> <p>In addition: 2 post graduates associated with the programme from France 3 PhDs sponsored under other programmes linked to RM consortia and work and studying in US and UK</p>	PhD	10	MSc	3	MBA	1	Post doc	3	Total	17	Annex 3
PhD	10											
MSc	3											
MBA	1											
Post doc	3											
Total	17											
Enumerators teams in eight countries better able to undertake household surveys in eight countries	Training workshops for enumerators on household surveys held in each Component 1 country											
Market chain champions are better able to moderate multi-stakeholder chain –wide learning meetings and to apply tools and approaches that enable critical assessment	21 participants receive training from Bangladesh, China, India, Indonesia, Pakistan, Philippines, Thailand and Vietnam and representing multiple sectors.	Capacity building short course – Asia region. Report on the training event. May 2-4, 2007 Davao, Philippines										

of policies that can support small-scale producers to participant in dynamic markets	Country participants led national multi-stakeholder meetings in the Philippines, Bangladesh and Pakistan after training.	Training manual published ISBN 978-90-8504-964-7
Journalists in Pakistan better able to report on key market and trade issues	Regional training for journalists in collaboration with South Asian Association of Economic Journalists (SASEJ) in Pakistan on domestic commerce in 2006.	
Contribution of curriculum – short course and post graduate in agribusiness – South Africa	Better curriculum informed by RM	Collaborative MSc degree with teaching inputs from RM – from the region including Uganda, Kenya, Zambia Tanzania and Zimbabwe
Contribution to improvements in curricula of Higher Education in Hungary	Value chain development and the participation of smallholders in value chains have become part of curricula for undergraduate and graduate students in agricultural economics and rural development in Hungary	New curricula at Corvinus University of Budapest, Hungary
Employment of agribusiness students from LEAP programme including by industry South Africa	Better curriculum informed by RM	40 students 39 employed
National Farmers' Unions – advanced leadership programme	Better curriculum informed by RM	
Modern retail and service providers seek to employ graduates – Turkey, Morocco, Indonesia		
CSR pilot project on funding support (intermediation) for horticulture producers in Indonesia connected to the supply chain to supermarket focus on financial support model.	New business model in place	Workshop for training and approach development March 3-4 2007 Lembang Indonesia. Attracted funding support from CSR of PT Hutama Karya (govt owned company), and aligned with future funding channel agent PNM (National Micro Finance Institution). CAPAS served as technical support for private-private partnership between

		Bimandiri and farmers in Lembang area to develop financial lending model.
Peer review within consortia of research outputs and other products strengthen linkages and builds skills		Throughout programme
Carrefour-CAPAS training facility, Indonesia	Strengthen human capacity in particular graduates and undergraduates to understand practice as well as theory	

Annex 1: List of publications

All Regoverning Markets products are available on the website (www.regoverningmarkets.org).

Books and chapters

Berdegúe, J, T Reardon, F Balsevich, L Flores and R Hernández (2007) Supermarkets and Small Horticultural Product Farmers in Central America in *Global Supply Chains, Standards, and the Poor*. Edited by JFM Swinnen, KU Leuven, Belgium

Berdegúe, J and X Sanclemente (eds) (2007) *La Fresa en Michoacán: Los retos del mercado*. Gobierno del Estado de Michoacán. Secretaría de Desarrollo Agropecuario (SEDAGRO) Consejo Estatal de la Fresa (COEFREM), Mexico

Csaki, C and C Forgacs (2007) 'Restructuring market relations in food and agriculture of Central Eastern Europe: Impacts upon small farmers' in *Global Supply Chains, Standards, and the Poor*. Edited by JFM Swinnen, KU Leuven, Belgium

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Milczarek, D, A Malak-Rawlikowska and J Falkowski (2007) Dairy food chain restructuring in Poland – Causes and impacts in: Petrick, M. and G. Buchenrieder *Sustainable rural development: What is the role of the agri-food sector?* IAMO, Halle, pp.200-218

Vermeulen, S, J Woodhill, F J Proctor and R Delnoye (2008) *Chain-wide learning for inclusive agrifood market development: a guide to multi-stakeholder processes for linking small-scale producers with modern markets*. International Institute for Environment and Development, London, UK, and Wageningen University and Research Centre, Wageningen, the Netherlands. [Also as CD]

Vorley, B, A Fearne and D Ray (eds) (2007) *Regoverning Markets: A Place for Small-Scale Producers in Modern Agrifood Chains?* Gower, UK.

Forthcoming:-

- Digal, L, A Balisacan and F J Proctor (eds) (2008), Southeast Asia: *Changing Agrifood Markets in Southeast Asia: Impacts on Small-scale Producers*
- Louw, A, L Ndanga and D Chikazunga (2008) *Restructuring food markets on the sub-Saharan Africa region: dynamics in context of the fresh produce sub-sector. A synthesis of findings*. Department of Agricultural Economics, Extension and Rural

- Development University of Pretoria. Forthcoming.
- Louw, A, L Ndanga, D Chikazunga and J Jagwe (2008) *Southern Africa: Restructuring food markets in the Southern African region: Dynamics in the context of the fresh produce sub-sector. A synthesis of country findings*. Department of Agricultural Economics, Extension and Rural Development University of Pretoria. Forthcoming.
 - Sustainable Development Policy Institute (2008) *Regoverning Markets: South Asia. Synthesis Report* Sustainable Development Policy Institute, Islamabad, Pakistan.

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Dong, X, J Huang, S Rozelle and H Wang (2006) 'The development of supermarkets and household horticultural production and marketing' in *Greater Beijing Chinese Rural Economy*, No.263 (2006 No. 11): 9-16. (In Chinese)

Dong, X, J Huang, S Rozelle and H Wang (2006) 'The geographical allocation, transportation and cropping patterns' in *Management World*, No.9 2006: 59-63 and 79

Dries, L, T Reardon and J Swinnen (2004) 'The Rapid Rise of Supermarkets in Central and Eastern Europe: Implications for the Agrifood Sector and Rural Development' in *Development Policy Review* 22(5):525-556

Huang, J, X Niu, H Zhi and X Dong (2007) 'Determinants of vegetable production and crop patterns' in *China Issues in Agricultural Economy*, No.331 (2007 No.7: 4-10.(In Chinese)

Louw, A, H Vermeulen, J Kirsten and H Madevu (2007) 'Securing small farmer participation in supermarket supply chains' in *Development Southern Africa* (2007), Vol 4 (4): 539-552

Reardon, T, S Henson and J Berdegue (2007) 'Proactive fast-tracking diffusion of supermarkets in developing countries: implications for market institutions and trade' in *Journal of Economic Geography* (2007): 1-33

Wang, H, X Dong, S Rozelle, J Huang and T Reardon (2008) 'Producing and Procuring Horticultural Crops with Chinese Characteristics: The Case of Northern China' in *World Development*, forthcoming (2008 special issue).

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Berdegué, J A, E Biénabe and L Peppelenbos (2008) *Keys to inclusion of small-scale producers in dynamic markets-Innovative practice in connecting small-scale producers with dynamic markets*.

Huang, J and T Reardon (2008) *Patterns in and determinants and effects of farmers' marketing strategies in developing countries. Synthesis report – micro study.* Synthesis of Component 1 (micro).

Proctor, F J and L N Digal (2008) *Making a difference. A synthesis of the Regoverning Markets programme.* Regoverning Markets IIED London

Proctor, F J and L N Digal (2008) *Opportunities and options for small-scale producers' inclusion in dynamic markets in developing countries and transition economies: A synthesis of findings from country-level workshops.* Regoverning Markets IIED London

Reardon, T and J Huang (2008) *Meso level restructuring of the food industry in development countries. Synthesis report – Meso study.* Regoverning Markets IIED London

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Note: Prepared for the International Conference March 2008 and edited post conference to final Issue Papers with same title and numbers

Regoverning Markets (2008) *Background to the Regoverning Markets programme.* Conference Issue Paper 1. Paper prepared for the international conference 'Inclusive business in agrifood markets: evidence and action', Beijing, P.R. China. March 5-6, 2008.

Regoverning Markets (2008) *Business innovations for inclusive agrifood markets.* Conference Issue Paper 2. Paper prepared for the international conference 'Inclusive business in agrifood markets: evidence and action' Beijing, P.R. China. March 5-6, 2008.

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Policy brief and information note

Regoverning Markets (2006) *Inclusion of small-scale producers in dynamic local and regional markets*. 4pp information note.

Vorley, B and F J Proctor (2007) *Inclusive agrifood markets. Emerging findings from a programme of research policy development*. Policy Brief 1.

Agrifood sector studies

These studies look at specific agrifood sectors within a country or region. Research studies have been carried out in China, India, Indonesia, Mexico, South Africa, Turkey, Poland and Zambia covering the horticulture, dairy and meat sectors. Part A (meso) of the studies describes the observed market restructuring along the chains. Part B (micro) explores the determinants of small-scale farmer inclusion in emerging modern markets. Using quantitative survey techniques, they explore the impacts on marketing choices of farmers, and implications for rural development.

Component 1 meso studies

Berdegue, JA, T Reardon, R Hernandez and J Ortega (2008) *Modern market channels and strawberry farmers in Michoacan, Mexico*. Rimisp, Chile/Michagan University/FAO.

Chikazunga, D, A Louw, O Muloongo, and C Haankuku (2007) *Smallholder farmers' participation in restructuring beef value chains: The beef sub-sector in Zambia*. University of Pretoria/Farming Systems Association of Zambia, Zambia

Huang, J, X Dong, Y Wu, H Zhi, X Nui, Z Huang and S Rozelle (2007) *Restructuring agrifood markets in China: The horticulture sector*. Center for Chinese Agricultural Policy/Chinese Academy of Sciences, PRC.

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Louw, A, D Chikazunga, D Jordaan and E Bienabe (2007) *Restructuring food markets in South Africa: Dynamics in context of the tomato subsector*. University of Pretoria, RSA.

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Sharma, VP and RV Singh (2007) *Restructuring agrifood markets in India: The dairy sector*. Indian Institute of Management, Ahmedabad, India.

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Component 1 micro studies

Berdegué, J, R Hernández, J Ortega and T Reardon (2007) *Modern market channels and strawberry farmers in Michoacán, Mexico*. Rimisp/Michigan University/FAO.

Bignebat, C, A. Ali Koç, R Demirer, A Aksoy, N Mencet and S Lemeilleur (2008) *Restructuring of agrifood chains in Turkey: The produce sector*. MOISA, France/Akdeniz University, Turkey.

Chikazunga, D, A Louw, L Ndanga and E Bienabe (2008) *Smallholder farmers participation in restructuring food markets: The tomato sub-sector in South Africa*, University of Pretoria, RSA.

Chikazunga, D, A Louw, O Muloongo and C Haankuku (2008) *Smallholder Farmers participation in restructuring beef value chains: A case of the beef sub-sector in Zambia*, University of Pretoria/University of Zambia.

Huang, J, Z Huang, H Zhi, Y Wu, X Niu and S Rozelle (2008) *Production, marketing and impacts of market chain changes on farmers in China: The case of cucumber and tomato in Shandong Province*, Center for Chinese Agricultural Policy, PRC and Stanford University, USA.

Milczarek-Andrzejewska, D, A Malak-Rawlikowska, J Fałkowski and J Wilkin (2008) *Farm level restructuring in Poland: Evidence from the dairy sector*, Warsaw University and Warsaw Agricultural University, Poland.

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Sharma, V.P, K Kumar and R.V Singh (2008) *Determinants, costs, and benefits of small farmer inclusion in restructured agrifood chains: A case study of dairy industry in India*, Indian School of Management, India.

Innovative Practice (C2 case studies)

Innovative Practice is a series of country case studies from the Regoverning Markets programme providing examples of specific innovation in connecting small-scale producers with dynamic markets at local or regional level. Based on significant fieldwork activities, the studies focus on four drivers of innovation: public policy principles, private business models, collective action strategies by small-scale farmers, and intervention strategies and methods of development agencies. The studies highlight policy lessons and working methods to guide public and private actors.

Abramovay, R and R Magalhães (2008) *Brazil: Access of family farmers to biodiesel markets: partnerships between large companies and social movements*. University of São Paulo.

Alam, G and D Verma (2008) *India: Case study of a successful supply chain in Uttarakhand*. Centre for Sustainable Development, India.

Aliguma, L, D Magala and S Lwasa (2007) *Uganda: The case of the Nyabyumba United Farmers Group in Kabale district*, Uganda Agricultural Economic Association.

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Bakucs, L.Z, I Ferto and G.G Szabo (2008) *Hungary: Morakert Cooperative: A successful case of linking small farmers to markets for horticultural produce in Hungary*. Institute of Economics, Hungarian Academy of Sciences, Hungary.

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Concepción, S, L Digal, R Guarín and L Hualda (2007) *The Philippines: Keys to inclusion of small-scale organic rice producers in supermarkets: the case of Upland Marketing Foundation Inc.*, University of Philippines/ UMFI.

Dinghuan, H and X Dandan (2007) *China: Case studies of Carrefour's quality lines*. Institute of Agricultural Economics and Development, Chinese Academy of Agricultural Sciences.

Ewert, J, G Eva and J Hamman (2007) *South Africa: The inclusion and empowerment of farm workers through partnerships: the case of 'Thandi' fruit and wine*, University of Stellenbosch.

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Jikun, H, Z Huang, X Niu, H Zhi, W Suxia, C Yongde and H Dinghuan *China: Market chain changes in a small farm dominated economy: A case study of mushrooms in China*, Center for Chinese Agricultural Policy, Institute of Agricultural Economics and Development.

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Natawidjaja, R.S, Y Deliana, W Rusastra, T Perdana, T.A Napitupulu, H Sulistyoningrum and Y.M Rahayu (2008) *Indonesia: The transparent margin partnership model: Linking mango farmers to dynamic markets*. CAPAS/Padjadjaran University/ CAPSA/UNESCAP.

Ngugi, I. K, R Gitau and J Nyoro (2007) *Kenya: Access to high value markets by smallholder farmers of African indigenous vegetables in Kenya*, Tegemeo Institute, Egerton University.

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Samaratunga, P. A (2007) *Sri Lanka: Innovative practice in integrating small farmers into dynamic supply chains: a case study of Ma's Tropical Food Company*. Institute of Policy Studies of Sri Lanka.

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Tanvir A (2007) *Pakistan: A case study of milk production and marketing by small and medium scale contract farmers of Haleeb Foods Ltd*, University of Agriculture Faisalabad.

Wiboonpongse, A, S Sriboonchitta and P Khuntonthong (2007) *Thailand: The case of CMK housewives' group in the potato chip market*. Chiang Mai University.

Zuhai, H, L Qiao and S Yu (2008) *China: Collective action by small-farm households in big markets: A case study of Ruoheng farmer watermelon cooperative*. Zhejiang University.

Innovative Policy (C2 Desk Studies)

Innovative Policy is a series of short studies from the Regoverning Markets programme addressing a specific policy innovation in the public or private sector that improves the conditions for small-scale producers to access dynamic markets at national, regional and global level.

Banaszak, I and V Beckmann (2008) *Poland: The incentive structure in public policies offering financial support for farmers' marketing organizations and the response to it. Example of the Law on Producer Groups in Poland*. Humboldt University Berlin, Division of Resource Economics.

Brom, J (2007) *Argentina: Best Commercial Practice Code (2000-2006) as an efficient policy innovation to prevent conflict and solve controversies between suppliers, processors and supermarkets, COPAL/UCA/Quickfood SA*.

Gagné, I (2008) *Canada: La mise en marché collective : Loi sur la mise en marché des produits agricoles, alimentaires et de la pêche*. UPA.

Hooton, N and O Amos (2008) *Kenya: Policy innovations on small-scale milk markets in Kenya and East Africa* International Livestock Research Institute.

McElhone, C (2008) *Australia: Australia Farmer collective bargaining, Australia's revised Trade Practices Act*. National Farmers' Federation.

Medina, R and A Marx (2007) *Mexico: Strategy for the inclusion of small- and medium-sized avocado producers in dynamic markets as a result of phytosanitary legal controls for fruit transport in Michoacan, Mexico*, SEDAGRO.

Monchuk, C and J To (2008) *Canada: Marketing boards used to connect and empower small to medium scale farmers in domestic and international markets*. Canadian Federation of Agriculture.

Shudon, Z (2008) *China: Agribusiness and the cooperative farmer model: Jing Hai chicken production cooperative*. Nanjing Agricultural University.

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Chain-wide learning workshop reports

Digal, L.N, L.A.T Hualda, C.Q Balgos, M Locquiao and C Francisco (2007) *Linking small producers to modern markets: policy and institutional mapping workshop*. University of the Philippines in Mindanao and Department of Agriculture, Philippines, with the Regoverning Markets Programme. Workshop Report.

Koç, A.A, S Aksoy, F.J Proctor and J Woodhill (2006) *Policy and institutional mapping for small-scale producers' participation in dynamic markets in Turkey*. Akdeniz University, Turkey, with the Regoverning Markets Programme. Workshop Report.

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Natawidjaja, R. S, L Sulistyowati, Y Deliana, T Perdana, G.W Mukti, F.J Proctor and J Woodhill (2006) *Policy and institutional mapping for small-scale producers' participation in dynamic markets in Indonesia*. CAPAS, Padjadjaran University, Indonesia, with the Regoverning Markets Programme. Workshop Report.

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Sbai, A, R Hamimaz, A Chohin-Kuper, F.J Proctor and S Vermeulen (2007) *Policy and institutional mapping for small-scale producers' participation in dynamic markets in Morocco*. Targa-Aide, Morocco, with the Regoverning Markets Programme. Workshop Report.

Regoverning Markets resources: methods and approaches

Berdegué J, L Peppelenbos and E Biénabe (2005) *A method for the analysis of innovative practice in connecting smallholder producers with dynamic supply chains*.

Proctor F.J (2005) *Guidelines on building multi-stakeholder policy platforms around private sector driven agrifood restructuring*.

Proctor F.J (2005) *Component 3 – Learning Alliances and Policy Dialogue – Operational plan*.

Proctor F.J (2006) *Strengthening the Monitoring and Evaluation Framework of the Regoverning Markets programme – September 2006*.

Reardon T and J Huang (2005) *Methods for Assessing Determinants, Costs, and Benefits of Small Farmer Inclusion in Restructured Agrifood Chains*, updated version finalised October 2005.

Reardon, T and J Huang (2005) *Methods for Assessing Determinants, Costs, and Benefits of Small Farmer Inclusion in Restructured Agrifood Chains*. Resource Paper for Component 1 of the Regoverning Markets Programme, Phase 2. Presented at the Regoverning Markets Methodology and Planning Workshop, 27-30 August 2005, Amsterdam.

Other Regoverning Markets policy papers and notes

International

Reardon, T and J Berdegue (2006) *The retail-led transformation of agrifood systems and its implications for development policies*. WDR2008 working paper. www.rimisp.org/wdr2008.

Africa

Below seven information sheets also prepared as a CD

Ashimogo, G and P Greenhalgh (2007) *Tanzania: Trends in growth of modern retail and wholesale chains and related agribusiness*. Information sheet. April 2007.

Graffham, A.J (2007) *Public and Private Standards. Trends on the horticulture export sector from SSA* Information sheet April 2007.

Hichaambwa, M, H Haantuba and M Nawiko (2007) *Zambia: Trends in growth of modern retail and wholesale chains and related agribusiness*. Information sheet. April 2007.

Louw, A, D Chikazunga, D Jordaan and E Biénabe (2007) *South Africa: Restructuring Food Markets South Africa - dynamics within the tomato subsector*. Agrifood Sector Studies Regoverning markets

Mussa, M and P Greenhalgh (2007) *Ethiopia: Trends in growth of modern retail and wholesale chains and related agribusiness*. Information sheet. April 2007.

Nair, M and C Coote (2007) *Mozambique: Trends in growth of modern retail and wholesale chains and related agribusiness*. Information sheet. April 2007.

Nyoro, J and I.K Nguri (2007) *Kenya: Trends in growth of modern retail and wholesale chains and related agribusiness*. Information sheet. April 2007.

University of Pretoria (2008) – a series of Policy Briefs

Policy Brief 1 (2008) *Restructuring food markets in the Southern African region: A synthesis of country findings*. Ndanga L., Louw A. and C. Chikazunga. University of Pretoria

Policy Brief 2 (2008) *Agribusiness linkages in the Southern African region: Small farmer participation*. Louw A., Nhemachena C. and S. Van Zyl. University of Pretoria

Policy Brief 3 (2008) *Improved small scale farmer access to fresh produce agri-food markets in South Africa*. Louw A. University of Pretoria

Policy Brief 4 (2008) *The role of Fresh Produce Markets in South Africa*. Chikazunga D. and S. Deall. University of Pretoria

Policy Brief 5 (2008) *Interregional trade in agri- and agroprocessed produce*. Kalaba M. University of Pretoria

Policy Brief 6 (2008) *A programme to mainstream black farmers into supply chains: An emphasis on fresh produce*. Karaan M. and J.Kirsten. University of Pretoria

Policy Brief 7 (2008) *Botswana: Trends in growth of modern retail and wholesale chains and related agribusiness*. Emonger R. University of Pretoria

Policy Brief 8 (2008) *Namibia: Trends in growth of modern retail and wholesale chains and related agribusiness*. Emonger R. University of Pretoria

Policy Brief 9 (2008) *Restructuring food markets in Zambia: Dynamics in the beef and chicken sub-sectors*. Chikazunga D., Ndiyoi M. and O. Muloongo. University of Pretoria

Central and Eastern Europe

Wilkin J, D Milczarek, J Fałkowski and A Malak-Rawlikowska (2007) *The dairy sector in Poland*, Warsaw Agricultural University.

Policy papers in Csaki C., Forgacs C., Milczarek-Andrzejewska D. and J. Wilkin (Eds) *Restructuring market relations in food and agriculture in Central and Eastern Europe: Impacts upon small farmers*.

- Region: *Observations on regional level*. Csaba Csaki and Csaba Forgacs
- Poland: *Country Study: Regoverning dairy sector in Poland*. Dominika Milczarek-Andrzejewska, Agata Malak-Rawlikowska, Jan Falkowski and Jerzy Wilkin
- Bulgaria: *Inclusion of small-scale dairy farms in supply chain in Bulgaria (a case from Plovdiv Region)*. Hrabrin Bachev and Ivan Manolov
- Hungary: *Morakert Cooperative: A succesful case of linking small farmers to markets for horticultural produce*. Lajos Zoltan Bakucs, Imre Ferto and Gabor G. Szabo
- Hungary: *Avium agricultural co-operative and Avium 2000 poultry processing co-operative - succesful co-operatives in the Hungarian poultry sector*. Aniko Juhasz and Gyongyi Kurthy
- Russia: *Tomato small-scale producers in Atrakhan Region of Russia*. Eugenia Serova

Latin America

Special Issue of the *InterCambios* electronic newsletter (circulation 11,000) with Latin American C1 and C2 reports (July 2007).

Modrego, F. and X. Sanclemente (2007) 'La red de comercialización de la fresa en Michoacán, México: una mirada estructural'. *Debates y temas rural* No 7, Rimisp, Chile.

South Asia

A weekly Regional Newsletter about agrifood marketing disseminated to around 100 stakeholders produced by SDPI Pakistan.

Pakistan Horticulture Development and Export Board (PHDEB) sponsored an International session on Regoverning Markets at the SDPI Sustainable development Conference Islamabad, Pakistan 2007 .

Sharma V.P (2007), *India's Agrarian Crisis and Smallholder Producers' Participation in New Farm Supply Chains Initiatives: A Case Study of Contract Farming*, W.P. No 2007-08-01, Institute of Management, Ahmedabad, August 2007.

South East Asia and China

China: Various policy briefs to the national leaders on how small farmers adopted new technology and adapted to new market environments. Center for Chinese Agricultural Policy, PRC.

Manalili, N. and L.A. Lapar (2008) *The Food Retail Sector Development and its Implications to the Small Scale Producers in Vietnam Focus on the Livestock Sector*. A working note prepared for the Regoverning Markets Programme.

Dinghuan, H and X Dandan (2006) *Case Studies on Carrefour's Quality Lines*. China Institute Of Agricultural Economics and Development Chinese Academy of Agricultural Sciences.

Huang, Z.L.Q and S Yu (2006) *Collective actions of small farm households in big markets - A case study of Ruoheng farmer watermelon cooperative in China* Center for Agricultural and Rural Development (CARD) Zhejiang University, China.

Naiquan, S (2007) *Supermarket Penetrating into Chinese Countryside: The Suguo Model and its Impacts on Smallholders and SMEs*. Chinese Academy of Sciences Institute of Geographical Sciences and Natural Resources.

"The Impact of the Rise of Supermarkets on Horticulture Markets and Farmer in Indonesia" presented at the "Vegetables and Bio-pharmacy plants Revitalization

Program: Medium Term Development Plan'' Meeting in Yogyakarta, Indonesia, December 10-11, 2006.

Eastern Mediterranean and the Middle East

Bignebat C, J.M Codron and S Lemeilleur (2007) *Uncertainty and sequential investment in specific assets: the fresh fruit and vegetables sector in Turkey*. Presented at the International Society for New Institutional Economics Conference. June 21-22 2007, Reykjavik, Iceland.

Koc, A.A (2007). An article in *Key Food Journal* focused on global trend in retail food markets and small-scale agricultural producers.

Lemeilleur S, C Bignebat and J.M Codron (2007) *Marketing cooperative versus Producer's agent: the Turkish dilemma in the modern Fresh Fruit and Vegetables market*. Presented at the European Association for Agricultural Economics. April 23-24 2007, Barcelona, Spain.

Lemeilleur S and S Tozanli (2007) *A Win-Win Relationship between Producers' Unions and Supermarket Chains in Turkish Fresh Fruits and Vegetables Sector* MOISA, Montpellier, France.

Delayed adoption of specific practices in uncertain environments: the case of the fresh fruit and vegetables in Turkey presented at the International Society for New Institutional Economics (ISNIE) Conference 2007.

Newsletter No 1 July 2007 Turkey

Workshop and Conference reports

Regoverning Markets Mid-term Review 27-29 September 2006 Royal Adelaide Hotel, Windsor, UK Workshop Report

Regoverning Markets Synthesis Workshop September 25-27, (2007) Casa de la Cultura, Morelia, State of Michoacán, Mexico Workshop Report. Editor F.J. Proctor

Zambia Linking small-scale producers and processors to dynamic and restructured local, regional and international markets for high value products in East and Southern Africa. Workshop 15 - 17 May, 2007 funded by SIDA. Workshop report

Capacity Building workshop on Policy and Institutional mapping for Inclusion of Small-Scale Producers in Dynamic Markets at Pearl Farm Resort, Davao, Philippines 2-4 May, 2007. Workshop report

Inclusive Business in Agrifood Markets: evidence and action. International

Conference, Beijing PRC March 5-6, 2008 Conference Report

Improving the performance of supply chains in the transitional economies: Responding to the challenge of linking smallholder producers to dynamic markets". July 9-12, 2008. Davao City, Philippines. Coordinated by the University of the Philippines, Curtin University of Technology, and the Regoverning Markets programme. Felicity Proctor, Tom Reardon and Larry Digal

Conference papers and workshop contributions

Full transcript of the Beijing proceedings

FAO-IAMA meeting *The Rural Poor and tomorrows market* 23-24 June 2007 Parma, Italy Bill Vorley with Estelle Bienabe and Andre Louw

FARA General Assembly June 10-15, 2007, South Africa *Promoting the productivity and competitiveness of African agriculture in a global economy* Working paper for the side event *Pan African Private sector consortium as leverage for impact networking and agribusiness development* Andre Louw

IAAE-EAAE Regional Inter-conference Seminar: Agricultural Economics and Transition: *What was expected, what we observed, the lessons learned*. September 6-8, 2007, Corvinus University of Budapest (CUB) Budapest, Hungary

International Symposium Improving the Performance of Supply Chains in the Transitional Economies - Responding to the Demands of Integrated Value Chains September 23-27, 2007, Hanoi Vietnam. ISHS. Papers presented drawn upon Regoverning markets programme outputs

- Wiboonpongse A. and S. Sriboochitta (2007) An alternative deal for potato growers in the contract farming system. Chiang Mai University
- Concepcion S. B. and Digal L. N. (2007) Small producer groups in the restructuring Philippine vegetable industry. University of the Philippines Mindanao
- Natawidjaja R.S., Deliana Y., Rusastra W, Perdana T., Napitupulu T.A., Sulistyoningrum H. and Y. M. Rahayu (2007) Linking mango farmers to dynamic market through transparent margin partnership model. CAPAS Indonesia
- Manalili N. and L. N. Digal (2007) Restructuring agri-food system in Southeast Asia and its implications to small-scale Producers. University of Mindanao, Philippines.

NEDLAC / BUSSA / NEPAD workshop on 4 June 2007 (Investment in SADC and Africa- agriculture sector) Andre Louw.

Second European Forum on Sustainable Rural Development 18-21 June 2007 Berlin Germany

- Felicity Proctor and Bill Vorley Resource persons for the working group *How can rural producers in Africa become more competitive in the face of globalisation and supply chain integration?*

The Impact of the Rise of Supermarkets on Horticulture Markets and Farmer in Indonesia presented at the "Vegetables and Bio-pharmacy plants Revitalization Program: Medium Term Development Plan" Meeting in Yogyakarta, Indonesia, December 10-11, 2006

Bignebat C., Codron J. M. and S. Lemeilleur (2007) Uncertainty and sequential investment in specific assets: the fresh fruit and vegetables sector in Turkey. Presented at the International Society for New Institutional Economics Conference. June 21-22 2007, Reykjavik, Iceland

Digal L.N. (2006) Quality, cost and marketing margins: the case of vegetables in Southern Philippines. Second Mindanao Agro-enterprise Learning Alliance.

Digal L and R Montemayor (2006) The Philippines Vegetable industry trends, issues and policy implications – paper prepared as part of the collaborative program on "Participation of Producers in Dynamic Agri-food Chains: A Program of Support to Producer Organisations (Asia Component)

Digal L. N. (2007) Philippine retail food restructuring: Implications to policy and small scale producers. A paper was presented in the Professorial Chair Lecture Series in the Southeast Asia Research Center in Agriculture (Los Banos)

Digal L (2007) *Linking Small Producers to High Value Markets: the Role of Technical Assistance and Credit* in the Southeast Asia Conference on Value Chain Financing, December 12-14, 2007, Sheraton Subang Hotel, Kuala Lumpur, Malaysia

Lemeilleur S., Bignebat C. and J.M. Codron (2007) Marketing cooperative versus Producer's agent: the Turkish dilemma in the modern Fresh Fruit and Vegetables market. Presented at the European Association for Agricultural Economics. April 23-24 2007, Barcelona, Spain

Proctor F. J. and B. Vorley (2008) Innovation in business models and chain-wide learning for market inclusion of small-scale producers. Presented at Conference "Improving the performance of supply chains in the transitional economies: Responding to the challenge of linking smallholder producers to dynamic markets". July 9-12, 2008. Davao City, Philippines. Coordinated by the University of

the Philippines, Curtin University of Technology, and the Regoverning Markets programme.

Reardon T., Digal, L.N. and G. Dee (2008) The changing landscape of the Philippines food industry Presented at Conference "Improving the performance of supply chains in the transitional economies: Responding to the challenge of linking smallholder producers to dynamic markets". July 9-12, 2008. Davao City, Philippines. Coordinated by the University of the Philippines, Curtin University of Technology, and the Regoverning Markets programme.

Reardon T and C.P Timmer (2005) *The Supermarket Revolution with Asian Characteristics*. Paper presented at The International Conference - Agricultural and Rural Development in Asian., Philippines

Sharma V.P (2006) *Trade Liberalization and Indian Dairy Industry*, International Symposium on "Institutional Structures for Sustaining Livelihoods through Dairying in a Competitive Environment", National Dairy Development Board, Nov. 15, 2006

Sharma V.P (2007) *Restructuring of Agri-food Market Chains and Smallholder Dairy Producers Participation in India*, 17th Annual World Forum and Symposium on Food Culture, Tradition, Innovation and Trust: A Positive Force for Modern Agribusiness, International Food and Agribusiness Management Association (IFAMA), during June 23-26, 2006 in Parma, Italy

Sharma V.P (2007) presented the India dairy case study at SDPI's Sustainable Development Conference 12 December, 2007 Pakistan

Vorley B. and T. Reardon (2006) Transnational retail, market structure and governance: Challenges for development policy. *Globalizing Retail* seminar, University of Surrey, 17-18 July 2006

Wang H, X Dong, J Huang, S Rozelle and T Reardon (2006) Producing and procuring horticulture crops with Chinese characteristics" IAAE 2006 Conference Australia

Wang H, X Dong X, J Huang, S Rozelle and T Reardon (2006) *Producing and Procuring Horticultural Crops with Chinese Characteristics: Why Small Farmers are Thriving and Supermarkets are Absent in Rural China*, the 26th Conference Paper of the International Association of Agricultural Economists, August 14-19, 2006

Videos

A video documentation on the NorminVeggies case was completed which was funded by IFAP-Regov-FFF project which was disseminated to various groups and presented in the Mindanao Food Congress August 4-5, 2007

Theses

Niu X. (2007) Implications of Agricultural Supply Chain Changes on Farm Production in China – Evidence from Shandong province. Based on the Regoverning Markets research 2007. MSc thesis of Center for Chinese Agricultural Policy, Chinese Academy of Sciences.

Dong X. (2007) Horticultural marketing, geographical location and crop production: a case study in the Greater Beijing. Ph.D thesis of Center for Chinese Agricultural Policy, Chinese Academy of Sciences, and Nanjing Agricultural University.

Annex 2 List of meetings and presentations

Global and OECD

IAAE 2006 Conference in Australia. Tom Reardon chaired and spoke in a Plenary Session on “Transformation of Unfavourable Areas: Technologies, Institutions, and Market Access”

USAID/World Bank [Regional Consultation on Linking Farmers to Markets](#), Cairo, 29 Jan – 2 Feb 2006. Regoverning Markets programme represented

Globalizing Retail seminar, University of Surrey, 17-18 July 2006: “Transnational retail, market structure and governance: Challenges for development policy” Bill Vorley and Tom Reardon participated

Farmers fighting Poverty Agriterria DGIS meeting (31 May – 1 June 2006). Felicity Proctor joined panel discussion

Agribusiness Forum 3-5 June 2007 Rome Italy organized by EMRC International. Lucian Peppelenbos attended

European Forum on Sustainable Rural Development. 18-21 June 2007 Berlin. Felicity Proctor and Bill Vorley

FAO workshop *The Rural Poor and tomorrows market* 23-24 June 2007 Parma, Italy during the IAMA conference. Bill Vorley, Andre Louw and Estelle Bienabe

China – International Agricultural Trade Research Consortium (IATRC, www.iatrcweb.org) Summer Symposium, one-day post-conference, Beijing, July 10 2007. Jikun Huang

Montreal Canada, Forum on Market Access Mechanisms October 2-4, 2007. Bill Vorley

Global Donor Platform Seminar 13 December 2007. Felicity Proctor and Bill Vorley

OECD Seminar Paris 8 February 2008. Bill Vorley

Conference on Rural Economic Development: Opportunities and Challenges in Future Growth Strategies 8-9 April 2008 Copenhagen Denmark. Regoverning Markets Programme presented by Felicity Proctor

World Bank Seminar on Regoverning Markets programme and business models. 19 May 2008. Felicity Proctor and Bill Vorley

International Federation of Agricultural Producers International Congress Warsaw - Development Committee 31 May 2008. Felicity Proctor

Inclusive Business in Agrifood Markets: Evidence and Action International Conference of the Regoverning Markets Programme. Beijing PRC. March 5-6, 2008

Central and Eastern Europe

Hungary

Workshop on initial review of C2 results with stakeholders. July, 2006.

IAAE-EAAE Inter-conference Seminar, September 6-8, 2007, Budapest.

Workshop on rural poverty and small farmers, December 2007. Hungary

Poland

Seminar December 6, 2006 Corvinus University, Poland. Focus on Poland empirical study and Hungarian case studies included representatives of the Ministry of Agriculture, producer and trading organizations cooperatives, consulting firms, academia, processors, PhD students.

Meeting in Białystok at Politechnika Białostocka (May 26, 2006),

Meeting in Warsaw at the Ministry of Agriculture and Rural Development (June 1, 2006),

Meeting in Olsztyn at Warmia and Mazury University (August 18, 2006),

Conference organized by the Department of Economics of Warsaw University in Cedzyna (Poland) 22-23 September , 2006. Presentation of C1 project results (Dominika Milczarek, Jan Fałkowski)

Seminar at Warsaw University (April 12, 2007) – presentation and discussion on macro-and meso results and their implications

Seminar November 8-9, 2007, *Changing Agrifood Markets – Impacts upon Small-Scale Farmers. Results of Regoverning Markets Project*, participants from Hungary, Poland, Russia, Lithuania, Bulgaria and Romania. Presentation and discussion on results of

empirical findings of Component 1 and Component 2. Representatives of the Polish Reference Group and other representatives of Ministry of Agriculture, producer and trading organizations cooperatives, consulting firms, academia.

Other

IAMO Conference in Halle (Germany) 27-29 June 2007 Institute of Agricultural Development in Central and Eastern Europe (IAMO). Presentation of the first stage results from the Poland case Dominika Milczarek

Eastern Mediterranean and Middle East

Retail Sector Submit 2006 in Istanbul.

Regoverning Markets Seminar *“The Keys to Inclusion of Small-Scale Producers in Dynamic Markets: The State of Fresh Fruit and Vegetable Sector in Turkey”*, Akdeniz University, Economic Research Centre on Mediterranean Countries, 23-24 November 2006 Antalya.

The French team was co-organizer (with T. Reardon and R. Ruben) of a special session for the 103rd Seminar of the European Association of Agricultural Economists (1st Mediterranean Conference of Agro-food Social Scientists. Title: Adding Value to the agro-food Supply Chain in the Future Euro Mediterranean Space. April 23-25, 2007. Barcelona, Spain)

A platform on restructuring trend of food retailing and its impact on Small and Medium Size Enterprises (SMEs) was organized by Enterprise Association of Antalya (ANSIAD) 2007. Ali Koc presented paper on restructuring trends in retailing

Working meeting on key findings from Component 1 work – October 2007

Joint conference Akdeniz University and MARA - November 2007

South East Asia

IFAP Regional Meeting, Hanoi, November 6-10, 2007 presentation of Best Practices and Lessons learned as well as the NorminVeggies Experience Larry Digal

FAO International Symposium on Fresh Produce Supply Chain Management in Thailand December 2006

The 4th Supply Chain Forum on “Enhancing Producer Linkage to Markets”

Philippines August 2006

The 4th Development Policy Research Forum to the Mindanao vegetable stakeholders in Sept 2006

Vegetables and Bio-pharmacy plants Revitalization Program: Medium Term Development Plan” Meeting in Yogyakarta, Indonesia, December 10-11, 2006. Representatives from Dinas Pertanian (Agricultural Office) from all of the provinces, private sectors, NGO, research centers and universities.

Participation of the Regoverning markets programme in the 2nd Mindanao Agro-enterprise Learning Alliance (MAELA). Presentation on “Quality, cost and marketing margins: the case of vegetables in Southern Philippines”

Video documentation of NorminVeggies case and shared during the 6th Mindanao Food Congress, August 15-16, 2007. This video was developed by the FFF-RM project supported by IFAP

Booth/Flyer for information exchange and promotion of Regoverning markets programme in 4th (2006) and 5th National Vegetable Congress-NVC (2007), 4th Supply Chain Forum-SCF, 4th Development Research Forum –DRF (2006), 2nd Mindanao Agro-enterprise Learning Alliance (2006), Regional Policy Consultations (RPC) with Vegetable Stakeholders (Luzon – Banguio and Manila, Visayas- Cebu and Mindanao-Davao); FAO-workshop

Advocacy of policy issues and recommendations for the vegetable sector – regional policy consultations and 5th National Vegetable Congress

Partnership with Catholic Release Service in the conduct of the 2nd Mindanao Agro-enterprise Learning Alliance conducted last March 2006. Larry Digal presentation on “Quality, cost and marketing margins: the case of vegetables in Southern Philippines”

World Bank Workshop “Retailing in Indonesia: Trends, Opportunities and Challenges” divided into two sessions: (1) Implication for horticulture producers-Equity and efficiency, (2) Modern and tradisional retail-Co-existency and complementarity. CAPAS presented the research result for tomato study and supermarket development August 1 2007 Jakarta Indonesia

Workshop on” Investment and Financial Source for Agribusiness in Horticulture”. Multi stakeholder meeting to discuss an investment opportunity and financial source to conduct agribusiness in horticulture sector in Kabupaten Bandung (2007). The workshop was conducted in collaboration with the Kabupaten Bandung Regional

Government and DG of Horticulture. Capas and the Reference Group served as an organizer of the workshop:

- Presented the research findings from tomato and potato study as well as the meso study.
- Facilitated a discussion with banking sector, micro finance, and investors

China

Workshop on *Agricultural Extension and Marketing Reform* held in Sichuan 22-24 January 2007, and gave presentation on reforming China's agricultural extension system.

Workshop organized by World Bank and Ministry of Commerce in Beijing on 18 Sept. 2007. Jikun Huang gave presentations on small farms and trade liberalization

China FAO workshop on the Small Farmers and Agrifood Commercialization on 14-15 May 2007

China International Agricultural Trade Research Consortium (IATRC, www.iatrcweb.org) Summer Symposium, one-day post-conference, Beijing, July 10 2007. Regoverning markets to prepare a booth and join event – Larry Digal and Ronnie Natawidjaja

National extension reform forum in Sichuan in January 2007. Presentation on: Reforming China's agricultural extension system in the held

International Agricultural Trade Research Consortium. *China's Agricultural Trade: Issues and Prospects* July 8-9, 2007 Beijing China. Workshop *Emerging Links between Retail Transformation and Agrifood Trade in Asia*

- "Asia Supermarket Revolution and Potential Trade Implications" by Thomas Reardon (Michigan State University)
- Retail transformation's regional trade, FDI, and supply chain impacts in Southeast Asia: a view from the Philippines: Larry Digal, Professor, University of the Philippines at Mindanao
- Retail transformation's regional trade, FDI, and supply chain impacts in Southeast Asia: a view from Indonesia: Ronnie Natawidjaja, Professor in the Department of Social Economics of Agriculture, Padjadjaran University and Director of the Centre for Agricultural Policy and Agribusiness Studies, Bandung, Indonesia

Sub-Saharan Africa (including South Africa)

Role of small-scale farmers to emerging markets in the World Development Report consultative meeting for Eastern and Southern Africa held at ILRI, Nairobi in November 2006

National Fresh Produce Conference (AllFresh) 2006 South Africa

A joint workshop between the South African research team and the National Agricultural Marketing Council hosted at the annual conference of the Association of Agricultural Economics Society of South Africa September 2006.

Regoverning markets stakeholder workshops in Kenya and Uganda 2006/07

Participation in Africa wide Fertilizer Summit. 9-13 June 2006 Abuja Nigeria

Participated in a COMESA meeting to harmonize policies for farm inputs in the regional economic bloc 2006

FARA General Assembly 10-15 June 2007 South Africa FARA General Assembly *Promoting the productivity and competitiveness of African agriculture in a global economy including a side event Pan African Private sector consortium as leverage for impact networking and agribusiness development*

Forum for African Agricultural Research (FARA) week at the Gallagher Estates Trade Fair & Seminar (June 2007) Andre Louw attended

Trade Conference International (TCI) - Agribusiness Trends Dialogue August 2007 with Agribusiness in SADC Andre Louw addressed meeting

NEDLAC / Business Unity South Africa / NEPAD workshop on 4 June 2007 (Investment in SADC and Africa)/AgriFica (endorsed by the Foundation for Development of Africa (FDA) Andre Louw participated

National Seminar South Africa. 6 September 2007. Participants from National Department of Agriculture (NDA), National Agricultural Marketing Council (NAMC), SACAU, Freshmark, Tshwane FPM, representatives from the University and Zambia. regional organization s, such as Nepad, SARPN, the SADC Secretariat, and FANRPAN; private sector organization s, such as supermarkets, processors and consultants; provincial and national departments of agriculture and trade, farmer organization s, FPMs and representatives from the University.

African Association of Agricultural Economists (AAAE) Conference, Ghana. 20-22 August 2007. Davison Chikazunga South Africa and James Ngoro Kenya presented papers

Agricultural Economics Association in South Africa (September 2007). University of Pretoria presented a poster

North Africa

RM seminar held during the International Food Fair Morocco (2007)

Latin America

Regional Workshop on "The expansion of supermarkets and their impact on agrifood chains: challenges and opportunities", October 26-28, 2006 Lima, Peru, co-funded between Rimisp and OXFAM International. The 37 participants from seven countries included representatives of farmers' and consumers organizations; NGOs; national, regional and local governments; public sector agencies; researchers and university professors.

One day workshop in Michoacán, Mexico. Regoverning Markets with special focus on smallscale producer inclusion in Mexico. 28 September 2007

South Asia

SDPI Sustainable Development Conference Islamabad 10-13 December 2007 – panel on small-scale producers in dynamic markets

Pakistan Horticulture Development and Export Board (PHDEB) sponsored an International session on Regoverning Markets at the SDPI Sustainable development Conference Islamabad, Pakistan 2007

Missing Links in Sustainable Development: South Asian Perspectives Ninth Sustainable Development Conference 13-15 December 2006, Islamabad, Pakistan. Panel 2: Regoverning markets: Inclusion of small growers and producers in the supply chain

Third Triennial Conference title "Reorienting Agricultural Research to meet the Millennium Development Goals" from 9-11 November 2006, at New Delhi, India, organized by Global Forum on Agricultural Research (GFAR).

Emerging Food Markets, Small Producers, SMEs and Trade Policy of Pakistan organized by Sustainable Development Policy Institute (SDPI) 28 May 2007.

Inclusion small producers in dynamic Markets, organized by SDPI on 3 August, 2007

Review of Trade Policy in the light of small producers and SMEs. Organized by SDPI on 25 August, 2007

Asia 2015 conference organized by DFID in UK 2006 Dr. Suleri SDPI attended
UNCTAD civil society hearing conference in Geneva, 2006 Dr. Suleri participated

Importance of domestic markets workshop co-organized by Ministry of Commerce Pakistan and UNDP, 2007. Lahore. Dr. Suleri attended

Third Triennial Conference title "Reorienting Agricultural Research to meet the Millennium Development Goals" 9-11th November 2006, New Delhi, organized by Global Forum on Agricultural Research (GFAR). Mr. Kazami SDPI

MINFAL strategic meeting to discuss on the subject "Doha Negotiations, Space for Pakistani Agriculture" on 2-3 Jan 2008. SDPI was requested to share the findings of its RGM programme. Mr. Ramey SDPI attended

Regional workshop on Regional Trade in South Asia. SANEM Bangladesh 25-26 January 2007. Mr. Ramey SDPI attended

CUTS meeting on trade and development. Vietnam 5-7 March 2008. Mr. Ramey SDPI attended

Annex 3: Capacity building: Post-graduates and postdoctorals

China	<ul style="list-style-type: none"> • Ms. Xiaoxia Dong: Ph.D student from CCAP <ul style="list-style-type: none"> - working full time on this project - surveys and thesis - completed her thesis and Ph.D programme in July 2007 • Ms. Yunhua Wu: Ph.D student from CCAP <ul style="list-style-type: none"> - full time working on this project - surveys, data analysis and micro study - expected to complete her thesis and Ph.D programme in July 2008 • Ms. Xianfang Niu from CCAP has completed and defended her MS thesis, Implications of Agricultural Supply Chain Changes on Farm Production in China – Evidence from Shandong province <ul style="list-style-type: none"> - completed her thesis and MS programme in July 2007. • Ms. Zhurong Huang: MS student from CCAP <ul style="list-style-type: none"> - part time working on this project - surveys, data analysis and meso study - expected to complete her thesis and Ph.D programme in July 2008 • Mr. Honglin Wang: Ph.D student from the Michigan State Univ (student of Dr. Tom Reardon) <ul style="list-style-type: none"> - working full time on this project - surveys, data analysis and micro study - expected to complete thesis and Ph.D programme in July 2008
India	<ul style="list-style-type: none"> • Postdoctoral grants allocated and responsibilities of postdoctoral fellow working on empirical research Mr. Kalpesh Kumar, M. Sc. (Agricultural Economics) Research Associate • Mr. Perwinder Singh, MBA in Rural Management Research Associate
Indonesia	<ul style="list-style-type: none"> • Trisna Insan Noor, doctoral student in Agricultural Economics, Padjadjaran University • Elly Rasmikayati, doctoral student in Agricultural Economics, Padjadjaran University • Tommy Perdana, doctoral student in Agribusiness Supply Chain Management, Agriculture Industrial Technology Dept, Bogor Agricultural Institute (IPB)
Philippines	<ul style="list-style-type: none"> • Ligaya Rubas, Ford Foundation Ph D Scholar to start on August 2008 (in the US, Europe or Australia-university not yet finalized) and thesis will be on competition policy in the supply chain and implications to small scale producers.
Poland	<p>PhD or postdoctoral grants were given to:</p> <ul style="list-style-type: none"> • Jan Falkowski (PhD), PhD dissertation concerning distribution of benefits from direct support along the food chain in Polish dairy sector. • Agata Malak-Rawlikowska (Postdoc) thesis on effects of Common

	<p>Agricultural Policy Reforms on dairy sector in Poland (at the farm and processing level).</p> <ul style="list-style-type: none"> • Dominika Milczarek (Postdoc) preparing a postdoctoral dissertation on creation and activity of interest groups in the agricultural sector
South Africa	<ul style="list-style-type: none"> • PhD student Davison Chikazunga Support to RM empirical research studies • Prospective PhD student: Danie Jordaan Support to RM empirical research studies • MSc student Leah Ndanga Support to RM empirical research studies
Turkey	<ul style="list-style-type: none"> • Sylvaine Lemeilleur (PhD). Support to RM empirical research studies • Ayca Aksoy is writing her Master thesis in Montpellier, she followed her undergraduate studies in the Aegean University (Izmir) and is planning to write a PhD • Sureyya Kovaci MSc indirectly linked to programme
France	<ul style="list-style-type: none"> • Aurelle de Romement – CIRAD-RIMISP intern MSc thesis on LAC work – first round C2–
Kenya	<ul style="list-style-type: none"> • Indirectly linked to programme • Isaac K Ngugi, Tegemeo Institute PhD, UK
Pakistan	<p>Indirectly linked to programme:</p> <ul style="list-style-type: none"> • Sajid Kazmi SDPI PhD studentship at the Middlesex University Business School, UK. PhD topic is "European Trade Union Strategy towards CSR".

Annex 4: Multi-stakeholder Reference Groups: Making a difference

Multi-stakeholder Reference Groups

Multi-stakeholder Reference Groups were established, supported by the programme, in each country where empirical research has been undertaken.

The generic roles and functions of these Reference Groups were to:

- Review the overall work of the Regoverning Markets programme in the context of dynamic market change at national level and the policy and institutional implications for small-scale producers and agri-business and specifically the work of the country teams
- Create an environment (a constituency) for embedding the outputs from the wider Regoverning Markets programme (as appropriate) and specifically the findings from the Component 1 work within public and private sector policy and change processes
- Share and learn from the wider Regoverning Markets programme ensuring that outputs from the Programme are made available to the Reference Group

Each Reference Group set its own agenda and pace and mode of functioning. The Regoverning Markets programme sought to support the Reference Group, as far as was practical, in taking forward the wider public and private sector policy and strategy dialogue and change process as they related to the goals of the programme. For example, contribution to specific meetings and policy dialogues, presentation of information sheets, and the presentation of wider action plans beyond the immediate scope of the Regoverning Markets programme but aligned to the goal and wider vision.

Country updates

China

Specific objectives of the Reference Group:

- Designing programme outputs to match government policy e.g. 'green food' and quality improvement programmes.
- Enable members of the reference group to become more engaged with Regoverning Markets Programme
- Help to link the Chinese experience with global findings.

Reference Group members

Government	Mr. Chunlin Wang	Representative, The Agricultural and Rural Development Commission of the People Congress, PRC
	Mr. Xiwen Chen	Vice-Minister, National Leading Group on Finance and Economy, which is in charge of national policies in agricultural and rural development.
	Mr. Hongyu Zhang	Deputy Director General, Policy and Regulatory Department, the Ministry of Agriculture
Academia	Prof. Funing Zhong	College of Economics and Trade, Nanjing Agricultural University, Nanjing
	Prof. Xigang Zhu	Former Director General, Institute of Agricultural Economics, Chinese Academy of Agricultural Sciences
Private Sector	Mr. Shuo Meng	Manager for Fresh Agricultural Products, Carrefour, Fangjingdian, Beijing
	Mr. Xiaoyan Feng	President, Qingdao Sanfeng Fruit Company
Producers	Representative	A Farmers Association, Shandong Province
	Representative	Watermelon Farmer Cooperative, Wenlin, Zhejiang Province
Group moderator	Dr Jikun Huang	Director, Centre for Chinese Agricultural Policy (CCAP)

Meetings and specific outputs and outcomes

Members of the Reference Group participated in the research workshop in Beijing held on 1-7 March 2007 in Beijing. All programme activities in China were reviewed and contributed to the presentation of working papers.

The full Reference Group was briefed on results of the research workshop on 20 March, 2007 in Beijing.

Two working papers (in Chinese) were distributed to Reference Group members (March 2007).

India

Specific objectives of the Reference Group:

- provide guidance and inputs to the planning and implementation of action research for Component 1
- Act as a learning group for dialogue on the policy implications, assessment of emerging research findings and evolution of possible future public and private sector action
- Enable information sharing, understanding of issues and opportunities for small-scale dairy producers, and strengthen better understanding of different points of view of stakeholders involved with changes in dynamic markets
- Undertake joint actions which the members can address together to inform policy or practice change

Reference Group members:

Public sector	Dr. S. K. Bandyopadhyay	Animal Husbandry Commissioner, Govt. of India, Department of Animal Husbandry, Dairying & Fisheries, Ministry of Agriculture, New Delhi
Cooperative sector	Sh. Devender Singh	IAS, Managing Director, Haryana Dairy Development Cooperative Federation Ltd., Panchkula, Haryana
Private sector	Sh. Animesh Banerjee	President, Indian Dairy Association, New Delhi
Cooperative sector	Mr. B. M. Vyas	Managing Director, Gujarat Cooperative Milk Marketing Federation Ltd.
Private sector	Mr. Paul Steinkamp (tbc)	Nestle India Ltd, Firozpur, Punjab
Academia	Dr Raj Vir Singh	Prof and Head of Dairy Economics, Statistics and Management Division. National Dairy Research Institute, Karnal, Haryana.
Group moderator	Dr Vijay Sharma	Indian Institute of Management, Ahmedabad (IIMA)

Meetings and specific outputs and outcomes:

First Meeting of the Policy Advisory Group (PAG) scheduled for January 5, 2007 at Indian Institute of Management, Ahmedabad (IIMA).

The PAG played a strategic role in the review of the macro and meso levels assessment and in the direction of and planning for the micro level household surveys.

A workshop was held in Ahmedabad (IIMA) in May 2006

Indonesia

Specific objectives of the Reference Group:

As RM general

Reference Group members:

	Name	Institutional Background
Government	Dr. Ir. Ahmad Dimiyati, MS.	Directorat General of Horticulture, Ministry of Agriculture
Government	Dr. Ir. Bayu Krisnamurthi, MS	Deputy of Agriculture, Fisheries, and Forestry, Coord. Ministry of Economy
Government	Ir. Lucky Rulyaman, MS.	Chief of Production Biro, West Java Province Office
Government	Ir. Abubakar, MS.	Program Chief, Dinas Pertanian West Java Province
	Ir. Sophian Nataprawira, MS.	Head of Dinas Pertanian Kabupaten Bandung
Private sector	Azwar	Public Affair Manager, PT Ultra Jaya Milk Industry Tbk. (Beverages Company)
Private sector	Ir. Achmad Rivani	Director, CV. Bimandiri (Supermarket Specialized Wholesaler)
Private sector	Satria Hamid Ahmadi	Aprindo (Indonesian Retailer Association)
Private sector	Tato Sugianto	Indofood Sukses Makmur (Food Processor)
Private sector	Deny Rohman	BRI (Bank Rakyat Indonesia)
Farmers Organization	Rudi Gunawan, SH.	HKTI (Indonesian Farmers Association)
Farmers Organization	Dr. Sutrisno Iwantono	Chairman, Advocacy Centre for Indonesian Farmers (IFAP Member)
Moderator	Dr Ronnie Natawidjaja	Center for Agricultural Policy and Agribusiness Studies (CAPAS), Padjadjaran University

Meetings and specific outputs and outcomes

The first reference group meeting was held in April 2, 2007 in Bandung. The focus of the meeting was to discuss a profit-risk sharing credit scheme for small farmers to link to the dynamic market. As a result of the discussion a proposal has been made to the AMARTA project (USAID) for funding. If accepted, a generic model will be developed and introduced to a commercial shariah banking system. The programme will include a seminar with the ministry of agriculture and governor of the central bank of Indonesia, and a pilot project will be conducted.

The second meeting was in held in Jakarta at the Directorate General of Horticulture on May 25, 2007. The focus of the meeting was to discuss a horticulture cluster development and initiation of an institution to support horticulture farmers, including the development of an innovation system.

In partnership with the members of the Reference Group, policy briefs have been developed and shared at key national events:

- Inclusion of Small farmers in Supermarket Supply Chains (linked to the seminar organized by the World Bank “Indonesia smallholders and modern supply chains”, January 2007)
- Partnership and Technical Support for Small Farmers (Supermarket conference Jakarta organised by the World Bank, April 2007)
- Role of Central and Local Government for the Inclusion of Small Farmers (TBC)

Mexico

Specific objectives of the Reference Group:

As for RM programme

Reference Group members:

Government	Mr. Rubén Medina	Secretariat for Agricultural Development of the Government of the State of Michoacan (SEDAGRO)
	Ms. Marx Aguirre	
Farmers Organization	Mr. Juan Garibay	Executive Director, Regional Union of Horticultural Producers of Michoacan
Private sector	Carlos Kuster	Manager, Michoacán State Council of the Strawberry sector
Moderator	Julio Berdegué	Rimisp

Meetings and specific outputs and outcomes

Numerous meetings have so far taken place with these partners, including during the initial presentation of the work plan, the meso level studies, the design and testing of the survey

A workshop was held 19-21 February 2007 to present and discuss the initial results from the C1 case study (meso and micro levels). This workshop included both the Reference Group as well as leading wholesalers, agri-processors, and retailers (approx 30 participants). This meeting directed the second round of results analysis and the report presentation.

SEDAGRO, the Regional Union of Horticultural Producers of Michoacán, and the Michoacán State Council of the Strawberry Sector, used the C1 reports as a basis for the joint formulation of a new Strategic Plan to 'promote the inclusion of small and medium farmers in restructured strawberry markets', September 2007.

SEDAGRO (Secretariat for Agricultural Development of the Government of the State of Michoacán) revises its support strategies and programmes for the strawberry sector. But the impact may be lower since there were State Government elections in Michoacán in November 2007 and a new government, perhaps with new teams, was to be sworn in in February 2008. If there is discontinuity, some of our effects may be lost.

Federal Senators and Deputies are informed by the C1 team about national-level policies and legislation necessary to promote the inclusion of small-scale producers in restructured markets. A meeting was held with Sen Silvano Aureoles, from the State of Michoacán, who is also a member of the Senate's Committee on Agriculture. RM conveyed the key findings of the research in the state, and detailed notes were taken and copies of the reports shared. Julio Berdegué was due to give a talk to a group of his advisors in September 2007.

The Rural Commission of the Nacional Conference of State Governors of Mexico was informed by the C1 team about state-level policies and legislation necessary to promote the inclusion of small-scale producers in restructured markets. This is done regularly through the Under-Secretary for Agricultural Development of the Government of the State of Michoacán, who is the contact point of Governor Cárdenas with the Rural Commission of CONAGRO.

The State Council and SEDAGRO published a book in Spanish with all the results of the Mexico RM work

Presentation of final results of C1 study in the Second National Conference of the Strawberry Industry, Zamora, Michoacán (September 2007)

September 2007 international one-day seminar in Michoacán. The final results were presented to a wider audience of private and public stakeholders.

Poland

Specific objectives of the Reference Group:

In the case of Poland specific attention and contribution to the following areas:

- Solving or at least easing problems emerging from the milk quota (fulfilled by Poland). These actions should focus on three directions: shift to high value-added products in dairy sector; lowering costs of milk production; economic diversification at farm level and at village community level.
- Coordination of rural development measures and sectoral measures for better inclusion of small producers and rural people. For example, EU dairy market organization measures within LEADER+ programme.
- Preparing strategy and action plan for EU-financed programme for eastern Poland in relation to small-farms inclusion. The EU decided to give an additional 900 million euro for measures improving economic and social cohesion in five eastern regions in Poland in 2007-2013. Research outcomes of our project can be helpful in fulfilling tasks of this programme, since it is concentrated on inclusion and cohesion. Two regions covered by research are among five regions eligible for this special program.

Reference Group members:

Government	Stanisław Stańko	Vice-President, Agricultural Market Agency
Government	Ewa Domańska	Director, Dairy Department Ministry of Agriculture and Rural Development
Dairy farmers	Urszula Brulińska	Owner. Family farm close to Łomża (Podlaskie region)
	Kazimierz Ołdakowski	Owner. Family farm close to Zambrów (Podlaskie region)
Producer association	Dr Sławomir Ignatiuk	Wydział Zarządzania Politechniki Białostockiej, Białystok (Podlaskie region)
Milk Processor	Ludmiła Kucharska	President. Milk processing cooperative "Spółdzielnia Mleczarska w Lubawie", Lubawa (Podlaskie region)
Wholesalers/ businessmen	Cezary Roszkowski	Member of executive board, wholesale company "Kontra" in Olsztyn (Warmińsko-mazurskie region),
	Maciej Pankiewicz	President. Wholesale company "Alpan" Warsaw
Agricultural advisory centre	Bronisław Żelaniś	Production Technology Department, regional advisory center in Olsztyn (Warmińsko-mazurskie region)

	Michał Gąsowski	Director of the Animal Production Section, regional advisory centre in Szepietowo (Podlaskie region)
Research institution	Prof. Mirosław Gornowicz	University of Warmia and Mazury in Olsztyn (Warmińsko-mazurskie region)
	Dr Michał Pietrzak	Warsaw Agricultural University (SGGW)
RM moderator		

Meetings and specific outputs and outcomes:

Meeting in Białystok at Politechnika Białostocka (May 26, 2006).

Meeting in Warsaw at the Ministry of Agriculture and Rural Development (June 1, 2006).

Meeting in Olsztyn at Warmia and Mazury University (August 18, 2006).

Seminar at Warsaw University (April 12, 2007) – presentation and discussion on macro-and meso results and their implications.

Regoverning Markets Seminar in Warsaw (November 8-11, 2007) – presentation and discussion on C1, C2 and C3 results.

South Africa

Specific objectives of the Reference Group:

Reference groups will be established at both national and provincial levels to facilitate the efficient dissemination of information and to ensure that consultations take place with a diverse group of stakeholders.

Reference Group members:

Government	Bongiswa Matoti	Official Agricultural Marketing, Western Cape Department of Agriculture
Government	Mike Ramushu	Official Musina District, Limpopo Department of Agriculture
Government	Sam Hlungwani	Official Mopani District Limpopo Department of Agriculture
Government	Makgaba Sefura	Official Mopani District Limpopo Department of Agriculture
Government	Doctor Phuti	Official Mopani District Limpopo Department of Agriculture
Government	Sydwell Lekgau	Manager Agriculture Value Chain Limpopo Department of Agriculture
Government	Hilton Madevu	Official, National Department of Agriculture
Government	Roydon Frost	Deputy director, Department of Trade and Industry
Private sector	Chris Gladwin	Senior manager, National Agricultural Marketing Council
Private sector	Shellboy Sedutla	Manager, Market System Development Tshwane Fresh Produce Market
Private sector	Juanita du Preez	Director, Fiyafakata Development and Training
Private sector	Patrick Mphahlele	Inventory Manager, Johannesburg Fresh Produce Market
Private sector	Tobias Doyer	Chief Executive Officer Agricultural Business Chamber
Private sector	Natasia Nel	QA Manager Freshmark FreshMark
Academic	Tsakani Ngomane	Post Graduate School of Agriculture
Academic	Johann Kirsten	Agribusiness Management, University of Pretoria
Moderator	Andre Louw	Agribusiness Management, University of Pretoria

	Junior Ferreira	Consultant
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Meetings and specific outputs and outcomes

The Limpopo Reference Group meeting

This meeting was held on 24 July 2007 with provincial Department of Agriculture (DoA) officials, the Chairman of the Limpopo Tomato Growers' Association and representatives of the University of Pretoria. The meeting revealed that government has already begun to put in place measures to ensure small-scale farmer inclusion into mainstream agriculture. Through initiatives such as the investigation into the feasibility of provincial fresh produce markets, the development of a public agribusiness firm, Agro-Processors of Limpopo (APOL), the establishment of district government value chain managers and training courses, government seeks to develop the local market and establish strong human and financial links within the province. This province's agriculture is very developed due to the strong presence of development agencies, such as LimDev, as well as the organization of the provincial DoA. The latter produces a monthly newsletter to keep stakeholders abreast of developments in the province's agricultural sector.

The Mpumalanga Reference Group meeting

This meeting was held on 30 July 2007 with provincial DoA officials and representatives of the University of Pretoria. It was revealed that the DoA, together with the Department of Labour have begun to perform training programmes. The department encourages the establishment of co-operatives to create economies of scale but has thus far had limited progress. The department also has links with the private sector on an advisory level on various projects. Government performs the feasibility studies and facilitates the establishment of the projects and the private sector implements and manages the projects. This has been in the case of sugarcane, citrus and macadamia, and investigations in biofuels are still in their early stages. However, small-scale agriculture does not predominate in the province.

The Pretoria Reference Group meeting

This meeting was held on 2 August 2007 with representatives from the Johannesburg and Tshwane Fresh Produce Markets, National Agricultural Marketing Council (NAMC) and the University of Pretoria. During this meeting, the increase in the importance of food quality standards and traceability and small farmers' inability to meet these standards was reiterated by all present. Although the importance of fresh produce markets (FPMs) has reduced, they are still important industry players. The feasibility of satellite markets, training of informal traders, establishment of black agencies and pack-houses, international accreditation of facilities and roadshows are all initiatives that FPMs are

considering and undertaking. Conflicting priorities between government, the private sector and producers are delaying the inclusion of small scale producers.

National Reference Group meeting

Meeting held on 6 September 2007 with representatives from the National Department of Agriculture (NDA); National Agricultural Marketing Council (NAMC); SACAU; Freshmark; Tshwane FPM; representatives from private sector organizations, such as supermarkets, processors and consultants; provincial and national departments of agriculture and trade; farmer organizations; FPMs and representatives from the University of Pretoria.

Turkey

Specific objectives of the Reference Group:

Expected outcomes

- The Fresh Fruit and Vegetable Market stakeholders (FFV-MS) is consolidated as a policy dialogue and interactive learning platform of/for all stakeholders involved in the restructuring supply chain of FFV markets in Turkey. It has obtained funding and has begun implementing a strategy and programme for a 3-4 year period.
- The FFV-MS have acquired new capacities, and perspectives to enhance their participation and supporting small- and medium-size producer inclusion in restructured markets.

Specific planned outcomes

- Producer organizations (unions and cooperatives) use the C1 reports as a basis for their action to promote the inclusion of small- and medium-scale farmers in restructured FFV markets
- MARA (Ministry of Agriculture and Rural Affairs) revises its support strategies and programmes for the tomato and other FFV sector
- Agricultural Committee of the Turkish Parliament, Agricultural Policy Department of the MARA and other related government institution are informed by the C1 team about national-level policies and legislation necessary to promote the inclusion of small-scale producers in restructured markets
- Traditional wholesaler and retailer associations or chambers use the C1 reports as a basis for their action to enter and survive in the restructuring FFV market.

Reference Group members:

Government		Agricultural Policy Department of the Ministry of Agriculture and Rural Affairs (MARA) and Antalya General Directorate of the MARA
Private sector		Union of the Association of Wholesale Agent
Private sector		FFV Exporter Unions in Antalya
Private sector		Private sector including supermarket chain
Private sector		Chambers of District Market (common wet market in Turkey) in Antalya
Farmers Organization		Chambers of Farmers in Antalya
Farmers		Agricultural Credit Cooperatives Regional

Organization		Directorate in Antalya
Farmers Organization		Tomato Producer Union (Kumluca Sub-province Producer Union and several others in the region)
Moderators	Dr Ali Koç Dr. Şafak Aksoy	Akedeniz University, Antalya

Meetings and specific outputs and outcomes:

Seminar held 23-24 November 2006 “Keys to inclusion of small-scale producers in dynamic markets: the state of fresh fruit and vegetable sector in Turkey”, 23-24 November 2006, in which the members of the Reference Group played a key role. The outputs fed into the planning for the RM empirical research study

Working meeting with RG and others on key findings from Component 1 work – October 2007

Joint conference of Akdeniz University and Agricultural Policy Department MARA - November 2007, with support from the Regoverning Markets.

Pakistan

A learning platform was established in Pakistan. Three meetings were held - August 22, 2006; May 29, 2007 and 27 February 2008.

Pakistan learning alliance was formulated comprising the following public and private institutes, organizations, departments and ministries:

- Board of Investment of Pakistan
- Social Policy Development Centre
- Agriculture Development Bank of Pakistan
- Pakistan Institute of Development Economics (PIDE)
- Economic Justice and Development (Pakistan)
- Sustainable Development Study Centre, GC University Lahore (Pakistan)
- Actionaid Pakistan
- Small and Medium Entrepreneur Development Association (Pakistan)
- Agri Business Development Project (Pakistan)
- Competitiveness Support Fund (Pakistan)
- University of Arid Agriculture, Rawalpindi
- Sustainable Agriculture Action Group,
- Sustainable Development Alternatives,
- South Asia Watch on Trade, Economics, and Environment,
- Imagine New South Asia,
- Journalists for Development and Human Rights.
- Ministry of Food, Agriculture, and Livestock

It seeks to address issues of market inclusion including issues of external trade.



Regoverning Markets

Regoverning Markets is a multi-partner collaborative research programme analysing the growing concentration in the processing and retail sectors of national and regional agrifood systems and its impacts on rural livelihoods and communities in middle- and low-income countries. The aim of the programme is to provide strategic advice and guidance to the public sector, agrifood chain actors, civil society organizations and development agencies on approaches that can anticipate and manage the impacts of the dynamic changes in local and regional markets. The programme is funded by the UK Department for International Development (DFID), the International Development Research Centre (IDRC), ICCO, Cordaid, the Canadian International Development Agency (CIDA), and the US Agency for International Development (USAID).

