THE AGRICULTURE AND AGRI-BUSINESS SECTOR OF THE WESTERN CAPE

A CONSENSUS ON LAND REFORM, ECONOMIC DEVELOPMENT, ENVIRONMENT, FOOD SECURITY, SUSTAINABLE LIVELIHOODS AND THE DESIRED INTERVENTION STRATEGIES

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ACRONYMS

ABET	Adult Basic Education and Training
ACB	Agriculture Credit Board
Agri- BEE	Agriculture Broad Based Black Economic Empowerment
ARC	Agriculture Research Council
CASIDRA	Cape Agency for Sustainable Integrated Development in Rural Areas
CASP	Comprehensive Agriculture Support Programme
DAC	District Assessment Committee
DEAT	National Department of Environmental Affairs and Tourism
DEDT	Provincial Department of Economic Development and Tourism
DOA	National Department of Agriculture
DTI	Department of Trade and Industry
ECD	Early Childhood Development
ESTA	Extension of Security of Tenure Act
FET	Further Education and Training
GET	General Education and Training
GI	Geographical Indicators
HDI	Historically Disadvantaged Individuals
HE	Higher Education
HRD	Human Resource Development
IDP	Integrated Development Plan
LED	Local Economic Development
LRAD	Land Redistribution for Agriculture Development
MEC	Member of the Executive Committee
NAFU	National African Farmers Union
NDA	National Development Agency
PAETA	Primary Education and Training Authority
PDA	Provincial Department of Agriculture
PDI	Previously Disadvantaged Individuals
PLAAS	Programme for Land and Agrarian Studies (University of Western Cape)
PPP	Public and Private Partnership
PSA	Proudly South African campaign
REDS	Regional Electricity Distribution Authority
RPL	Recognition of Prior Learning
SA	South Africa
SALGA	South African Local Government Association
SETA	Sector Education and Training Authorities
SMME	Small, Medium and Micro Enterprises
SWOT	Strength, Weakness, Opportunities and Threats
USA	United States of America
WTO	World Trade Organisation

ACKNOWLEDGEMENTS

The following social partners deserve special mention as key catalysts for the birth of this engagement process. These include the Western Cape government, civil society, organised labour and business, who through their incredible knowledge of the Agriculture and Agri-Business sector, provided a detailed analysis of challenges besieging the sector in the Western Cape province. The Steering Committee that has managed the process to date, members of the task teams and finally, the delegates and presenters who participated at the Western Cape Agriculture and Agri-business conference in May 2004. The views, interpretations and conclusions expressed in this document represent the views of the key stakeholders mentioned above. A list of stakeholders who contributed to the discussions is attached at the end of this report.

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PREFACE

As social partners in the Western Cape, we embraced enthusiastically President Mbeki's dictum to push back the frontiers of poverty and our honorable Premier Rasools' campaign to create a home for all / ikhayalethu sonke / tuiste vir almal by developing this Agriculture and Agri-Business sector strategy. This sector strategy is buttressed on the need to address the socio economic disparities in our communities, increase agro-productivity, enhance the competitiveness of this sector nationally and to re-position the Western Cape as a global role player in the 21st century and beyond.

The launch of the Provincial Growth and Development Strategy and the signing of the Framework Agreement in November 2003, appealed for the development of sector strategies acceptable to all social partners. However, the real challenge lay in crafting an acceptable programme of action to execute the tasks. A programme that accommodates the often conflicting views of stakeholders, bearing in mind our historical legacy. Gathered in the Steering Committee and Task Teams were men and women who are diverse in their experience, but committed to deploy the finest attributes of the human mind towards illuminating our strategic path to a better life. As such, it becomes difficult to find appropriate words to convey the full measure of our appreciation for the unwavering support that we received from various stakeholders within and outside the sector as we navigated the thorny pathways in order to accomplish this difficult task.

It is in this context that we are presenting the sector strategy developed by the four social partners. This document therefore holds out the promise of deepening the theoretical thrust of our ongoing efforts at making the province a better place to live in. Recognizing the fact that we still have outstanding work, we would like to congratulate the leadership of the four social partners, for combining their efforts to bring about the excellent progress we have made further to entrench our democratic system and enhance the capacity of government to contribute to the realisation of the goal of a better life for all.

What we have put in place is a vision of unity and prosperity for the sector that is embraced by the stakeholders and that also creates a policy environment that seeks to boldly enhance participation and equity in the agricultural sector, enhance competitiveness and profitability along the total agricultural value chain and ensure the sustainable management and use of the scarce and precious natural agricultural resources in the country.

The successful implementation of the sector strategy not only resides with the Department of Agriculture, but it requires the support and input of our social partners to assist in the areas identified in this document. The Steering Committee would be responsible for monitoring the implementation process and intervene as needs arise to remove any obstacle to this strategy.

INTRODUCTION

"It is in the Agriculture sector where long-term economic development will be won or lost. If there is peace in the rural areas we will have a future"1. President Thabo Mbeki in his State of the Nation Address during 2003 said, "our country has a continuing task to push back the frontiers of poverty and expand access to a better life for all. The challenge we all face as South Africans is to put our shoulder to the wheel to accelerate the pace of change".

The Provincial Growth and Development Summit (GDS) held on 14 November 2003 at the Cape Town International Convention Centre signed into effect an agreement between various social partners for growth and development in the Western Cape. The Framework Agreement provided a broad guideline to address the economic and social challenges of the Western Cape. One of the outcomes of the process was the identification of Agriculture (including aquaculture with the associated value chains) as a key priority sector in the Western Cape.

To give effect to the agreement reached, an Interim Steering Committee (ISC) representing the various social partners in the sector was established to outline a process for the development of an Agriculture sector strategy for the Western Cape. One of its first tasks was to host a consultative conference involving all stakeholders to identify the issues that impact on the sector and to agree on a process to develop the sector strategy. These issues would serve as the menu for discussion to address the challenges faced by the sector.

The Agriculture and Agri-business conference drew the attention of a large number of delegates from the four social partners, namely, the government sector (national, provincial and local government, statutory bodies and parastatals), business, labour and civil society, to commence a consultative process on the key issues and address the challenges confronting this sector. Whilst acknowledging the reality that some of the issues are beyond the provincial scope of policy intervention, the social partners agreed that such constraints do not deny them a role for local action to create favourable conditions for a prosperous Agriculture sector. The provincial initiative would therefore acknowledge national initiatives and attempt to, given the national framework, develop a provincial strategy for the sector and in the process strengthen national processes.

The provincial conference provided a unique opportunity to (i) review the role and contribution of this sector in the overall growth and development of the province (ii) review the extent to which the national processes impact on the sector and to gauge their implementation (iii) consider and (re) examine the challenges and opportunities facing the local industries (iv) involve additional role-players in attempts to develop an Agriculture and agri-business sector strategy for the province to ensure its long-term and sustainable growth.

A series of post conference activities were embarked upon to map the programme of action for this sector. These include the establishment of a Steering Committee to co-ordinate the programme of action and the formation of task teams to work on the issues identified. Before moving to a discussion of post conference activities, which include the launch of the Western Cape Agriculture and Agri-Business sector initiative, key challenges and proposed turn around strategies, a brief analysis of the sector in the national and provincial context is important to foreground our deliberations.

SECTION A
THE NATIONAL AND PROVINCIAL CONTEXT

Western Cape's Agriculture is distinguished in several ways from that in the rest of South Africa, largely because of the physical resource differences. The winter rainfall region of the Boland and the year-round rainfall of the Southern Cape provide Agriculture conditions that make the crop mix and productive potential unique. A main feature of the region's Agriculture is production stability, based on stable and relatively adequate winter rainfall and supported by well-developed infrastructure for both input supply and output processing.

Agriculture is one of the primary pillars of the Western Cape economy. Although the province contributes some 14% to the country's Gross Domestic Product, it generates about 23% of the total value added of the Agriculture sector in South Africa, which was R25bn in 2001. Agriculture accounted for 5.2% of the Western Cape's Gross Regional Product in 2001. As many as 11 commodities contribute significantly to Agriculture production, with fruit, poultry/eggs, winter grains, viticulture and vegetables together comprising more than 75% of total output. Consequently, diversity of Agriculture enterprises also contributes to Agriculture's general stability.

The total output of the Agriculture sector in the Western Cape grew from R10,4 billion[2] in 1999 to R11,8 billion in 2001 (an increase of 13,5% over the two-year period). The main industries in the sector include fruit (R2,4 bn), winter grain (R1,8 bn), white meat (R1,6 bn), viticulture (R1,6 bn) and vegetables (R1,4 bn).

The data in Table 1 provides an indication that Agriculture still plays an important role in the economy of the Province. It is clear that this sector has grown consistently since the political transformation of 1994. This growth was higher than in the case of other primary sectors, as well as certain secondary and tertiary sectors.

Although the average growth for the Agriculture sector over this period was lower than in the case of the provincial economy as a whole, the sectoral statistics hide the considerable structural change that took place between the industries, and within the industries, of the Agriculture sector.

TABLE 1: COMPOSITION OF THE REGIONAL GROSS GEOGRAPHIC PRODUCT OF THE WESTERN CAPE AT CONSTANT 1995 PRICES.

SECTOR	1995	1996	1997	1998	1999	2000	2001	% SHARE	% CHAN.	AV. ANN.
Agriculture, forestry and fishing	4 853	4 801	5 064	5 033	5 241	5 130	5 505	5.9%	13.4%	2.2%
Mining and quarrying	463	384	233	211	166	206	176	0.2%	-62.%	-10.%
Manufacturing	16 671	16 758	17 200	16 834	16 687	16 855	17 356	18.5%	4.1%	0.7%
Electricity and water	2 200	2 407	2 585	2 683	2 769	2 830	2 825	3.0%	28.4%	4.7%
Construction	2 986	2 793	3 019	3 156	3 387	3 540	3 526	3.8%	18.1%	3.0%
Wholesale and retail trade; catering	10 544	11 038	11 142	11 016	11 734	11 986	11 963	12.8%	13.5%	2.2%
Transport and communication	6 432	6 824	7 414	7 913	8 826	9 322	10 038	10.7%	56.1%	9.3%
Finance, real estate and business services	16 545	18 391	18 932	19 962	21 758	23 364	24 330	25.9%	47.1%	7.8%
Community, social and personal services	3 445	3 535	3 530	3 586	3 692	4 043	3 585	3.8%	4.1%	0.7%
General government	7 313	7 786	7 764	6 773	6 523	6 360	6 571	7.0%	-10.%	-1.7%
GGP	**78 221**	**81 849**	**84 235**	**84 504**	**88 304**	**91 365**	**93 727**		**19.8%**	**3.3%**

Source: Gross Domestic Product per Region (2002), Stats SA

The contribution of the sector to the overall economy is much greater than is suggested by the contribution to GGP. Agriculture's strong indirect role in the economy is a function of backward and forward linkages to other sectors. Its purchase of goods such as fertilizers, chemicals and implements forms backward linkages with the manufacturing sector, while forward linkages are formed through the supply of raw materials to industry. About 66% of Agriculture output is used as intermediate products in the manufacturing sector. These linkages augment the sector's contribution to the GGP. The GGP multiplier for Agriculture in the Western Cape is estimated at 1.29, while that of Agribusiness and non-Agriculture industries are similarly estimated at 1.02 and 1.1 respectively. The employment multiplier for Agriculture is 82.8, compared to 39.7 and 29.4 for Agribusiness and non-Agriculture industries respectively. Agriculture's potential to contribute to employment and value added in the provincial economy therefore, on average, exceeds those of the non-Agriculture sectors.

Although the Western Cape has only access to 12,4% of the farming area in South Africa[3], it contributes 22,4% to the gross farming income (see Table 2). Furthermore, it is significant to note that the Western Cape Agriculture is relatively more labour intensive than the national average (17,8% of farm workers) and that the sector has higher levels of remuneration than the national average (23,9% of the wage bill). It is also important to note that the capital expenditure in the Province is higher (31,4%), but the debt situation is lower than would be expected.

TABLE 2: WESTERN CAPE AGRICULTURE IN NATIONAL PERSPECTIVE

ITEM	RSA	WESTERN CAPE	WC/RSA (%)
Farming area (ha)	82 748 886	10 249 642	12,4
Number of commercial farms	57 980	8 352	24,4
Farm workers	1 139 427	202 949	17,8
Gross remuneration (000)	2 779 816	664 555	23,9
Gross farming income (000)	19 631 654	4 394 427	22,4
Capital expenditure (000)	2 078 368	651 962	31,4
Total debt (000)	15 283 265	2 522 127	16,5

Source: Agriculture Survey (1996), Stats SA

The South African Agriculture sector is an important earner of foreign exchange, namely R14.7 billion in 1999. Well over half of the country's Agriculture exports originate from the Western Cape. Western Cape's two most important export products (which are together responsible for more than a third of the value of the Province's exports) are indelibly linked to the Agriculture sector. A third, hides, skins and leather, are an extremely important product originating in the extensive rural areas of the province. It is also clear that these industries are still on a strong growth curve with especially the wine industry being an unqualified success. While the volume of wine exports increased from 23 million litres in 1991 to 217 million litres in 2002, the value increased even more rapidly. This is a clear indication that the industry succeeded in establishing itself as a producer of quality products.

Investment in Agriculture in the Western Cape varied between 27 and 31.4 per cent of total expenditure in Agriculture in South Africa between 1993 and 1996, with an average of 28.5 per cent. If investment in Western Cape Agriculture followed the same trend throughout until 2002, it is estimated that investment expenditure would have increased from R651 million in 1993 to R1.89 billion in 2002. Total investment in the Western Cape increased from R13.35 billion in 1997 to R16.81 billion in 2000. Agriculture's share in total investment in the Western Cape is approximately 7 per cent as opposed to 3 to 4 per cent at national level.

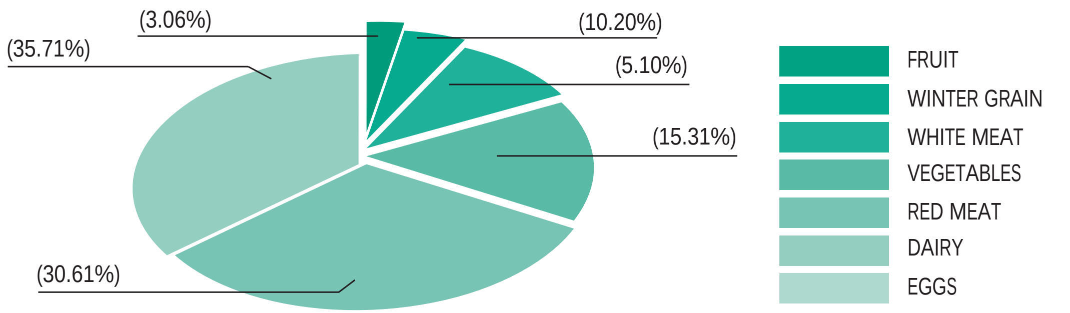
The structure of capital investment changed quite substantially over the period 1998 to 2003. In the initial period *de facto* disinvestment took place in livestock. However, this changed to positive (although slight) investment in this sector following 2000. Over the same period, a constant marginal increase in investment in land and fixed improvements was also experienced. The same trend was observed for machinery and implements with especially marked increases over the period 2001 to 2003.

From the 2001 Census data it is clear that while manufacturing in the Western Cape shed 30 000 jobs, Agriculture gained 32 000. It is also clear from the data that the average numeration of farm workers in the Western Cape is 25% higher than the average for South Africa. Recent research has indicated that substitution of permanent labour with temporary or seasonal labour is taking place in some areas. It was also found that an increasing number of farmers make use of labour contracting and that there is a relative increase in the number of women farm workers.

1. THE COMMODITY MIX

Table 3 and Figure 1 show the most important Agriculture commodities grown in the Western Cape. These are discussed in more detail below.

FIGURE 1: AGRICULTURE PRODUCTION IN THE WESTERN CAPE



Source: Wesgro 2001

TABLE 3: THE COMMODITY MIX OF WESTERN CAPE AGRICULTURE

	Total Output (Rm)	Top five Agriculture production sectors (Rm)					Total Ha	Irrigation (Ha)
		Fruit	Winter Grain	White Meat	Viticulture	Vegetables		
1999	10,442	2,088	1,566	1,462	1,462	1,253	10,200,000	1,789,650
2001	11,799	2,360	1,770	1,652	1,652	1,416		

***Source:** Wesgro 2001*

1.1 VITICULTURE

South Africa is the world's sixth largest wine producer, accounting for 2.8% of global production. The Western Cape's favourable climatic and soil conditions make it home to most of South Africa's wineries, accounting for 90.5% of production. Viticulture contributes some 30% to the region's horticultural income and about 3% to its Gross Regional Product. The gross output value of wine-industry-related firms is R14.6 billion. In 2001, there were 4 390 primary wine producers and 388 cellars – an increase of 15% over 1999. This included 67 co-operatives, 91 estates, 219 private wine cellars and 11 producing wholesalers. The area under vines is estimated to be 106 000 hectares. Approximately 746 million litres of wine are produced annually from 314 million vines. On average, 71% of production finds its way into good wine (for drinking) - up from 65% in 1999. Another 1% finds its way into rebate wine (for distillation of pot still brandy), 15% into distilling wine, and 13% into non-alcoholic uses such as grape juice and grape concentrate.

The late 1990s saw considerable foreign investment in Western Cape vineyards, large-scale replanting and quality improvements, leading to a boom in exports. There was an explosion in the number of wineries and wines produced – over 100 new wineries between 1999 and 2001. There was also substantial investment in information technology, export infrastructure, and distribution facilities. Given the low production costs in the Cape (despite the high cost of imported equipment and cost escalation caused by devaluation of the Rand), Cape wineries have proven competitive – particularly those wineries producing a fine quality at a premium price. The South African wine industry is encouraging people from previously disadvantaged communities to emerge as wine farmers/makers. To this end, the Wine Industry Trust was established in 1999, with funding of R370 million over ten years. One of its responsibilities is investment in 'wine education' to facilitate entry into the industry. A number of Cape wine farmers have established joint ventures with their workers, e.g. Spice Route, New Beginnings, Thandi Wines and Tukulu. The New Farmers' Development Corporation helps workers from disadvantaged communities to secure capital for the establishment of commercially viable farms.

South African wine exports grew to 210 million litres in 2002 – up from 50.7 million litres in 1994. Exports accounted for 33.5% of good wine production, compared to just 14.6% in 1995. In addition, 61.5 million litres of bulk wine were exported. Total export value for wines in 2001 was about R4.5 billion. In 2001 South Africa imported 2.4 million litres of natural wine, 20 787 litres of fortified wine and 151 03 litres of sparkling wine. Approximately 50% of bottled wine exports are to the UK, 21% to the Netherlands, 9% to Scandinavia and 6.5% to Germany – together accounting for more than 85% of South Africa's wine exports. Other markets currently representing less than 3% of exports, but identified as growth opportunities, include the US, India, China and Japan.

Wine tourism has potential – 43% of tourists to South Africa visit the winelands. The wine industry indirectly contributes more than R3.5 billion annually to the tourism industry.

1.2 FRUIT

Fruit farming forms the backbone of Agriculture in the Western Cape. Growing conditions are ideal for both soft citrus and deciduous fruit, exports of which are expected to rise from R6.5 billion in value in 2001 to R8 billion in 2003. Since 1990, the total value of citrus production has increased by 9.9% a year – twice the rate of the Agriculture sector as a whole. This trend is expected to continue, mainly as a result of production expansion supported by strong export market growth. The citrus industry is currently valued at R1.8 billion annually.

With some 2 500 deciduous fruit growers, the Western Cape is the country's largest producer of deciduous fruit, accounting for about 85% of total exports. In 2001, gross export earnings were about R5.1 billion. The Western Cape's share of world apple production is just under 2%, yet it exports 35-45% of its total crop. The EU absorbs 75% of South African apple exports, while exports to the Middle East, Far East and the United States are growing. The Western Cape accounts for only 1% of world pear production, but is the largest southern hemisphere exporter of Comice and Forelle varieties. About 40% of production is exported, with some 75% going to the EU (about 35% to the UK and 65% to mainland Europe). Together with Chile, the Western Cape is the southern hemisphere's main exporter of table grapes. Exports have grown in recent years, especially of both white and red seedless varieties. More than 90% of the crop is exported, with the EU accounting for 75% of table grape exports. Similarly, the Western Cape and Chile are the main southern hemisphere players in the stone fruits market, although Chile exports nearly three times the volume. It is plums, however, which represent the largest volume of exports, with over 80% bound for the EU. About half of all production is sold fresh, while some 20% is processed into juice. The remainder is used for canning and dried fruit. Although the apple market is currently static, and nectarines and peaches are growing at just 0.5% per annum, growth in the pear and apricot markets is approximately 2% per annum, with more substantial growth of 5% for plums and 7.5% for table grapes.

There are some 1 200 citrus growers in South Africa, producing 1.5 million tons of fruit in 2001. The Western Cape produces 15-20 % of the total citrus crop. While South African citrus makes up only 2% of total world production, it accounts for more than 8.5% of total world exports. It competes directly with other southern hemisphere producers like Australia, Argentina and Chile, all of which go to market during the same season. Some 60% of the annual crop is exported, accounting for 80% of income, while 20% is consumed locally and 20% is processed into juice.

The Western Cape has long been known as a quality producer of canned fruit, much of it exported. Although European subsidies have put South African canners under pressure, there are still opportunities for high value added products for markets in the Far East, Europe and the Americas.

The fruit juice industry is also a strong growth sector. The biggest producer in the Western Cape is Ceres Fruit Processors, which produces large quantities of apple and pear concentrate. Other major players include Associated Fruit Processors, Elgin Fruit Juices and Granor Passi, as well as KWV, which produces grape juice concentrate. For the export market, aseptically packed concentrates and juices – without preservatives, artificial sweeteners or colorants – have proved popular. Major export markets include Europe and the Far East, where the Western Cape is known for its quality products and wide variety of flavours and flavour combinations.

In 2001, total production of dried fruit was 3 740 tons of dried tree fruit and 31 000 tons of vine fruit. The gross value at producer level was R34.9 million for tree fruit and R121.6 million for vine fruit. Some 65-70% of annual production is exported. There are approximately 1 450 growers supplying this industry, mostly in the Citrusdal, Boland and Langkloof areas, although vine fruit for drying into raisins comes largely from the Orange River area in the Northern Cape. SA Dried Fruit is the largest player and the only one processing and marketing both tree and vine fruit.

1.3 VEGETABLES

Given the suitability of the regional climate, vegetable production is an important component of Western Cape Agriculture, representing some 12% of total production. In 1999, some 61260m of fresh vegetables were exported from Cape Town's port. Most trade in fresh produce is either through the major urban fresh produce markets or through farmer organisations like Potato South Africa and the Onion Forum, which also make efforts to establish business partners abroad. Trade in vegetables through the Epping Fresh Produce Market in Cape Town is some 150 million tons annually, although this figure does not take into account an estimated 50% of production that is traded via the informal sector, produced under contract for major supermarket chains or exported, largely to the EU. In 1999, some 9800 hectares of land in the Western Cape was planted with potatoes, producing over 323 000 tons. More than 80% of the national crop is sold fresh or as seed, most of the balance being processed into French fries and crisps, although a small percentage is also used for baby food, mixed vegetables and canning.

The yield from the province's 3 200 hectares of onion fields in 1999 was 152 000 tons. Nearly 23 000 tons of fresh tomatoes were also produced, excluding those destined for processing. In addition, the Western Cape accounts for 80-90% of national vegetable seed production.

1.4 ANIMAL PRODUCTS

With 505 000 head of cattle in 1999, the Western Cape accounts for just 3,7% of the national herd, although its 3,5 million sheep make up a more substantial 12%. The region also has 227 000 pigs (14,8%) and 243 000 goats (3,8%). The industry is either extensive and field-based (cattle and sheep) or intensive and based on grain feeds (poultry and pigs). While demand for red meat has declined, demand for pork and poultry has risen strongly. The ostrich industry, historically based in the Western Cape, has faced hard times since the mid 1990s, which were characterised by plummeting prices due to over-production, as well as problems with disease and quality control.

The Western Cape broiler industry produces some 135 000 tons annually, accounting for over 17% of national production, which is worth almost R6bn at producer level. The region is home to the country's third largest broiler player, County Fair, as well as its largest egg producer, Nulaid. The Western Cape produces about 20% of the country's annual total of 4,6 billion eggs.

1.5 DAIRY

The dairy industry is the fourth largest Agriculture industry in South Africa, representing 5.6% of the gross value of all Agriculture production. The coastal regions of the Western, Southern and Eastern Cape and KwaZulu-Natal contribute more than 42% of national milk production, with the largest number of dairy producers found in the Free State (24.9%) and the Western Cape (21.5%). The 1 267 milk producers in the Western Cape produced 500 million litres of milk in 1999, with a total value at producer level of R545 million.

Milk is bought and processed by over 300 processors and manufacturers, while some 500 producer-distributors also market liquid milk and fresh dairy products. Large dairy companies represent a very small percentage of all processors but process over 80% of the total milk delivered to dairies, producing a large range of mainly commodity dairy products. There are also numerous small operations processing less than 2000 litres of milk a day, often supplying on a regional basis. Following Agriculture deregulation in the mid 1980s, there has been substantial restructuring of both the dairy production and processing sectors in an effort to improve global competitiveness. A significant confidence indicator in the restructuring of the processing sector, in particular, has been the recent heavy investment of multi-nationals like Parmalat and Danone in large South African dairy companies and the continuing presence of Nestlé and Unilever.

1.6 GRAIN, CEREALS AND OILSEEDS

The Western Cape is traditionally the country's second largest wheat producer, with 43% of its wheat fields. The province is also the country's sole grower of hops – primarily in the area around George – as well as its major barley grower, producing nearly 95% of South Africa's 90 000 tons of barley in 1999.

1.7 FLOWERS

The floricultural export market has reflected growth in value of more than 54% in the last four years, although the devaluing Rand has played a part in this dramatic appreciation. Roses, chrysanthemums, carnations and gladioli, mostly from Gauteng, make up the bulk of sales, but indigenous flora from the Western Cape also make a significant contribution to national sales. Total annual production of indigenous "fynbos" flowers is in the region of 5 million kilograms, of which 95% is grown in the Western Cape. The export value at producer level is some R60 million for fresh flowers and R30 million for dried flowers, while the local fresh flower market accounts for a further R15 million. Over the past decade, growth in the market for indigenous, fresh, cut flowers has been some 3-5% annually.

1.8 NATURAL PRODUCTS

Growth in global demand for organic foods is beginning to make an impact on South African markets, leading a number of farmers to turn to organic production methods that preserve the soil by crop rotation and natural composting, without the use of synthetic fertilisers or chemical pesticides.

2. GEOGRAPHICAL DISPERSAL

Various topographic features divide the province into a number of regions, each with its own distinct climate. High mountain ranges interact with on-shore movements of moisture laden ocean air to serve as water harvesting systems. The resulting runoff provides substantial irrigation potential in the coastal region and parts of the Karoo semi-desert area beyond the mountains. The province can be divided into seven main climate-zones.

While there is Agriculture activity in the **Cape Metropolitan area**, including some high value enterprises, the economic and social character of this region is definitely urban or metropolitan. This area is comprised of the Bellville, Goodwood, Cape Town, Simonstown and Wynberg districts and is usually referred to as the Cape Peninsula. However, intensive poultry, pork, vegetable and milk production based on zero grazing technology can be found within a radius of about 75 km from Cape Town.

The **South Coast** region, with an area of approximately 960 000 ha, produces mainly wheat and malting barley in rotation with planted pastures under rainfed conditions. The production of wool, milk and meat, which is already significant, should increase and cultivated pastures and fodder grains can be expected to replace some wheat in the future. Intensive production under irrigation of vegetables and hops, mainly in the George area, and irrigated pastures for milk production can be found towards the escarpment.

The **Little Karoo,** stretching from Barrydale to the upper reaches of the Langkloof, is renowned for its ostrich industry around Oudtshoorn, the production of deciduous fruit for canning, drying and increasingly for export, and for lucerne hay. The land under irrigation is less than 4% of the total area of about 2 million ha but produces more than 80% of the total value of production.

The 80 000 ha intensively cultivated and irrigated areas of the **Boland** produces mainly deciduous fruit and wine grapes, with Elgin and Ceres being the main centres for apple and pear production and the Hex River Valley and Paarl for table grapes.

The **Swartland** consists of approximately 270 000 ha of land that is confined primarily to rain-fed wheat and pastures. Sheep and dairy farming are also found in rotation with wheat. A move away from monoculture wheat toward mixed crop-livestock systems is occurring at present and should continue in the near future.

The **northwest** subregion produces mainly wine grapes and citrus under irrigation along the Olifants River. A small but flourishing rooibos tea industry has been established around Clanwilliam. The grazing areas, such as those in **the Great Karoo**, are used for the production of meat, wool and mohair.

3. THE IMPLICATIONS FOR THE AGRICULTURE AND AGRI- BUSINESS SECTOR

The prosperity of the Agriculture sector is linked to the extent to which primary production is aligned to the needs of the economy, both in terms of direct consumption of primary commodities and the demand for Agriculture raw materials at the manufacturing level. It is important, therefore, that the vision for Agriculture is seen in a broader view of the larger economy rather than a narrow focus on primary Agriculture production.

The social partners should strive to ensure that Agriculture in the Western Cape can:

(a) Contribute to economic stability, development and growth for the benefit of all as the backbone of a thriving rural and Provincial economy;
(b) Play a harmonious part in the natural beauty and environmental stability of our landscape;
(c) Help to foster reconciliation, equitable transformation and stability, which is the mainstream of a vibrant civil society and contributes to a safe and secure rural life; and
(d) Produce foods and fibres that enhance the living conditions of consumers.

The vision should inspire excitement, vibrancy and address issues such as (i) global competitiveness (ii) enhancing people's quality of life (iii) transformation (iv) access and participation (v) adding value and (vi) attracting more investment. The common vision should guarantee sustained participation in the South African Agriculture economy by all stakeholders that recognises the need to maintain and increase commercial production, to build international competitiveness and to address the historical legacies and biases that resulted in a dual Agriculture economy. A process to construct such a vision should take into consideration three dimensions of the sector, namely:

(a) Industry based

The industry can be grouped into three components, namely, animal production (includes fibres, poultry, milk, red meat, game and aquaculture), agronomy (grains) and horticulture (deciduous fruit, citrus, wine, vegetables, fynbos, rooibos).

(b) Issue based

A number of issues have been identified as critical to the sector's development. These include the need for an export focus, international competitiveness and the transformation of the sector consistent with equity requirements. The provision of infrastructure such as transport has impacted on competitiveness and congestion at Cape Town Harbour during specific times proves to be critical. Human resource development and other social issues such as housing, energy and transport are considered critical.

(c) Geographically based

The geographical spread of productive, marketing and social activity varies from region to region in the Western Cape. These nuances need to be encapsulated when concretising the development and implementation of a strategy.

Each of these three dimensions has certain advantages and disadvantages. It is thus recommended that an approach be followed that incorporates each of these dimensions in the development of the vision

The challenge of designing, resourcing and implementing process orientated institutional responses is a responsibility thrust upon government, business, labour and civil society. What is evident is that there is no panacea or recipe for success and we would have to manage adversity, diversity and provide creative innovations and practical options in the process of coming to grips with these challenges. The principles that guide this process and agreed to as an outcome of the GDS process are transparency, equity, inclusivity and social accountability.

The legislation on land and agriculture should be geared towards accommodating a diversity of production. The Agriculture policy reforms and objectives must call for special attention to sustainable growth, with a focus on equity in order to improve livelihoods in the rural sector where widespread poverty prevails. The support for small and emerging farmer development will promote opportunities for new entrants. This policy dictum must constitute part of broader processes of rural development, which include land reform, investment in water supply and transport infrastructure, farm financing, marketing, food security, as well as education, research and extension and improved social service delivery. The manner in which farmers manage their land for sustainable use is likely to be as important a determinant of sustainability as the production potential of land and whether it is capable of providing a complete livelihood.

Generic challenges identified are listed below. These challenges were later refined and will be discussed further in the next section. These challenges present a huge threat and an enormous opportunity as we enter the next decade of democratic transformation. Social and power relations exhibit huge inequalities in income, skills, wealth, networks, lobbying and access to information. These challenges include:

(a) A lack of a common vision for Agriculture in the Western Cape
(b) Poor socio-economic conditions and low wages for farm-workers
(c) Lack of support infrastructure
(d) Low educational levels
(e) Accelerating land reform and broad based black economic empowerment
(f) Huge power and information asymmetries.
(g) Appropriate technology for all forms of Agriculture
(h) Establishment costs
(i) Equity, shares and business empowerment
(j) Business models which promote BEE
(k) Insufficient research and development of all farming systems
(l) Climatic conditions
(m) Exchange rate fluctuations
(n) Low levels of formal organisation among farm-workers and small-scale farmers
(o) Market development
(p) Land tax
(q) The Western Cape's role in Nepad
(r) Competitive position
(s) Economic growth
(t) Research
(u) Market access
(v) Food safety; and
(w) Product differentiation.

SECTION B

THE DEVELOPMENT OF A LONG TERM SUSTAINABLE AGRICULTURE AND AGRI-BUSINESS SECTOR STRATEGY

The development of a strategy for the sector serves to work towards building a developmental platform from which to formulate and implement inclusive, broad based equitable, strategic interventions. These interventions embed policy principles of competitiveness, economic growth, equity, job creation and BEE. This developmental platform was crafted on a solid operationally orientated interventionist foundation comprised of the following: A commitment from all stakeholders represented by labour, business, government and civil society to actions/interventions designed to make the sector significantly more competitive, inclusive and equitable. The adoption of a strategic framework, methodology and instruments, which would format proposed interventions, activities and institutional /stakeholder responsibilities, actions and accountabilities. The strategic framework concretises the multi-stakeholder GDS coalition in an action/intervention plan, thereby establishing multi-stakeholder developmental coalition commitments to the intervention results, activities, responsibilities and accountabilities specified in the Operational Plan.

Following the inaugural conference, an industry-focussed approach with a geographical dimension was adopted. One of the recommendations emanating from the conference was to establish a Steering Committee consisting of eight representatives from each social partner to commence deliberations and map out a programme of action.

Given the wide range of issues presented above, the Steering Committee devised a focused approach to address the intertwined generic challenges. Those chosen to structure and inform the development of a sustainable Agriculture and Agri-business sector strategy deliberations were clustered around the following eight thematic areas which by no means are exhaustive:

(a) Competitiveness of Agriculture, marketing, market development and market access;
(b) Land reform and Agri-BEE;
(c) Human resource development and social development;
(d) Research and development;
(e) Extension services and farmer support;
(f) Environment , food safety and security;
(g) Institutional development and
(h) Physical infrastructure.

The work programme of the Agriculture and Agri-business sector initiative gathered momentum on 31 August 2004 at Elsenberg (Die Herehuis), where the Provincial Department of Agriculture is located. Due to capacity constraints within the social partners and the need for effective engagement on these issues eight task teams were established to deliberate on the eight thematic areas listed above.

Using the eight thematic areas as guidelines, the task teams made considerable progress towards building a developmental platform from which to formulate and implement inclusive, broad-based, equitable, strategic interventions. Please note the timeframes as illustrated in certain tables for projects to commence were based on the assumption that the entire work programme would be completed within the allocated timeframe. However, the complexities and dynamics of certain issues deliberated moved beyond the depth and scope of the allocated time. The tables are structured as follows: the first table will outline a contextual analysis (SWOT analysis) and the preceding table would then outline the strategic interventions and desired outcomes. It is the purpose of the following section to present the outcomes of the deliberations that took place in each of the task teams.

SCHEDULE ONE

1.1. MARKET IDENTIFICATION AND DEVELOPMENT

1.1.1: Market Identification and Development: Strategic Dimension Profile

STRENGTHS	CHALLENGES	OPPORTUNITIES	THREATS
An increase in agriculture imports and exports over the last few years	(a) Deregulation of the Agriculture sector in South Africa (b) Western Cape remains a small player in most markets	(a) A deregulated Agriculture sector in South Africa (b) Market trends driven by consumer demand play an important role in competitiveness and profitability	

1.1.2: Market Identification and Development: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
(1) Market Information Intelligence	(a) Research in respect of the following: • Market access • Market and Consumer Trends • Market Entry Barriers • Technical Market Requirements • Distribution Channel information • Retail trends • Continent Analysis • Competition Analysis • Price trends • Farmers marketing information needs (b) Setting up of a "one stop" centre to provide reliable market information (c) Raise awareness of market and marketing information and make it more accessible	Lead: Government: Provincial Department of Agriculture (PDA) Support: other stakeholders	(a) Clear information on availability of markets and with regards to the issues identified (b)Availability of one stop shop	(a) Research on market access completed (b) One-Stop centre set up completed
(2) Local Market Access	(a) Increase and improve local producer's market access taking into account increased imports (b) Reduce the imports of Agriculture goods and research the effect on a competitive price structure (c) Further development of existing markets through penetration and repacking of goods to add new customers to existing ones	(a) Lead: Government (PDA) Support: DTI and other stakeholders (b) Lead: Government (PDA) and DTI Industries	(a) Increased and improved local market access (b) Reduced imports (c) Repackaging of goods (d) Development of new markets	(a) Increased local market access gained (b) New markets are developed and maintained
(3) International Market Access	(a) Research and analyse free trade agreements (b) Identify and analyse country strategic alliances which will result in improved market access (c) "Tap" into the NEPAD agreements in respect of exports on the continent	(a) Lead: Department of Agriculture and DTI Support: Business and Industries (b) Lead: Department of Agriculture and DTI Support: WTO	(a) Solutions to market entry barriers (b) More access towards international markets	Successful access to markets that were previously not accessible

1.2: REAL AND REVEALED COMPETITIVENESS

1.2.1: Real And Revealed Competitiveness: Strategic Dimensions Profile

STRENGTHS	CHALLENGES	OPPORTUNITIES	THREATS
1) The perception exists that producers in some importing countries are not subject to the same stringent compliance regime as Western Cape exporters.	If different levels of compliance are expected, then it may be cases of unfair and/or illegal competition and in the process our producers' competitive edge may be eroded.	By early compliance local producers may have a real and perceived competitive edge over their international competitors	Compliance of producers in importing countries comparable to those expected from local export producers
2) It is claimed that certain Agriculture inputs are subject to higher levels of tariff protection than in the case with Agriculture products.	Higher protection in the upstream may be an indication of inefficient input suppliers. In this way, the competitiveness of the whole supply chain is eroded.	Efficiency gains in the supply chain may lead to new up-and-downstream export opportunities.	Comparable up-and-downstream protection in the Agriculture supply chain.
3) Certain trade and / or marketing prerequisites may have a bigger impact on smaller producers than is the case with larger producers.	If the specific impacts on smaller producers are not kept in mind, new initiatives may be to their detriment (i.e. a new inspection regime may be relatively more expensive per production unit than the smaller the unit).	Analysis may identify specific opportunities where smaller producers may have a competitive edge.	Recognition of differential impact of trade practices on differently scaled producer operations

1.2.2: Real and Revealed Competitiveness: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) Compliance of producers in importing countries comparable to those expected from local export producers	(a) Develop capacity to analyse potential case studies. (b) Identify potential suspected case where compliance differs between importing and exporting countries or where the benefits of an enhanced trade environment are not given through to producers. (c) Investigate potential case study. (d) Repeat process until a real transgression is found (e) Take transgression to its logical conclusion	(a) Lead: Government (PDA) Support: other stakeholders (b) Lead: Business Support: Other stakeholders (c) Lead: Government (PDA) Support: other stakeholders (d) Lead: Business Support: other stakeholders (e) Lead: Government (PDA) Support: other stakeholders.	(a) Person in government to be appointed within three months (b) First case study submitted. (c) Report available within six months after case study identified (d) Series of case studies submitted and reports prepared (e) Proceedings initiated for international remedies.	(a) Appointment made (b) Written request for investigation (c) Report available (d) Written requests and reports (e) Case submitted to WTO
5) Comparable up-and-downstream protection in the Agriculture supply chain.	(a) Develop capacity to analyse potential case studies. (b) Identify potential suspected case where exorbitant protection exists on the input side or benefits of an enhanced trade environment are not given through to producers. (c) Investigate potential case study. (d) Repeat process until a substantiated deviation from the normal trade regulations are found. (e) Use appropriate fora (Agricultural Trade Forum (ATF)), MINMEC, (Intergovernmental Technical Committee of Agriculture (ITCA)) in order to seek remedies.	(a) Lead: Government (PDA) Support: other stakeholders (b) Lead: Business Support: other stakeholders (c) Lead: Government (PDA) Support: other stakeholders (d) Lead: Business Support: other stakeholders (e) Lead: Government (PDA) Support: other stakeholders.	(a) Person in Government appointed within three months (b) First case study submitted. (c) Report available within six months after case study identified (d) Series of case studies submitted and reports prepared (e) Proceedings initiated for remedies.	(a) Appointment made (b) Written request for investigation (c) Report available (d) Written requests and reports (e) Case submitted
6) Recognition of differential impact of trade practices on differently scaled producer operations	(a) Create the necessary infrastructure to research differential impacts. (b) Monitor trade research projects by partners to ensure that differential impacts are addressed (c) Request remedial action if necessary.	(a) Lead: Government (PDA) Support: other stakeholders (b) Lead: Civil Society Support: other stakeholders (c) Lead: Civil Society Support: other stakeholders	(a) Generate micro-level economic data on differently scaled farming enterprises (b) Contents of reports (c) Contents of reports	(a) Availability of data (b) Watchdog function (c) Written request

Continued on page 26

Continued from page 25 – 1.2.2: Real and Revealed Competitiveness: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
7) Well understood and analysed policy environment of specifically identified fields.	(a) Create the necessary infrastructure to do policy research and analysis.	(a) Lead: Government (PDA) Support: other stakeholders	(a) Person in Government appointed by 30/03/2005	(a) Appointment made
	(b) Identify range of social, economic, political and cultural conditions that demand policy interventions, as well as specific policies whose impact are not well understood (legislation is seen as a policy instrument).	(b) Lead: Civil Society Support: other stakeholders	(b) Specific issues documented on a regular basis	(b) Documents available
	(c) Analyse the specific policy case studies to determine their impact (triple bottom line), issues, alternative mechanisms, targets, etc.	(c) Lead: Government (PDA) Support: other stakeholders	(c) Contents of reports.	(c) Reports available
	(d) Identify and describe a list of alternative policy mechanisms that may be used.	(d) Lead: Civil Society Support: other stakeholders	(d) Specific issues documented on a regular basis	(d) Documents available
	(e) Create consensus on policy changes necessary.	(e) Lead: Government (PDA) Support: other stakeholders	(e) Contents of reports.	(e) Reports available


THE AGRICULTURE AND AGRI-BUSINESS SECTOR OF THE WESTERN CAPE

1.3: INFORMATION

1.3.1: Information: Strategic Dimensions Profile

STRENGTHS	CHALLENGES	OPPORTUNITIES	THREATS
Availability of and access to relevant information (print media, field days)		(a) Experimental farms are of utmost importance for the whole of the Agriculture sector to make sure farmers in South Africa maintain their position in the markets, locally and internationally (b) Support existing initiatives underway	

1.3.2: Information: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) Successes and failures have been investigated and understood so that farmers can learn from the mistakes and build on the successes of others	(a) Identify instructive and relevant successes and failures (b) Clarify if these are the result of unique circumstances or if it represents a pattern common to a range of similar cases. (c) Research and analyse the case studies and document the relevant lessons from theses (d) Identify possible strategic interventions from these case studies (e) Communicate the outputs and lessons to farmers and other role players (f) Implement agreed upon strategic interventions (g) Embark on a new round of case studies	(a) Lead: Business All other stakeholders actively participate (b) Lead: Business All other stakeholders actively participate (c) Lead: Government (PDA) All other stakeholders to actively participate (d) Lead: Government (PDA) All other stakeholders to actively participate (e) Lead: Business All other stakeholders to actively participate (f) Lead: Government (PDA) All other stakeholders to actively participate	(a) First case study identified within 6 months (b) Clarified within 6 months after identification (c) Research report available within 6 months (d) Strategic interventions as part of report (e) Communication strategy implemented Specific interventions described and in place	(a) Written document to other partners (b) Written document to other partners (c) Report available (d) Report available (e) Case study results prominent in popular press (f) Projects running

1.4: BUILDING A BRAND STRATEGY FOR THE WESTERN CAPE AGRICULTURE AND AGRI-FOOD PRODUCTS

1.4.1: Building A Brand: Strategic Dimensions Profile

CHALLENGE	OPPORTUNITIES
1) Increasing environmental concerns and hence public criticism of farming practices, the recent disease outbreaks such as Foot and Mouth disease, African Horse Sickness, Avian Influenza (Bird Flu)	(a) Increasing environmental concerns and hence public criticism of farming practices, recent disease outbreaks such as Foot and Mouth disease, African Horse Sickness, Avian Influenza (Bird Flu)
2) The commingling that occurs to take advantage of bulk handling means that signals cannot be sent from consumers to producers.	(b) Beneficiation of Agriculture products before export. (c) To realise its potential, Agriculture must be recognised and valued, the community must have a sense of vision and purpose and people must be inspired to action. (d) Using sophisticated branding techniques to create a point of difference that is relevant and compelling - gain recognition and build markets locally and abroad (e) Improve access to global markets for Western Cape Agriculture and agri-food products and to strengthen the sector's capacity to market their products locally and abroad

1.4.2: Building a Brand: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) Integrate the local Agriculture sector into the mindset of local consumers. Strengthen the PSA campaign	(a) Conduct a baseline survey on the image of local Agriculture.	(a) Lead: Government (PDA) in consultation with DOA, DTI and others. Other stakeholders actively encourage constituents to participate	(a) Appointment made. Survey completed within six months.	(a) Baseline study completed, report available and results communicated.
	(b) Explore the possibilities of an international survey on the image of South Africa and / or South African Agriculture products.	(b) Lead: Department of Agriculture in consultation with Government (PDA), DTI and others. Other stakeholders actively encourage constituents to participate	(b) Look at possibilities to appoint a contractor within one month. Survey completed within six months	(b) Study completed, report available and results communicated.
	(c) Use the research that is readily available as a basis			
	(d) Identify areas where the image can be improved and develop an image improvement strategy.	(d) Lead: Business Support: other stakeholders	(d) Image improvement strategy completed by 30/09/2005	(d) Strategy documented and accepted by partners
2) Image improvement strategy implemented	(a) Re-inspection of products on the other side. In other words, institutions that offer inspection services are to be supported financially.	(a) Lead: Business Support: other stakeholders	(a) Milestones reached according to strategy	(a) Milestones reached according to strategy
				(b) Improved image and recognition of Western Cape products
	(b) Launch competitions where prizes will include a day or two to have experience of what is happening at farm level.	(b) Lead: Business Support: other stakeholders	(b) Actual competition	
	(c) Value adding to products			
	(d) Identification of niche products, unique SA products for a specific market with specific consumer demands	(d) Lead: Government (PDA) Support: other stakeholders	(d) Niche products identified	(d) Availability and recognition of niche products
	(e) Ensure sustainable competitive advantage through Geographical Indicators		(e) Successful establishment of GI's for the Western Cape products	(e) Successful establishment and adoption and recognition of geographical indicators
	(f) Investigate possibility of branding Western Cape products in markets where the market share justifies such an investment. Careful analysis conducted before a product is engaged	(f) Lead: PDA and DTI Support: Business and other stakeholders	(f) Investigation completed within six months	(f) Report made available and results communicated
	(g) Ensure sustainable competitive advantage by the branding of Western Cape products and by the differentiation of Western Cape Agriculture products according to cost, quality, features and services to create a unique competitive advantage	(g) Lead: Business		

1.4.2: Building a Brand: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
2) PSA and fair trade: Establish a system of logo(s) and /or brand(s) in order to differentiate Western Cape products on the domestic and international markets. This system should make provision for the triple bottom line and create opportunities for cultural and traditional products	(a) Conduct an investigation on the need for the appropriate legislation and/or brand registration.	(a) Lead: Department of Agriculture	(a) Investigation completed within six months	(a) Report made available.
	(b) Develop consensus on triple bottom line criteria.	(b) Lead: Business Co-Lead: Labour Other stakeholders actively participate.	(b) First draft completed within six months Final draft completed within one year	(b) Publication of documents at appropriate target dates. Acceptance by stakeholders.
	(c) Draft the appropriate legislation if necessary. Ensure partner buy-in of legislation.	(c) Lead: Department of Agriculture All other stakeholders actively participate	(c) First draft legislation available within six months. Consulted version available within one year. Legislation submitted to parliamentary process within 15 months.	(c) Publication of appropriate copies at target dates. Acceptance by stakeholders
	(d) Draft the appropriate rules and institutional requirements for using the brand	(d) Lead: Business All other stakeholders actively participate	(d) First draft completed within six months Final draft completed within one year	(d) Publication of documents at appropriate target dates. Acceptance by stakeholders.
	(e) Develop appropriate logos and brands	(e) Lead agent: Department of Agriculture. All other stakeholders actively participate	(e) Appoint consultant within six months Agreement on designs completed within one year	(e) Physical designs available at target dates. Acceptance by stakeholders.
	(f) Implement the systems.	(f) Lead agent: : Department of Agriculture All other partners actively support:	(f) At least 3 products actively use the system within 15 months	(f) Products with logo/brand available on shelves.
	(g) Promote the system	(g) Lead agent: : Department of Agriculture: Use intergovernmental relations to promote domestic and international Business: Use links with supermarkets. Labour and Civil society: Use structures to actively promote in constituencies.	(g) Sales of products using the system increased more than Agriculture growth. Job growth higher percentage than for sector. Achievement of triple bottom line criteria.	(g) Reporting system as part of institutional arrangements.
	(h) Evaluate success of system	(h) Lead agent: : Government (PDA) All other stakeholders to actively participate	(h) Consensus on evaluation system within one year. Evaluation completed by March 2009	(h) Survey completed, report available and results communicated.
	(i) Conduct regular surveys in order to verify change of image.	(i) Lead: Government PDA Other stakeholders actively encourage constituents to participate	(i) Contractor appointed by 30/11/2008. Survey completed by 30/03/2009.	(i) Survey completed, report available and results communicated.

1.5: CAPACITY BUILDING

1.5.1: Capacity Building: Strategic Dimensions Profile

STRATEGIC DIMENSIONS PROFILE / DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1) Human Resource Development	High-end and low-end skills are not being developed by support service institutions.	Scarce skills are lost to the Sector.	Develop educational, skills training and RPL programmes. (a) Develop career profile and career mobility packages to retain, attract and grow the human resource pool for the entire value chain.	Attractive jobs and career paths within sector backed by skills training support services with post-training mentoring, coaching, career counselling provided.
2) Institutional	Fragmented strategies of isolated business units. (a) Lack of value chain integration. (b) Lack of scale integrated business models.	Market impacts differentially on business units of different sizes. (a) Small farms die out. (b) Value-adding processes migrate elsewhere.	Design, implement, support scale-integrated business models which pool resources and promote SMMEs, job creation and economic growth. Value chain, scale-integrated business models designed, implemented,	supported to maximise business growth, job creation, career mobility, SMME development and BEE.
3) Local Economic Development	Agriculture and agri-business do not participate in drafting of local and district IDPs and LEDs.	Agriculture loses out on LED incentives, support services and local market opportunities.	Develop fully integrated LED policies, strategies, plans and programmes which optimise use of local resources and grow local economies and markets	Agriculture and agri-business enjoy competitive advantages from integration with local markets and support services clusters.
4) Government Negotiations: International Trade Agreements	Disparities in information, sector knowledge, global trade policies and programmes impact adversely on sector performance and growth.	Sector's global competitive status disadvantaged.	Improve government's negotiating instruments, knowledge base and performance in international fora.	Well integrated, adequately resourced negotiating teams with multi-stakeholder representatives armed with solid information, sector knowledge and competition's SWOT.

1.5.2: Capacity Building: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) Value chain and scale integrated business models designed, implemented, supported to maximise business growth, job creation, SMME and BEE development.	(a) Identify potentials and opportunities for such business models in specific product clusters	(a) Lead agent: : Department of Agriculture • Labour • Civil Society • Business	(a) At least 10 business opportunities identified within two months	(a) Written reports of business opportunities submitted to Agri Steering Committee.
	(b) Conduct business feasibility studies for business opportunities identified	(b) Lead agent: : Department of Agriculture • DEDT • Business • Labour • Civil Society	(b) At least 10 business plans completed within six months	(b) Business plans submitted to Agri Steering Committee.
	(c) Design institutional arrangements for each scale-integrated business Model identified highlighting SMME, BEE, skills development and job creation components	(c) Lead agent: : DEDT • Labour • Civil Society • Business	(c) At least 4 institutional business models designed within eight months	(c) Institutional models discussed, documented and submitted to Agri Steering Committee
	(d) Business models selected, resourced, field-tested / piloted and monitored	(d) Lead agent: : Government • Labour • Civil Society • Business	(d) At least 5 pilot business models which create at least 300 jobs implemented with support and monitoring services in place within nine months	(d) Progress reports • Monitoring reports • Site evaluations
2) Agriculture and Agri-business fully integrated in local and district IDPs and LEDs	(a) Identify social, infrastructural and economic opportunities that strengthen the competitive base of Agriculture and Agri business	(a) Lead agent: : Government • Business • Labour • Civil Society	(a) At least 5 opportunities identified in each pilot district selected by 30/05/05.	(a) Written documentation of opportunities identified submitted to Steering Committee
	(b) Feasibility studies conducted of opportunities identified	(b) Lead agent: : Department of Agriculture DEDT	(b) At least 5 feasibility studies completed per pilot district by 31/07/05	(b) Feasibility studies documented and submitted to Steering Committee
	(c) Feasibility studies translated in sector programmes for business development with equity, job creation, skills development programmes	(c) Lead agent: : Civil Society Labour	(c) At least 5 sector projects which create at least 300 jobs per pilot district designed and completed by 30/09/05	(c) Sector projects documented and submitted to Steering Committee
	(d) Sector programmes integrated, resourced, implemented and monitored within IDPs and LEDs of local and district municipalities	(d) Lead agent: : Government • Civil Society • Labour • Business	(d) At least 5 sector projects integrated and implemented within IDPs and LEDs of each pilot districts by 31/10/05	(d) IDPs and LEDs • Progress reports • Monitoring reports. • Site evaluations

SCHEDULE TWO

2.1 LAND REFORM AND AGRI- BEE

2.1.1: The Provincial Land Reform Framework: Strategic Dimensions Profile

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
(a) The transfer of land to previously disadvantaged communities is problematic (b) There is a high institutional failure to implement land reform projects – DACs (c) State and institutional land need to be audited (d) There is insufficient funding to fully implement the programme (e) There are no precise guidelines to follow with respect to the land reform programme and the principles of the land reform programme are not included in the policy	(a) Inadequate land with water at an affordable price available on the market (b) Skewed local authorities prioritisation of land use - housing vs. agriculture (c) Lack of funds, LRAD, CASP have budget constraints, (d) Lack of capacity to conduct land audit (state) (e) Absence of identification process guidelines for land and people to be empowered (f) Land with	(a) Housing needs shown / projected as need for land (b) Housing on good agriculture land (spatial plans) (c) Inadequate support systems, extension services and mentorship (d) High prices only affordable to privileged few and foreigners (e) Prices force projects to include too many people – numbers needed to meet required price (f) State funding usually tied to person and not project requirements (g) High expectations (all role-players and stakeholders) (h) Consultancy fees and sustained commitment to projects	(a) Research to distinguish the need for housing and land (b) Spatial plan involvement (c) Increased extension services (d) Skills improvement (e) Private mentorship (f) Building database, including land audit on all land (g) Unique funding more project related, foreign capital (h) Qualifying willing buyer -seller principle without changing the principle (i) Land and water linkages – high potential small land with water	(a) Influence spatial plans to reserve high potential land for agriculture (b) Extension officers trained and employed (100) 2005 (c) Audit privatised and completed 2005 (d) Database updated yearly (e) Accreditation for mentors 2005 (f) Window of opportunity regarding forced sale of land introduced by 2005 (g) Mentorship tasked with comprehensive skills improvement programme (h) Affordable consultants (i) Committed consultants – to be monitored (j) Speed up DAC processes (k) Unique funding

2.1.2: The Provincial Land Reform Framework: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) Suitable and high potential land for Agriculture should not be unduly utilized for other purposes	Local forums - IDP, LED, labour, farmers and civil society should mandate people to sit on the local authorities' decision making bodies that deal with spatial planning	All social partners should mobilise their constituencies	(a) Meeting minutes (b) People should sign attendance registers	(a) Signed database of people partici-pating in the programme. (b) Accurate records of decisions taken, adopted and rejected over a period of time
2) 100 full time extension workers trained during 2005 with appropriate and sustainable mentorship programmes in place	(a) Liaison with the provincial Department of Agriculture and secure the actual figures for mentors targeted and the criteria for selection and support. (b) Designing the specifications of the mentorship programmes, the accreditation process and remuneration (c) Identification of potential farmers and workers to enroll for the programmes (d) Lobby the MEC for Agriculture to revise the law on mentorship programme	(a) Lead agent: Government (PDA) will obtain the required information and present it to social partners (b) Provincial Dept. of Agriculture, Business and Civil society	(a) Progress report from government, specifying the business plan, type of courses (b) Finalized programme	(a) The document should be tabled within six months (b) Social partners sign off the programme
3) Comprehensive audit of private and institution(s) owned land and an updated database presented yearly	(a) Identify the agency / institution conducting the audit • Information on private land audit should made available • Information on tender specifi-cations and the budget should be accessible and the task team should give input to the process (b) Liaison with the Provincial Department of Agriculture and Land Affairs	Lead agent: Department of Land Affairs, business and civil society to contact the relevant departments and get the information	(a) Report and results of the audit work private, institution and state land. (b) An updated database	(a) Social partners report on their liaison activities with the agencies conducting the audit work (b) An updated database should be presented to the social partners every year

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
4) Affordable and committed consultants	Mentors should structure the requirements and pricing levels for consultants' work	Lead agent: : Government (PDA) and accredited mentors	All identified projects should be availed to the social partners. They should include cost structures and performance indicators	Signed document(s) outlining the agreements involving social partners, mentors and consultants with regard to the project/programme specifi-cations
5) Accelerated approval of projects by	District Assessment Committees Development of a process to accelerate the evaluation and approval of business plans (a) Identify more qualified individuals or train more people to evaluate DAC projects (b) Identify consultants to undertake the work where necessary	Provincial Department of Land Affairs	On going monitoring of the number of approved projects over a specified time frame	Reports and minutes to be tabled to the task team from DACs
6) Unique funding vehicle established • International funds sourced • Fully functional Agriculture Credit Body	Develop mechanisms to use the proposed Credit Control funds to start projects and save existing projects that may be disintegrating (a) Funding should be project based (b) Provide loans and grants where possible	• The Provincial Department of Agriculture is already working on the Agriculture Credit Board facility proposals • Department of Land Affairs	Progress report should be presented to the task team by February 2005	Social partners study the progress report

THE AGRICULTURE AND AGRI-BUSINESS SECTOR OF THE WESTERN CAPE

2.2: LAND TENURE AND FARM WORKERS

2.2.1: Land Tenure and Farm Workers: Strategic Dimensions Profile

ISSUES /DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
Key challenges on Land Tenure and farm workers/ families (a) Absence of farm workers at crucial meetings (b) Absence of farm worker representatives, excluding unions, on decision making bodies (c) Security of Tenure Act is problematic, costly (ESTA) (d) Poor dissemination of information (e) Absence of awareness campaigns on farming communities (f) Inadequate housing provision and the quality of houses (g) Adapting housing for agri-tourism (h) Demolishing of housing on certain farms (i) High number of evictions especially pensioners	(a) Farm workers in key positions have difficulty taking leave to attend meetings (b) Transport expensive and not readily available to attend meetings (c) Lack of communication (d) The ESTA Act is problematic (e) Housing programmes only in towns and too slow (f) No houses being built on farms (g) Existing houses not kept up (h) Too few representative organisations (i) Poor provision of social services to farm workers (j) Workers who go on early retirement before the age of 60 are not catered for by the farmers	(a) Farm worker voice is not heard, inputs not made (b) Farm worker representatives not properly mandated (c) Political instability because of shortcomings in ESTA (d) Cost of applying the ESTA Act - not affordable (e) People without housing - informal settlements not planned - uncoordinated (f) All pay threat to work stability and productivity (g) Less housing available for workers (h) Uncontrolled people influx to Western Cape (i) Most early pensioners are homeless	(a) Establish central trust fund (Agri-SA) to empower farm workers to attend and serve (b) Amend ESTA Act (c) Use LED's to access social services (d) Workshop All Play principle to farm workers (e) Tax reductions for farmers who built houses on farms (f) Agri- villages, also within boundaries of existing towns (g) Enhance ABET (h) Introduce mentorship programmes (i) Transformation of organized Agriculture - inclusive of stakeholders (j) Assist neighbouring provinces' programmes to slow people influx into Western Cape (k) Agri-BEE could be enhanced and promoted	1) Comprehensive farm worker attendance and participation 2) Mandated farm worker representatives on decision making bodies 3) Employers not liable for costs of farm worker participation 4) Fair and affordable ESTA Act 5) Advancing housing programme 6) Rezone policy on agri-tourism housing 7) Information made available comprehensively 8) Farm worker representative bodies established throughout province 9) Above bodies functioning and delivering successfully 10) Farming communities involved at LED's (needs listed and included in planning

2.2.2: Land Tenure and Farm Workers: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) Comprehensive farm workers attendance and participation. They have to be mandated by their constituencies	(a) Educate farm workers, managers and farmers to attend meetings on farms and outside their farming communities (b) Organise communication networks with farm worker's representatives (c) Development of a viable communication strategy	Lead agents : Department of Agriculture , Land Affairs and local government • Business • Labour, Civil society and co-opted attendants	Attendance registers and the number of sectors represented. • Tenders for roll out programmes	Progress report presenting comprehensive account of the verifiable indicators should be presented to the Steering Committee
2) Employers should not be liable for costs of workers attending meetings	A trust fund should be established by 2005 Employers should be reimbursed for expenses incurred as a result of workers attending these meetings	Lead agent: Department of Agriculture assisted by the three social partners (civil society, labour and business)	The establishment of a trust fund by Department of Agriculture	Claim forms signed by the mandated people attending the meetings
3) Fair and affordable ESTA Act ESTA Act should protect the rights of people who have lived and worked on farms or a group of farms continuously for a period of 15 years, but who have not reached the age of 60.	Lobby the relevant Provincial and National government to have the Act amended	Lead agent: Business and social partners	Action minutes and decisions taken.	Amended ESTA Act
4) Adequate provision of social and physical infrastructure (Homes/ houses and roads networks)	Social, physical infrastructure audit of farm-worker households' needs completed	Lead agent: Department of Social Services and Housing • Civil society, labour and business	Needs assessment and feasibility studies of farm-worker households completed within six months	Needs assessment and feasibility study documents
5) Rezoning policy should be applied for agri-tourism businesses and farm workers houses should not be converted to tourism without adequate provision of houses or mutual agreement	(a) Workshops be conducted with workers and farmers to ensure that there is mutual understanding on the issue (b) Feasibility studies and consultation with stakeholders be done to ensure that Agri- Tourism ventures are sustainable and worker rights to housing are not compromised	Lead agent: Government (PDA), DEAT, DEDT • Labour and Civil Society	Workers are not evicted from houses on farms rezoned for tourism without an agreement/ or proper compensation in place.	Rezoning policy on Agri Tourism accommodating the farm houses issue

2.3: AGRI- BEE

2.3.1: Agri- BEE : Strategic Dimensions Profile

ISSUES \ DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1) Procurement and equity	Reluctance from white business to procure from black business	Relative lack of successful BEE business results to showcase	Established white business to transform by practicing BEE Create new businesses using BEE as departure	Successful BEE businesses
2) Skills transfer and mentoring	(a) Lack of skills and training of employees by stakeholders in the established businesses (b) Absence of professional mentorship programmes	(a) Shortage of trained workers leads to poor market performance (b) High failure rate of new farming enterprises	Speed up skills improvement through mentorship programmes, such as ABET	(a) Fully institutionalised mentorships policy (b) Realistic turnover expectations (c) Competitive edge in global market - new value added products for Europe (d) Farming and farm work acknowledged as a career
1) Broad based economic empowerment (BEE)	(a) Too few successful BEE companies from which to procure goods and services (b) Incomplete Agri-BEE framework document (no charter yet to bind stakeholders) (c) Skewed BEE implementation (Majority of BEE transactions benefit select same few elite)	(a) Time taken with Agri-BEE document to become a charter deters stakeholder commitments (b) Quality and price of commodities deters buyers (c) Illiteracy and ignorance of stakeholders on BEE benefits	(a) Address time problems by prioritising as critical work done in BEE field (b) Expand extension services in BEE area (c) Policy on qualifications and criteria need to be clarified to broaden empowerment ventures (d) Marketing of BEE as a Fair Trade mechanism (e) BEE could be a new addition to the Proudly South African campaign (f) PPP information workshops on BEE in rural areas	(a) Ample workshops within reach of stakeholders to inform them about the benefits of real empowerment (b) Sustainable Agriculture (c) Empower those who are working on farms to be co-owners and retain jobs

Continued from page 42 – 2.3.1: Agri- BEE : Strategic Dimensions Profile

ISSUES \ DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
4) Start up capital and production capital, public private partnerships and loans and grants	(a) Perceived financial risk by financial institutions to emerging farmers (b) Inadequate support from government with respect to the provision of start up and operational capital (c) Investments (d) Inadequate grants and poor access to loans (e) Lack of Private Public Partnerships policy	(a) Inadequate capital may derail land reform policy (b) Too small grants cause "rent a crowd" (c) Uncertainty on loans and grants provision	(a) Establishment of state agencies to provide more loans and grants (b) PPP ventures involving Land Bank, financial institutions, government and emerging groups. (c) New unique capital fencing and supply mechanisms by budget control.	(a) Fully operational Agriculture Credit Board providing loans and grants (b) PPP policy on financial investment (start up and operational capital should be ring fenced)
5) "Rent a crowd"	Too many people being settled on single farms without adequate feasibility studies done	Food security may be compromised	(a) Strategic intervention programmes by Department of Agriculture may curb failures (b) Fewer people per project	Food security should not be compromised.
6) Framework and the charter and employment equity schemes	Timeframe for charter unspecified	(a) Quick fixes (policy vacuum) (b) Mismatch between Political and economic drive for BEE (c) Political stability jeopardised if failures are race perceived (d) Acceptability of charter still debatable.	(a) Transform farm work to become a profession. (b) Acknowledge contribution of commercial Agriculture (c) Expanding the market requires improvement of infrastructure, e.g. transport to deliver goods (d) Charter creates growth not threat	(a) Increased jobs and "better" working environment (b) Improved understanding of agri economics (c) To meet targets of charter (d) To retain commercial farmers and make them feel needed

2.3.2: Agri- BEE: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) Successful Agri-BEE businesses	(a) Training of farmers and farm workers and other role players to understand the importance of Agri BEE (b) Development of database of all BEE suppliers. Branding of locally produced products - recognition of products and development of trademarks (identification)	Lead agent: Government (PDA) • Registered training authorities • Agri-businesses and industry groupings	(a) Audit reports on farmers who procure locally (b) Trademark and branded local goods on the market (c) Data base of BEE companies supplying goods and services (d) Database of trained farm workers	Number of accredited stakeholders on the BEE score card for fulfilling these requirements
2) Sustainable agriculture production	Lobby policy makers to ensure that: (a) Not too many people are settled on one farm (b) Feasibility studies on new farms are done (c) There are sustainable financing mechanisms - loans and grants (d) "Subsidised" loans with interest-free periods and (e) Central loan fund for empowerment for purposes created	Lead agent: Business • Labour • Civil Society • Agriculture Credit Control Board	(a) Details of Policy (b) Green paper	The creation of a soft loan fund and finalisation of the % amount to be deducted from every farm sold. This does not include farms transferred from father to child
3) More jobs created and retained in the value chain industries	Measure success rate of projects in the value chain by means of audit and research	Lead agent: Government (PDA), DEAT and PLAAS	Audit report on project's success, failures, gaps and the number and types of sustainable jobs created	Tabled reports
4) Empower those who are working on farms to be co-owners	(a) Identification of suitable beneficiaries - proper business plans (b) Ensure that DACS include shareholding criteria in their prioritisation models	Lead agent: Department of Land Affairs • Agri businesses • Labour	Verifiable indicators : (a) Reports from DACS (b) Reports from government Scorecards from all stakeholders	Submitted annual progress reports from all stakeholders to the PDC

2.3.2: Agri- BEE: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
5) PPP policy on financial investment and fencing of capital (start up and operational capital)	Lobby with private financial institutions and government to provide start up capital. Liaise with banking council. Invite them to report back to the Specialist Committee (economics). Seek aid from foreign donors	Lead agent: Organised Agriculture, including business, Steering Committee	Database of Agriculture SMME's, BEE's beneficiaries	Report from the Banking Council outlining progress and gaps
6) Agriculture BEE ventures must not compromise food security	Ensure that any BEE program addresses the issue of food security by improving production and supply of food	Lead agent: Steering Committee (4 social partners)	Statistical comparison on food security status quo after the implementation of the Agri-BEE ventures in food production	Statistical comparison report
7) To retain commercial farmers and make them feel needed	Guarantee security of ownership - convene an Indaba (a) Improve relationships/attitudes (farmers, unions) (b) Establish joint ventures and farmers who comply with BEE criteria must be accredited (c) Encourage the utilisation of successful farmers as mentors to assist emerging entrepreneurs	Lead agent: Government (PDA) • Dept of Land Affairs • Three social partners	(a) Scorecards (b) Results of implementation (c) Data base of joint ventures formed (d) Mentors appointed and Annual Reports	Annual progress reports
8) Research on the sustainability of golf estates as empowerment vehicles	Ensure that the creation of golf estates accommodate Agri BBEE imperatives	Lead agent: Government (PDA) Business	Framework document outlining the requirements for sustainable and empowering golf estates and other exclusive recreational facilities	The policy document to guide the creation of golf estates and BEE imperatives in the projects

SCHEDULE THREE

3: HUMAN RESOURCE, SOCIAL DEVELOPMENT AND FARM WORKERS

Strategic Results and Interventions

3.1.1: Human Resource, Social Development and Farm Workers: Strategic Dimensions Profile

DIMENSIONS /DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1) Farm Schools	(a) Lack of sport and recreation (b) Poor quality of education (c) Bad infrastructure (d) Lack of transport (e) Lack of safety (roads, busses) (f) Ownership of schools (g) Lack of finance	(a) Antisocial behaviour and delinquency (b) Road accidents (c) Absenteeism from school	(a) Creation of morally responsible citizens (b) Reduction of road accidents Employment and Growth (c) Farmer involvement	Building a knowledgeable and skilled society with strong leadership that utilises its environment in a sustainable manner
2) Recognition of prior learning	(a) Non recognition of experience (b) Poor assessment criteria (c) Group in SETA processes (d) Functions of SETAs (e) Unit standards not in place (f) Lack of financial resources	(a) Wasted skills (b) Poverty cycle (c) Poor career pathing (d) Industry stagnation	(a) Development of human resources and sector (b) Improved productivity	Developing a positive, committed and satisfied workforce through acknowledging the capabilities workers accumulated over the years for the development of a competitive industry
3) Skills training and learnerships	(a) Funds for training (b) Lack of manpower (c) Legislative shortcomings (d) Administrative support and red-tape (e) Women (gender) discrimination (f) Lack of accredited service providers (g) High end and low end skills are not being developed by support service institutions	(a) Attitude problems (employer) (b) Alcohol abuse syndrome (c) Low life skills (d) Imbalance between hard and soft skills (e) Fear for the unknown (f) Fear for peer prejudice (bias) (g) Scarce skills are lost to the sector	(a) Upward mobility (b) Culture of skills development and life long learning (c) Improved productivity and competitiveness (d) Develop educational, skills training and RPL programmes. (e) Develop career profile and career mobility packages to retain, attract and grow the HR pool for the entire value chain	(a) Ensuring workers become assets to the industry that could compete globally. (b) Attractive jobs and career paths within sector backed by skills training support services with post-training mentoring, coaching, career counselling provided.

DIMENSIONS /DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
4) HIV/Health	(a) Access to primary health care (distance) (b) Lack of transport (c) Lack of knowledge (d) Poverty Syndrome (e) Lack of parental skills (f) Lack of recreation programmes	(a) Unproductive people (b) Burden on state and society (c) Alcohol and drug abuse (d) Early school drop-out (e) Broken family structures (f) Orphans	(a) Educational programmes, awareness (b) More responsible citizens (c) Health conscious society (d) Improved morals (e) Access to health	Establishing a systematic health system and conscientious farming community to ensure a better work environment.
5) Legislation	(a) Ignorance with respect to rights and obligations (b) Non compliance (c) Unilateral decision making (d) Lack of consultation with respect to legislation (e) Flawed processes (f) Poor protection under legislation (g) Party political differences hampers legislative policy implementation (h) Lack of enforcement of rights	(a) Relationship between employer/ee strained (weakened relations) (b) Attitudes lead to breaking down of legislative requirements (c) Foreign owners' lack of understanding of South African farming culture	(a) Improved social relations and nation building	(a) Development of a democratic environment (b) Better relationship and nation building
6) Tenure reform and security	Social insecurity	(a) Relationship between employer/ee strained (weakened relations) (b) Attitudes lead to breaking down of legislative requirements (c) Foreign owners' lack of understanding of SA farming culture	(a) Development of a democratic environment (b) Better relationship and nation building	(a) Development of a democratic environment (b) Better relationship and nation building
7) Awareness / Communications	(a) Language differences : Xhosa / Afrikaans (b) Illiteracy (c) Ignorance of laws (d) Legal jargon not simplified (e) Lack of communication centres	(a) Relationships breakdown (b) Fear for prosecution (c) Un-and-ill-informed communities	(a) Create services centres to enable people to understand their rights and responsibilities (b) Lead to job creation	(a) Establishment of services centres to inform people and enable them to understand rights and responsibilities (b) Lead to job creation

3.1.2: Human Resource, Social Development and Farm Workers: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) An informed and knowledgeable Agriculture sector where the rights of all, especially disadvantaged groups, are protected	a) Facilitate the establishment of community based resource centres with appropriate resource materials in farm-worker communities. b) Provision of quality education, perspective of farm-schools and policy on transport	Lead agent: Government (PDA) Civil Society, Business and Labour	At least 10 easily accessed, user friendly farm-worker resource / communications centres are piloted and replicated within one year	(a) Programme reports (b) Site evaluations
	(a) Training of Farm-worker representatives and support in the running, administration and management of these resource centres. (b) Bringing PAETA SETA and Service Providers on board	Lead agent: Labour and Business • Civil Society • SETA	• At least 80 persons from farm-workers communities trained and implementing training within 18 months of start of programme.	(a) Training reports with attendance registers. (b) Quarterly Progress reports
2) Attractive jobs, career paths and business opportunities in agriculture. Value chain and related services identified, documented, supported and marketed	(a) Programme of information workshops and seminars with farm-worker communities is designed, implemented and monitored. (b) Linking skills needs with provision of learnerships	Lead agent: Civil Society, Labour and Business • Government • SETA	At least 10 workshops / seminars per year are held in each district	Workshop / seminar reports with attendance registers Quarterly progress reports
	(a) Compile occupational profile of sector by skill clusters, skills deficits and strategic career opportunities . (b) Identify, profile black farm managers and other PDI strategic functionaries	Lead agent: Department of Agriculture • Business • Labour	High level profile of occupational clusters with employment numbers completed within three months	Skills and occupational profile document completed
	(c) Identify training needs of strategic and generic job clusters at both high, middle and low ends of sectoral labour market.	Lead agent: Business • Civil Society • Labour • Government	High level profile of sectoral training and educational needs completed within six months	Educational and training needs document completed
	(d) Identify training opportunities, training and educational courses, as well as institutional gaps in the training and educational fields.	Lead agent: Government (PDA)	Training and educational opportunities, courses and funding sources/budgets completed within eight months	Educational and training courses, institutions and budgets documented and disseminated
	(e) Design training, educational and learnership interventions which will enhance the sector's competitiveness, equity profile and human resource skills base	Lead agent: Labour Government (PDA) Civil society Business	At least 10 interventions identified and documented within nine months	Programme of education and training interventions documented and disseminated.

3.1.2: Human Resource, Social Development and Farm Workers: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
3) Farm-worker households enjoy security of tenure and a good quality social environment	(a) Facilitate tenure security for farm-worker households with good quality recreational, social and sports amenities / facilities. (b) Review of tenure security legislation and policy to counter existing loopholes and practices (c) Farm-worker households, civic, social and recreational organisations facilitated, established and functioning well.	(a) Lead agent: Government (PDA) • Civil Society • Labour • Business (c) Lead agent: Civil Society • Labour • Business	(a) Agri-village sites and facilities comply with the residential, social and recreational needs of farm-worker households (c) Local and district farm-worker civil society organisations established within one year	(a) Physical infrastructure, social plans and progress reports (c) • Workshop reports with attendance registers. • Progress reports. • Minutes of meetings
4) Farm-worker households and communities enjoy a safe and healthy social environment	(a) Farm-worker households and communities provided with basic infrastructure and clean, healthy environment and obtain similar subsidies as urban dwellers (b) Farm-worker households provided with affordable and appropriate social services (c) Safety, security and human rights of farm-worker communities protected, enforced and monitored (d) Training of volunteer workers (auxiliary / lay workers) to form safety nets / support services	(a) Lead agent: Government (Local Government) • Civil society, labour and business (b) Lead agent: Government (Department of Social Services) • Civil society, labour and business (c) Lead agent: Civil Society • Labour • Business • Government	(a) Infrastructure and environmental programme designed, implemented and monitored (b) Basic social services plan for farm-worker communities designed, implemented and monitored. (c) Rights based programme for farm-worker communities designed, implemented and monitored	(a) Infrastructure and environmental plan and quarterly progress reports (b) Social services plan and quarterly progress reports (c) • Workshop reports with attendance registers. • Progress reports. • Case studies of bad and good practices

SCHEDULE FOUR
RESEARCH AND DEVELOPMENT

4.1. INNOVATION, NEW OPPORTUNITIES AND INDUSTRIES

4.1.1: Innovation, New Opportunities and Industries: Strategic Dimensions Profile

DIMENSIONS /DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1) Support of innovation within Agriculture research	Lack of capacity to do basic research and applied research - no time for innovation	New inventions will be lost	Support innovation with a dedicated innovation fund where scientists are invited to “innovate”	New and applicable technology obtained by dedicated scientists in an innovation-supporting environment
2) Establishment, expansion and support of centres of excellence	Lack of human capacity and funding Networking not sufficient to align focus within a discipline	Research institutions will become “generalists” with no specific depth within a discipline	Refocus research efforts to obtain “center of excellence status”	Focussed groups of scientists within an institution delivering an service of excellence, based on good science
3) Establishment, expansion and support of selected incubators	Lack of focus to identify specific incubators	Incubators might be established by international role-players with own agendas	Select incubators to the benefit of Agriculture in the Western Cape	Successful incubators for specific crops/disciplines to the benefit of Agriculture in the Western Cape
4) Explore new areas of research (for example: Biotechnology Genebanks / IP protection, Remote sensing)	Lack of capacity/facilities without scientists/lack of focus/lack of funds to start new programmes /drives	SA is staying behind in its progress in these areas - technology becomes outdated	Leverage of funds and initiatives to get these areas explored and implemented to the benefit of Agriculture in the Western Cape	Exploring new areas of research to stay abreast with international trends to the benefit of Agriculture in the Western Cape

DIMENSIONS /DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
5) Implementation of research results and adaptation of existing technology for custom-made operations	Inability or lack of commitment to convert the research rand into an information rand	Research results are not making a difference on grass roots level - only scientific and academic exercise	Lever a concerted effort to transform scientific results into information and drive a dedicated process of technology transfer and implemen-tation	Constant flow of information from the generators of information (scientists) to the end-users (producers, irrespective of scale)
6) Explore new niche products in support of new agri-business (persimmons, indigenous plants, i.e. buchu)	Various aspects of the crop need to be researched/lack of funding/lack of buying from role-players in terms of the need for a new crop	Niche products are not explored and opportunities lost	Lever funding and interest in new crops to the benefit of specifically beginner farmers producing in limited quantities	Exploitation of new and indigenous crops through intensive research efforts as a basis of new agri-businesses
7) Explore and expand upon international networks for funding and collaboration	Networks based on collaboration and not consortium forming for funding	Other countries could sign agreements for funding, whereby SA is not in the picture	Expansion of limited SA research funds	To establish an international research network for collaboration and funding

4.1.2: Innovation, New Opportunities and Industries: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) New and applicable technology obtained by dedicated scientists in an innovation-supporting environment	(a) Develop research models within all institutions involved in research and development in the Western Cape (b) Creating an innovation-supporting research environment (c) Linking needs from the farming community with the research programmes of institutions	Lead: Tertiary institutions, Government (PDA) Supporting: Other research bodies, i.e., Agricultural Research Council	(a) Measure outcomes (impact on community, farming, etc.) (b) Measure outputs (publications, patents, etc.) (c) Measure against international standards and norms	(a) Progress reports, summary of outcomes and outputs, reporting back at forums, task teams, etc.
2) Focused groups of scientists within an institution delivering service of excellence, based on good science	(a) Attract and appoint young researchers and build their careers (b) Linking of focus areas with needs within Agriculture (c) Capacity building within research institutions	Lead: Tertiary institutions, Government (PDA) Supporting: Other research bodies, i.e., Agricultural Research Council	(a) Measure outcomes (impact on community, farming, etc.) (b) Measure outputs (publications, patents, etc.) (c) Measure against international standards and norms (d) Measure against international networking frameworks.	(a) Groups of experts (centres of excellence within institutions and consortium forming between institutions
3) Successful incubators for specific crops /disciplines to the benefit of Agriculture in the Western Cape	(a) Identify incubators of importance to the Western Cape (b) Determine centre of excellence where incubator should be housed (c) Develop business plan for each incubator	Lead: Tertiary institutions, Government (PDA) Supporting: Other research bodies, i.e., ARC	(a) Writing of business plans for incubators (b) Implementation of incubators in a focussed way	(a) Measuring success of incubators against set objectives and impact on Agriculture (b) Measure against technology developed, jobs created and establishment of new Agri-businesses
4) Exploring of new areas of research to stay abreast with international trends to the benefit of Agriculture in the Western Cape	(a) Stay informed on international developments and new areas of research (b) Proactive search for new areas and crops with potential in Western Cape (c) "Feeding" from incubators set up in the Western Cape	Lead: Tertiary institutions, Government (PDA) Supporting: Other research bodies, i.e., ARC	(a) International networks (b) Focussed forums for identification of new crops and research fields	(a) Successful introduction of new areas - verification with outcomes and outputs

4.1.2: Innovation, New Opportunities and Industries: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
5) Constant flow of information from the generators of information (scientists) to the end-users (producers, irrespective of scale)	(a) Focused efforts to "pack" scientific information into "bite-size" packs for end-users (b) Implementation of information networks - researcher to extension officers to farmers	Lead: Tertiary institutions, Government (PDA) Supporting: Other research bodies i.e., ARC	(a) Successful conversion of research rand into information rand (b) Measurable impact on farm level with implementing of new technologies via info packs	(a) Monitoring reports (b) Report back for farming groups
6) Exploitation of new and indigenous crops through intensive research efforts as a basis of new Agri-businesses	(a) Identify stakeholders (b) Identify crops with commercial value (c) Identification of research consortia for focussed efforts on new crops	Lead: Department of Water Affairs and Forestry, Tertiary institutions, Government (PDA) Supporting: Other research bodies, i.e, ARC, Department of Economic Affairs	(a) At least 5 new crops investigated for potential and setting up of research groups to focus on exploitation	(a) Successful start-up businesses based on new crops research (b) Empowerment of beginner farmers (setting up of nurseries, etc.)
7) Explore and expand upon international networks for funding and collaboration	Linking national centres of expertise to international centres of expertise	Lead: Tertiary institutions, Government (PDA) Supporting: Other research bodies	Increase in consortia forming and levering of external international funding	Progress reports in terms of collaboration and funding and signing of agreements

4.2.: INFORMATION

4.2.1: Information: Strategic Dimensions Profile

DIMENSIONS /DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1. Availability of readily available measurable parameters to aid sound decision-making in Western Cape Agriculture	(a) Various stakeholders have access to parameters which are not shared • At micro-level, farmers do not acknowledge the need to share their information with stakeholders • Stakeholders who provide data and information seldom get recognition or feedback • The confidentiality of data is not always guaranteed	(a) A lack of measurable parameters will lead to poor decision-making at micro, macro and policy-levels • Potential suppliers of data may distrust the rationale behind the process • Given data / information / parameters may threaten the guaranteed confidentiality of individuals and groups • Inaccurate and unverified data and information may be sourced • Poor communication and in some cases trust amongst stakeholders (government institutions, agribusiness and organised Agriculture)	(a) Agriculture has a wealth of information and data to be accessed • The Department of Agriculture has structures in place to store data and information (specifically with reference to Geographical Information Systems (GIS) capacity) • Various government departments and organised Agriculture groups have access to some data and information • Information technology makes access to data and information more accessible and affordable	(a) Co-ordinated sharing and trusting of verified, timely and accurate data and information amongst all stakeholders
2. Marketing	(a) There exists a lack of affordable and accessible accurate marketing information on Agriculture products, especially new products and niche markets. Consumer preferences and comparative information on competitors are lacking.	(a) The Western Cape lacks human capacity with marketing skills • Access to marketing information is lacking • Affordability is a problem • Dissemination is problematic especially to the emerging farming communities, resulting in farming being supply-driven and not demand-driven	(a) All Agriculture industries need competent marketers and need to invest in them. • Tertiary institutions are putting more emphasis on marketing courses, as the employment market demands it.	(a) Marketing intelligence should be readily available and affordable to the whole Agriculture community in order to remain competitive, specifically focussing on consumer and competitor studies

4.2.2: Information: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
(1) All Agriculture stakeholders buy into the sharing of identified data, thereby providing access to reliable information that will aid sound Agriculture decision- making	(a) Identify social, economic, environmental and infrastructural data needs	• Government (PDA) • Business • Labour • Civil Society • Tertiary institutions	(a) At least 5 data indicators of each data set (Economic, social, ecological and infrastructural/ technological) - to include: farm numbers, ownership demographics; employment statistics; development and HIV/Aids data	(a) Feedback to involved communities and cross-check with Statistics South Africa Utilization of data in Agriculture studies (i.e. Impact of technology on employment)
	(b) Source the goodwill of role players to provide the data and information	• Government (PDA) • Business • Labour • Civil Society • Tertiary institutions	(b) Measure levels of co-operation of areas and industries in providing data - identify and list limitations	(b) Compare with Statistics South Africa and other statistics to determine levels of participation in percentage. Compare participation Annually
	(c) Identify a one-stop base / agent who will take responsibility in maintaining these data	• Government (PDA) • Business • Labour • Civil Society	(c) Number of signatories to terms of Agreement document	(c) Compare levels of participation across Agriculture areas and industries
	(d) Source and ensure the confidentiality of data	• Government (PDA) • Business • Labour • Civil Society	(d) Get statistics of each farm and farmer in the Western Cape (annual 100% census) on spatial base - 20% of farms per year	(d) Compare levels of participation across Agriculture areas and industries; cross-check with industries and organized Agriculture
2. Facilitate and encourage marketing agencies to make market intelligence available and affordable to all	(a) Research contract agreements between producers and merchants with specific reference to origin concepts, certification and regulation systems, pricing systems, label economics, marketing strategies, BEE and land reform, differentiation studies, scenario models and competitive analysis	(a) • Government (PDA) • Business • Civil Society • Tertiary institutions • International organizations	(a) Dedicated industry studies per annum funded by Agriculture industries.	(a) Business plans, enterprise budgets, workshops, farmer days, post-graduate studies, radio talks

Continued from page 55 4.2.2: Information: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
3. Macro-economic model that models the Western Cape economy, linked to other regions will enhance sound macro - Agriculture decision making.	(a) Establishment of macro-economic model with the aid of dedicated human expertise	• Government (PDA) • Business • Labour • Civil Society • Tertiary institutions	(a) Establishment of dedicated unit and 5 annual studies on macro-economic impacts Information dissemination sessions with interested parties annually	(a) Number of dedicated personnel involved with macro-economic modeling Number of workshops and courses rolled out to business and interested parties
	(b) Sourcing macro-economic issues to be researched with specific relation to taxation forms, interest rates, state of intervention, minimum wages, exchange rate, trade-barriers (tariffs and non-tariffs), water prices, etc.	• Government (PDA) • Business • Labour • Civil Society • Tertiary institutions	(b) At least 5 impact studies annually, all determining impact on households	(b) Impact studies documented and submitted to reference groups - information sessions to be held with all relevant parties
4. Integrated, adequately resourced negotiating teams with multi-stakeholder representatives armed with solid information, sector knowledge and competition's SWOT.	(a) Disseminate information on WTO agreements and its implications to local Agriculture - rules, outcomes of negotiations, new market opportunities, competitors, trade patterns, production changes, demand shifts, regional agreements (Southern African Customs Union / Southern African Development Community)	• Government (PDA) • Business • Civil Society • Labour - Tertiary institutions	(a) Annual Agriculture summit to consider Macro-economic impact studies	(a) Workshops; peer review at conferences
	(b) Establish co-ordinated well equipped negotiating teams to enhance local industry's competitiveness	• Government (PDA) • Business • Labour • Civil Society	(b) Annual training programme Quarterly collaboration between Government and stakeholders	(b) Success rates of opening of new markets; improved trade figures


THE AGRICULTURE AND AGRI-BUSINESS SECTOR OF THE WESTERN CAPE

4.3: CAPACITY BUILDING

4.3.1: Capacity Building: Strategic Dimensions Profile

ISSUES	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1. Provide enough Mentorship in the field of Research and Development	(a) Not enough mentors (b) Inadequate training (c) Accreditation (d) Formal structure (e) Lack of career planning for new entrants (f) Lack of culture of mentorship	(a) Students do not complete studies / training (b) Credibiity of mentors (c) No practical experience (d) Losing young trainees	(a) Use Honours or Masters students, retired or current farmers, retired and current researchers and all available experience as mentors (b) Create mentorship programmes (c) Fast track training through experience (d) Accreditation of mentors (e) International linkages	(a) Provide adequate well trained, accredited mentors (b) Well functioning legislative system of contracts to keep a good inventory of mentors
2. People and Facilities	(a) Lack research skills and training (b) Unsatisfactory remuneration (c) Working conditions - too little individuals employed to do too much work (d) Expensive equipment (e) Lack of focus (f) Lack of research culture	(a) People not attracted to work in this sector (b) Image of research. (c) ARC decision making (d) Lose existing knowledge	(a) Use existing facilities in new ways (b) Look at cheaper alternatives for equipment used (c) Outsource (d) Create innovative supporting structure (e) Build capacity	Researchers with sufficient research skills and training working in good working conditions with required equipment.
3. Profile of People	(a) Highly qualified (b) Dedicated (c) Meticulous (d) Promotion has to go to management (e) Current profile is white male	(a) People get demotivated (b) Leave the profession (c) Research structure	(a) Identify people with potential to develop and guide them to have a successful career (b) Create promotion structure (c) Create a culture of research to attract all people into the industry	A continuous supply of highly qualified, meticulous researchers available for research needed, with promotion structure.
4. Training	(a) Long training period (b) Lack of applicants (c) Funding (d) No experiential training	(a) Not enough money to pay for studies (b) Does not complete training (c) Less research.	(a) Short term training (cheaper) (b) Supply bursaries. (c) Create posts. (d) Supply experienced co-workers.	Adequate funds available to train capable applicant and supply experienced support.
5. Mindset	(a) Negative perceptions (b) ARC Capacity limited	(a) Negative and demotivated because of difficult work environment (b) Positive because of opportunities available	(a) Challenge people to be positive (b) Create better working environment. (c) Positive perceptions	A positive, innovative mindset for profitable research.

Continued from page 58 4.3.1: Capacity Building: Strategic Dimensions Profile

ISSUES	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
6. Recognition of prior learning	(a) Prior learning at certain institutions not recognized.	(a) Students unable to do post-graduate studies	(a) Get training institutions to get accredited and improve their level of training	Make sure that all the training institutions are up to required standards
7. Funding (Commercialisation and Innovation fund)	(a) Lack of / insufficient funds (b) ARC distribution (c) Government and industry (d) Funding for research is lacking	(a) Research not completed due to lack of funds (b) ARC capacity (c) Too expensive management structure.	(a) Get funds from alternative sources (b) Generate money through profitable research (c) Funding institutions must join hands (d) ARC to work closer together with their clients.	Generation of funds through innovative research work Commercialise results
8. Responsibilities (Co-ordination and Linkages)	(a) Lack of dynamic leaders to take responsibilities (b) Responsibilities are unevenly distributed (c) Decision-making	(a) Responsibilities end up in the wrong hands (b) Slow decision-making.	(a) Identify young leaders (b) Create opportunities (c) Pay better salaries	Distribute responsibilities between dynamic leaders
9. Technology	(a) New technology is expensive (b) Lack of trained staff to use new technology	(a) Research fails to develop without new technology (b) Industries will not be competitive.	(a) Look at new ways/ media to transfer technology (b) Stay competitive in world markets	The efficient transfer of technology from researchers back to farm level / industry level where its implemente
10. "Passion" for Agriculture and a passion for research	(a) Lack of passion (b) Lack promotion opportunity (c) Low salaries	(a) Continuous difficulties kill the passion for the Agriculture sector (b) Lose experience (c) Lose competitive edge	(a) Motivation programme for workers throughout the Agriculture sector (medals, certificates for good work) (b) Create promotion structure	Creating an atmosphere of co-operation throughout the Agriculture sector and a joint passion to succeed

4.3.2: Capacity Building: Strategic Results and Interventions:

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1. Providing enough mentors in the field of research and development and the co-ordination and linkages	(a) Head hunting of mentors (b) Formal establishment of structure for mentorship training (c) Official accreditation of mentors (d) Funding of mentors (e) Establishment of evaluation system to determine mentorship successes	Business Labour Civil Society Business Civil Society	Number of successful trained students released from training institutions	(a) Creditability checks of mentors (b) Validation of companies used for accreditation (c) Interviews with students about capability of mentors
2. Find sufficient researchers and the availability of technology	(a) Identification of potential students (b) Identification of suitable facilities (c) Renovation of facilities (d) Obtaining the necessary equipment (e) Investigation of outsource possibilities	Labour Business Business Business Business	Number of well-trained students available for industry	Validation of quality/outputs of students by industry
3. Continuous supply of researchers	Promotion of available students	Business		Business plan for promotion
4. Training, Recognition of Prior Learning and Funding	(a) Identification of training opportu-nities (b) Validation of training centres (c) Allocation of bursaries (d) Creation of job opportunities	Labour Civil Society Business Business	Accreditation of training institutions Available bursaries Available jobs	List of accreditation institutions Plan for available bursaries Job register
5. Good mindset and passion for Agriculture	(a) Regular information sessions (b) Constant feedback sessions with students	Civil Society Civil Society	Successes of programme	Attendance of potential students Processing of feedback material

4.4. ENVIRONMENTAL ISSUES

4.4.1: Environmental Issues: Strategic Intervention And Results

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1. Understand the impact of climate change on agriculture industry of the Western Cape	Climatic studies projecting impact of change in climate on Agriculture in the Western Cape	Lead agent: : Tertiary institutions / Government (PDA) / Botanical (Kirstenbosch) Support: : ARC / other	Document showing conclusive recommendations relating to impact of climate change	With difficulty
2. Sustainable use of natural resources (e.g. water) for Agriculture	(a) Analysis of water resources (b) Optimum utilisation of water - supporting technology transfer (c) Identify alternative sources of water (rain rich areas to rain poor areas etc)	Lead: Government (PDA) / Water Research Commission Support: : Tertiary institution / ARC	Equitable allocation of Agriculture versus domestic Reduction in water usage / ha without reducing yield / ha.	Progress reports Water usage
3. Improve / sustain quality (microbial and physical) of irrigation water / systems	(a) Identify the status of water quality - status report (b) Put actions in place to ensure quality	Lead: Government (PDA) Support: : DWAF	Regular measurement of ecoli level - levels within international standards	Benchmark with international standards (1 000 ppm)
4. Conserve and sustainable usage of natural flora / fauna	Integrate various plans in Western Cape by different role players into consolidated plan	Lead: Government (PDA) Support: : Dept of Nature conser-vation & Industries	Benchmark measurements	
5. Reduce the use of synthetic chemicals	(a) Concerted strategy of key industries with milestones set of objectives to be achieved (b) Invest in necessary research to address issue of reducing chemical usage	Lead: Business Support: : Tertiary institutions / ARC	(a) Measurement of synthetic chemicals used in the Western Cape b) Number of alternatives, no chemical control mechanisms put in place.	Yearly milestones and measurement against those
6. Identify the effect of the "Environmental Act" and "Water Act" on Western Cape Agriculture	Analysis - both physical and economic of the impact of these acts	Lead: Government (PDA) Support: : Business	List of implications - physical - financial / economic	Progress report
7. Sustainable usage of soil and other natural resources	Investigate existing act that protect the different natural resource - Identify and recommend changes	Lead: Government (PDA)	List of recommended changes	Progress reports
8. Reduction in impact of waste management and pollution and effluent water on Agriculture in the Western Cape	Develop an effective plan to minimise the waste and pollution on Agriculture in the Western Cape	Lead: Government (PDA) Support: : Dept of Environmental Affairs	Reduced levels of pollution / waste in waterways and environment	Benchmark levels of waste in water systems and environment

SCHEDULE FIVE

5: NATURAL ENVIRONMENT, FOOD SAFETY AND SECURITY

5.1.1: Natural Environment, Food Safety and Security: Strategic Dimensions Profile

CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1) Information (a) Lack of condensed, consolidated document; strategy and policy	(a) Uninformed stakeholders	(a) Commission to consolidate	(a) Single information paper
(b) Relatively uninformed Agriculture	(b) High production risk Little winter rainfall area Few products Export fruit threatened	(b) Include extension service. Create awareness Change in commodity pool Higher prices, short supply Higher prices New cultivars	(b) Informed Agriculture Master plan guideline (5yrs) Maintain exports research focus shift
2) Availability of water (a) Inadequate pool of resources	(a) Less water for Agriculture and Agri-Business.	(a) Influence decision-makers: Claim for Agriculture	(a) Balanced approach
(b) Money	(b) Cost of alternatives, i.e. seawater (desali-nation)	(b) Budget re-allocation refocuses not on cost but availability and natural environment	(b) Use sea water (5yrs)
(c) Quantity of groundwater or the accessive abstraction of ground water	(c) Boreholes in Tafelburg Aqua threat to natural environment Lowering of water table	(c) Decrease pressure on ground water - sea Better communication between all sectors	(c) Retain and effects of aquifer on natural environment; Responsible utilization; and Water of adequate quality and quantity for all sectors - individual households, industry and Agriculture

5.1.1: Natural Environment, Food Safety and Security: Strategic Dimensions Profile

CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
(d) Good water available on good land (combination)	(d) Not ideal use (uneconomical) of water if soil is not the best	(d) Store water in areas where land is good (where generated)	(d) Policy change: less water from land sources to the metropole
(e) Emerging farmers' success not guaranteed	(e) Emerging farmers fail (Agri BEE and Land reform at risk)	(e) Water to land linkage Part of land reform	(e) Successful agri-transformation (2014)
(f) Not enough water treatment plants	(f) Low percentage of water recycled; Low percentage of grey water utilisation Biosphere's (Berg River)	(f) More plants; Urban Agriculture is equivalent to grey water and Protect Berg and Breede Rivers	(f) Drastic increase in use of recycled water
(g) Policy on water	(g) Too much focus on cost – "Water is as essential as food"	(g) Higher priority on more water, at a lower or no cost and water demand management and Attitudinal change	(g) Holistic approach - do not take from agriculture, add sea water (5yrs)
3) Quality of water Four major catchment areas only - Berg River; Breede River; Olifants River and Gouritz River	Pollution and Salinization	Restrict use: keep rivers "alive"	Increase flow (again seawater recycled)
(a) Plants to purify - monitoring inadequate	(a) Not enough water effectively recycled and monitored; Quality of water from plants unacceptable; and Recycled water should be portable	(a) Maize plants and Better plants	(a) Local government and province essential policy developed (2yrs)
(b) Agriculture soil quality	(b) Use of chemical fertilizers	(b) Organic farming and Agriculture best practice	(b) Measured downscaling of use of: : • Chemical fertilizers • Pesticides • Weed control (chemicals)
(c) Studies not completed	(c) Lack of policy and control	(c) Speed up research	(c) Completed studies
(d) Quality of drinking water	(d) Health: cholera, and cancer	(d) Increased sources and better treatment and Bottled water	(d) Acceptable food quality standards to include water as primary food
(e) Policy is not being implemented	(e) Unnecessary contamination of rivers	(e) Enforce the policy	(e) Enforced policies
4) Availability of land (a) Planning not completed	(a) Agriculture land lost	(a) Speed up process eg. Moratorium on the development of golf estates	(a) Policy in place (2yrs)
(b) Lack of inclusive consolidated policy	(b) Many "small" spatial plans	(b) Combined, consolidated provincial LED strategy	(b) Single master plan (5yrs)

CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
(c) Lack of policy on human migration	(c) Movement of people and Cost on infrastructure	(c) Pre-active actions and policy	(c) Influx control based on environmental capacities (5yrs)
(d) Perception that Western Cape is land of milk and honey	(d) Too many people migrate	(d) Influx control not based on race and Development opportunities in neighbouring provinces	(d) Policy in place (5yrs)
(e) Eastern and Northern Cape lack opportunities	(e) Migration	(e) Tripartite policy formulation on development issues	(e) Stop migration (5yrs); and Reverse migration (20yrs)
(f) Perception that Eastern Cape Agriculture potential is underutilised	(f) Migration; Food security; and Poverty	(f) Address legacy of farming and change perceptions	(f) Collaboration at provincial government level
5) Quality of soil			
(a) Low percentage of top quality soil	(a) Food Security; and the Transformation of Agriculture	(a) Reserve Agriculture lands in spatial plans	(a) Spatial plans move from guides to fixed plans. Set targets (3yrs)
(b) Knowledge of soil science	(b) Poor advice from extension officers	(b) Training and skills improve	(b) Suitably equipped extension officers
(c) Too much ploughing	(c) Quality deteriorates; and Erosion-soil losses	(c) New, better practices, minimum tillage	(c) Develop 5yr plan - Dept of Agriculture. Soil science to be enforced (5yrs)
(d) Locality of quality soil: Cape Flats	(d) Theft; and Safety	(d) Agriculture police for law enforcement (like stock theft)	(d) Save vegetable garden of the Cape - Philippi
(e) Distance from harbour and airport, also local market	(e) Quality of product Cost of transport Quantity of land available for agri BEE	(e) Intensive food production near airport glass houses; Increase export capacity of Cape Town International Airport to export “greens and flowers”; and Small area and high intensity	(e) P.P.P–emerging farmers to export products by air (3yrs).
(f) Agricultural practices	(f) Loss of fertile soil Bad/ poor		
6) Wetlands			
(a) Low number of individual biospheres intact	(a) Urbanization; Agriculture; Recreation; and Alien Plants	(a) Prioritize areas; Introduce extension officers; Moratorium where unsure; Public works programme - jobs	(a) P.P.P emerging farmers to export products by air (3yrs)
(b) Individual ownership	(b) Individual Decides	(b) P.P.P.'s	(b) “Scorecard” principle enforced (3yrs)
(c) Importance of short term human needs	(c) Human above nature	(c) Holistic approach - Training and Education - also at school and tertiary levels	(c) Increased status - more important as area (2yrs)

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CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
7) Food Safety Information			
(a) Lack of knowledge	(a) Restrictions on export.		
(b) Capacity to police	(b) Unsafe food.		
(c) Cost of processes	(c) Lacking application	(c) Central subsidy by Govt.	(c) Policy formulated (2yrs)
(d) Cost of inspection	(d) Serious threat to profits on farms	(d) Central Government. fund some inspections: spot checks on local food	(d) Local food safety improved (3yrs)
(e) Export processes for export produce i.e. Eurepgap	(e) Local food not complying	(e) Broaden base: share costs	(e) Increase food safety for local consumption and Inspect imports
(f) Lack of early warnings system: (example this week)	(f) Tracing and tracking difficult and costly	(f) Enforce, develop local systems	(f) Apply policy: enough inspectors (3yrs)
8) Safe management programmes			
(a) Lack of enforcement of codes and policies	(a) Local food higher risk than export food; and Local consumer perceived as less importance	(a) Programme line Fair Cape, Proudly S.A. to include codes	(a) Endorse the SA export criteria for local standards as well
(b) Direct selling - grower to consumer	(b) Standards absent, not inspected	(b) Broaden base: share costs	(b) Local Government. Health Inspection services (2yrs)
(c) Implementing maximum residue levels	(c) National fresh produce markets fail to identify; and Costs too high	(c) Enforce spot checks related to risks	(c) Code in place (2yrs)
(d) General cost of implementing programmes	(d) Non-compliance	(d) Spot-check policy to be developed where programmes are not officially in place. Job creation	(d) Spot check policy affordable (shared) (2yrs)
9) Crises management - handling an outbreak of food borne illness			
(a) Capacity to enforce	(a) Same as in two above	(a) Job creation	Plan in place: inspection etc. (2yrs); and Spot check policy in 8 'C' above broad enough to cover issue
10) Export and Import requirements			
(a) Sometimes over sophisticated programmes	(a) Goal to keep imports out: USA; and Cannot meet with requirements: low exports	(a) Identify hidden agendas and expose: W.T.O.	(a) Lobby W.T.O. and UN. Food commission (continuously)
(b) Production lower because of standards	(b) Food Security	(b) Interact with other broader countries with same difficulty	(b) Lobby as above
(c) Capacity	(c) Broad population	(c) Apply standards to all foods	(c) Measured local risk to local consumer within 2yrs
(d) Medical services costly, inadequate - doctors per 1000 patient ratio	(d) Epidemics	(d) Change national policy to encourage new entrants to medical profession	(d) Pre-active policies (2yrs)

Continued from page 64 5.1.1: Natural Environment, Food Safety and Security: Strategic Dimensions Profile

CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
(e) Lack of information and knowledge	(e) Low awareness: • Cholera • Malaria • Foot and mouth • Avian flu • Heart disease • Cancers	(e) Education and training	(e) Focus programme in rural areas, schools (2yrs)
(f) Hardly any import requirements	• Food safety • Food security • Stimulates production in exporter country - dumping • Fine line because of foreign subsidies	(f) New standards equal to what RSA has to comply to	(f) Develop and enforce policy (2yrs)
(g) Too free imports	(g) South Africa has relaxed import laws - hence poor quality and obnoxious food / products are dumped here - • Food safety now • Food security - long term	(g) Apply standards equal to EuropGap - bench mark	(g) Policy as above
(h) Manpower capacity	(h) Imports in many cases not inspected at all. Examples exist (lately)	(h) Job creation - appoint and train inspectors	(h) Programme at national level starts immediately (enforce 2yrs)
(i) Lack of quotas at shop shelf level	(i) Across board imports - dumping; and Food security - loss of local production	(i) Enforce quotas - job creation: Cost paid by levy on imports	(i) Programme in place (1yr)
11) Food Security Availability in sufficient quantities, variety and fulfil nutritional requirements (a) Agriculture policy	(a) Isolated from rest of economy: Still seen as legacy of 'apartheid'	(a) Change perceptions by embracing where possible	(a) Charter in place (1yr)
(b) Lack of adaptable “free market” policy on imports levies	(b) Dumping; Affordable imports when necessary; and Cheap imports	(b) Develop new adaptable policy; Set up council to administration; Higher levies when RSA has enough; and Lower levies when in need	(b) Introduce new policy
(c) Uneven playing fields	(c) Lacking competitiveness	(c) Stop over eagerness to be seen as a free trade world leader	(c) Day to day operation on the basis of fuel price (5yrs)
(d) Inadequate water	(d) Low productivity of land	(d) Increase sources	(d) Get policy in place (5yrs)
(e) Minimum wages	(e) Too high - less employment; and Too low - poverty	(e) Establish balance; and Learnerships (lower entry wage)	(e) Re-negotiate, involve all stakeholders 2006; and Adaptable policy - strong Rand, low inflation checks on increases
(f) Lack of subsidies	(f) Lose competitiveness; and Lower production	(f) Develop NEPAD policy to include RSA. Agriculture	(f) Enforce new policy when competing with countries that continue subsidies i.e. export subsidy; Re-introduce

Continued from page 64 5.1.1: Natural Environment, Food Safety and Security: Strategic Dimensions Profile

CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
(g) High input costs	(g) Uneconomic production	(g) Restrict profit margins where excessive	(g) Immediate Government. action, especially where inputs are imported (strong Rand not seen to benefit agri expenditure)
(h) Fluctuating Rand (exchange rate)	(h) Export losses; Lower production; Job losses; and Less foreign exchange	(h) Grow local economy; Increase supply; and Export subsidies	(h) Develop policy of national interest to assist sectors threatened by value of Rand eg. - Clothing and textiles and Export fruit and wine
(i) Government perceptions (views) on agriculture	(i) Lesser importance - shrinking of economy	(i) Use agri-BEE and transformation to change perceptions and views	(i) Take rightful place in economy and society (2yrs)
(j) Mechanization versus labour intensive production	(j) Fewer jobs when mechanized	(j) Identify areas where mechanization is needed and vice versa	(j) Established balance approach i.e. expected subsidy not on mechanised production (3yrs)
(k) Too small a part of economy - not seen as important	(k) Perception may become fact - nullified to zero importance “white male”	(k) Show Agri-BEE and transformation as sustainable ; Ensure emerging farmer successes; and Grow political stability	(k) Achieve rightful rankings. Changed perceptions (2yrs)
(l) Disaster policies slow to roll out	(l) Severe damage to agriculture economy before assistance is given (e.g. drought in Southern and Western Cape)	(l) Develop measures to speed up programmes that can assist	(l) Streamlined policy (2yrs)
(m) Uneven playing fields	(m) Foreign government subsidies to agriculture- make it hard to pick-up dumping Lower local production. Long term threat to food security	(m) National Government should threaten to do the same instead of bending backwards to comply with the requirements of others	(m) Level playing fields (3yrs)
(n) Government intervention at input levels only	(n) Wages; Property tax; Water levies; Fuel levies; Toll roads; and Duties (wine)	(n) Less government intervention at input level More government protection at output level	(n) Develop a balanced approach (5yrs)
(o) Availability of land	(o) Housing	(o) LED's and IDP's	(o) Ensure that the remaining available land and the best agri land is reserved in spatial plans (IDP's)
(p) Lack of holistic approach	(p) Community unstable; Missing opportunities; and Political instability	(p) Spatial planning to involve community and Agriculture to facilitate- cross pollination	(p) As above (3yrs)

Continued from page 64 5.1.1: Natural Environment, Food Safety and Security: Strategic Dimensions Profile

CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
(q) Availability of water	(q) Land without water does not help and cannot produce sustainability	(q) New sources: • Grey water • Recycled water	(q) Policy to be formulated urgently (2yrs)
(r) Cost of water	(r) Lower production - water inaccessible for normal small scale farming	(r) As above	(r) As above
(s) Market access	(s) Stay at subsistence level - no growth and Stagnation	(s) Organised Agriculture can assist if in turn assisted by government. Do not separate agriculture at market level	(s) Expand Phillippi and Create similar infrastructure at other growth points. eg. George, Worcester, Oudtshoorn, Vredendal (2014)
(t) Extension services	(t) Not applied to urban Agriculture	(t) Develop strategies and plans - language barriers to be removed	(t) Dept of Agriculture to include appointments of specialists in Urban agriculture. (2006)
(u) Crime	(u) Theft and Safety	(u) Develop strategies and policies to Discourage crime, encourage participation. and Job creation	(u) Enforce law. 'Agri police' (5yrs)
(v) Intensive farming opportunities	(v) Poverty if we say “no land, no farming” Political instability	(v) Glass house, hothouse, hydroponics, and aqua culture and Establish city folk needs - pet care etc.	(v) P.P.P.'s Export driven airport - greens vegetables, flowers, herbs (3yrs)

5.1.2: Natural Environment: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1 Maintenance of biodiversity in the Western Cape, whilst promoting sustainable growth and development	(a) Development of a biodiversity database to access information - Informing agricultural stakeholders (Master plan guideline)	(a) Lead implementing agent - Government - Department of Environment Affairs - plus cluster of Departments (Agriculture, Water and SALGA)	(a) Substantiated mandate • Verified political buy-in by; relevant MEC's; • Inclusive IDP's and dissemination of information; • Master plan guideline; and • Activity reports	(a) Conclusive buy-in; • Central information database; (growth of database); and • Master plan guideline in place and accessible
	(b) Protect / maintain quality and quantity of water in rivers, wetlands, dams and aquifers. • Responsible utilization • Long-term strategic plan to improve water demand management and address the need to find alternative water sources (e.g. Desalination; rainwater harvesting, adequately re-cycled water)	(b) Lead implementing agent - Water Affairs (DWAF) Western Cape - plus cluster of Departments (Agriculture, Business, Civil Society and SALGA)	(b) Holistic approach • Availability of water of adequate quality and quantity for all sectors (individual households; industry; agriculture. Holistic approach • Policy change: improved efficiency	• Strategic plan; • Optimal water usage by all; and • Ongoing water sampling, monitoring and analysis
	(c) Promotion of good agricultural practices (GAP) throughout the sector; • Enforce policies; and • Develop guidelines for management of riparian zones, conservation and biodiversity.	(c) Lead implementing agent - Western Cape Department of Agriculture • Western Cape Department of Health • Agri-Business • Dept of Environment	(c) Best management practices re: chemical application and usage implemented (with enforcement options) on all agricultural industries; and Access of information - linked to central database	(c) Ongoing water sampling, monitoring and analysis
	(d) Good industrial practice throughout the sector and other sectors	(d) Lead implementing agent - DWAF (Western Cape); Western Cape Department of Health; Business; and SALGA	(d) Pollution control impacting on water resources, using best management practices (with enforcement options) on all users; and Access to information - linked to central database	
	(e) Develop a settlement management strategy/plan based on the environment capacities of the area/region	(e) Lead implementing agent - Western Cape Department of Land Affairs; SALGA; and DEAT	(e) Inclusive spatial plans; and Optimising land usage in a sustainable manner	(e) Spatial framework and plans

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STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
2) Natural Environment	(a) Conserving and improving quality of available soil by introducing and promoting good agricultural practice through the use of suitably skilled extension officers; and Linked to spatial plan: erosion issues related to urbanization.	(a) Lead implementing agent - Western Cape Department of Agriculture • Business (e.g. Grower Associations) • Civil Society • SALGA	(a) To be incorporated into the Integrated Provincial Spatial Development Plan	(a) Spatial plan
3) Assurance that food is safe, causing no harm to consumers when prepared and / or eaten according to its intended use	(a) Investigate the possibility of establishing a National Food Safety Authority	(a) Lead implementing agents - National Departments of Health and Agriculture	(a) Cabinet decision on this specific issue	(a) Establishment of National Food Safety Authority
	(b) Develop integrated food safety policy/ management requirements (local, import; export)	(b) Lead implementing agents - Food Safety Authority - in the absence of above structure being formed National Departments of Health and Agriculture and all stakeholders affected.	(b) • A single integrated policy • Unified standards applied • A single monitoring body • Effective, inclusive networking	(b) Policy document in place
	(c) Establish capacity-building programmes regarding good hygiene practices (GHP) and food safety practices, throughout the value chain, from conception to consumption	(c) Lead implementing agents - Food Safety Authority, in the absence of above structure being formed National Departments of Health and Agriculture and all stakeholders affected.	(c) Linking to the skills development package and process of appropriate SETAs	(c) A capacity-building plan
4) Ensuring that every citizen in the province has access to affordable, adequate, safe and nutritious food or by providing the means where people could produce their own food	(c) Establishing an integrated food and nutrition programme that assists the poor; Create conditions where local inhabitants will be granted the opportunities to grow and produce their own food to counter food insecurity and malnutrition in a sustainable manner by providing available land, skills, capacity training, support bases, and a monitoring and evaluation system.	(c) Departments Social Services, Land Affairs; Agriculture; DWAF; SALGA; PDC Universities; NDA; Civil society; and Business	(a) • Contractual agreements; • Databank with monitoring and evaluation system; • Intervention strategies; • Developing implementation, marketing and skills and capacity training plans; • Establish food security forums in local government; and • Establish infrastructure support	(c) Monitoring the rollout in the pilot areas; and Reports from the pilot areas and steering committee

Continued from page 65 5.1.1: Natural Environment, Food Safety and Security: Strategic Dimensions Profile

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
	(b) Develop new and flexible policy that will ensure that local producers can produce food commodities that will be adequate, safe, nutritious and affordable to the local consumers by ensuring the playing fields are equal in the competitive market.	(b) Government (PDA), Department of Economic Development and Tourism Business Labour	(b) Renegotiate import policy; Subsidies for non-mechanised production; and impact on fluctuation of Rand and fuel	(b) Renegotiated policy
	(c) Establish a safety net to protect industry against natural disasters, adverse climatic conditions and unfair labour practices	(c) Government (PDA), Department of Environmental Affairs and Tourism; Business and Labour	(c) • Streamline policy; • Establish rightful rankings - through the new transformation policies; • Levelling playing fields with foreign governments; • Develop a balance approach; and • Disaster management policy	(c) Disaster management plans and strategies
	(d) Develop an holistic approach to supply adequate agricultural land and water	(d) Government (PDA), Environment and DWAF Agri-business Labour	(d) Adequate fertile land and water; • Cost of water and land; • Market access points; and • Holistic policy and approaches to access to land and water	(d) Holistic policies; and Integrated spatial plans and frameworks
	(e) Putting a charter in place to ensure the agricultural industry transforms to grant it its rightful place and respect in the economy	(e) Department Agriculture Agri-business Labour Civil Society	(e) Negotiate the establishment of a charter	(e) Agricultural charter

SCHEDULE SIX

6: EXTENSION SERVICES AND FARM WORKERS

6.1.1: Extension Services and Farm Workers: Strategic Dimensions Profile

DIMENSIONS /DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1) Inadequate mentorship for people who are operating new farms • Subsistence farmers (including food gardens)and emerging farmers • Commercial farmers	(a) Mentors tend to be drawn from farmers who have no track record of farming or people who failed as farmers. (b) The correct remedy for existing projects takes a long time to be implemented	High failure rate of projects implemented by new farmers	Improve the mentorship programmes through the identification of successful and experienced farmers to use as mentors	(a) More mentors should be trained and accredited to support farmers and ensure successful and sustainable agricultural production (b) Experienced commercial farmers should be used as informal mentors
2) Lack of start up capital and operational capital	(a) Financial institutions are not flexible enough to accommodate emerging farmers (response rate for applications takes approxi-mately one year) (b) Inadequate support from financial institutions (land bank, private banks, CASIDRA, co-operatives)	(a) Failure to acquire start up and operational capital in time disrupts farming activities (b) Some people who acquire land as emerging farmers are reselling the land due to inadequate resources to farm	The state could identify suitable institutions for supporting the farmers with loans and grants. The proposed Agriculture Credit Board could be used in this regard	The proposed Agriculture Credit Board should be operational to assist emerging farmers with loans and grants
3) Poor dissemination of information (absence of awareness campaigns in farming communities, absence of information on work done by extension services, Department of Agriculture and other statutory and private organisations on work done by extension workers)	Lack of communication and dissemi-nation of correct information at the right time to emerging farmers(farmers who are not members of local co-operatives find it difficult to access information with respect to international markets and the required production ingredients)	Some emerging farmers tend to produce goods that are not in demand globally or use chemicals that are not accredited globally for producing goods, hence the products cannot be exported	Information could be made available comprehensively, through local institutions such as Agriculture co-operatives and government agencies and seminars	All emerging and existing farmers should have equal access to information on market requirements, services rendered by extension workers and a help line / help desk to locate these agencies

ISSUES DETAILS	ACTIVITIES	THREATS	OPPORTUNITIES	DESIRED RESULTS
4) Poor quality of end products and low demand of goods and services on international and domestic markets	Poor access to latest technology with respect to planting, harvesting and processing the local resources	Poor and inferior agro products on the market	The State should identify accredited agencies that could assist farmers to source the latest technology required to enhance production to be globally competitive	High quality goods produced by emerging farms and better access to latest farming technology
5) Poor access to competitive markets for emerging farmers	Inadequate support from marketing agencies	Farmers are forced to sell their products to existing bodies at lower rates	The extension services could assist farmers to penetrate global markets to negotiate prices with highest bidders	Removal of market monopoly, trade barriers and restrictive laws that frustrate emerging farmers e.g. A farmer should not be obliged to be a member of a particular body to sell products
6) Institutional capacity to implement the land reform programme • Land reform and distribution process not targeting the needy communities	Inadequately trained and experienced officials with managerial and bargaining skills One week waiting period imposed on farms on the market is too short	Some officials are not capacitated to implement land reform. Hence, there is little knowledge transfer to beneficiaries People who are not interested in farming (in some cases, foreigners) are acquiring farms at the expense of the needy communities	The state should identify and utilise well-trained and capacitated agencies to identify the correct people to acquire land People residing on farms as workers should be targeted first.	The waiting period of farms put on the market should be extended to enable the local people to mobilise resources
7) Poorly constructed business plans for emerging farmers	Most business plans do not take into account contextual realities on farms e.g. inadequate water supply to meet the demands of the proposed farming activity	Some business plans cannot be used to enhance agricultural production	Appoint accredited and experienced mentors/ professionals to draw business plans and the recipients should be part of the process	Business plans should be comprehensive and must relate to the geo-physical realities of the farm. One business plan must not be replicated as a standard procedure for farming in all the communities

6.1.2: Extension Services and Farmer Support: Strategic Results and Interventions

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) More mentors should be trained and accredited to support farmers and ensure successful and sustainable agricultural production	(a) Liaison with the Provincial Department of Agriculture and secure the actual figures for mentors targeted and the criteria for selection and support.	Lead agent: : Government (PDA) will obtain the required information and present it to social partners (NB. the Department of Agriculture has already commenced with the appointment of mentors / extension workers)	• Progress report from government , specifying the business plan, type of courses	The document should be tabled within two months. • Social partners sign off the programme
2) Experienced or retired commercial farmers should be used as informal mentors	(a) Designing the specifications of the mentorship programmes, the accreditation process and remuneration (b) Identification of potential farmers and workers to enroll for the programmes.	Government (PDA), business and civil society • Civil society , labour and business should identify potential people for enrolment	• Number of HDI recruited and trained as mentors • Number of experienced local commercial farmers recruited as informal mentors programme	• Signed database off HDI on farms participating in the programme and • The accredited local informal mentors accredited on the BEE score card
3) Affordable and committed consultants	(a) Mentors should structure the requirements and pricing levels for consultants' work	Lead agent: : Government (PDA), civil society, business and labour	All identified projects should be availed to the social partners. They should include cost structures and performance indicators.	Signed document(s) outlining the agreements involving social partners, mentors and consultants with regard to the project /programme specifi-cations
4) The proposed Agriculture Credit Board should be operational to assist emerging farmers with loans and grants	• Mobilise emerging farmers to submit applications and business plans for funding.	Lead agent: : Business and civil society. Government (PDA) is already working on the Agriculture Credit Board facility proposals	(a) Number of HDI farmers accessing funding (soft loans and grants) (b) An updated database	An updated database of people who applied for financial assistance, successful candidates and rejected applications accompanied by the reasons

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STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
5) High quality goods produced by emerging farms and better access to latest farming technology	(a) Farmer support workshops held on quarterly basis to enhance knowledge on farming (b) Lobbying government to procure and lease high tech instruments to enhance production	Department of Land Affairs, Department of Agriculture and the social partners	(a) Number of workshops held and information disseminated. (b) The technical support and nature of capital investments provided	Social partners study the progress report
6) Business plans should be comprehensive and must relate to the geo-physical realities of the farm. One business plan must not be replicated as a standard procedure for farming in all the communities	Lobby the Department of Agriculture to revise the procedures used to draw and approve business plans. Feasibility studies should be done through consultation with client, experienced local farmers (informal), professional mentors and approved within a short period of time	Lead agent: Business • Civil society support:	Revised strategy for developing and approving business plans	Easy to read, consensus based business plans

SCHEDULE SEVEN

7: PHYSICAL INFRASTRUCTURE

7.1.1: Physical Infrastructure: Strategic Dimensions Profile

DIMENSIONS /DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1) Electrification Including Pre paid meter boxes	(a) Inadequate provision of electricity in farm workers' houses (b) Inability of workers to pay for the services (c) Installation fees are high (d) Some farm owners tend to monopolise the accessibility of vouchers i.e. they sell to loyal workers	(a) Use of candles and paraffin create a fire hazard environment (b) Poor studying environment for children (c) Restriction on the use of household electricity powered entertainment facilities (d) Living in semi-darkness promotes anti-social behaviour (e) Farmers abuse the distribution system	(a) Explore the use of alternative forms of energy such as solar, wind and bio energy (b) SMME on farms to sell the pre-paid vouchers (c) Sustainable household consumption of electricity (d) More jobs can be created	(a) Electrified households with prepaid meter boxes (b) Improved studying environment for children (c) Reduction in anti-social behaviour and improved household recreation facilities (Televisions, radios and video games)
2) Water and Sanitation	(a) Inadequate provision of potable clean water (b) Absence of mechanisms to use recycled water for irrigation. (c) Poor infrastructure for solid waste removals	(a) Escalation of water borne diseases (b) Disruption of farming activities due to drought (c) Job retrenchments and unemployment (d) Escalation of disease related to poor solid waste disposal (e) Contamination of rivers and catchment areas	(a) Extensive use of bore holes where applicable (b) Introduction of water desali-nation plants (c) Improvement of water catchment management (d) Promotion of the use of recycled water	(a) Improved provision of clean water to households (b) Water recycling plants on farms (c) Water desalination plants on farms (d) Introduction of boreholes (e) Water catchment management programmes
3) Housing provision for farm workers is problematic including Housing for retired workers inadequate	(a) Inadequate provision of safe houses for farm workers (b) Lack of funds to improve the housing structures (c) The quality of houses in some areas is appalling due to maintenance apathy (d) Capacity of farmers to provide houses for retired and new workers limited	(a) Overcrowding spreads communicable diseases (b) Overcrowding exposes children to antisocial behaviour at an early age (c) The use of sub-standard materials for construction leads to disasters (d) Ownership crisis - residing in the house may not entitle you to own the property	(a) Increased housing subsidies for poor workers (b) Enforcement of minimum building standards for houses (c) Collective ownership / partnership/ share holding of the enterprise creates security	(a) Safe and sustainable housing structures (b) Farmers and workers should enter into partnerships. The owner will benefit on the BEE score card and the worker will have shares that may be redeemed if he /she wants to relocate.

ISSUES DETAILS	ACTIVITIES	THREATS	OPPORTUNITIES	DESIRED RESULTS
4) Transport for children, workers and farmers is problematic Including • Toll gates	(a) Inadequate provision of public transport to ferry children and workers (b) Poor quality of road networks (c) Absence of rail networks in some areas (d) High toll fees for farmers transporting goods to markets (e) Alternative roads are poorly maintained and dangerous	(a) Safety of children and workers compromised (b) The quality of farm produce is compromised - goods are damaged on the roads and income is reduced (c) Some farmers are unable to transport goods on time to the markets (d) Transportation costs are high due to goods ferried in small quantities. (e) Retrenchments and unemployment	(a) Increase subsidised public transport for children and workers (b) Form co-operatives to transport goods in bulk (c) Local authorities could invest in road maintenance. (d) Better quality of goods reaching the markets (e) Concessions for local farmers to pay less toll levies within the province	(a) Public transport should be efficient and affordable. (b) Transport co-operatives (c) Investment on road and rail infrastructure (d) Reduced toll levies
5) Poor access to schools Including Hostels and boarding lodges	(a) Limited number of schools on farms offering grades 1- 12 classes (b) Limited investment in recreation facilities on schools (c) Limited funds to buy textbooks • High travelling costs of sending children to school • Limited schools providing boarding lodges for students and some hostels are being rented out for private businesses	(a) Children travel long distances to schools – fatigue reduces performances in class (b) Safety and security of children compromised. (c) High absenteeism in class as parents fail to raise fares for private transport (d) Limited recreation facilities encourages antisocial behaviour such as gangsterism (e) Children cannot participate in post class sporting activities – talent is wasted	(a) Upgrade farm schools within walking distance to offer classes in all grades (b) Government to invest in better infrastructure on schools • Potential to convert idle buildings to boarding lodges	(a) Better access to education facilities for farm children (b) Boarding lodges should be created where applicable
6) Inadequate handling facilities for farm products and produce	(a) Lack of on-farm storage hubs and preservation facilities for perishable goods (b) Lack of capacity at ports and harbours to handle bulk goods destined for export markets (c) Storage costs at ports and harbours exorbitantly high	(a) Perishable goods lose value due to absence of storage hubs on farms (b) Farms lose income due to time delays at ports and harbours (c) The variety of crops grown is limited to those that can withstand unfavourable storage conditions (d) Retrenchments and unemployment	(a) Form co-operatives and build on-farm storage hubs. (b) Expansion of the capacity of ports and harbours to handle bulk goods	Adequate provision of storage facilities for perishable and non perishable goods on farm and ports

ISSUES DETAILS	ACTIVITIES	THREATS	OPPORTUNITIES	DESIRED RESULTS
7) Health breeding facilities for animals; including • Animal housing, animal handling and waste handling facilities • HIV and AIDs on farms	(a) Inadequate provision of shelter for animals kept in sties, stables and fowl runs (b) Inappropriate standard of facilities lead to below optimum production and health risks (c) Lack of funds to build and buy the required instruments to enhance animal husbandry (d) Lack of facilities for confidential testing and counseling of victims (e) Lack of facilities to provide nutritional food supplements	(a) Any outbreak of contagious diseases can ruin the entire farm turnover (unhygienic conditions can lead to animal diseases and poor health of animals, health risk for people eating the products; low quality products; loss of income) (b) Farmers may lose income due to global quarantine (c) Retrenchments and job loses become inevitable. (d) Affected people are stigmatised	(a) State subsidies to import required instruments and build hygienic animal shelter (b) Farmers should be educated to constantly monitor the living conditions of their animals and report any anomaly and disease outbreaks to local authorities. (c) Increased production, better quality and safe products, improvement in quality of lives and general livelihood (d) Establishment of facilities to offer HIV/Aids awareness campaigns, testing and counselling	(a) Animals bred in healthy environments (b) Highly competitive animal products for global markets (c) Sustainable animal husbandry (d) Optimal animal production to ensure safe and high quality products; higher income, job creation (e) Infrastructure for confidential counseling, testing and treatment should be created on farms.
8) Irrigation systems	Expensive to purchase; costly to operate	Lack of production (volumes and quality) due to insufficient irrigation; wasting of water	(a) Increased production; better quality products; (b) Improvement in quality of lives and general livelihood	Use scarce water resources optimally to produce best quality products; increased production can lead to job creation
9) Camp fences and drinking water for animals	Inappropriate standard of facilities lead to below optimum production; degradation of natural veld; soil erosion	Lack of production (volumes and quality) due to insufficient watering; soil erosion lead to loss of valuable soil due to overgrazing	Increased production from the same fields; prevention of soil loss and pollution of water resources; improvement in quality of lives and general livelihood	Optimal and sustainable use of land for animal production; protection of our natural resources
10) Churches and religious places of worship	Many denominations on farms but inadequate facilities to allow freedom of worship • Costly to travel in search of places to worship	Conducting ceremonies in houses or under trees is disruptive to others	Create multiple purpose centres on farms for religious and business meetings and recreational use	Multipurpose centres should be created on farms
11) Telecommunication	(a) Inadequate provision of accessible telephone booths and lines (b) Telephone costs are high (c) No emergency lines are provided	In cases of emergency people die due to lack of communication channels	Establishment of telephone booths for public usage • SMME development	Prepaid telephone boxes within walking distance that allow for emergency calls

7.1.2: Physical Infrastructure: Strategic Interventions and Results

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) 75% of households on farms should be electrified with meter boxes by 2006, the introduction of solar and wind energy power supplies on farms	(a) Liaison with the Regional Electricity Distributors (REDS) to fulfil this objective (b) Liaison with Government to obtain statistics of households on farms and requiring electricity (c) Liaison with District Integrated Centres to drive this initiative	(a) Lead agent: : Labour • Civil society • Business • Dept of Social Services and Housing (b) Lead agent: : Provincial Department of Social Services and Housing • Business, labour and civil society • Department of Agriculture	(a) Progress report from REDS on the number of households electrified • Access to the minutes of discussions held • Annual reports (b) Statistics and geographic locations of households in need of electrification	(a) Number of electrified households measured against the set target; Solar panels in areas where the technology is applicable; and Wind energy generators where applicable. (b) the report should be tabled to all social partners
2) Adequate provision of clean water and sanitation on farms	(a) Liaison with the DWAF to provide boreholes, water recycling plants or desalination plants where applicable (b) Liaison with the Department of Social Services and Housing to provide sustainable waste removal services on farms .	Lead agent: : Business • Labour	Number of households with access to borehole water for drinking and recycled water for irrigation.)	(a) Progress reports on water and sanitation projects and the Existence of water recycling plants where applicable
3) Safe and sustainable housing structures	Liaison with the Department of Social Services and Housing to provide sustainable housing structures that conform to the approved building standards	Lead agent: : Labour, Civil Society • Local authority inspectors	• Number of upgraded housing structures	Progress reports on the implementation programme
4) Safe and efficient public transport for school children Improved transport infrastructure for farmers	(a) Liaison with the Department of Education and Transport, taxis and buses associations to improve the transport crisis for school children on farms: lobby for transport subsidies (b) Liaison with local authorities to improve local roads	(a) Lead agent: : Labour • Business and Civil society (b) Lead agent: : Business	(a) Subsidised public transport for children (b) Improved road networks	Reports on the implementation plans

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STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
5) Existing toll levies for local farmers should be at a nominal rate. Alternative routes be upgraded and maintained	(a) Lobby Department of Transport to provide concessions to local farmers, foresters and fisheries ferrying goods (e.g. diesel for machinery) on a daily basis to pay minimum toll levies (b) Lobby local authorities to maintain roads developed as alternative routes to toll roads	Lead agent: Business Support: All social partners	• Reduction of toll fees / levies for local farmers	Progress reports on negotiations and agreements reached
6) Better education facilities for farm children	(a) Lobby the Department of Education to upgrade schools and render practical subjects, with the necessary equipment from primary to grade 12 levels (b) Lobbying government and farmers to form partnerships and build recreation facilities. (c) Lobby SETA to assist/ offer with practical training on farms	(a) Lead agent: : Department of Education and the three social partners (b) Lead agent: Business and the Department of Education (c) Department of Labour	(a) Number of workshops held and information disseminated. (b) Number of farm schools offering grades 1 to 12 subjects and more technical subjects offered. • Adequate textbooks in schools • Recreation facilities	Social partners study the progress report from SETAs and Department of Education
7) Adequate provision of storage facilities for perishable and non perishable goods on farm and ports and airports	(a) Lobby emerging and established farmers to form or join co-operatives and build collective storage hubs in communities, transport co-operatives to ferry goods to the markets (b) Liaison with National Ports Authorities to improve the handling facilities of goods at the ports	Lead agent: : Business • Labour • Civil society	(a) Number of transport co-operatives ventures and storage facilities established (b) Less congestion on ports and harbours	Progress reports on the implementation plans should be submitted to the four social partners for evaluation
8) Clean breeding facilities for animals	• Health awareness campaigns to educate communities practicing backyard animal husbandry	Lead agent: : Government and the three social partners	• Good practices on animal husbandry	Progress reports on the awareness campaigns
9) Camp fences and drinking water for animals	• Health awareness campaigns to encourage farmers to improve animal breeding stables and to report disease outbreaks	Lead agent: : Business and Government	• Reduction of disease outbreaks • Increase in funding to buy the required infrastructure for sustainable animal breeding	• Progress reports on the awareness campaigns • technical advisors appointed by the Department of Agriculture to assist farmers.

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STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
	• Encourage farmers and relevant adjacent land owners to fence farms and practice rotational grazing to conserve natural resources through awareness campaigns	Lead agent: : Business and Government (PDA)	• Demarcated and fenced grazing areas • Reduction of overgrazing and improvement of natural resource conservation	
10) Testing and counselling facilities for HIV/AIDS and other lifestyle diseases	• Liaison with the Department of Health to provide adequate facilities for HIV/ Aids, testing, counselling, awareness raising and medication accordingly	Lead agent: : Labour • Business, Civil society • Department of Health and Social Services • Primary and secondary Agriculture SETA	• On-farm infrastructure for HIV/Aids testing, counselling, awareness raising and medication	Progress reports on the implementation plans should be submitted to the four social partners
11) Adequate provision of irrigation systems and access to tractors, harvesters and machinery for production	(a) Facilitate funding mechanisms for farmers to acquire funding for irrigation systems (b) Lobby farmers to utilise co-operatives, other boards to borrow equipment for production at a nominal fee	(a) Lead agent: : Department of Agriculture and Business (b) Lead agent: : Business	(a) Number of farmers accessing loans to buy irrigation systems; and and Improvement of agriculture production (b) Number of farmers utilizing co-operatives to gain access to equipment	Progress reports Progress report
12) Adequate provision of telecommunication infrastructure in rural areas	(a) Lobby Telkom, Vodacom and other service providers to provide infrastructure and access to communication to all people on farms (b) Encourage workers to start SMMEs providing communication services	(a) Lead agent: : Business, Department of Agriculture, Civil Society and Labour (b) Lead agent: : Labour and Civil society	(a) Number of households accessing telephone lines and public booths (b) Existence of SMMEs rendering the service at affordable rates	Progress reports on the implementation plans should be submitted to the four social partners

SCHEDULE EIGHT

8: INSTITUTIONAL DEVELOPMENT AND INFRASTRUCTURE

8.1.1: Institutional Development and Infrastructure: Strategic Dimensions Profile

ISSUES DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
1) Intelligence • Generate • Share • Learning	• Budget information costs money to access • Lack of capacity	Lack of political will	DTI structures in place (foreign and domestic) and Department of Agriculture has good structures/ expertise and databases	Well functioning state of the art intelligence system.
2) Risk management • Risk sharing • Market • Climate change • Remote sensing • Access to water	The combination of risks associated with agriculture includes inter alia climatic or natural risk (drought, floods, rain at the wrong time, hail, wind, heat, fire, frost), market risk (changes in consumer preferences, price fluctuations, transport costs, over-supply), policy risk (changes in tariff regime, marketing arrangements, fiscal policy, trade policy), social risk (labour action, personal circum-stances) and macro-economic environmental risk (changes in technology, farming practices, demography	• Exposure to risk by individuals • Cost of insurance • Wrong incentives • A system that does not make provision for all types of farmers • Inadequate institutional arrangements	• Risk avoidance • Risk sharing • Risk transfer • Risk acceptance	An integrated risk management strategy for the agricultural sector of the Western Cape

ISSUES DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
3) Marketing of agriculture sector as a concept • Capital versus labour • Positive investment • Ethical investment	• Financing agricultural projects • Resources: land and water • Fragmentation of entities in the sector • Negative investor perceptions about South Africa: politics, development, land issues, etc. • Strength of the rand	• Agriculture's contribution to gross regional product (GRP) diminishing • Decreased investment in agriculture • Current industry may not welcome competition	• Benchmark the sector with global leaders to introduce innovations • Wealth of information with Department. of Agriculture, ARC, etc. This can be tailored to investor needs • Encourage beneficiation of resources • Develop co-operatives into competitive business clusters to compete in the global arena • Market the sector as the world's best • Use Wesgro as a platform to promote investment	• Consolidation of entities to market and develop the sector • Create a commercial mindset for agriculture, so it is given the necessary attention • Information bank for investors, supplying customized information • Greater involvement of BEE farmers and emerging farmers • Development of co-operatives into major functional business units • Creating opportunity and employment in the sector • Turn the Western Cape into an agri-business hub for Africa
4) Social; Welfare; Health and HRD needs • Water • Electricity • Sanitation • Safety net • Housing	• Access to primary health care (distance) • Lack of transport • Lack of knowledge • Poverty Syndrome • Lack of parental skills • Lack of recreation programmes • Lack of agri- villages • Lack of services and adequate housing • Ownership • Tenure Security • Farmers changed view on housing • Lack of appropriate infrastructure (water, roads, electricity, sewerage) • Services	• Unproductive people • Burden on state and society • Alcohol and drug abuse • Early school drop-out • Broken family structures • Orphans • Shebeens and drugs • Gansterism • Degrading of human dignity • Displacement of communities • Legal practices (security) • Unemployment • Squatter camps • Safety and health pollution (environmental problems) • Poor infrastructure • Poor service delivery • Lack of implementation of legislation	• Educational programmes, awareness • More responsible citizens • Health conscious society • Improved morals • Access to health • Employment • Accessibility to services • Job creation	• Establishing a systematic health system and conscientious farming community to ensure a better work environment. • Establishing a socially secure environment by granting security of tenure, ownership and establishing sound relations that will result in a positive agricultural image • Establishing a safe and healthy environment

ISSUES DETAILS	CONSTRAINTS	THREATS	OPPORTUNITIES	DESIRED RESULTS
5) Fragmented agriculture with inequalities • Conflict resolution • Ethical agricultural practices • Ethical labour practices • Ethical social practices • Ethical environ-mental practices • Information sharing • Code of conduct • Remedies • Sanctions • Lobby activity • Gender / youth • Sectoral consensus • Mechanisms for participation • Lack of indicators for integrated land use planning and sustainable management [LRAD]	• Lack of awareness • Lack of political will • Inadequate participation by role-players and interested and affected parties • Information dissemination/advice not readily available	• Food security • Food safety • Climate change/global warming	• Brand loyalty to Code of Conduct supporter produced product • Maintenance of biodiversity integral to branding • Social upliftment throughout sector • Educational upliftment throughout sector • Agri-tourism/bio-diversity tourism • Secondary industries on farms (add value to product) • Job creation	To promote and develop a well-integrated and respected agricultural sector that produces well-accepted and marketable products that satisfies the needs of both local and international markets
7) Continuing of process between partners • Interaction • Monitoring • Inclusivity	• Time • Money (cost) • Suitable venues • Lack of structures • Ability to participate (time; transport; cost; leave from work) • Not identified (lack of address) • Absence of mandates	• Exclusivity • Estrangement • Opportunism • Uninformed social partners • Break down in relationships • Absence of key stakeholders • Opportunism • Bad faith negotiations	• Interaction • Consensus • Appreciation • Understanding • Monitoring by joint assessment	• Cross pollination • Common ground • One acceptable outcome (Strategic results - Regular interaction) • Inclusive monitoring (Strategic results - Inclusive monitoring)

8.1.2: Institutional Development and Infrastructure: Strategic Intervention and Results

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
1) Risk Management Development of an integrated risk management strategy for the agricultural sector of the Western Cape.	(a) Appoint a Task Team representing the 4 stakeholder partners	(a) Lead: Department of Agriculture to convene the meeting and all social partners participate	(a) Task Team in place within one month	(a) First meeting of the task team
	(b) Conduct a literature scan	(b) Task Team	(b) Within two months	
	(c) Identify unresolved issues and prepare first preliminary report	(c) Task Team	(c) Reports - one month	(c) Report available
	(d) Identify international best practice and learn from countries where such programmes have been implemented to resolve unresolved issues. .	(d) Task Team	(d) Within two months	
	(e) Investigate the reasons why similar proposals met resistance in the past.	(e) Task Team	(e) Within six months	
	(f) Second preliminary report	(f) Task Team	(f) Report within one month	(f) Report available
	(g) Identify, obtain and process additional data requirements	(g) Task Team	(g) Within two months	
	(h) Evaluate advantages / disadvantages and costs / benefits of options	(h) Task Team	(h) Three months	
	(i) Final report and recommendations	(i) Task Team	(i) Report available within four months	(i) Report available
2) Investment Establishment of an Agri-business Investment Unit for the Western Cape Province.	(a) Facilitate workshop to identify objectives, offerings and tasks	(a) Task Team	(a) Within six weeks	(a) Confirmation of attendance from representatives
	(b) Identify necessary local stakeholders and engage to support the initiative	(b) Social Partners	(b) Within three months	(b) Notify Stakeholders, ask to nominate representatives
	(c) Leverage resources to fund the investment vehicle	(c) All Stakeholders	(c) Within three months	
	(d) Establish a small, focused task team to identify the role of the investment vehicle	(d) Social partners	(d) Within two weeks	(d) Notify task team of the facilitated workshop
	(e) Define implementation strategy for the investment vehicle	(e) Task Team	(e) Within three months	(e) Complete report available at the end of this phase

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STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
	(a) Drafting and signing of a memorandum of understanding between the integrated government departments and Wesgro	(a) Lead : Government and social partners - memorandum of understanding	(a) Within four months	(a) Signed memorandum of understanding
	(b) Implement within Wesgro	(b) Task Team	(b) Within six months	(b) Report available
3) Intelligence Powerful intelligence input and retrieval system to act as institu-tional and sector memory; Detail past and ongoing projects and identifying gaps and opportunities.; and Intelligence for Business / Social / HRD / Technology / Rand and Sector Development	(a) Develop intelligence requirements for industry (see Appendix)	(a) Department of Trade and Industry and International offices. Department of Economic Development; Department of Agriculture - National; Department of Agriculture - Provincial; Business; Labour; Civil Society; and Where is the system located - Security	(a) Comprehensive list of intelligence variables	(a) Stakeholders agree on list of intelligence variables
4) Security system to protect our heritage, products and markets, maintaining our biodiversity link-up with the South African Botanical Institute (SANBI)	(a) Identify and screen sensitive data Develop physical and human infrastructure to acquire data	(a) Same as above	(a) Strategic planning on what the human and physical requirements are	(a) A blueprint for an intelligence fraternity
	(b) Implement To acquire and process data	(b) Appropriate Experts	(b) Capacitate transfer of skills Identification / acquisition and activation of relevant Professionals	(b) Processing of Data into usable information on opportunities
	(c) Sector shareholder awareness programme	(c) All	(c) An agreed on plan to roll-out awareness campaign	(c) Stakeholders using intelligence system

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STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
5) Unified Agriculture • Unified Agriculture • Inclusive of key stakeholders • Commercial and emerging farmers • Labour • Industries • Business • Appreciative of and sensitive to needs of role-players • Environment • Water - Public/consumer	Initiate the establishment of an inclusive unified body	Lead : Business (commercial farmers Emerging farmers Agri- Business Agri Commodities Workers	Transformed organised agriculture within one year	Institutional new body consisting of all.
6) Pricing Investigate the possibility of buyer of last resort and to consider the use of co-operatives	(a) Conduct an investigation	(a) Lead agent: Government (Provincial Department of Agriculture	(a) Person responsible	(a) Written mandate
	(b) Compile a report	(b) Provincial Department of Agriculture	(b) Report	(b) Report available
	(c) Create caucuses on results and recommendations	(c) Provincial Department of Agriculture and social partners	(c) Meeting / workshop	(c) Minutes of workshop/meeting
	(d) Implement	(d) According to recommendation	(d) According to recommendation	(d) According to recommendation
7) Social welfare Establish an institution whereby the farming community could enhance their social development issues in a healthy environment	(a) Structure farming communities in cohesive forums on local, district and provincial levels (b) Build the capacities of the forums (c) Supplying the institutional capacity to allow the forums to function efficiently and effectively	Civil Society, Government, Business Labour	Forums on B-Level, C-level and Provincial levels	Established and constituted forums

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STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
8) Human resource development • Skilled and trained labour force • Development of an integrated education strategy for economic growth in the agricultural sector of the Western Cape • Education and training centres to be increased.	(a) Process to develop a baseline study on education levels and training profiles of farm workers and farmers	(a) Consult their constituency to ensure all social partners make constructive input/contribution	• Attendance register to be signed • Reports from Government identifying the levels of skills development and need for Further Training and Education. • Reports to be tabled for debate. • Reports from Task Team members	• Database of Participants • Government and Task Team should table relevant documen-tation • Comprehensive reports in document format. • Social Partners to conclude programme • Final document to be tabled.
	(b) Conduct a study on general education skills, specialist skills and further education.	(b) Department of Agriculture and Department of Education		
	(c) Liaison with Provincial Department of Agriculture and Department of Education as well as PAETA and SETASA	(c) To obtain required information and present to social partners		
	(d) Identify key factors to improve and promote growth	(d) Task team to present input		
	(e) Liase with Government and education/training specialist			
	(f) Liase with PAETA and SESATA on effective cooperation and partici-pation in agricultural sector			
	(g) Identify and discuss applicable legislation e.g. National Qualifications Framework (NQF)	(g) Lead agent: : Government (Provincial departments of Agriculture and Department of Education), Business, SETAs and Civil Society		
	(h) To identify the need for education and training institutions	(h) Social partners to engage with their constituencies		
	(i) Land for infrastructure should be identified	(i) Lobby relevant Provincial Government Department to provide assistance		
	(j) Focus point should be the rural areas			
	(k) Minimum of 10 Education and Training Facilities to be available in Western Cape.			
	(l) Shorter courses need to be designed.			

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STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION
9) Code of good practice The promotion and development of sustainable practices in the agricultural sector	(a) Develop a Code of Conduct	(a) All four social partners	Code of Conduct acceptable to all four social partners Best practices readily available to all involved in sector(i.e. those signed up to Code of Conduct Biodiversity discussed in agricultural sector as a sustainable part of farming... not as an inconvenience Brand support/advice body made up of all four social partners(with a conflict resolution mechanism)	Readily accessible Code of Conduct Readily accessible best practices list Increase in land incorporated into conservancies, reductions in requests to Department of Agriculture to plough virgin land, water quality in areas where applicable Agriculture is the major role-player in affecting water quality Brand support body in place
	(b) Identify best practices	(b) Lead agent: : Government (Provincial Department of Agriculture with interested and affected parties		
	(c) Awareness raising (biodiversity)	(c) Provincial Department of Environmental Affairs and Tourism (support from National Botanical Institute, Custodians of Rare and Endangered Wildflowers (CREW), pro conservancy lobby)		
	(d) Create market advantage (social buy-in and product loyalty)	(d) All four social partners		

SECTION C: IMPLEMENTATION CHALLENGES

The Agriculture and Agri-business sector initiative is an integral component of the GDS. It falls under the ambit of the Economic Participation, Enterprise Development and Employment Creation Programme.

This report covered all the key challenges addressed by Agriculture and Agri-business social partners on:

(a) Competitiveness of Agriculture, marketing, market development and market access
(b) Land reform and Agri-BEE
(c) Human resource development and social development
(d) Research and development
(e) Extension services and farmer support;
(f) Natural environment , food safety and security
(g) Institutional development and Infrastructure
(h) Physical infrastructure.

The Steering Committee has been reconstituted with a new mandate to facilitate the implementation of the Agriculture and Agri-business Sector strategy.

The implementation of programmes and projects emanating from the strategy has commenced. Mechanisms for monitoring and evaluation of the work programme is being devised and a review process will be conducted to identify gaps and possible mechanisms to address the shortfalls.

Annexure A: List of participants who contributed to the Agriculture and Agri-business deliberations

STEERING COMMITTEE REPRESENTATIVES

BUSINESS	CIVIL SOIETY	GOVERNMENT	LABOUR
Mr. Ernest Bester	Mr. Franklin Adams	Mr. Khalid Khan	Mr. Peter Visser
Mr. Neil Joubert	Mr. Jonathan Cartwright	Mr. Tom De Wet	Mr. Barry Stemmet
Mr. Rynard Kóstens	Mr. William Ellis	Mr. Dupie Du Plessis	Mr Tony Franks
Mr. Chris Krone	Mr. Hennie Van Wyk	Ms Rochelle Louw	Mr. Peter Dirks
Mr. Augustinus Hendricks	Mr. A.K. Warnick	Ms Sue Middleton	Mr. Fritz Swartbooi
Mr. Carl Opperman	Mr. Wilfred Wentzel	Mr. Keith Nicol	Mr. W Adams
Mr. Bert Petersen		Cllr D J Rossouw	Ms Riefdah Ajam
Mr. David Seale		Dr. Dirk Troskie	Mr J Brink
Mr. Willie Williams		Dr. Piet Van Rooyen	Mr. Herbert Ferris
			Ms Gretchen Humphries
			Mr. Freddie Lindoor
			Mr. Jesaja Louw
			Mr. Bruce Manuel
			Mr. David Meyer
			Mr. T Morris
			Mr. Albertus Olivier
			Mr. Ferdinand Smith
			Mr. Elvis Soldaat

The following tables present the list of names of people from the four social partners who contributed to the Agriculture and Agri-business sector deliberations per thematic area.

THEMATIC AREA	BUSINESS	CIVIL SOCEITY	GOVERNMENT	LABOUR
Competitiveness of agriculture, marketing, market development and market access	Mr. Henk de Beer Mr. Augustinus Hendricks Mr. Niel Joubert Ms Lina Keyter Ms Ester Lotz Mr. Pietman Lourens Dr. Daan Louw Mr. Bert Petersen Mr. Anton Rabe Mr. Andries Theron Mr. Jacques Theron Dr. Johan van Rooyen	Mr. Jonathan Cartwright Mr. William Ellis Mr. Ricardo Jacobs Mr. Stephen Mc Veigh Mr. Wilfred Wentzel	Mr. Herman Jonker Mr. Khalid Khan Ms. Bongiswa Matoti Dr. Ilse Trautman Dr. Dirk Troskie Dr. Marthiens Wolhuter	Mr. Willem Karolus Mr. Fritz Swartbooi Mr. Tobias Amerika
Extension services and farmer support	Mr. Reinhard Köstens Mr. Willem Grobbelaar Mr. Dawid Muller Mr. Andries Theron Mr. Augustinus Hendricks Mr. Hubert Feris	Mr. Cupido Rogers Ms. Anne Stagler Ms. Nomsa Pasiya Ms. Christina Nkunzi Mr. Wilfred Wentzel Mr. A K Warnick Mr. J Daniels Mr. Dan Kotze Mr. C J Titus Mr. Billy Claasen Mr. J A Kayster	Mr. Jan Theron Mr. Alwyn Louw Ms. Sue Middleton	Mr. Fritz Swartbooi
Human resource development and social development	Mr. Koos Baadjies Mr. Michael Jones Ms. Karin Kleinbooi Prof. A. Kritzinger Mr. Johan Liebenberg Mr. Francois Malherbe Mr. Dawid Muller Mr. David Seale Mr. Jack Van Dyk Mr. Denver Williams	Mr. Hennie van Wyk Mr. Ernest White	Ms. Desi Angelis Mr. Barry Levinrad Mr. Oosie Marincowitz Ms. Nobom Mashabalala Mr. Danie Niemand Mr. Marius Paulse Ms. Odette September	Mr. Pieter Dirks Mr. Nolen Isaacs Mr. Freddie Lindoor Mr. Peter Visser

THEMATIC AREA	BUSINESS	CIVIL SOCEITY	GOVERNMENT	LABOUR
Institutional Development and Infrastructure	Mr. Chris Krone Mr. Wiehahn Victor Mr. Kobus Uys Mr. Dawid Muller	Rev Keith Benjamin Mr. Jonathan Cartwright Mr. Dan Kotze Mr. Jan Daniels Mr. Andy Peterson Mr. Billy Claasen Ms. Nandi Mgijima Mr. Andrew Cloete	Dr. Dirk Troskie Mr. Riaan Nowers Mr. Khalid Khan Mr. Rishaad Hajee	Mr. Fritz Swartbooi Mr. Gershon Gordon Mr. Charlton Snyders Mr. Jack Johnson Mr. Freddie Lindoor Mr. Andries Matheoane
Land reform and Agri-BEE	Mr. Arnoldus du Toit Mr. Hubert Feris Mr. Augustinus Hendricks Mr. Radie Heyns Mr. Hermanus Kitshoff Mr. Reinhard Köstens Mr. Chris Krone Dr. Edward Lahiff Mr. Niekie Mouton Mr. Denver Williams Mr. Willem Williams	Mr. Jonathan Cartwright Mr. Sibongile Mgwali Mr. A K Warnick	Ms. Debbie Goodwin Mr. Khalid Khan Ms. Sue Middleton Mr. Iaan Olckers Mr. Rhian van Wyk	Mr. Stephanus Abrahams Ms. Annelie Afrika Mr. Petrus Engelbrecht Mr. Jesaja Louw Mr. G. Monwabisi Mr. Albertus Olivier Mr. Fritz Swartbooi Mr. Matthews Swartz Mr. Williams
Natural environment , food safety and security	Mr. Chris Krone Mr. Koos Baadjies Ms. Lindi Benic Mr. Niel Joubert Mr. Willem Williams	Ms. Sweetness Mzolisa Ms. Joye Gibbs Mr. Patrick Kulati Mr. Jonathan Cartwright Mr. Hennie van Wyk Ms. Nomsa Pasiya	Mr. Johan Roux Mr. Jerry Aries Mr. Martiens Wolhuter Mr. Willem de Lange Mr. Willem Smith Mr. Johnny Slingers Mr. Ewald Bonzet	Mr. Jesaja Louw
Physical Infrastructure	Mr. Reinhard Köstens Mr. Anton Rabe Mr. Andries Theron Mr. Johan Durr Mr. Daan Louw	Mr. Cupido Rogers Mr. Hennie van Wyk Mr. A K Warnick Mr. C J Titus Mr. J N Blaauw Mr. Jamiel Sedan Ms. Ursula Williams	Mr. André Roux Mr. Iaan Olckers Mr. Willem Smith Ms. Jacqui Gooch Ms. Carin Fouché	Mr. Jesaja Louw Mr. Apollis Stemmet Ms. Roelien Titus Mr. Niklaas Nÿl Ms. Bronwin Adonis Mr. Armstrong Ntoyakhe Mr. Fred Meyer Ms. Jody Mathews Ms. Marie Pienaar Ms. Henrietta Cupido N Mentoor P Farmer M Tities

THEMATIC AREA	BUSINESS	CIVIL SOCEITY	GOVERNMENT	LABOUR
Research and Development	Mr. Phillip Fourie Mr. Dappies Smit Mr. Hugh Campbell Mr. Jan Booysen Mr. David Seale	Ms. Nomakaziwe Mshwela Mr. Willem Gabriël Mr. Hennie van Wyk Mr. Andy Peterson	Dr. Ilse Drakenstein Mr. Johan Blomerus Mr. Riaan Nowers Mr. Khalid Khan Mr. Rishaad Hajee	Mr. Pieter Dirks

The Programme co-ordinators and secretariat: Western Cape Provincial Development Council
Mr. Joshua Wolmarans
Mr. Yusuf Patel
Mr. Shelton Kaba Mandondo
Mr. Adrian Sayers

STRATEGIC RESULTS	ACTIVITIES	STAKEHOLDER RESPONSIBILITIES	INDICATORS	MEANS OF VERIFICATION