POLICY AND INSTITUTIONAL MAPPING FOR SMALL-SCALE PRODUCERS' PARTICIPATION IN DYNAMIC MARKETS IN TURKEY

22-26 May, 2006

ANTALYA WORKSHOP REPORT

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This report records views and opinions shared at the workshop. These may not necessarily reflect the views of the sponsors, the Government of the Republic of Turkey or those of the Regoverning Markets Programme as a whole.

Policy and institutional mapping for small-scale producer participation in dynamic markets

Summary

Small-scale agricultural holdings are poorly prepared for rapid changes that are taking place in agri-food markets in middle and low-income countries. The spread of dynamic modern retailers, wholesalers and food processing businesses is reshaping the way that food systems are governed. Public policy makers and development partners are generally remote from these changes. To provide research and policy support to solve the problems of rural families, special work was undertaken between 22-26 May 2006 in Antalya, Turkey, as part of a multi-donor funded programme entitled Regoverning Markets. The procedure for institutional and policy mapping requires an 8-step process.

In the first step, the supply chain was mapped in draft by the technical team and validated and enriched at the meetings with multi-stakeholders and with the business/trade sector. In the second step, the key trends, drivers, issues and uncertainties were identified. The focal problem was specified as the small and shrinking market for small scale producers. The major trends were *a) increasing pressure for safety standards in EU and Russian markets, b) increasing awareness of local consumers, c) more effective application of inspection processes, d) growing importance of traceability.* In the second step, future scenarios were estimated in the light of the trends and uncertainties. Some of these were *the increasing share of organized retailing, expansion of controlled production, differentiation in varieties, increasing imports in fresh fruit and vegetables, diminishing number of small scale agricultural holdings*, *and increasing effect of producer organizations*. In the forth step, implications of these changes on small-scale producers' inclusion or exclusion from dynamic markets were considered. In doing this, *the vital importance of government support to small scale producers* and *the necessity for tighter producer collaboration* was particularly noted. In the fifth step, technical, institutional and political factors that influence inclusion and exclusion were reviewed. In the sixth step, options for enhancing small-scale producers' inclusion were searched. *Organized action, production planning, and support* were specified as the three key need areas for producers. In the seventh step, tactics and strategies for policy change were sought. In this part, some business models practised by large scale retailers were reviewed. It was concluded that this pilot study in Turkey will create more general interest to other countries engaged with such national policy and institutional analysis.

Background

Rapid changes are taking place in agri-food markets in middle and low-income countries. The spread of dynamic modern retailers, wholesalers and food processing businesses is reshaping the way that food systems are governed. Small-scale agriculture, which supports the livelihoods of the majority of rural poor, is poorly prepared for these changes. Public policy makers and development partners are generally remote from changes taking place within the market. They lack evidence upon which to support policy dialogue and intervention.

Research and support to the policy process can assist producers, businesses, and policy makers to anticipate and respond to this challenging environment, in ways that contribute to the resilience of rural economies. Work undertaken 22-26 May 2006[1] on policy and institutional mapping was part of an international and multi-donor funded programme entitled Regoverning Markets[2]

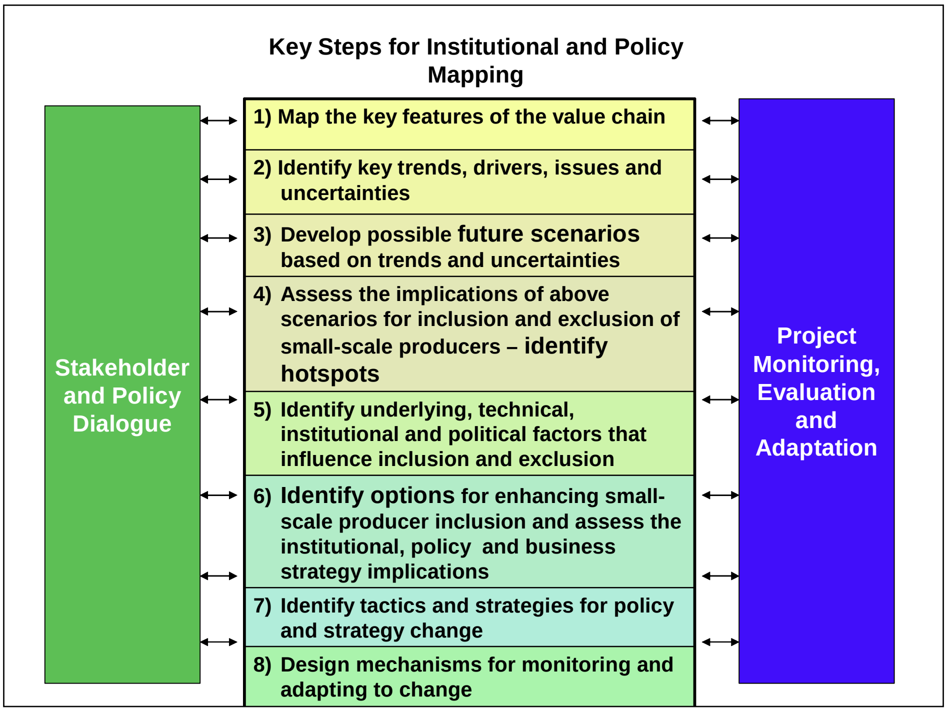
Objective

- Contribute to and re-enforce the work of the Team at the University of Antalya in the context of the macro and meso studies and explore whether applying new approaches on policy and institutional mapping can help refine key questions for completion of the empirical research
- Pilot some of the key stages in the Policy and Institutional tool kit as a contribution to the wider Turkey policy processes and to learn lessons that are of value to both Turkey and of more general interest to other countries engaged with such national policy and institutional analysis.

This work complemented the ongoing empirical research study and policy development being undertaken through the Regoverning Markets programme by the Akedeniz University, Faculty of Economics and Administrative Sciences, Department of Economics, Antalya and the University's own independent work programme

Approach

The key steps for institutional and policy mapping were developed during a two day working meeting held in the UK in May 2006[3]. Table 1 defines the key steps.



[1] Joint Team from Akedeniz University led by Dr Ali Koc, the Natural Resources Institute, Felicity Proctor and Wageningen International, Jim Woodhill
[2] www.regoverningmarkets.org
[3] Draft framework prepared in May 2006 at working meeting of NRI, IIED, WUR and IFPRI building on working paper prepared by Sonja Vermeulen IIED.

Annex 2 presents the agenda for the four day programme and lists the participants and their organisations. Day 1 focussed on group team work planning of the following meetings, Day 2 a multi-stakeholder meeting, Day 3 a farmers and local service providers meeting and Day 4 meeting with the trade and business sector.

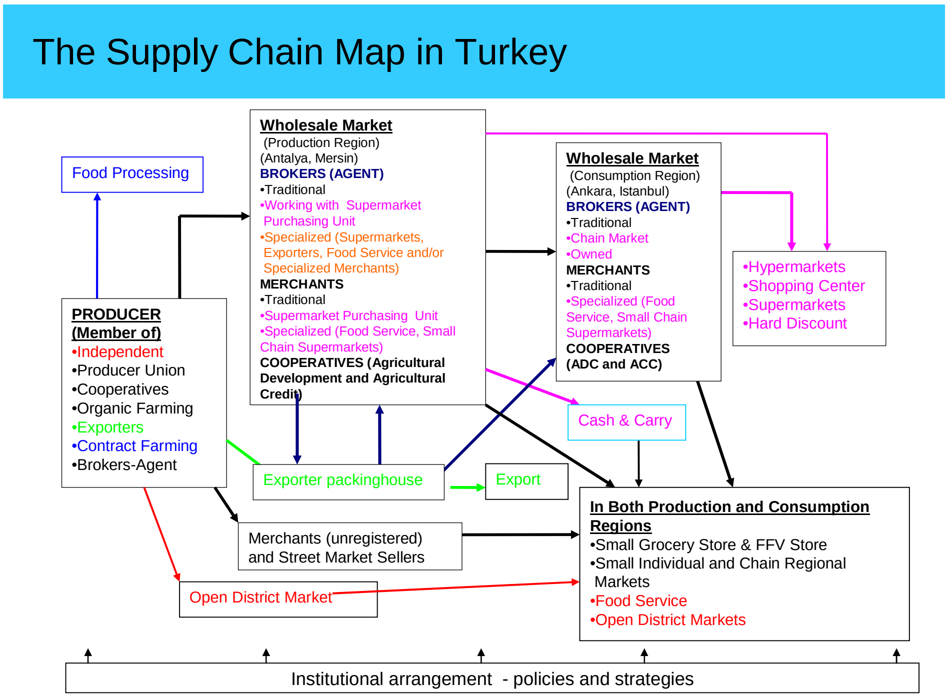
The methods used by the team were short presentation by key stakeholders in plenary, brainstorming and use of cards, and small buzz groups. Notes were recorded by a rapporteur on a flip chart throughout proceedings. Some ranking was used (coloured stickers against listed issues etc.

The following is a synthesis of the findings relating at the key steps within the framework.

Step 1 Map the key features of the value chain

The supply chain was mapped in draft by the technical team and validated and enriched at the meetings with multi-stakeholders and with the business/trade sector. It was not taken for validation with the farmers group.

The groups began to map the interacting institutional and policy factors which influence each stage of the value chain – however this mapping was not completed in a visualised form.



Step 2 Key drivers, trends, issues and uncertainties including

Step 5 Technical, institutional and political factors that influence inclusion and exclusion

This draws mainly on the multi-stakeholder meeting:

1. Increasing sensitivity and controls in pesticide residues in the export markets of EU and the Russian Federation.
2. Increasing importance of the traceability.
3. Increasing consciousness and sensitivity of consumers on food safety and quality in domestic and foreign markets.
4. The race in "grabbing" the markets in the globalizing world and increasing importance of food safety and quality.
5. Intensifying controls on domestic and foreign standards in line with the harmonization with the EU legislation.
6. Increasing number of "producing countries" as a result of rapid technological developments.
7. Moving towards the free-market economies; liberalization.
8. Developments in mass communication tools.
9. Rapid growth of the retail sector; consumers' preferences towards large scale retailers (super/hypermarkets).
10. Growing importance of productivity and traceability for competitive advantage.
11. More effective application of the inspection mechanism in the production stage by better educated people.
12. Developments in the concepts of quality, logistics, and organized action.
13. Large scale investors' and conscious firms' entrance in the agricultural production as farming organizations.

In addition the traders and business group meeting noted:
1. Supermarket Law
2. Increasing consumer awareness
3. Integration efforts to the EU
4. Liberalization in international trade
5. Globalization/localization (glocalization) of retailers
6. Legislation has slowed down the change.

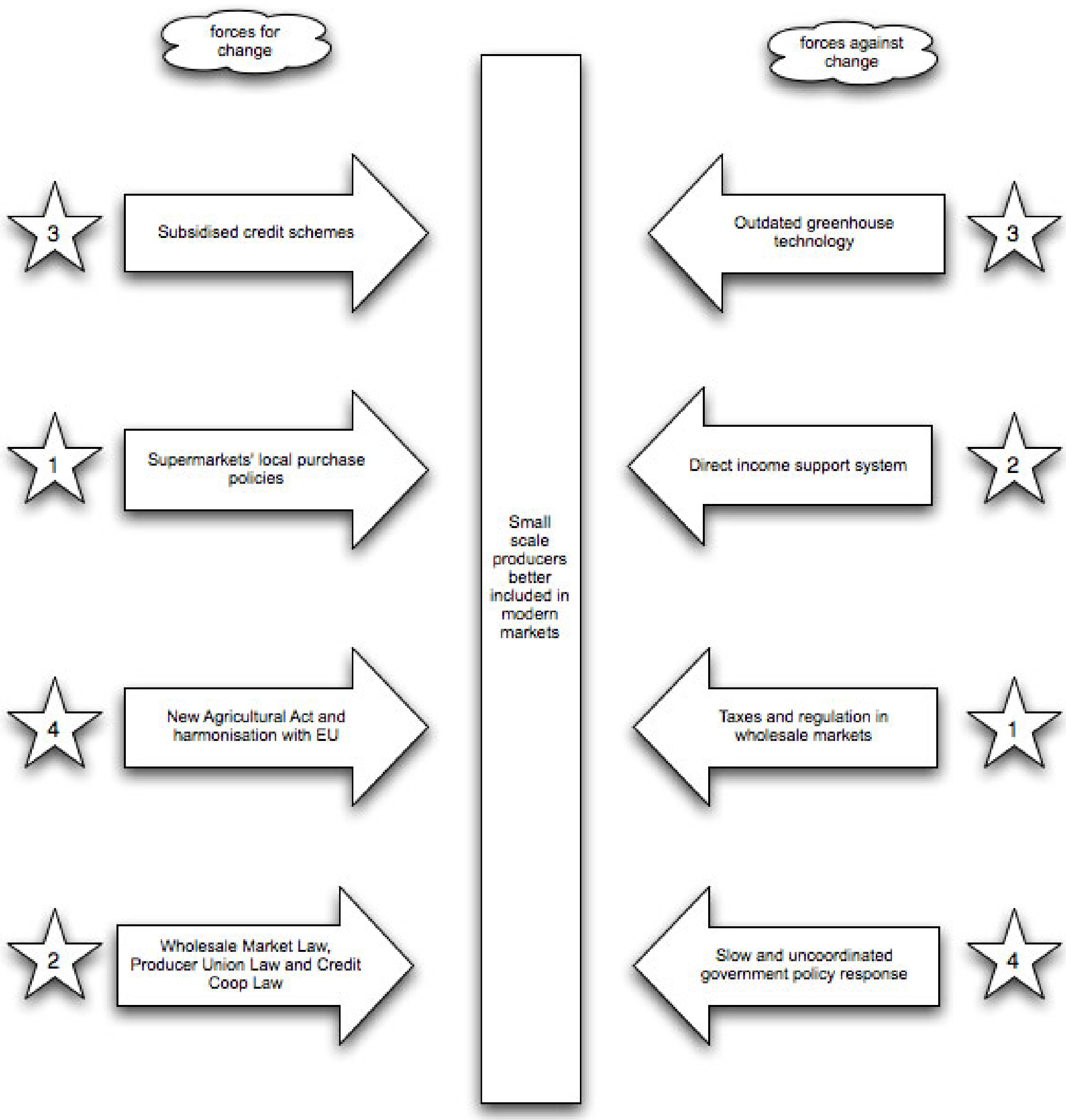
Annex 1 also details threat/issues. A key challenge to this work is to find effective and simple means to express the complexity of the issues. Two models are given below (developed after the working meeting):

A sample analysis of threats to smallholders (from meeting notes)

Relative importance → Relative likelihood ↓	LOW	MEDIUM	HIGH
LOW		Modern retailers will procure from sources outside of Turkey	
	Consumer preference and awareness	Producer/exporters will supply new and dynamic	Radical changes in the wholesale law (restricting

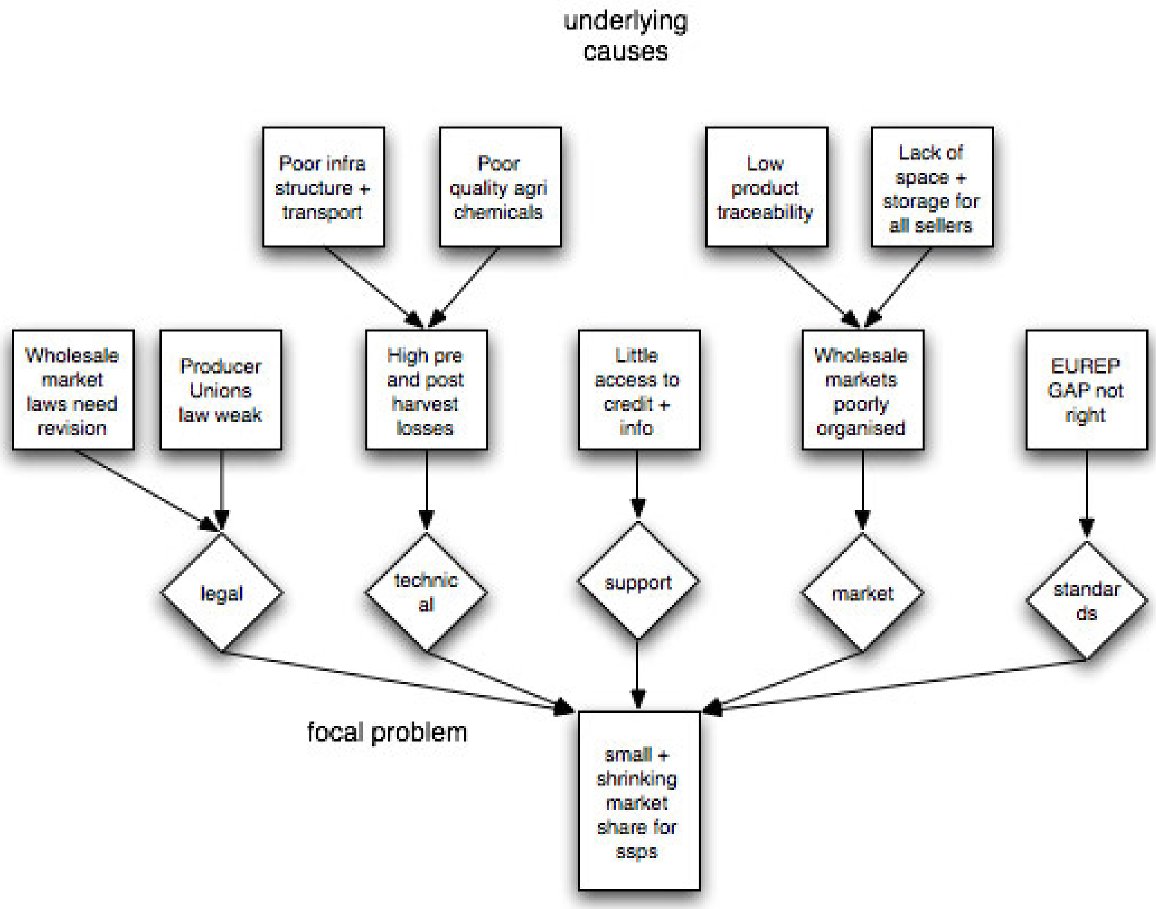
MEDIUM	change	markets where current sourcing and processes does not include ssp	direct procurement) without change management support will create ssp exclusion
HIGH		Producers organisations/cooperatives and unions are too weak to engage directly in modern market chains	Ssp cannot comply with EUREPGAP/ maximum pesticide residue; Failures in the credit market cannot meet ssp needs in a more open and competitive market

More generalised **example of forcefield analysis** (forces for and against change, *rankings of importance invented as this was not undertaken during the workshops*):

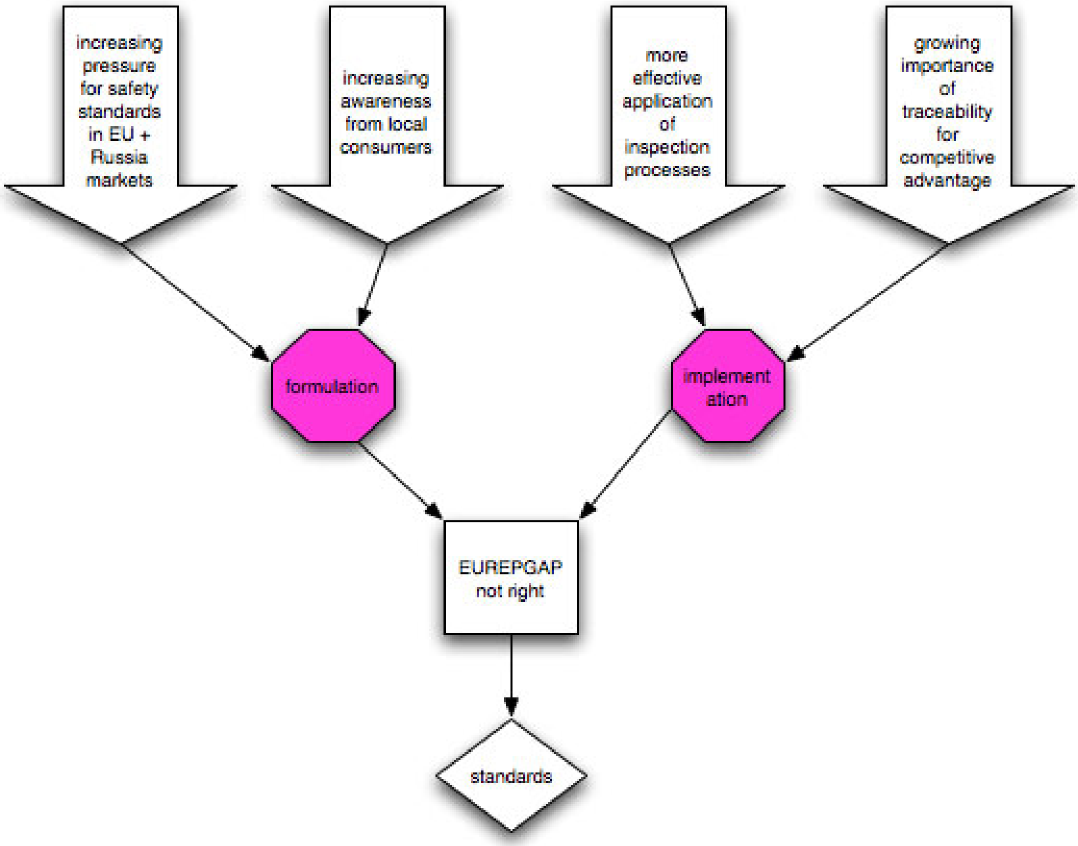


Using a **problem tree** can also help to sort causes into groups (which can then be ranked or scored according to importance or according to likely leverage points). Such an approach can also be used to build a **solutions tree**

(*Causes taken from Turkey workshop meeting records, relationships surmised*)



Trends can be mapped onto the problem tree diagram (an alternative approach would be to do problem trees or causal diagrams for now and the future, depending on the fit with the future scenarios approach). (*Trends taken from Turkey workshop meetings, relationships surmised*)



Step 3 Future Scenarios based on trends and uncertainties

1. Specialization in retailing will increase (the buyers, traders and business group meeting noted that organised retailing is 30% of total retail with share of FFV currently at 15% and expected to exceed 50%).
2. Turkey's share in the export markets will expand.
3. More conscious producers and consumers will prevail.
4. The number of consumer associations will increase and the scope of consumer protection laws will expand accordingly.
5. Small scale agricultural holdings will disappear and land consolidation (formation of larger holdings) will intensify.
6. Producer organizations will spread, producer unions will prevail in the market and perform their intended functions.
7. Unregistered production will be prohibited.
8. Produce of controlled- and planned-production will be marketed easily; importance of quality will be more prominent.

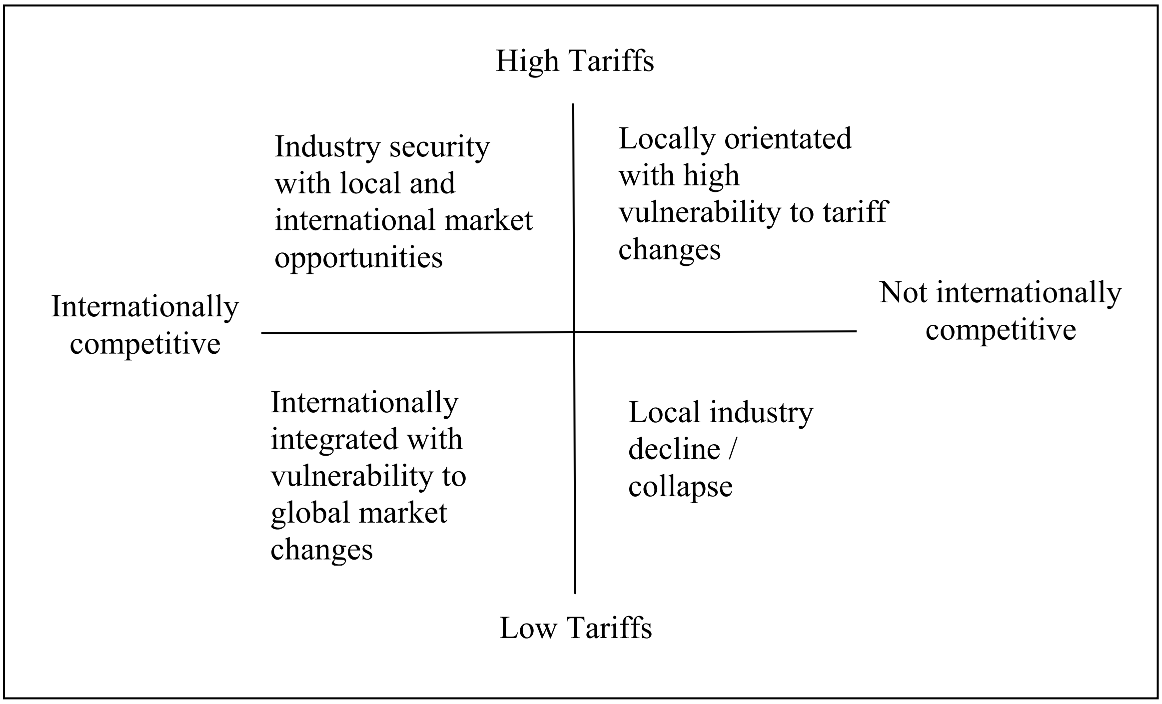
9. Product variety as well as the communication between producers and consumers will increase.
10. Greenhouses and packinghouses will be modernized.
11. Cool storage and cooled transportation will be more common.
12. Action plan for food safety will spread rapidly and efficiently
13. Controlled and traceable production will become widespread.
14. Produce standards will be formed.

Additional points from the buyers, traders and business group meeting

1. Commission Men (in wholesale markets), Specialized Wholesaler, Exporter and Fresh Produce Buying Directors of Supermarkets as the main actors will determine the changes in the supply chain.
2. New large scale suppliers started to take a greater share in the market. In recent years, big investors started to invest in the agricultural sector. The main reason for this is the observed stability and improvement in the national economy. Privatization of the State Owned Farms is a good example to the above remarks; however, "to whom those farms are being sold" is an important issue.
3. The effects of Producer Unions are on increase.
4. Within the framework of the Cooperatives Act, producers have started to sell their produce to supermarkets by way of Producer Unions
5. By 2007, only the produce of "controlled production" will be purchased. The commission men in the wholesale markets should make a note of this.
6. In the years to come, agricultural protectionism will diminish and an increase in imports is expected. Changing trading conditions have affected almost everybody in the sector.
7. The New Agricultural Act has been prepared within the policy harmonization framework with the EU. In line with this, the consultancy system for farmers will spread.
8. The number of actors in the fresh F & V will increase. These actors will give increasing importance to traceability and backward inspection.
9. Hydroponic production (production without soil) will expand and alternative production systems will spread.

Selection of pairs of critical uncertainties can be used to create different scenarios for example:

- Changes in import tariffs
- International competitiveness of the tomato sector



Step 4 Implications of these changes on small-scale producers inclusion or exclusion from dynamic markets

1. Small scale producers will be pushed outside the system unless they get together.
2. Large scale retailers will diversify product assortment by importing produce from abroad.
3. Small scale producers can only survive if they practise modern (controlled) agricultural methods.
4. Government support to producers in investing to new technology is a necessity since small scale producers cannot afford to do it themselves.
5. Given the present competitive environment, support to producers is of critical importance.

Step 6 Options for enhancing small-scale producers inclusion

Annex 1 maps a wider set of options against the issues identified through the group meetings. Key options which were summarised at the end of the multi-stakeholder meeting include:

1. Small and medium sized producers should get organized under the roof of “producer unions”.
2. Legal measurements should be introduced to stimulate the development of producer organizations.
3. The Law of Retailing should be amended in a way to secure the existence of small scale producers and local open markets.

4. Small scale producers should increase their bargaining power by getting organized and by practising controlled-production.
5. Education is the most critical function in the re-structuring process, and therefore producers should be educated on produce quality and production techniques.
6. “Organized action”, “production planning”, and “support” are the three key need areas for producers.
7. The number of consultancy firms offering supervision to farmers should be increased and a mechanism for farmer inspections should be set up.

Step 7 Tactics and strategies for policy change

Limited time was available to work with the groups on alternative strategies however the private sector outlined some current examples of private sector models

Metro Group has initiated its “Controlled Production Project”. Their agricultural engineers are supervising farmers in several ways. Under this program, producers have been able to get low-interest loans from the Agricultural Bank of Turkish Republic. Further the Metro Group pays attention to supplying its produce locally. The Group also supports its producers and tries to create price advantage for them. When higher prices are formed outside the Metro supply chain, the producers are released by Metro to benefit from them.

As a leader of modern supermarket chain, **Migros** buys either directly from the producers or through wholesale agent. Migros has developed the concept of “Agricultural Village” by getting the producers together. Contract farming has eased registered production. Those who buy unregistered produce are left outside the system.

Commission men have started to become producers. Hydroponic production (production without soil) looks like an attractive area to invest for them).

Reflections and lessons learnt on the Institutional and policy mapping process

The following table summarises the key feedback from the Turkey team together with the external team during the May workshops and lists (international team) ideas and issues for future consideration

Feedback from the Turkey team (including external team members)	**Options for other country teams and international team**
Overall framework and stakeholder engagement	
There is a need to map the stage of the programme and the fit of the analysis and tools over time i.e. a road map for the institutional and policy processes through the life of the programme It is important not to see multi-stakeholder engagement as just meetings or workshops, but	Map C1, C3 and stakeholder engagement against each other over time? (Gantt chart) Note bilateral interactions as well as multi-stakeholder meetings, and the purpose of each encounter (see next point).

also to recognize that bilateral engagement that goes beyond data gathering is also critical. It is important for all stakeholders to understand how they will be involved in a longer term process over the life of the project, rather than just being invited to one meeting outside of wider context.	
Multi-stakeholder meetings seen as a useful complement to the PRA and focus interviews in that they can - Engage interest - Gain more detailed analysis if used in a structured manner - Validate data - Support strategic planning - Secure commitment for change Participants should be fully informed in advance of the meeting objectives and key themes for discussion	Different functions of stakeholder meetings at different stages in the process: - Gaining initial interest in and support for the project - Refining research questions and focus - Gathering perspectives and data from different stakeholder groups - Undertaking detailed analysis in a participatory way - Validating research findings - Developing strategies for the future based on research outcomes - Developing commitment for change So country teams need to think carefully about (a) function of getting stakeholders involved at any stage and (b) which stakeholders are appropriate. And then to inform them beforehand of the exact objectives and subject matter.
A big risk with the analysis would seem to be gathering lots of data and different perspectives but not being able to arrive at a synthesis that is agreed to and enables further progress.	Due to the different aims of different stakeholders, there is unlikely to be strong consensus on (a) what the key problems are and (b) ways forward (especially where responsibility lies). Maybe instead of aiming for a synthesis of all viewpoints, teams could be rigorous in sticking to the "hotspots/levers" approach to keep a tight focus within the set of options and recommendations?
<u>Toolkit content</u>	
Seek means to make complex interactions more visible and accessible	Market chains are so complex that it will most likely be necessary to (a) deal with only a subset of the chain at once (b) accept a degree of over-simplification (c) use ranking exercises to focus the analysis onto hotspots
Need to address the challenge of matching stakeholder "perceptions" with "evidence"	Start off multi-stakeholder forums by presenting data – can then use this to challenge assumptions. Important to record perceptions as well as facts, since perceptions will drive behaviour of market chain participants. During discussions/tooling, keep note of evidence and source behind any assertion.
Seek means whereby external factors i.e. WTO, impact of oil prices, changes in regional economic unity, trade relations) can be brought into the processes	Incorporate among the set of facts used to kick-start the meeting?

Need clarification /definition of "Institutions" the key elements i.e. formal and informal, rules of the game etc and of "Organizations" It would be useful to prepare a check list of relevant types of institutions	Note: IFPRI working on this
It would seem that further work is required to understand better the relation between C1 questions and research and the policy and institutional mapping.	More background understanding of the C1 results beforehand. Each country team could prepare by reading through the toolkit and identify and use relevant C1information
- Most of the tools are quite time consuming to use properly in a workshop context - Currently the list of tools is rather overwhelming. Further refinement down to a few tools most useful for policy and institutional mapping could be helpful. - It is perhaps worthwhile to make a distinctions between tools that are generally useful in any workshop context and those tools that we think have particular analytical relevance for each step in the policy and institutional mapping - A number of the tools would be very useful for analysis irrespective of use in a workshop context	Tools like brainstorming, focus groups, card clustering and semi-structured interviewing are useful at all stages in the process and can be focused to the particular question at hand. Other tools such as the value chain mapping, problem tree analysis, force field analysis, scenario analysis and stakeholder policy influence have a specific analytical function in relation to specific steps.
<u>Process of using toolkit in multi-stakeholder context</u>	
Not much time to get everything done.	- More dialogue and preparation with the country team before hand - A slightly longer in-country mission - Adequate time should be allocated with country team which would include some introduction to use of tools and multi-stakeholder facilitation - Task team should review at the end of each day when a series of meetings are held to consider what has worked well and less well and to help to secure consistency of messages - Full day for reflection and planning follow up C3 activities with the team
The importance of having either a skilled – market chain friendly facilitator/ moderator and or meeting leader. Such skills cannot be assumed Should not assume that teams have experience of different process techniques: brainstorming, buzz groups etc	Use of a local experienced facilitator for some multi-stakeholder workshops (a contracted professional facilitator?). Extra preparation time at start of process to introduce team to methods (see point above).
Significant challenge presented where there are mixed language requirements- this has implications to the process.	Need skilled translators or different approach i.e. local teams only
Important to ensure that one person facilitates the process to minimize confusion	Need clearly defined roles for all of the team, with one person leading.
Important that the research teams do not/are not seen to have a bias towards one or other outcome – independence is important. Farmers should not be seen as the "core of the problem"	Neutral language.
Some stakeholders are or may feel less	This is always a challenge in workshops. Some

empowered to share views in multi-stakeholder settings. Means to enable all to have voice is important (in particular small-holders, farmers)	simple tactics are: - Take turns – round the room; everyone is invited to make one point. - Brainstorming/card technique. Everyone gets 1-3 post-it notes. All go up on a board (ensures equal + anonymous inputs from all). Can then do various things such as sorting the notes into categories, etc. - Same-stakeholder break-out groups that then report back to plenary. Often need a neutral /professional facilitator here to guide discussion and encourage sharing of ideas. - Avoid multi-stakeholder workshops – in each case ask is it really necessary to combine the various groups?
Ensure that the sequence of debate is such that there is early debate and active engagement by all stakeholders	Starting with interesting facts should help?
An important reflection is that the process outlined in the manual is something that needs to be undertaken over an extended period of time linked in with the C1 research. As such it is difficult to in fact 'test' the whole process in just a few days.	See the first two entries in the table.

ANNEX 1 **Threats to/Issues for small –scale producers (ssp)** **Step 2 and Step 5**	**Multi - group**	**Farmers**	**Trade**	**Solutions /options** **Step 6**	**Multi-group**	**Farmers**	**Trade**
Adoption of high quality and buying standards that may not be met by ssp EUREPGAP inspectors have international certificates but no legal authority in Turkey	X		 X	Agree national standards and not just assume EUREPGAP Traceability and standards could be put in place within wholesale market systems Register all actors to foster traceability Producers should be better educated through consultancy services. Consultancy firms and Producer Unions should work together. The law on consultancy should be drafted and implemented Land consolidation will increase produce quality	X X X X X		X
Unequal playing field on planning; Municipalities define location of open markets with inadequate market assessment; weak planning controls for modern market	X			Better Urban planning Improve infrastructure The authority of the Open Market Traders Association should be strengthened to better control and regulate markets	X X X		
New laws and regulations include barriers to ssp rather than support them Lack of legislation to protect ssp	X		 X	Laws and regulations should be updated according to market conditions The concept of ssp in the distribution chain together with their authorities and responsibilities should be defined in the related laws and regulations	X X		
Credit support to ssp is weak directing them to work with commissioners (who offer	X			Agricultural Credit Cooperatives seen as useful		X	

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credit) High bureaucracy and formalities in getting loans		 X					
Inadequate market control	X			Municipalities should delegate authority to lower level of organisation	X		
High level of loss in transportation (30-40%); inadequate and broken distribution chain	X			Invest in cool chain Design and develop new organisational arrangements that allow producers and open market traders to action together (storage and packaging)	X X		
Ssp producers lack information for production and market planning	X			Some ssp problems can be overcome by controlled and contracted production	X		
Ssp cannot exploit controlled production opportunities as barcode systems has not been fully established	X			Documentation and registration should be effectively implemented all stages of the value-market chain			
High levels of loss in unregistered production (climate and market related)	X			Control unregistered production	X		
Open markets not well maintained and less attractive than shopping centres	X						
Wholesale market (e.g. Kumluca) is inadequate for modern marketing and exporting		X		Wholesale market law and regulations should be revised, and markets modernised Exports can be performed from wholesale markets The Wholesale Market Authority should register merchant and private guarantees to producers on reliability Unsuitable traders should lose permits	X	 X X X	
Producer Unions (under the Ministry of	X			Producer Unions sales within wholesale markets should	X		

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Industry and commerce) cannot find permanent place of suitable size in wholesale markets				be enabled			
Weak and inadequate laws on farmer organisation	X			Laws of Producer Unions should be revised	X		
The structures and channels between producer and consumer are multiple and complicated Transport to wholesale markets is individualistic and thus inefficient Inadequate production planning	X	 X		Streamline channels and re-arrange related institutions Share transport Need for investment in local level packing house (Kumluca) Local organisations should be fostered and helped to plan	X	 X X X	
Difficult for ssp to sell produce to the dynamic retail sector Difficult for ssp organisations to penetrate the wholesale markets		X					
Unstable and declining producer prices		X					
Increasing input price without increased output price		X					
Low quality of inputs: origin, equivalence, imitation and thus risk cf residues		X		Improve import policy for inputs Quality inspect inputs		X X	
Weak producer organisation for marketing, lack of trust in both other farmers and the State		X					
Uncertain future		X		EU policies should be consistent and long term		X	

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				EU Rural Development Funds should be fairly distributed		X	
Producers unwillingness to invest; technology in greenhouses is outdated; coal (more polluting) is cheaper than wood for heating		X					
Irresponsible attitude of the press (blame on increase in consumer prices in farmers)		X					
Wide gap between producer price and retail price		X					
Inadequate extension and education services for producers		X		Improve services and make appropriate to current market conditions Consultancy services should be independent of input sales Universities should play a greater role on information and service provision		 X X	
High official deductions in wholesale markets		X					
Inadequate Chamber of Agriculture		X					
Inability to cope with risk including natural disasters (flood, frost etc)		X					
				Government should support exporters procuring from ssp		X	
Inappropriate support tools (Direct Income Support Systems) that do not work in the interests of ssp engagement in the market			X				

Annex 2 Agenda, scope of work and methods

Day 1 Monday 22 May

Participants: Internal team: University of Akdeniz, the Natural Resources Institute UK, Wageningen International Netherlands and MOISA France

Proposed agenda

1. Confirm expectations and share views on objectives and expected outputs - agree objectives

2. Review the approach and tool kit

3. Discuss what the teams have already done building on policy processes within the C1 and wider programme

4. Map value chain (Step 1)

5. Review key institutional and political factors that impact on inclusion or exclusion (part Step 5)

6. Prepare for the stakeholder meetings

Day 2 Tuesday 23 May – Working meeting with all stakeholders

Participants: Multi-stakeholder meeting including the full national and international teams, Agricultural Cooperative, Producer Organisations, wholesalers, market authorities, small and larger retailers and Ministry of Agriculture.
Approx 25 persons

10.00 -11.00 Introductory session

Welcome	Prof Yavuz Tekelioglu
Introduction to the Regoverning markets Programme	Felicity Proctor
Ongoing work in Turkey on dynamic markets and the small-scale producer	Prof Ali Koc
What we would like to achieve/objectives	Felicity Proctor

11.00 – 12.30 Working session 1:

Review of the value chain map **(Step1)**
Review of the key institutions and policies that influence the evolution of dynamic markets and small scale producer's participation **(Step 1 and 5)**

12.30 - 14.00 Lunch

14.00 – 16.30 Working session 2:

Set in the context of external factors – EU accession, WTO, globalisation of markets etc:

1 What are the major drivers of change in the fresh and processed market for tomato within Turkey? **(Step 2)**

Brainstorm: All ideas written on single cards and pasted on wall

2 What are the changes that could occur over the next 10 years (different scenarios) **(Step 3)**

Brainstorm: list all ideas on single cards and posted on wall

Rank likelihood of particular scenario – all participants have 2 stickers and place next to their own view of highly likely change

3 What are the implications of the top three scenarios on small-scale producer inclusion or exclusion from the dynamic markets **(Step 4)**

Brainstorm: List for inclusion and exclusion by small-scale producers of each of the top three scenarios
What are critical hotspots or most important issues?- rank with stickersX3 per person

4 Taking 2-3 of the key issues – what are the options for enhancing small-scale producer inclusion **(Step 6)**

Brainstorm: list ideas and options
List the institutional, public policy and business strategy implications /necessary or possible actions

Day 3 Wednesday 24 May

Venue: Kumluca (Hasyurt Municipality) sub-province of Antalya

Participants: Producers and Producer Organisations, traders, service providers, local/municipal government, Ministry of Agriculture and the full national and international teams.

Provisional programme:

Short presentation on the ReGoverning Markets programme
Short presentation on the current research in Turkey

Working sessions:
- Assess issues and dynamics of inclusion or exclusion of small-scale farmers within current situation **(Step 4)**
- Rank options/key issues for possible action – **(Step 5)**

Participants of Kumluca-Hasyurt Municipality Meeting (May 24, 2006)

Most of the participants were small scale producers, including young and female vegetable growers. Mayor of the town and input suppliers were also participated. At the beginning of the meeting, participants were informed about the Project. Some greenhouses and packing plants were visited after the meeting.

Day 4 Thursday 25 May

Venue: University
Participants: Supermarket representatives, major wholesalers and traders, and the full national and international teams

10.00 -10.30 Introductory session

Welcome	Prof Yavuz Tekelioglu
Introduction to the Regoverning Markets Programme	Ms Felicity Proctor
Ongoing work in Turkey on dynamic markets and the vegetable producers	Prof Ali Koc

10.30 – 12.30 Working session

1 Rapid review of the value chain map – key channels for product entry into supermarkets (Step 1)

2 What is the vision of the future in retail for fresh fruit and vegetables – say in next 10 years? (Step 3)

3 What are the key drivers of these changes- what will speed up or slow down these changes? (Step 2)

4 What are the key policies and or institutional factors that influence the small scale producers participation on modern retail? (Step 4)

5 Do the modern market chains have particular policies on procurement which address smaller scale and local supplier participation? (Step 6)

6 What public policies, interventions and or incentives would the supermarkets wish to suggest /encourage that would help to secure access to their markets by local/regional small scale producers? (Step 6)

List of Participants-Antalya Meeting (23 May 2006)			
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