Western Cape Government

FOR YOU

Optimal Agricultural Business Systems

A Diagnostic and Design Evaluation of the Service Needs of different Farmer Categories

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POLICY SUMMARY

The team's investigation into the Western Cape Department of Agriculture (WCDoA) services prioritizes aligning service provision with strategic objectives, acknowledging agriculture's significant role in the Western Cape's economy.

Strategic directives for services provisions:

The following seven strategic directives are proposed to focus the policy design and implementation of service delivery coordination and collaboration and necessitating an integrated approach in the agricultural sector of the Western Cape province:

1. **Economic Integration and Support:** Emphasize agriculture's economic role, advocating for services that stimulate commercial initiatives within existing policy frameworks, ensuring alignment with social, environmental, and ethical values.
2. **Public-Private Partnerships:** Define services as public, private, or collaborative ventures, focusing on a coordinated approach to optimize agriculture's multifunctional benefits, including direct and indirect employment and income generation.
3. **Commercialization and Market Access:** Prioritize strategies that link all farmers, especially smallholders and emerging commercial farmers, to lucrative markets. This involves supporting commercialization within environmental and social considerations and transitioning public sector responsibilities to private initiatives post-incubation.
4. **Adapting to Global Changes and Market Requirements:** Address the need for agricultural policy makers to adapt to rapidly changing global agricultural trends. This includes supporting technological innovation, niche market participation, and sustainable farming practices to remain competitive.
5. **Farmer Development Programs:** Recommend developing programs that favour education and technological advancements for smallholder groups, aiming to graduate them towards commercial viability. Prioritize incubation programs for new, commercially viable farming units for disadvantaged groups.
6. **Support for Emerging and Innovative Agri-industries:** Identify and support smaller agri-based industries currently underserved by farmer support services, advocating for incubation and mobilization of private sector support to integrate them into the wider agricultural economy.
7. **Community Development Support:** Collaborative initiatives are required to enhance community life quality in rural environments, focussing on farmworkers and their families as a main target group.

This set of seven strategic directives and policy-focused approach underscores the need for dynamic, flexible strategies to enhance agricultural service provision, ensuring the Western Cape's agriculture sector remains robust, inclusive, and competitive in a changing global landscape.

EXECUTIVE SUMMARY

CONTEXT AND PROBLEM STATEMENT

The need for a thorough study to establish a scientific foundation for the varied service requirements of Western Cape farmers stems from the variability of these needs across the region. Initiated by the Western Cape Department of Agriculture (WCDoA) and expanding on a 2014 study, this effort aims to customize support across infrastructure, financial guidance, marketing, and agri-business. Given the constitution's provision for provincial autonomy in agricultural development and the need for efficient resource use, this study is essential for crafting targeted, efficient service delivery models to enhance the agricultural sector and, by extension, benefit the regional and national economy.

OBJECTIVE

The purpose of this diagnostic and design evaluation is to provide the scientific foundation for determining the service needs of farmer categories in the Western Cape Province, i.e. support requirements in terms of on and off-farm infrastructure as well as economic, financial, marketing, agri-business, extension, research, training and animal health services and recommending adjustments where so required.

METHODOLOGY

The project progressed in four phases: initiation, situation analysis, evaluation design, and report compilation. A literature review examined international agricultural service delivery. Using a representative sampling, 1,214 commercial farmers were selected through random stratified sampling for district-wide generalizations, while 252 smallholder farmers were chosen via quota sampling. This approach aimed to generalize findings to the broader population and district municipalities for commercial farmers. A Survey Monkey survey obtained 734 responses (50.1% of the target), with 665 usable. Inter active and participative farmer group discussions, using the log frame methodology and mobilising different groupings of the Western Cape farmer typologies, complemented and contextualised the survey.

LESSONS FROM ELSEWHERE

Literature highlights the need for farmers, also smallholders, to expand their market knowledge and strategy to evolve their businesses into sustainable, profitable entities. Despite their innovativeness, a knowledge gap in market strategies necessitates diverse advisory services. With the trend of connecting farmers directly to markets, largely through commercial value chains serving such, there's a shift from traditional public extension services, focussing on farm production and regulatory matters, to pluralistic, business-centric models involving various service providers, including the private agents , to improve agricultural services. Globally, this shift towards inclusive models featuring private, and also NGO contributions, contrasts with South African practices. Examples include Brazil's focus on innovation and value chain partnerships, Australia's efficiency focussed collaborative programmes model, and Zambia and Tanzania's use of digital technologies and partnerships, illustrating diverse approaches to enhancing agricultural support, market access, and sustainability, benefiting farmers with a competitive, inclusive service system.

KEY RESULTS OF THE SURVEY

The top 5 services categories for commercial farmers (Large, Medium and Small) are related to Resources acquisition, Social and Security services, Resource access, Farm planning and Market access. The top 5 services categories indicated by smallholder and subsistence farmers is similar compared to commercial farmers. Farm planning, resource acquisition / access and market access are key services required by these categories. More detail is provided below:

In 2023, Western Cape farmers still faced significant hurdles in accessing electricity and fertilizers, crucial for both commercial expansion and subsistence farming, mirroring 2014's findings. The struggle for water and secure land rights remains, with Environmental Impact

Assessment (EIA) processes identified as major obstacles due to their cost and “red tape” complexity, especially for livestock farmers in arid regions like the Karoo.

Farm planning services have shown a divide; large commercial farms emphasize water management and labour relations, while smaller farms seek financial advice, reflecting a shift towards self-reliance and away from government aid. Farm security and the importance of training have surged in response to increasing rural crime and are now key concerns across all farmer categories, marking a noticeable shift towards prioritizing these services over the years.

Market access and compliance with food safety regulations are primary concerns, particularly for smallholders, highlighting a broader trend of consumer safety awareness. While commercial farmers are well-served with market information, smallholder and subsistence farmers' growing interest in these services points to a gap in market intelligence dissemination.

Interestingly, 2023 showed a budding interest in strategic information among smaller farmers, contrasting with 2014 where it was less critical. Veterinary services have become vital, especially for micro-commercial and smallholder farmers, prompting discussions on local vaccine production facilities. Off-farm infrastructure needs, like road maintenance and port services, remain essential, and is becoming critical, for commercial agriculture, with changing priorities noted among farmer categories.

Regulatory compliance, especially in labour laws and bio-safety, has become more tedious and pressing, with an increased focus on livestock identification due to theft concerns. Finally, there's an increasing trend towards regenerative agriculture and a preference for direct, personal engagement in technology transfer, emphasizing the ongoing value of farm visits and interactive sessions with specialist advisers for effective knowledge sharing and transfer.

KEY RESULTS OF GROUP DISCUSSIONS

Commercial farmers aim for a competitive, profitable, sustainable sector that enhances job creation and welfare in a safe environment, listing 106 activities towards this core goal. Smallholder farmers' core objective is to run commercial, profitable businesses emphasizing self-employment and independence, with 69 activities identified to achieve this. Subsistence farmers core focus on producing enough to sustain households, ensure food security, and alleviate poverty, planning to sell any surplus for income in local markets, outlining 16 activities towards these outcomes.

DESIGN PHASE SUMMARY

A matrix using the RACIF (responsibility, accountability, consultation, Information and funding) model outlined roles for agricultural service delivery in the Western Cape, with an efficiency score of 78% according to IFC criteria, indicating high performance relative to other South African provinces. After evaluating the WCDoA's eight programs and services, the authors confirmed the importance maintaining all current services, emphasizing the department's effectiveness as the leading provincial agriculture department in South Africa, crucially supporting its vision and mission.

RECOMMENDATIONS

To ensure alignment with the principle "structure follows strategy," a post-2024 election organizational review of the WCDoA is advised, coinciding with a new 5-year strategic plan. Key recommendations include:

- **Implementing a Matrix Management Approach** for better program alignment, coordination and impact, focussing on all role players.
- **Streamlining processes to reduce bureaucracy** in EIAs and rights applications, enhancing efficiency.

- **Enhancing disaster management** for quick recovery from natural disasters.
- **Developing sustainable funding mechanisms**, including PP partnerships with financial institutions and business organisations, for land reform and research.
- **Recalibrating support between farmer types** and promoting diversity in agriculture as per the stated core focus areas and objectives by the different farmer types.
- **Considering a "Rural Development Agency"** to boost rural and social development at the farm level.
- **Creating a transformation support structure** related to an incubation support model, for a unified approach to farmer development and related Black Economic Empowerment (BEE) activities.
- Promoting **regenerative agriculture** for sector sustainability.
- **Engaging with agri-food/beverage value chain partners** and R&D for effective market (local and global) information dissemination, market access, farmer support, policy dissemination, and industry coordination.
- Safe rural communities will contribute to continued investment and growth of the agricultural sector in the WC and thus support national and provincial priorities for economic growth and creating jobs. Facilitate support to assist the municipalities with their **implementation of rural safety plans**.

Key priorities are:

- **Boost Extension Officer networking** with commercial farmers and agribusiness to broaden service perceptions and information/advisory offerings.
- Launch a **streamlined one-desk service** for **land reform/BEE guidance**.
- **Cut bureaucratic delays** in acquiring resources like water rights and EIAs.
- **Introduce a renewable energy help desk** for farmers to adopt sustainable solutions.
- **Increase support for regenerative** and climate-smart agricultural practices.
- **Expand capacity for emerging industries** (e.g., CULTURAL FARM TOURISM, HONEY BUSH TEA, almonds, avocados. etc).
- **Advance climate change mitigation** to strengthen sector resilience.
- **Consider a "Rural Development Agency"** to improve social life conditions, professional skills and training in live skills matters and community development coordination.
- Facilitate support to assist the municipalities with their **implementation of rural safety plans** through partnerships, communication, adequate funding, use of technological innovations.

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

LIST OF ABBREVIATIONS

AAMP	Agriculture and Agro-Processing Master Plan
AB	Agri Businesses
AFPM	Agents on fresh produce market
APP	Annual Performance Plan
ARC	Agricultural Research Council
ATMA	Agriculture Technology Management Agency
CFI	Commercial Financial Institutions
CG	Commodity Groups (Statutory and non-statutory)
CON	Consultants
CONS	Consumers
COR	Community organisations / Civil society
CSIR	Council for Scientific and Industrial Research
DALRRD	Department of Agriculture, Land Reform and Rural development
DBSA	Development Bank of Southern Africa
DEADP	Department of Environmental Affairs and Development Planning
DL	Department of Labour
DOBE	Department of Basic Education
DOHE	Department of Higher Education & Training
DPME	Department of Planning, Monitoring and Evaluation
DPWWC	Department of Public Works & Roads
DTIC	Department of Trade and Industry and Competition
DWAS	Department of Water Affairs & Sanitation
FED	Further Education
GIA	Government Implementing Agencies
HAWK	Hawkers
IDC	Industrial Development Corporation
IDPs	Integrated Development Plans
IGRF	Intergovernmental Relations Framework Act
LG	Local Government (District and Local Municipalities)
MTEF	Medium-Term Expenditure Framework
MTSF	Medium-Term Strategic Framework
NAMC	National Agricultural Marketing Council
NDP	National Development Plan
NFPM	National Fresh Produce Markets
NPPO	National Plant Protection Organisation (NPPO) at DALRRD
NUST	Namibia University of Science and Technology
OA	Organised Agriculture
OL	Organised labour
PIC	Public Investment Corporation
PPECB	Perishable Product Export Control Board
PROD	Producers

PUC	ESCOM (Public Utility Company)
SABS	South African Bureau of Standards
SANPRA	The South African National Pesticide Registration Authority
SIME	Strategic Integrated Municipal Engagements
SM	Supermarkets
SP	Strategic Plans
UNAM	University of Namibia
VIP	Vision Inspired Priorities
WC	Western Cape
WCDoA	Western Cape Department of Agriculture
WCG	Western Cape Government
WRC	Water Research Commission
WS	Wholesalers

1 CONTEXTUALISATION

In 2014, the Western Cape Department of Agriculture (WCDoA) commissioned a diagnostic and design evaluation study to provide a scientific foundation for determining the service needs of a range of farmers in the Western Cape Province. Nearly a decade has elapsed since the completion of this evaluation, and during that time, the agricultural landscape and the requirements for services have evolved. Farmers face a wide array of challenges, such as:

a) Climate change (leading to protracted drought, floods, pests);
b) Social determinants (e.g. escalating crime rate, post Covid-19 pandemic effects),
c) Geo-political instabilities (e.g. the war between Russia and Ukraine has resulted in increased costs for inputs like fertilizer, fuel, and food, as well as disruptions in supply chains. Furthermore, the conflict between Israel and Palestine has led to additional supply chain disruptions, partly due to major shipping companies avoiding certain sea routes.);
d) A bleak economic outlook (e.g. local interest rate hikes, high inflation)
e) The ESKOM load shedding disaster; and
f) Slow response to technological disruptions introduced by the Fourth Industrial Revolution.

The narrative on income earned, and the distribution strata and employment contribution by the commercial farms, cannot be complete without unpacking the different farmer categories contributing towards food security, economic growth and supported by government in South Africa. In 2012, MINTECH, (the technical structure that advises the Minister of Agriculture, Land Reform and Rural Development), and Members of the Executive Councils (MECs), officially classified South African farmers as indicated in Table 1-1.

Table 1-1: Categories of South African farmers

CATEGORY	SUB- CATEGORY
Subsistence	Urban/peri-urban
	Survival
Smallholder	Lifestyle
	Commercial aspirations
Commercial	Small
	Medium
	Large

Source: Mintech (2012)

The Mintech classification of farmer categories was further validated by WCDoA's 2014 evaluation of service needs of farmers, with one of the recommendations stating that "there is no one size fits all when it comes to the service needs of farmers". The service delivery needs of these categories of farmers differ. Another element to the service delivery needs of farmers, must be introduced at this stage. Chapter 2 of the Constitution of the Republic of South Africa (Act 108 of 1996) enshrines the rights of all people of South Africa and instructs the state to promote and fulfil these rights (e.g., access to water, food, safe environment, etc.). In service of these fundamental rights Section 40 of the Constitution constitutes government at national, provincial and local spheres, as distinctive, interdependent and interrelated. However, neither the Constitution nor other legislative mandates prescribes the nature of the services, the most appropriate delivery mechanisms nor the priority of each. It is especially important, given scarce government resources, that these resources be used to provide maximum utility.

2 PROBLEM STATEMENT

In 2014, a pivotal evaluation was conducted to assess farmers' specific needs. Given the importance of this initial assessment, conducting another evaluation is vitally important in a constantly changing environment. This will help to identify emerging service needs, verify which challenges have not yet been resolved, and adjust the department's priorities accordingly. This process should consider the roles and obligations that the Constitution bestows upon provinces.

3 OBJECTIVE

The objective of this intervention is to provide a scientific foundation for determining the service needs of the range of farmers in the Western Cape Province. Furthermore, given the roles and responsibilities conferred to provinces by the Constitution, a well-founded set of recommendations should be provided regarding the services which should be prioritised for delivery by the WCDoA.

4 METHODOLOGY

The service provider adopted a fully inclusive interactive approach involving all relevant participants and stakeholders who stand to benefit from the study as part of the broader methodology. The project was executed in the four phases:

- PHASE 1: Organising the effort and project inception
- PHASE 2: Situation analysis and evaluation
- PHASE 3: Evaluation design
- PHASE 4: Final report

5 NATIONAL, PROVINCIAL, LOCAL GOVERNMENT POLICIES AND STRATEGIES

5.1 Levels of government

The national and provincial spheres of government have concurrent legislative competence in accordance with Schedule 4 of the RSA Constitution (Act 108 of 1996). Hence, Parliament and the Provincial Legislatures of the Republic of South Africa at national and provincial level have the power to make laws for the country in accordance with Sections 43(a) and 44 of the Constitution. The National Council of Provinces (NCOP) represents the provinces to ensure that provincial interests are considered in the national legislative process. This is done by participating in the national legislative process and by providing a national forum for the public consideration of issues affecting the provinces. Section 43 of the Constitution vests the legislative authority of the national, provincial and local sphere of government in:

- Parliament - i.e. the National Assembly (NA) and the National Council of Provinces (NCOP),
- The nine Provincial Legislatures, and
- The municipal councils.

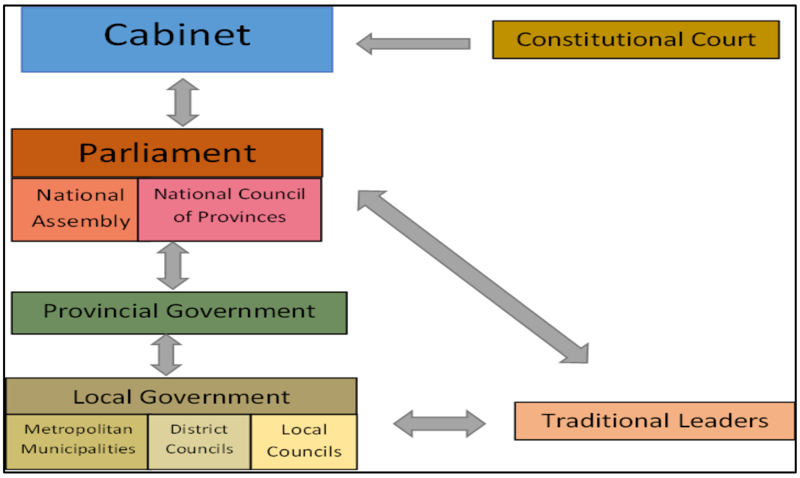

Figure 5-1: Conceptual overview of levels of government

In terms of Section 44(1) (b), the national legislative authority vested in Parliament confers on the National Council of Provinces (NCOP) the power to:

- Participate in amending the Constitution in accordance with Section 74
- Pass **ordinary Bills** affecting the provinces (Section 76 of the Constitution)
- Consider ordinary Bills not affecting the provinces (Section 75 of the Constitution) but passed by the National Assembly.

Parliament may intervene and pass legislation that falls within the functional areas of exclusive provincial legislative competence, only when it is necessary to:

- Maintain national security
- **Maintain economic unity**
- Maintain **essential national standards**
- Establish **minimum standards** required for the rendering of services
- Prevent unreasonable action taken by a province, which is prejudicial to the interests of another province or to the country as a whole.

OABS (2023) provides a comprehensive overview of the national, provincial and local government policies that should be considered in the strategic direction of all agricultural services providers but particularly the WCDOA. This document was developed as one of the deliverables for this project. However, for the sake of brevity, it is available as a standalone report (**APPENDICES 2**: AN OVERVIEW OF THE RELEVANT LITERATURE ON GLOBAL EXPERIENCE VS THE LOCAL REALITY AND NATIONAL & PROVINCIAL POLICIES). Figure 5-2 is a conceptual overview of the key policies and strategies within the context of this report.

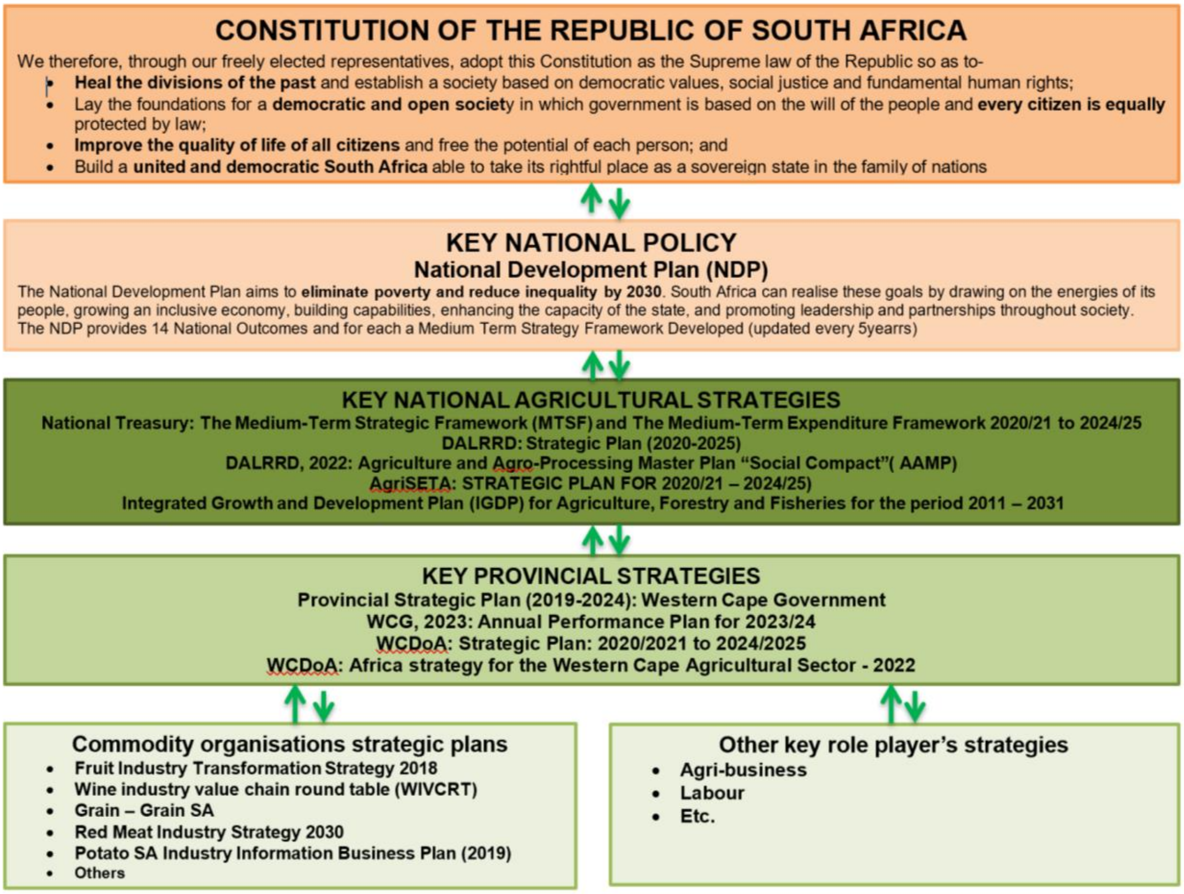

Figure 5-2: Overview of the strategic framework for South African agriculture

6 SITUATION ANALYSIS

6.1 International benchmarking – services

Traditionally, farmers were served by public extensionists. In response to the trends described here and the challenge to link farmers to markets, several countries have been reconsidering extension delivery, encouraging a more pluralistic, business-oriented, and demand-driven approach to providing advice to its farmers. The role of the private sector in delivering agricultural extension and advisory services (AEAS) is of interest in relation to agrifood systems transformation in most developing countries. Stimulating market demand for the services and getting the financing model right are identified as the most critical success factors in establishing and scaling such models (Katothya et al., 2020). Business service providers now operate in a pluralistic system where governmental, non-governmental, for-profit companies and farmers' organizations all play a role in service provision (Wongtschowski et al., 2013).

The literature review in **Appendices 2** provides valuable insight into the global arena (the international experience) with regard to service delivery of farmer support services compared to the local South African reality. It is apparent that historical service delivery channels have **shifted from traditional public sector agricultural organizations to agribusinesses and others linked to the sector**. Escalating cost in service delivery by the state in relation to the perception that the private sector can channel the services to end-users or recipients more efficiently due to the sectors' extended capacity, experience in agriculture and distribution networks seemed to have motivated this paradigm.

6.2 Definition of categories of farmers

For the purpose of this study, the Mintech (2014) definitions for different categories of farmers are accepted (see Table 1-1).

6.3 Farmer's needs – survey sample

Prof. André Pelser, a Research Fellow at the Department of Sociology, University of the Free State, collaborated with the research team to calculate a representative sample that includes both commercial and smallholder farmers. The was done as follows:

- **For commercial farmers:** random stratified sampling to be generalised for producers & districts only (not per Municipality).
- **For Small & Subsistence farmers:** quota sampling method.

Drawing from their membership database, which includes 3,249 producers, Agri-Western Cape provided the distribution of commercial farmers throughout the districts and local municipalities. Consequently, this distribution was considered to reflect the overall representation of commercial farmers in the Western Cape. The number of producers (4 971) registered PRODUCER/FARMER REGISTER of the Department of Agriculture, Land Reform and Rural Development (2021) was used to calculate the sample for smallholders (all definitions). The data is similar to that of Agri-Western Cape per district and local municipality. The sample is presented in **Annexure A**. To generalise to total population PLUS each district municipality the sample was calculated for commercial farmers to be 1 214 producers using the stratified sampling method. To generalise to total population, local municipality as well as district municipality level the sample size should be 2 176.

Due to time and budget constraints, the survey was conducted on the Survey Monkey platform and distributed widely by organised agriculture and the OABS agricultural network / contacts in the Western Cape. However, due to the challenge of reaching smallholder farmers with Survey Monkey, it was decided to use the quota sampling method for smallholders and subsistence farmers. Although this type of sampling does not allow for generalisability and statistically significant differences between districts, the data does provide an overview of the main trends, perceptions and beliefs in the population. The data can therefore mainly be treated descriptively as an indication of the particular sample's respondents. Using this method, the sample was calculated to be 252 smallholder farmers. However, the target was to reach as many farmers as possible. The overall survey respondents are summarised below:

- 734 respondents (50.1% of the target sample)
- 665 usable questionnaires (91% of total questionnaires received and 45.4% of the target sample)

The sample aimed to reflect the relative contributions of commercial and smallholder/subsistence farmers at 83% and 17%, respectively. The actual outcome showed a distribution of 85% for commercial farmers and 15% for smallholder/subsistence farmers. For three districts (Cape Winelands, Overberg, and West Coast) the response rate went beyond the expected contribution. However, in four other districts, the actual contribution was slightly below the target. More than 42% of the respondents indicated that they farm with sheep, followed by fruit (36%), beef and small grain (each about 25%) and wine (23%) as the top 5 preferred farming enterprises.

6.4 Key survey results – the needs of farmers

The detailed survey results are available in an Excel database. The following sections present a condensed description of key findings and conclusions of the survey. The findings are reported in **11 categories of services**. **Note:** The 2014 survey only included 9 service categories (see Table 6-1). In the 2023 survey two categories were added (Veterinary services and Regulatory) and one consolidated (Research & Technology transfer) for more clarity (see Table 6-2).

Table 6-1: Agricultural services categories used in the 2023 survey

Resource access	Market access related services	Off-farm infrastructure
Resources acquisition services	Market information	Regulatory
Farm planning services	Strategic information	Research and technology transfer
Social services	Veterinary services	

Table 6-2: Nine agricultural services categories and colour codes used in the 2014 survey

Research	**Farm planning**	**Strategic Information**
Technology transfer	**Market access**	**Off-farm infrastructure**
Resources acquisition	**Market Information services**	**Social Services**

6.4.1 Overall ranking of services categories per farmer category

The data reveals that the five most valued service categories for commercial farmers (large, medium, and small) are Resource Acquisition, Social Services, Resource Access, Farm Planning, and Market Access. The five leading service categories identified by smallholder and subsistence farmers closely match those of commercial farmers. Essential services for both groups include Social Services, Farm Planning, Resource Acquisition/Access, and Market Access, underscoring their importance across all farming categories.

6.4.2 Detailed ranking of services needs per farmer category (2023 vs 2014)

In this section the 2023 survey results are compared with the 2014 results per farmer and services category. A lower ranking does not necessarily imply that the service is not important, it only indicate that there are other services with a higher priority. The detailed analysis is available in **Appendix A**. For the sake of brevity only the key results and trends are provided in the following sections.

6.4.2.1 Resource access services needs

Not surprising, in the 2023 survey access to electricity is regarded as a major constraint by most of the farmer categories. Smallholder farmers with commercial aspirations have a need for electricity supply to grow their businesses. Access to fertilizers is also a constraint for commercial farmers (not only because of costs, but also availability). In 2023, subsistence farmers that produce some surplus also indicated that access to fertilizer is a major obstacle (mainly because of lack of funding and knowledge). In 2014, similar to 2023, electricity (reliability and cost) was regarded as a strategic input for wine and especially fruit farms (cold storage and packaging). Access to fertilizer, herbicides and pesticides was regarded as a major constraint for smallholder and subsistence farmers. **Trend:** No significant change since 2014. However, in 2014 electricity supply were not indicated as a high priority for smallholder and subsistence farmers.

6.4.2.2 Resources acquisition services needs

In the 2023 survey, similar to 2014, water right acquisition was again pointed out as a major constraint (supported by the inputs of farmers during group sessions) by most farmer categories. Smallholder farmers with commercial aspirations and urban/peri urban subsistence farmers indicated that land use rights acquisition are problematic. Environmental Impact Assessment processes were mentioned in almost all the group sessions as a major obstacle towards agricultural development. Processes are simply too expensive and too cumbersome; hence, there is a need to reduce the cost (in both finance and effort).

Farmers across the board of farmer categories and enterprises indicated that services to enhance land use and water rights are of critical importance to ensure the growth and stability of the agricultural sector. Groundwater supply was pointed out specifically by the livestock farmers (many in the Karoo) as a key need (new sources and testing of existing sources). The key difference between the subsistence/small holders and the commercial farmers is that the latter is past the stage of acquisitioning of basic resources. The services needs of commercial farmers are to a large extent for expansion/growth. During 2014, farmers across all the farmers categories indicated that acquisition of water and land use rights was a problem. **Trend:** No significant changes since 2014. However, farm valuation services were not indicated in the 2014 survey as a high priority.

6.4.2.3 Farm planning services needs

A clear distinction of the priority of farm planning services needs between commercial and smallholder and subsistence farmers is evident from the survey results of 2023. The key priorities for large scale commercial farmers are water availability and quality advice, land use / soil health and labour relationships and conflict resolution. It is of interest to note that Medium Scale Commercial farmers in general rate budgeting, financial advice and water availability services high. This can probably be explained by the fact that they aspire to grow their farming operations. Small commercial farmers have a number of farm planning services needs with the highest priority related to budgets, land use / soil health and water availability and quality advice.

Smallholder farmers with commercial aspirations key services needs are very similar to medium scale commercial farmers. The services related to budgeting and financial advice (amongst others application for grant funding) scored the highest. Subsistence farmers producing some surplus indicated that budgets for cashflow, budgets for whole farm planning, climate information and irrigation equipment technical advice are priority needs.

The primary needs of survival subsistence farmers encompass guidance on budgeting, crop production benchmarks, irrigation infrastructure, livestock management, and water availability and quality. For micro commercial farmers, the most critical areas of focus are budget management, livestock technical support, and advice on water availability and quality.

It's noteworthy that urban and peri-urban subsistence farmers place a significant emphasis on services related to budgeting. This trend likely stems from the severe constraints on funding they experience, necessitating careful prioritization of their available resources. Irrigation infrastructure advice is also a high priority since the availability of land is a huge limitation and applying irrigation can contribute significantly to boost production on crops like vegetables and reduce the risk of crop failure.

It was clear during the 2014 survey that subsistence and small holder farmers (commercial aspirations) needed basic services related to access to inputs and production practices. More advanced commercial farmers did not regard access to input services as a key priority since they already have access. Two key services were highlighted by commercial farmers - all services related to labour and human resources planning, and the replacement of fencing for livestock farmers. It was indicated that fencing should be regarded as a public good to be subsidised since a deterioration of the current state of affairs will ultimately result in environmental challenges (over grazing, reduced livestock production, erosion, impact on biodiversity etc.).

Veterinary services were pointed out across all farmer categories as a critical service for the sustainability of the livestock industry. Commercial livestock farmers (mainly in the Karoo region) pointed out that services to eradicate intruder plants and vermin control are crucial for profitable and sustainable livestock production. All the commercial farmer typologies indicated that a service to develop independent crop and livestock budgets (e.g. Combuds) is extremely important. This is not only for farm planning purposes but also to negotiate with other stakeholders in the industry (buyers, in court cases, to react to micro and macro impacts etc.). Similarly, the Guide to Machinery Cost (KZNDOA) is an important service to be used in farm planning (budgets) and when negotiating hourly machinery and equipment hire rates.

Another important service mentioned by most categories of farmers was assistance with applications for funding, with either commercial institutions or grant funding. It is interesting to note that all the commercial farming categories indicated a need for assistance for grant funding which was possibly an indication of the support from commercial farmers for land reform and BEE projects to benefit their farm workers at the time. Also interesting to note is that technical services were not high on the priority list of large commercial farmers, probably because they have their own technical personnel.

Key farm planning services needs trends (2014 compared to 2023):

- Apart from whole farm budgeting in 2014, the trend for 2023 indicate that budgeting in general is a high priority especially for smaller scale farmers and specifically for subsistence farmers.
- The results of the 2023 survey also indicate that there is a decline in the need for assistance for grant funding for commercial farmers. In general this can be explained by farmers frustration with the bureaucratic processes and many failures reported on land reform projects. Commercial farmers are still committed to land reform but they have learned many lessons. They mostly now rely on private sector support with limited reliance on government (observation from group sessions).
- Labour relationship and conflict resolution remains a high priority.
- Technical services are not high on the priority list of large commercial farmers, probably because they have their own technical personnel.

6.4.2.4 Social services needs

During the 2023 survey, farm security services were indicated as a high priority by almost all the farmer categories (top of all social services). This is also no surprise given the high occurrence of farm attacks and crime in general in rural areas. Short courses and training services is also regarded as extremely important by all farming categories (also highlighted during the group discussions). During the 2014 survey, farm security was also indicated as a high priority. Medium commercial, lifestyle and subsistence farmers regarded training and education, health care as important. Access to schools were also indicated a high priority. Almost all the commercial farmers (especially fruit and wine farmers, and medium as well as large farmers) rate social services as crucial for a sustainable agricultural sector. This is not surprising since they employ the majority of farm workers and their farms are located in regions in the Western Cape that can be regarded as socio-economic "hot spots". The seasonality of employment on these farms contributes to the socio-economic problems in these regions. **Trends:** In general, social services are still regarded as very important. It seems, with the increase in crime since 2014, that farm security services have become even more important in 2023. The merits of short course and training in general also seems to be regarded as more important compared to 2014.

6.4.2.5 Market access related services needs

Market access is a high priority for most farmers categories (except for subsistence farmers) especially for smallholder farmers with commercial aspirations. Since most commercial farmers already comply with food safety regulations most of them did not indicate that food safety services are a high priority. However, one of the major barriers to improve market access for smallholder farmers with commercial aspirations is to comply with food safety regulations, thus, these services are relatively important to them. An interesting finding is that food safety services are also relatively important for subsistence survival farmers and even more so for subsistence urban/peri-urban farmers. This result can probably be explained by the fact that in general consumers (even in rural and urban areas) are more food safety conscious. Market compliance services are not so important for commercial farmers since they already comply. However, for smallholder farmers with commercial aspirations and subsistence urban/peri-urban farmers (probably with aspirations to enter formal markets) market compliance assistance is regarded as important.

The 2014 survey results indicated that market access services were important for all categories of farmers. At the time, food safety and market compliance assistance was not pointed out as a need by most farmer categories, apart from medium commercial farmers. The 2014 survey also indicated that a major distinction between small holders and commercial farmers is the emphasis on different market destinations. For the majority of small holders the emphasis is on access to the local market. The issue of compliance was also mentioned in several group sessions as a key area to be addressed (albeit on different levels). A notable discovery is the challenge faced by commercial livestock farmers in tapping into informal livestock markets. They indicated that there is a need for this service since in many cases informal markets are more profitable compared to formal markets. Medium and large commercial farmers place a higher emphasis on services in order to maintain existing and grow new export markets. **Trend:** The 2023 survey indicated that in general market access and food safety services have become more important for all small and subsistence farmers compared to 2014.

6.4.2.6 Market information services needs

The 2023 survey results indicates that in general market information services are regarded as less important to commercial farmers (since they already have access) and more important by smallholders and subsistence farmers (probably because many of them have not been exposed to these services). However, the results does not imply that market access is not important to commercial – there are just other services that are a higher priority that are not currently satisfied. In 2014 subsistence and small holder farmers were, not surprisingly, really interested in market information services. **Trend:** The results of the 2023 survey indicate that there is increasing interest amongst smallholder and even subsistence farmers in market information.

6.4.2.7 Strategic information services needs

Most commercial farmers have access to strategic information via the internet or from farmers associations and commodity organisations. The 2023 survey results indicates that livestock numbers have become important for smallholders and subsistence farmers. It is interesting to note that the impact of compliance to standards and regulation have become important for urban / peri-urban farmers. The 2014 survey indicated that large and medium commercial farmers express more interest in strategic information services compared to smaller farmers. It is of interest to note that lifestyle farmers showed keen interest in the impact of agricultural policies and the impact of external factors on agriculture. Fruit and wine farmers (more complex in many cases more progressive) showed a keen interest in both market information and strategic information. **Trend:** During the 2014 survey strategic information were not indicated as an important service by smallholder or subsistence farmers. The 2023 survey indicated some interest, albeit not significant.

6.4.2.8 Veterinary services needs

A shortcoming of the 2014 survey was that veterinary services was not a category on its own. This category was introduced in the 2023 survey. The results indicate that this service is very important for micro commercial, smallholder farmers with commercial aspirations and also for subsistence farmers producing some surplus. For most commercial farmers veterinary services are easily accessible and not indicated as high priority. However, during the group discussions there was a great concern raised about the availability of vaccines from Onderstepoort Biological Products and the sustainability of the institute in future. Some farmers indicated that the Western Cape should consider establishing its own vaccine production facility.

6.4.2.9 Off-farm infrastructure services needs

The majority of commercial farmers categories, lifestyle farmers and subsistence farmers producing some surplus indicated road maintenance as a priority Off-farm infrastructure service. Port services are important for commercial farmers since many of them depends on efficient services at the harbour for imports of inputs and export of produce (in particular the fruit and wine industry). Small commercial farmers indicated that all off-farm infrastructure services are important to them. This makes sense since many small farmers do not have economies of scale to have their own cooling, packaging and processing facilities. In 2014, neither smallholder Lifestyle nor micro commercial farmers indicated a need for Off-farm infrastructure services. However, all the other farmer categories indicated (similar to 2023) that road maintenance is a key service. Small holder farmers with commercial aspirations regard processing, packaging, cold storage and mechanisation services as equally important since they probably do not have economies of scale to provide their own services. **Trend:** Not much changed since 2014. However, in 2014 there seemed to be more off-farm infrastructure services needs from smallholder farmers with commercial aspirations in off-farm infrastructure compared to 2023.

6.4.2.10 Regulatory services needs

The results of the new category "regulatory services" that were introduced in the 2023 survey are presented in. It is clear that services related to labour laws and regulations are important for all commercial farmers and smallholder farmers with commercial aspirations followed by Bio-Safety – Chemical compliances. Smallholder farmers with commercial aspirations indicated the importance of livestock identification mark registration (probably because of the high incidence of stock theft). In general the results indicate that large commercial farmers, followed by medium commercial farmers have more regulatory services needs compared to the other categories of farmers. It can be postulated that the other farming categories will share the same sentiments as they progress to a commercial scale.

6.4.2.11 Research and technology transfer services needs

Most farmer categories indicated a need for services related to transition from conventional to regenerative agriculture. All commercial farmer categories indicated a need for marketing and production research. Subsistence farmers also indicated a need for services related to regenerative agriculture and also of interest for marketing (this result is consistent with the result of the group discussions where subsistence farmers indicated, as one of their objectives, to progress from subsistence to small commercial). It's crucial to highlight that across all categories of farmers, farm visits are the most preferred method for technology transfer, followed by electronic media and farmers' days. The key findings of the 2014 survey indicated that subsistence and small holder commercial aspiration farmers have significantly less research needs compared to the broad commercial category. The reason for this is probably the fact that many of these farmers have not been exposed to research to the same extent as commercial farmers. The conclusion nevertheless is that agricultural research is a cross cutting service between all categories of farmers. Within the broad concept of research it is not necessary to have a separate research service for different farmer categories. However, between commodity groups there are clear differences that are directly linked to the characteristics of farming within the commodity group, especially between crops and livestock. **Trend:** The most significant trend is the keen interest in 2023 for services related to regenerative agriculture for most of the farmer categories. During the 2014 survey, none of the farmer categories indicated this need for services. The 2023 survey also confirmed that farm visits and farmers days remains the preferred method of technology transfer.

It is interesting to note that many of the farmers (contrary to belief) still prefer personal attention through farm visits, information days and study groups. Noteworthy is that extension services were identified as essential for effective technology transfer by all farmer groups, including commercial farmers. In group discussions, detailed later in this report, numerous commercial farmers emphasized that the WCDoA and its extension officers should serve as the primary contact point for land reform and other Black Economic Empowerment (BEE) initiatives. The results of the 2014 survey are similar to the 2023 survey. **Trend:** In 2023, all the farmer categories indicated a strong preference for electronic technology transfer, even the subsistence farmers (Covid 19 probably played a role).

6.4.3 Rating of the top 5 services required per farmer category and provided by Who?

Tables 6-3, 6-4 and 6-5 shows the rating of the top 5 services required per farmer category and who should be providing the services. The following abbreviations are used to indicate who should provide the services: Government National & Provincial (GVT N&P), Independent Service Provider (ISP), Commodity Organisation (CO), Organised Agriculture (OA), Agri-Business (AB), Water User Association (WUA).

Table 6-3: Commercial farmers Top 5 services needs and provided by Who?

Commercial Large	**158**	**Service Category**	**Best Positioned**
Farm security	1	Social services	GVT N&P, Security companies
Water rights acquisition	1	Resources acquisition	GVT N&P
Labour laws and regulations	2	Regulatory	GVT N&P, ISP
Water availability and quality advice	2	Farm planning	GVT P, CO
Electricity	2	Resource access	GVT N&P / Private Co. Eskom
Commercial Medium	**114**	**Service Category**	**Best Positioned**
Farm security	1	Social services	GVT N&P, OA
Labour laws and regulations	2	Regulatory	GVT, ISP, Labour Consultant
Budgets - Whole farm planning	2	Farm planning	GVT P,CO, AB, ISP,
Resource access - Electricity	3	Resource access	GVT N, ISP, Eskom
Financial - Advice	4	Farm planning	CO, AB
Commercial Small	**223**	**Service Category**	**Best Positioned**
Farm security	1	Social services	GVT N&P, ISP, Farm watch, SAPD
Labour laws and regulations	2	Regulatory	GVT N&P, ISP, AB
Short courses and training	3	Social services	All
Budgets - Cash flows	4	Farm planning	AB, ISP, Auditors, Banks,
Water availability and quality advice	5	Farm planning	Gvt N&P, ISP,AB, WUA
Commercial Micro	**70**	**Service Category**	**Best Positioned**
Budgets - Whole farm planning	1	Farm planning	CO, ISP
Budgets - Cash flows	2	Farm planning	Gvt N&P, ISP, AB
Short courses and training	3	Social services	All
Farm security	4	Social services	Gvt N&P, ISP
Budgets - Crop & Livestock	4	Farm planning	AB (co-op)

Table 6-4: Smallholder farmers Top 5 services and provided by Who?

Lifestyle	17	Service Category	Best Positioned
Farm security	1	Social services	Gvt N&P
Alien clearing	2	Farm planning	Gvt N&P
Labour relationships and conflict resolution	3	Farm planning	Gvt P
Water rights acquisition	3	Resources acquisition	Gvt N
Social services - Health care	3	Social services	Gvt P
Smallholder with Commercial aspirations	**24**	**Service Category**	**Best Positioned**
Short courses and training	1	Social services	Gvt N&P, ISP
Financial - Grant application assistance	2	Farm planning	Gvt, AB
Budgets - Whole farm planning	3	Farm planning	Gvt N&P
Financial - Business plans	4	Farm planning	Gvt N&P, Banks
Market access	5	Market access	Gvt P, AB

Table 6-5: Subsistence farmers Top 5 services and provided by Who?

Subsistence: Some surplus	31	Service Category	Best Positioned
Irrigation equipment technical advice	1	Farm planning	Gvt P, AB
Veterinary - Disease diagnostics	2	Veterinary	Gvt P
Short courses and training	3	Social services	Surplus People Project
Climate information	3	Farm planning	Co-op
Budgets - Crop & Livestock	3	Farm planning	Co-op
Subsistence: Survival	**17**	**Service Category**	**Best Positioned**
Farm security	1	Social services	Gvt P
Short courses and training	2	Social services	Gvt P
Budgets - Crop & Livestock	3	Farm planning	Gvt P
Budgets - Cash flows	3	Farm planning	Gvt P
Strategic info - Livestock numbers	3	Strategic Info	Gvt N
Subsistence: Urban/Peri-urban	**13**	**Service Category**	**Best Positioned**
Budgets - Whole farm planning	1	Farm planning	Gvt P&N
Budgets - Crop & Livestock	2	Farm planning	Gvt P
Irrigation infrastructure advice	3	Farm planning	Gvt N&P
Short courses and training	4	Social services	Gvt P
Budgets - Cash flows	4	Farm planning	Gvt

6.5 Group sessions

A detailed standalone report "A REPORT OF THE DISCUSSIONS (WITH THE DIFFERENT FARMER GROUPS) AND THE MAIN FINDINGS OF THE FOCUS GROUP DISCUSSIONS" is available in **Appendices 1**. For the sake of brevity only the key highlights are reported in this section.

6.5.1 Commercial farmers consolidated Logframe analysis

STRATEGIC OBJECTIVE WITH AGRICULTURAL SERVICES **A STRONG COMPETITIVE, PROFITABLE, SUSTAINABLE AGRICULTURAL SECTOR CONTRIBUTING TO JOB CREATION AND WELFARE IN THE PROVINCE IN A SAFE ENVIRONMENT**

For the convenience of the reader a summary of the key activities are provided:

- A number of activities can be linked to communication / coordination between the different spheres of government, government departments and coordination between divisions / sections within government departments. The lack of communication and coordination often result in unnecessary "red tape".
- Improved communication with consumers to raise awareness of the importance of the agricultural sector in the Western Cape.

- There is also a number of cross cutting activities that were mentioned such as rural development in general, good relations, honesty, trust, and a conducive environment for the agricultural sector.
- Following on a number of disasters that struck the Western Cape since 2014, disaster management improvement activities are suggested.
- Activities to improve electricity supply and reliability and to promote the development of renewable energy.
- Activities to improve sustainable agricultural farm practices specifically during farm planning.
- A number of activities to improve farm security.
- Sustainable and all-inclusive / comprehensive funding for land reform projects, for irrigation and research activities.
- A high emphasis on the improvement of human resources capacities and skills development.
- Activities to improve and maintain infrastructure (transport – mainly road & rail, harbours, electricity).
- Numerous activities relating to the improvement of labour relations and productivity and labour regulations to be conducive of creating employment and to enhance efficiency were mentioned. The issues around the employment of foreign nationals were also highlighted.
- Activities to improve both local and export market access.
- Policies to provide stronger support and protection to the agricultural sector and the devolution of power.
- Research on the impact of climate change - especially on long-term forecasting, farm level practises, on agriculture to develop renewable energy, integrated of technology services and research on the sustainability of current crops and future crops adapted to climate change.
- Social services activities (schools / cheches and improvement of health clinics)
- Many activities related to transformation in general (farmer support, access to resources, skills development). It is important to note that commercial farmers expressed the importance of improving the balance between supporting smallholder farmers and commercial farmers - current focus is skew - we need more black commercial farmers,
- Several activities were mentioned to improve water resources management in general (e.g. advise, water quality, riverbank restauration processes to mitigate flood damage, rectify the skew distribution of contribution to maintenance cost of infrastructure, improve invoicing by the DWS). Very important for the WCDoA to review crop factors to calculate gross irrigation demand of crops
- The communication between provinces and national government to streamline the licensing of water entitlements - reduce the backlog. And finally reducing the restrictions on Water Users' Association that impact on their efficient operations (currently to rigid).
- An enabling environment in which they make decisions regarding strategic directions, acquiring services and reaching markets determines their success and reaching their ultimate goals. Much of the stated needs were directed towards public goods type of support as private goods services/commercial services are generally readily accessed through the well-developed local market structures serving agriculture. public sector/government support to access global markets (regulatory advocacy, etc, were highlighted).
- Another important finding relates to the interest of this type to engage in social support and rural development activities - stabilising farm worker environments. the need for type of "rural development foundation activities at farm level" was often mentioned.

6.5.2 Smallholder farmers consolidated Logframe analysis

STRATEGIC OBJECTIVE WITH AGRICULTURAL SERVICES TO HAVE COMMERCIAL BUSINESS AND SUSTAINABLE PROFIT, PROGRAM ACTIVITIES IMPORTANT - INCOME FROM FARMING: SELF EMPLOYED, SELF RELIANCE

Smallholder farmers mentioned 69 activities to reach the strategic objective and outcomes. They are summarised in seven categories as:

Farming Support: Activities around livestock support services, access to water and energy, specialised technical advice, incubation program, supportive legislation, reducing production costs, establishment of a agri-hubs, farm based development planning, diversification, farm security and financial management and planning.

Human Resources, Favourable Practices , Training: Giving small farmers support and training to grow, budgeting and costing, production and marketing practices, hazardous alerts.

Environmental: Soil erosion control, fixing farm dams, carrying capacity improvement and predator control.

Land: Collateral / Land ownership, user rights on communal land, veld management, more land, water use rights.

Improved market access: Better markets, support with mohair and wool certification, training on meat classification, value adding, horizontal alliances (look for and negotiate markets), fair business practices, government to focus more on local products than imports, contract farming.

Funding: Funding support, cutting the Red Tape, slow funding and not enough support.

Implementing support: Needs good mentorship, Inter Departmental collaboration.

Institutionalisation: Farming research and analysis, cross pollination of research for commercial and emerging commercial farmers, Dep of Agric must be more involved with small farmers, school level involvement agricultural training and exposure and proposed a high level committee including industry and farmers.

6.5.3 Subsistence farmers consolidated Logframe analysis

STRATEGIC OBJECTIVE WITH AGRICULTURAL SERVICES TO BE ABLE TO PRODUCE SUFFICIENT PRODUCE TO SUSTAIN HOUSEHOLDS, PROVIDE FOOD SECURITY AND TO COMBAT POVERTY. WHERE THERE IS SURPLUS PRODUCTION, WE SHOULD BE ABLE TO SELL INTO THE TOWNSHIP MARKET AS A MEANS OF INCOME GENERATION.

Subsistence farmers identified 16 activities to reach the strategic objective and outcomes. They are summarised in five categories as:

- **Farming Support:** Extension and planning, access to farming resources (funding, water, land, seedlings, fertilizer), technical support to grow crops, indigenous knowledge development, knowledge and information to be provided to farmers.
- **Human Resources, Favourable Practices , Training:** Participatory and indigenous focus.
- **Land:** Sufficient access to more land and other farming resources.
- **Improved market access:** Open access to the informal and other markets to sell surplus production – also collaboration to pool volumes.
- **Funding:** Not enough funding to support subsistence farmers to produce food and to provide employment opportunities for households. Grant funding must be provided to assist subsistence farmers.

6.6 Services per farmer category – Regional analysis (2023)

A detailed regional analysis of the agricultural services needs of farmers are available in **Annexure B.** The highlights are presented in graphic format just to highlight the differences between regions (not per farmer category – available in **Annexure B**). The analysis indicates that in many cases the relative importance of the categories of services highlighted in the

Survey is consistent with those in the Log Frame analysis (groups discussions). However, there are some differences. In all the regions, services were identified in the survey that was not mentioned in the Log Frame Group discussions.

6.7 Services per category – Commodity analysis (2023 survey)

A detailed analysis of the agricultural services needs of selected commodities are available in **Annexure C**.

7 DESIGN PHASE

7.1 Constitutional implications

Government has the responsibility to make policies and laws about the rights and responsibilities of citizens and the delivery of government services. Government collects revenue (income) from taxes and uses this money to provide services and infrastructure that improves the lives of all the people in the country, particularly the poor[1]. The Constitution of South Africa sets the rules for how government works. Provincial or local government may not do anything that is against the laws or policies set down by national government. Provincial government gets most of its money from the national government through Treasury. Local government also gets grants and some loans through the Treasury. Provinces[2] are responsible for social services like education, health and social development; economic functions like agriculture and roads; and provincial governance and administration which include the legislature, provincial treasury, local government and human settlements[3].

7.2 Categories of agricultural service providers

The key organisations and services provided are described in **Appendices 3**. Only a summary is provided in the report in Figure 7-1 below.

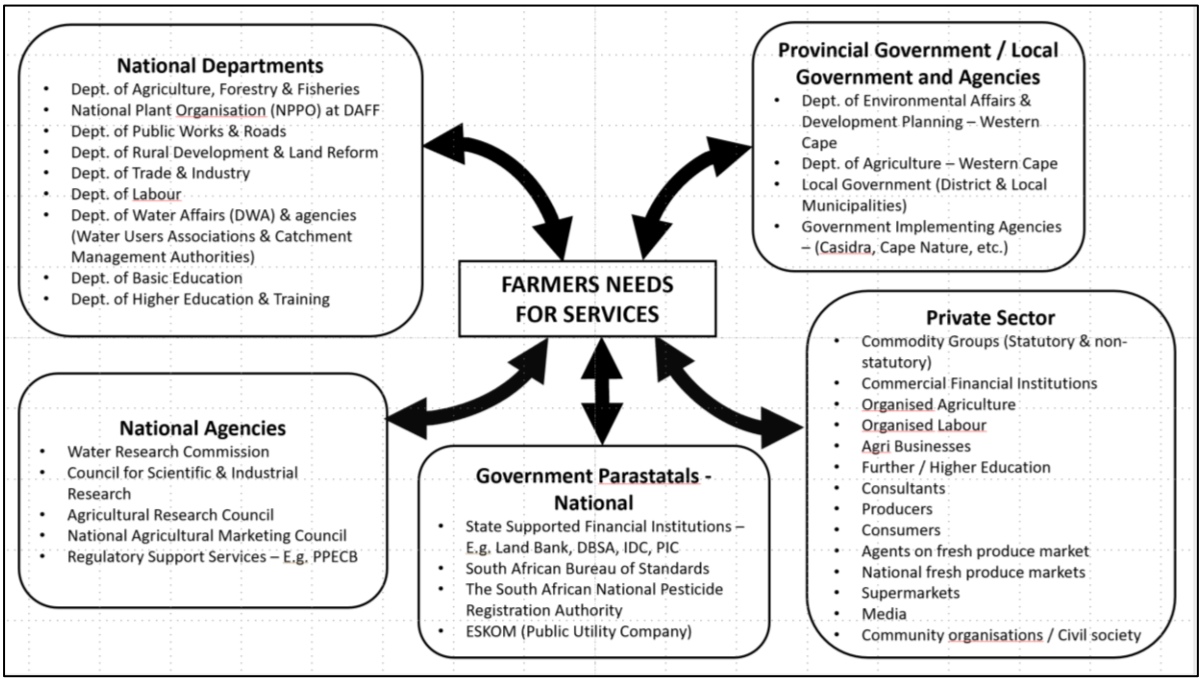

Figure 7-1: Summary of categories of agricultural service providers

[1] https://www.etu.org.za/toolbox/docs/govern/spheres.html
[2] https://www.gov.za/about-government/government-system/provincial-government
[3] https://www.gov.za/about-government/government-system/structure-and-functions-south-african-government

7.3 Design analysis framework

7.3.1 Which actors are the most appropriately placed to provide the various services?

Finding pathways to enhance the sustainability of farming systems (FSs) in the Western Cape is key, given the increasing challenges threatening them. FSs are complex socio-ecological systems in which social and ecological components are strongly linked. Actors dealing with challenges in farming systems in the Western Cape can broadly be categorised as:

- Farmers
- Associations & Cooperatives
- Financial Institutions
- Policy Makers
- Research & Education institutions
- Advisory Services
- Downstream Value Chain actors
- Upstream Value Chain actors
- Civil Society.

The pathways to enhance sustainability are the following (adapted from Soriano et al., 2023):

- **Farmers:** by building human capital (e.g., by being oriented to consumer's needs, open to change, flexible and quick adaptable), and by providing the system with diverse responses (e.g., by building a diverse and wide portfolio of strategies, using innovative plant varieties and additional crops and boosting local commerce).
- **Farmers' associations and cooperatives**: by promoting diverse responses (e.g., developing new products adapted to consumer's needs, supporting quality products and labels, opening new commercialization channels), by sharing learning (e.g., by providing relevant information, advice and monitoring, promoting compliance with good practices and conducting market analysis), and by promoting social organisation (e.g., by encouraging farmers to associate and having closer relationships with financial institutions).
- **Financial institutions:** by building human capital (e.g., by being knowledgeable of agricultural markets and having goals aligned with the sector), and by facilitating diverse responses (e.g., by designing products that meet farmer's needs, specializing insurances by products and developing mixed products).
- **Policy makers:** by defining diverse policies (e.g. by defining flexible programmes and certain interventions with limited entry barriers for beneficiaries).
- **Advisory services:** by sharing learning (e.g., by providing assistance in implementing new practices, training and advising on future business strategies and policy implementation).
- **Research and education:** by enhancing reflective and shared learning (e.g., by providing qualified technical assistance and disseminating up to date research results) and by promoting structures for innovation (e.g., by developing applied research, pursuing medium-term innovation and promoting research in new techniques and varieties).
- **Downstream value chain actors:** by reinforcing social organisation (e.g., by reinforcing the link between farmers and markets), and sharing learning (e.g., by providing advice and facilitate new ideas on doing business).
- **Civil society:** by building human capital (e.g., by being eager for new products and demanding quality products), and by keeping FS carefully exposed to disturbance (e.g., by not pursuing drastic changes in consumption habits).

7.3.2 Considerations for a functional framework and institutional responsibilities in the provision and funding of agricultural services

The various on-line surveys and participative planning sessions with participants from the agricultural sector in the Western Cape (17sessions throughout the province) identified a large number (+170) of required services. These services are listed in the RACIF (Responsible, Accountable, Consulted, Informed, Funding) matrix. Important next steps are to suggest responsibilities in the delivery of these services, followed by a priority statement related to each service. A conceptual framework for the institutional responsibilities for these services are proposed in the sections below.

7.3.2.1 The agricultural system - a conceptual framework for functional components and institutional responsibilities

Three points of departure are important in structuring a conceptual framework for institutional responsibilities re agricultural service provision (see Mosher, 1971; Hayami, 1989; Vink, 1989; van Rooyen et al, 1998; Van Niekerk, 2015; Lele, 2021):

- Firstly, the agricultural system consists of range of functional components viz farming and agri-processing, commercial support, non-commercial support and policy making. These functions, though independent are interrelated and are captured in context of relevant value chains.
- Secondly, each of these functions require a particular set of strategic, institutional and funding structures. Coordination will thus be important to optimize delivery and impact.
- Thirdly, participants in this functional framework needs to act in appropriate manners, from individualistic to collective, based on the nature of the function; this will provide scope for governing strategies such as collective bargaining and public-private (PP) initiatives in the design and implementation of support services.

In this functional system:

- **Agri-production actions-input supply, farming and agro-processing** - is generally viewed to best undertaken by the private sector, with commercialization and profit motives and through entrepreneurial and market drive incentives and strategies.
- **Commercial support services to agri-production** - farmers and related agricultural processing actions- is best provided on demand and through direct market related payments, by private enterprise , guided by profit and growth motives. If a service is not commercially viable i.e. does not add sufficient private value to a user, covering at least the cost of the service, it will not be acquired nor offered.
- **Public goods and services are non-excludable services** (or commodities) made available free of charge to all members of society. As it benefits society at large but are generally viewed as too expensive/costly for individuals to carry. Generally, these services are considered necessary to stimulate development and growth, protect the environment i.e. public goods. These services are mostly administrated by government agencies and paid for collectively by users through general taxation or public fees; no direct payments as in the case of commercial services. In an agricultural context public goods are related to the provision by the state of policy and strategic direction, general and supporting agri-infrastructure- transport systems, ports, roads, etc; basic research facilities and experimentation; regulatory services; disaster management, environmental conservation; basic human-plant-animal health; law enforcement; food security support; etc. Public goods relate to situations where individuals cannot commercially pay full cost recovery prices, due to the high cost while the community at large- current and future generations- is viewed to gain benefits, for example the development and administration of animal disease vaccinations, flood protection against water disasters (Acts of God), dams, conservations works and bio-diversity protection, etc. These high costs furthermore constrains the private sector to perform such services.

- **Merit goods and services** are effectively commercial goods and services that would normally be provided by private sector agencies and entrepreneurs, driven by the profit motive i.e. direct benefits to users must exceed private costs of the good or service. However, due to a range of factors and occurrences - some related to market failure, some related to government/policy failure and or the developmental state of affairs - private sector are justifiable constrained to provide such services against reasonable risk and returns. Subsistence and emerging commercial farming and enterprises along the agri-value chain is generally confronted by such a constraining production support environments. This merit "start-up" assistance and support by the public (and often NGO sectors) i.e. providing "merit services" at affordable rates to these groups. As development progress, full cost recovery should be pursued until a merit service could fully and efficiently be provided as a commercial service by the private sector. Similar argumentation re merit services in commercial/developed agriculture could also apply where long term gains would allow sufficient commercial charges, but when such rates are not affordable during the "incubation period" due to inter alia high initial capital investments and low application rates – power transformations, irrigation water charges in early production phases, extension/advisory services, etc. The concept of "merit services" therefore allow the public sector (government departments / parastatal agencies, etc) to initiate development programmes/projects and required services that would eventually be transferred to the private sector and entrepreneurs. The concept of "merit goods and services" thus provides a justifiable rational for the structuring of "private-public-projects" (PPP), aiming at the eventual full privatization of all such merit functions as the programme/project comes to commercial fruition. Collaboration in the design and implementation of merit services with private sector, in particular with farmers, commodity bodies and agribusiness, would thus be advisable and relevant.

7.3.2.2 RACIF and the conceptual framework

The "optimal" functional allocation of agricultural services in an agricultural functional system is thus not governed by immutable laws or criteria and institutions. Rather, it is the product of the history and experience of government/policy and market failures (and successes) in agricultural development endeavours and strategies. The above framework and criteria provide a logical and operational reference framework to suggest institutional missions, objectives and responsibilities; to identify gaps for institutional development and transformation; and to position institutions in the agricultural support structure. The so called RACI model (RACI Charts, 2014) were used to lay out roles and responsibilities for any activity or group of activities. The basic elements of a RACI model are:

- **R = Responsible**: the organisation who performs the work.
- **A = Accountable**: the organisation ultimately accountable for the work or decision being made.
- **C = Consulted:** Anyone who must be consulted with prior to a decision being made and/or the task being completed. There can be as many "C's" as are appropriate in each row.
- **I = Informed**: anyone who must be informed when a decision is made or work is completed. There can be as many "I's" as are appropriate in each row
- **In addition** the research team added: **F = Who should finance** the activity or service?

In this study the conceptual framework is interpreted through the RACIF system. A matrix **(Appendix D), using the RACIF model,** was developed to provide insight to:

- A list of relevant actors in the private sector.
- A list of relevant actors in the public sectors (at all three spheres of government).
- The type of service which can be provided by them.
- The appropriateness of their services to the various farmer categories.

7.3.3 Which key services should be provided by the WCDoA?

The WCDoA holds a pivotal role in fulfilling its mandate under the South African Constitution to bolster the agricultural sector, a cornerstone of economic stability and growth in the province. Performing functions such as Agricultural Producer Support and Development, Sustainable Resource Use and Management, Veterinary Services, Agricultural Economics Services, Agricultural Education and Training, and Rural Development is not just a responsibility but a necessity to address the challenges and leverage the opportunities within the agricultural sector.

The WCDoA must actively engage in these functions to drive positive change in the agricultural sector. This commitment is essential for turning around the negative real net core agricultural income trend witnessed between 2007 and 2017. Through focused efforts on economic growth, sustainable resource management, and comprehensive support and development programs, the department can ensure the long-term sustainability and success of the agricultural sector in the Western Cape, ultimately contributing to the overall prosperity of the province.

In summary, **Annexure E** provides the rationale for key services to be provided by the WCDoA. This includes the nature and extent of services to be supplied by the Department, which of the services should be provided to each farmer category?, why is the WCDoA is the most appropriate?, the reason why this service is a public good, the rationale for why the delivery of this service by a public institution will support national and provincial priorities and finally the most appropriate delivery mechanism.

The management of these programmes should consider involving role players from other relevant government departments and the private sector to enable the application RACIF model for coordinated service provision.

7.3.4 Which structures should be put in place to ensure comprehensive service delivery to farmers of all categories?

7.3.4.1 Introduction

Mckinsey & Company (2017)[4] pointed out core elements of planning and delivery of successful transformation plans:

- Focus on the changes that are most likely to kick-start rural economic growth. Many countries agricultural transformation plans are overly ambitious, cover too many value chains, and fail to **focus critical resources**.
- Successful agricultural transformation plans differentially target agri-food systems and geographic areas with tailored strategies
- Weighing the trade-offs among multiple objectives
- Focus on market-driven opportunities for farmers.
- Focus on establishing frontline change agents that helps farmers modify their practices. Change agents are people who farmers trust and interact with regularly. Effective change agents exist in both the public and private sectors.
- Selecting change agents is critical in every agricultural transformation, yet we rarely see this step addressed systematically.
- The best agricultural transformation plans have two critical characteristics: they anticipate the need for agility, and they selectively focus on the points of the system where small changes are likely to cause larger shifts. These focus areas could be within specific geographies or within particularly influential value chains.

[4] https://www.mckinsey.com/industries/chemicals/our-insights/successful-agricultural-transformations-six-core-elements-of-planning-and-delivery

- Approaching transformations with an investor mind-set is critical to the success of the process. In kick-starting agricultural transformations, coordination among government, donors, and civil society is critical, but it is equally important from the start to plan for private-sector engagement. Without this, the transformation may proceed more slowly, stall, or not reach scale.
- **Agricultural transformation plans** with an investor mind-set include three strategic planning components. **First**, the plan identifies public investments that complement likely private-sector investment. These are investments in areas where returns are low and/or risks are high. They can include typical public goods (such as rural advisory services or training) as well as investments in commodities or geographies that are important to transformation but unlikely to garner private investment. **Second**, a good agricultural transformation plan identifies public investments designed to catalyse additional private-sector engagement. This may be, for example, through risk guarantees, cost sharing, innovative public–private partnerships, targeted subsidies, or provision of infrastructure conditional on private investment. **Last**, agricultural transformation plans with an investor mind-set anticipate changes in the enabling environment that will be necessary as the transformation progresses to support increasing private-sector engagement. These policies, laws, and regulations are usually across multiple sectors in addition to agriculture, including banking, trade, and land policies.
- **Enabling policies**. Evidence-based policy making builds better plans and integrates accountability into the systems responsible for implementing the policies.

7.3.4.2 What should an effective service sector look like?

IFC (2015) has identified the key features of an effective service sector: a service sector that contributes to the achievement of farm quality and therefore the overall sustainability of a sector. These features should be borne in mind when designing delivery services:

- **High quality**. Service delivery should improve farm quality, and therefore the overall performance of a sector. Farm quality includes both public and private goods, for example the delivery of improved yields and product quality, but also poverty alleviation and environmental protection. Farmers behaviours change positively as a result of receiving training, inputs and finance. Farmers purchasing power also increases.
- **Farmers as "clients", not beneficiaries**. Farmer feedback on the quality of service delivery should be a key determinant of the design of delivery (who, how, when, where) and should be regularly assessed. Farmers should participate in designing service delivery.
- **Competitive.** Alternative service delivery can be used if quality of provision drops: ideally farmers should be able to choose between providers.
- **Accessible.** Delivery should be culturally relevant, non-discriminatory (other than, over time, on the grounds of performance in farm quality), available near or on farms so travel is minimised.
- **Comprehensive and consistent.** Farmers can work towards one holistic vision of farm quality in a way that minimises trade-offs (e.g. improvements in yield without compromising social or environmental norms). This also implies that different service providers send consistent messages to farmers on farm quality and the main technology packages to use.
- **Cost-efficient.** Bureaucracy is minimised. Modern systems are used to oversee, facilitate, and monitor delivery of services.
- **Bundled.** Inputs, credit and training should ideally be delivered as one integrated package of services. This reflects their interdependence: extension and training affect and informs the inputs used, which is in turn shaped by access to credit. By delivering these together, their effectiveness can be maximised and farm quality (in particular

social and environmental considerations) better achieved. Bundled service delivery should, however, allow a certain degree of competition between providers, to prevent them being "locked into" a finance-input scheme which does not allow them to change inputs when necessary.

- **Transparent.** Delivery should be based upon transparent and mutually agreed prices, quality and timing.
- **Driven by a clear business case.** The public and private goods that should be delivered as a result of anticipated improvements in farm quality should be calculated and monitored.

Over time there should be a progression towards delivery of services that can be:

- **Targeted and linked to performance in terms of farm quality**. Service delivery should exclude farmers who are not willing to give up worst practices (e.g., negative environmental impacts) and exclude farmers from obtaining the next "level" of service delivery if there are no improvements in performance. Accessibility should not be restricted based on race, gender, geographical location, level of education, etc., however. The intensity and scope of service delivery should increase as farmers progress towards higher levels of farm quality.
- **Affordable and financed directly from within the sector itself**. Once purchasing power has been built through improvements in farm quality, services also need to be affordable so that farmers can pay for provision themselves. This may be through direct payment by individual farmers or via revenue generation/collection within the sector as a whole. Ultimately service delivery should be free from donor support and financially sustainable.

Applying the IFC (2015) key features of an effective service sector, the authors scored the efficiency of agricultural services in the Western Cape on a scale of 1 to 5 where 1 is a low score and 5 the maximum score. The results of the analysis are summarised in **Annexure F**. Although the scoring can be regarded as somehow subjective since it is based on the perception of the authors (through engagement with many stakeholders), the analysis indicates that, in general service provision is efficient in the Western Cape (score of 78%). Further evidence is provided by the high performance of the sector compared to other provinces in South Africa.

> "The Western Cape agricultural sector is export-oriented and contributes more than 50% on average to South Africa's national agricultural exports to the world. A calculation was made through research conducted by the WCDoA that a 5% increase in the value of exports of certain competitive products (i.e. deciduous fruit, table grapes, wine, animal fibres, flowers and citrus) would lead to 22 951 new jobs being created especially in the non-agricultural sectors of the province" (Meyer, 2023).

7.3.4.3 Which formal or informal structures should be developed for service delivery?

Developing appropriate levels of agricultural services capacity takes decades to develop, is costly and will probably never be fully achieved. In the meantime the pressure on the WCG to effect rural and farmer development is reaching critical levels (due to many constraints, including amongst others human capacity drains and severe frequent budget cuts).

The solution lies in harnessing what capacity is available within the WCDoA and elsewhere in the economy (many of which reside in the private sector) and to develop and utilise these resources to greater effect. New institutional innovations that allow for greater levels of coordination are required (e.g., collaboration with commodity organisations to pool resources). However, since **key partners are ideally private organisations and sometimes even private individuals** this will only be achieved if they are provided with incentives that spur them to collaborate fully and continue to do so for decades to come.

The WCDoA is required to provide support to all farmers categories ranging from commercial through to subsistence farmers. The emphasis should be on providing quality not quantity services, which will require the retention of a core of competent professionals with adequate and stable levels of resourcing available to them.

Financial sustainability is a key challenge for effective delivery of services to sectors dominated by smallholders. Finding ways to build financial sustainability into delivery models is essential. Ideally, **service delivery should be financed directly from within the sector itself** to enable the transition towards a sustainable sector. Various options exist to finance service delivery in this way, these include:

- **Direct payment for services**: this is usually not an option at the outset for transforming smallholder- dominated agricultural sectors towards sustainability, unless prices are very low. As farm quality improves, producers' purchasing power will increase and their capacity to pay will increase. This may therefore be a longer-term option.
- **Indirect payment through membership fees of producer organisations**: this relies on producer organization, which, as described earlier, is limited in many countries. This means that coverage (and therefore accessibility) will remain limited.
- **Indirect payment via levies** on produce processed or marketed, for example, by a sub-sector organisation or a private company.
- **Earmarked tax revenues** raised from agricultural produce, such as export taxes or trade taxes collected by a public body that can be earmarked for the financing of service delivery.

Achieving sector-wide sustainability requires investments in technical assistance, inputs and finance – what we refer to as service delivery – that support farm and sector quality. Farm quality means that: farmers, and their workers, earn a decent living; are adaptive, resilient and innovative; produce at optimum productivity and product quality levels; and that farming has a positive social and environmental impact (IFC, 2015[5]).

7.3.5 How should the Department change to deliver these key services?

In line with the timeless principle that "structure follows strategy," it is proposed that the WCDoA undertake a comprehensive review of its organizational structure following the 2024 election and the establishment of a new 5-year strategic plan. This review is essential to ensure that the department's structure is fully aligned with its strategic objectives and can effectively address the evolving needs of the agricultural sector. Key enhancements to the WCDoA's operational approach are recommended in Section 8.

These strategic recommendations are aimed at enhancing the WCDoA's ability to effectively deliver on its mandate, addressing the challenges and seizing the opportunities within the agricultural sector. Through focused efforts on these key areas, the department can ensure the long-term sustainability and success of the agricultural sector in the Western Cape, contributing to the overall prosperity of the province. These strategic recommendations align with the WCDoA's broader functions.

7.3.6 Which current support services should be discontinued and why?

After a comprehensive assessment of the 8 programmes and services of the WCDoA, the authors are convinced that none of the services should be discontinued.

If something is working. Don't fix it. Keep going. Go with the glow

[5] https://www.iied.org/sites/default/files/pdfs/migrate/16585IIED.pdf

It is undisputed that the WCDoA is the best functioning provincial department of Agriculture in South Arica and most probably in Africa. The programs individually, but most important collectively, contribute to the vision and the mission of the WCDoA:

Vision: "A united, responsive and prosperous agricultural sector in balance with nature"

Mission: "The mission of the Western Cape Department of Agriculture is to unlock the full potential of agriculture to enhance the economic, ecological and social wealth of all the people of the Western Cape through encouraging sound stakeholder engagements; promoting the production of affordable, nutritious, safe and accessible food, fibre and agricultural products; ensuring sustainable management of natural resources; executing cutting-edge and relevant research and technology development; developing, retaining and attracting skills and human capital; providing a competent and professional extension support service; enhancing market access for the entire agricultural sector; contributing to alleviation of poverty and hunger; and ensuring transparent and effective governance"

In addition, the services provided in the WCDoA **8 programmes collectively support the systems** approach to addressing the current and future needs of farmers in the Western Cape.

> "We need the approach that is the antithesis of analysis, namely, synthesis. We are steeped in the analytical tradition. Essentially: take a living thing apart to discover what life is; you will not find a component called life-and behold the life thing is dead. If our only scientific tool is the analytic reduction of a system to its component parts, so that the very nature of the system itself as a viable entity is lost, so that its synergies are denatured, so that it is nothing but a bag of bits, then we do not deserve the name of scientist in the world of complex systems and complicated syntax."
>
> - Beer

Discontinuing one or more of these services will result in GAPS in the service delivery package to address the needs of all categories of farmers in the Western Cape and will defy the concept of the systems approach. However, the authors do have suggestions to make certain adjustments within some of the operational programmes to improve serving the needs of agriculture in the Western Cape. These recommendation are discussed in Section 8.

8 RECOMMENDATIONS

As mentioned, to align with the principle that "structure follows strategy," a comprehensive organizational review by the Western Cape Department of Agriculture (WCDoA) is recommended post-2024 election, following the creation of a new 5-year strategic plan. The review should build on current successes and strengths and address additional needs and weaknesses identified by stakeholders. This review aims to ensure the department's structure is in harmony with its strategic objectives to meet the agricultural sector's evolving needs effectively. Recommendations for enhancing the WCDoA's operational approach include:

- **Adopting a Matrix Management Approach**: Implement a matrix framework for program management to enhance coordination across themes, departments, and with external partners, including public-private partnerships (PPPs), ensuring initiatives are harmonized for maximum impact.
- **Streamlining Processes**: Focus on reducing bureaucratic procedures, especially in executing Environmental Impact Assessments (EIAs) and processing applications for water use and land use rights, to improve efficiency across government levels and departments.
- **Disaster Management**: Strengthen disaster management capabilities to prepare for and respond to natural disasters, ensuring rapid recovery and minimal disruption to the agricultural sector.

- **Funding Mechanisms:** Develop sustainable and inclusive funding mechanisms, including special purpose funding vehicles (SPVs), in partnership with development funding institutions and commercial banks, to support land reform, irrigation, and research.
- **Balanced Support for Farmers**: Recalibrate support between smallholder and commercial farmers, emphasizing increasing the number of black commercial farmers to foster an equitable and diverse agricultural sector.
- **Rural Development:** Explore the revitalization of a "Rural Development Agency" as a key partner to enhance farm-level rural development activities.
- **Transformation Support Structure:** Establish a dedicated structure for a coordinated approach to Black Economic Empowerment (BEE), acting as a one-stop-shop for assistance services.
- **Regenerative Agriculture:** Promote regenerative agriculture practices across all farming categories to support the sector's sustainability.
- WCDoA should actively and structured **engage with all agri-food/beverage value chain partners**, as well as R&D systems (ARC, commodity organisations, Universities) to facilitate the effective entrance of farmers and other entrepreneur; and to support the dissemination of policy information and to obtain regular policy evaluations from industry players. This will lead to an enabling and managed coordinated agribusiness networking and effective early warning systems.

Incorporating specific enhancements:

- **Improve Extension Officer Visibility**: Enhance the networking and visibility of extension officers with commercial farmers to change the perception that WCDoA services are exclusively for smallholder and subsistence farmers.
- **One Desk Information Service:** Create an efficient one-desk information service for land reform/BEE projects to streamline support and guidance.
- **Reduce "Red Tape":** Intensify efforts to minimize bureaucratic delays in critical resource acquisition processes, including EIAs, water right applications, and land tenure applications.
- **Renewable Energy Help Desk**: Establish a help desk for renewable energy solutions, such as electricity, wind, and bio-energy, to support farmers in sustainable energy adoption.
- **Support for Regenerative and Climate-Smart Practices**: Build capacity to support regenerative agriculture and climate-smart agricultural practices, reinforcing the sector's sustainability.
- **Support for Emerging Industries:** Develop capacity to support rapidly growing new industries in the Western Cape, such as almonds, avocados, macadamias, and kiwi fruit.
- **Climate Change and Mitigation Efforts:** Continue excelling in climate change mitigation practices to enhance resilience against ongoing and future challenges.
- **Rural Development and Infrastructure:** Investigate the establishment of a "Rural Foundation" organization to facilitate and coordinate rural development activities, possibly extending the services of Casidra, and increase the WCDoA's capacity to advocate for efficient services from key logistical infrastructure providers.

These recommendations aim to ensure the WCDoA can effectively support the agricultural sector's growth, sustainability, and resilience, contributing significantly to the Western Cape's overall prosperity.

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ANNEXURE A: SITUATION ANALYSIS AND COMPARISON WITH 2014

Farmer's needs – survey sample

Prof. André Pelser, a Research Fellow at the Department of Sociology, University of the Free State, collaborated with the research team to calculate a representative sample that includes both commercial and smallholder farmers. The was done as follows:

- **For commercial farmers:** random stratified sampling to be generalised for producers & districts only (not per Municipality).
- **For Small & Subsistence farmers:** quota sampling method.

Drawing from their membership database, which includes 3,249 producers, Agri-Western Cape provided the distribution of commercial farmers throughout the districts and local municipalities. Consequently, this distribution was considered to reflect the overall representation of commercial farmers in the Western Cape. The number of producers (4 971) registered PRODUCER/FARMER REGISTER of the Department of Agriculture, Land Reform and Rural Development (2021) was used to calculate the sample for smallholders (all definitions). The data is similar to that of Agri-Western Cape per district and local municipality. The sample is presented in Table 1**Table** .

Table 1: Farmers Needs Survey Sample (2023)

District municipality	Local municipality	Number of commercial farmers Agri WC	% contr (Mun)	% contr (Distr)	Number of Small farmes PFR	% contr (Mun)	% contr (Distr)	Stratified Commercial (CL=95%; CI = 5%)	Quota sample 5% Small farmers
Cape Wine-lands	Breede Valley	271	26%	8%	167	23%	3%	159	8
	Drakenstein	160	15%	5%	250	35%	5%	113	13
	Langeberg	257	24%	8%	109	15%	2%	154	5
	Stellenbosch	100	9%	3%	72	10%	1%	79	4
	Witzenberg	267	25%	8%	126	17%	3%	158	6
	Total	**1055**	**100%**	**32%**	**724**	**100%**	**15%**	**663 (282)**	**36**
Central Ka-roo	Beaufort West	209	65%	6%	192	58%	4%	135	10
	Laingsburg	76	24%	2%	59	18%	1%	63	3
	Prins Albert	35	11%	1%	80	24%	2%	32	4
	Total	320	100%	10%	331	100%	7%	**230 (175)**	**17**
City of Cape Town	City of Cape Town	67	100%	2%	657	100%	13%	57	33
	Total	**67**	**100%**	**2%**	**657**	**100%**	**13%**	**57 (57)**	**33**
Garden Route	Bitou		0%	0%	76	7%	2%		4
	George		0%	0%	190	17%	4%		10
	Hessequa	201	38%	6%	229	20%	5%	132	11
	Kannaland / Oudtshoorn	176	34%	5%	231	20%	5%	121	12
	Knysna	19	4%	1%	58	5%	1%	18	3
	Mossel Bay / George	127	24%	4%	112	10%	2%	95	6
	Oudtshoorn		0%	0%	240	21%	5%		12
	Total	**523**	**100%**	**16%**	**1136**	**100%**	**23%**	**366 (221)**	**58**
Overberg	Cape Agulhas / Overstrand	182	31%	6%	246	33%	5%	123	12
	Overstrand		0%	0%	49	7%	1%		3
	Swellendam	143	25%	4%	215	29%	4%	104	11
	Theewaterskloof	257	44%	8%	228	31%	5%	154	12
	Total	**582**	**100%**	**18%**	**738**	**100%**	**15%**	**381 (231)**	**38**
West Coast	Bergrivier / Saldanha	189	27%	6%	137	10%	3%	127	7
	Cederberg	125	18%	4%	315	23%	6%	94	16
	Matzikama	189	27%	6%	333	24%	7%	127	17
	Saldanha Bay		0%	0%	221	16%	4%		11
	Swartland	199	28%	6%	379	27%	8%	131	19
	Total	**702**	**100%**	**22%**	**1385**	**100%**	**28%**	**479 (248)**	**70**
Total		**3249**		**100%**	**4971**	**0%**	**100%**	**2 176 (1 214)**	**252**

Note: For the purposes of this study and to ensure generalizability of the data, a Confidence Level (CL) of 95% and a Confidence Interval (CI) (margin of error) of 5% were accepted in the calculation of the sample sizes.

To generalise to total population PLUS each district municipality the sample was calculated for commercial farmers to be 1 214 producers using the stratified sampling method. To generalise to total population, local municipality as well as district municipality level the sample size should be 2 176.

Due to time and budget constraints, the survey was conducted on the Survey Monkey platform and distributed widely by:

- Agri-Western Cape
- AFASA
- Commodity organisations
- At NAMPO Western Cape
- By the WCDoA through their networks
- Directly to OABS farmer networks

However, due to the challenge of reaching smallholder farmers with Survey Monkey, it was decided to use the quota sampling method for smallholders and subsistence farmers. Although this type of sampling does not allow for generalisability and statistically significant differences between districts, the data does provide an overview of the main trends, perceptions and beliefs in the population. The data can therefore mainly be treated descriptively as an indication of the particular sample's respondents. Using this method, the sample was calculated to be 252 smallholder farmers. However, the target was to reach as many farmers as possible. Survey participation

General

The overall survey respondents are summarised below:

- 734 respondents (50.1% of the target sample)
- 665 usable questionnaires (91% of total questionnaires received and 45.4% of the target sample)

Farmer categories

The sample aimed to reflect the relative contributions of commercial and smallholder/subsistence farmers at 83% and 17%, respectively. The actual outcome showed a distribution of 85% for commercial farmers and 15% for smallholder/subsistence farmers (See Table 2).

Table 2: Actual survey farmer category distribution (2023)

Commercial Large	24%	
Commercial Medium	17%	2%
Commercial Small	33%	
Commercial Micro Enterprise	11%	
Smallholder Lifestyle	3%	
Smallholder with commercial aspirations	4%	
Subsistence: Some surplus production	5%	-2%
Subsistence: Survival - No surplus	3%	
Subsistence: Urban/Peri-urban	2%	

Distribution per district municipality

For three districts (Cape Winelands, Overberg, and West Coast) the response rate went beyond the expected contribution. However, in four other districts, the actual contribution was slightly below the target. (see Table 3).

Table 3: Relative distribution of survey per district municipality - % deviation from target

Cape Winelands	9%
Central Karoo	-3%
City of Cape Town	-4%
Garden Route	-5%
Overberg	1%
West Coast	2%

Farming activities

More than 42% of the respondents indicated that they farm with sheep, followed by fruit (36%), beef and small grain (each about 25%) and wine (23%) as the top 5 preferred farming enterprises (see Figure 1).

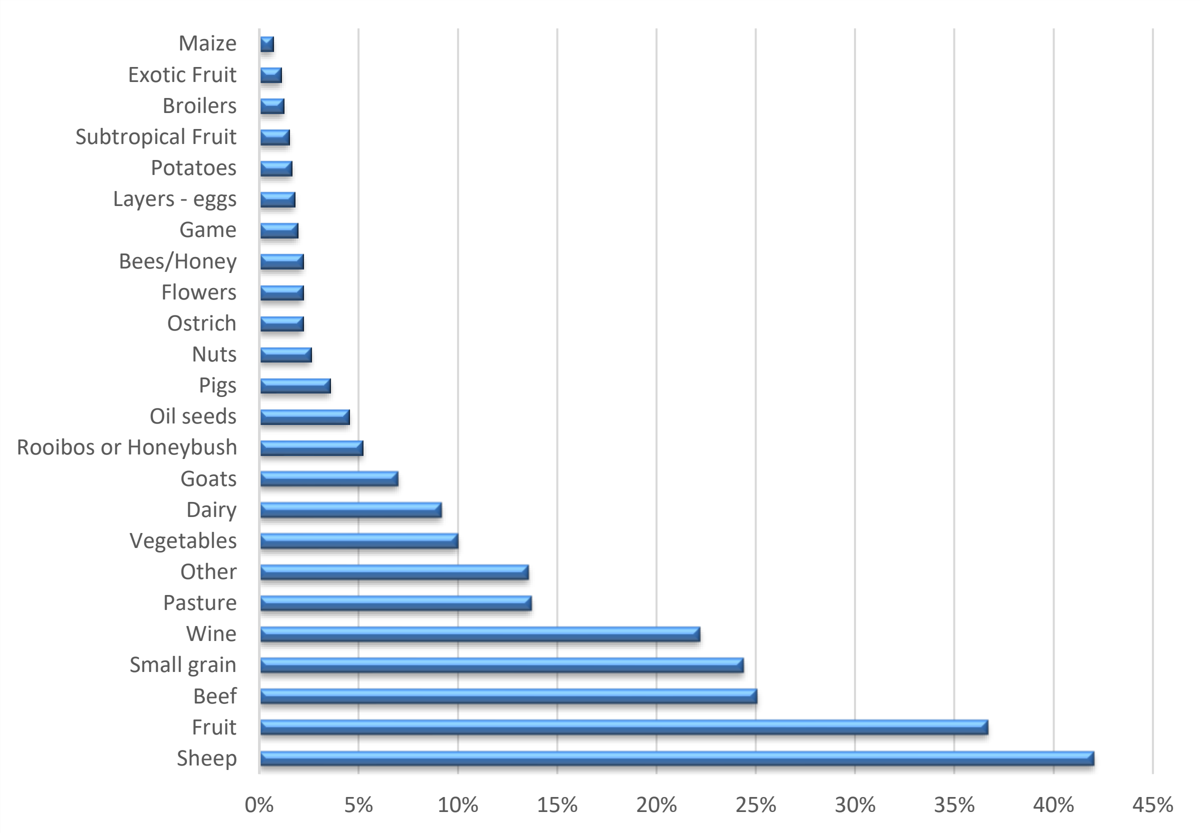

Figure 1: Farming activities (based on number of farmers)

Key survey results – the needs of farmers

The detailed survey results are available in an Excel database. The following sections present a condensed description of key findings and conclusions of the survey. The findings are reported in **11 categories of services**.

Note: The 2014 survey only included 9 service categories (see Table 4). In the 2023 survey two categories were added (Veterinary services and Regulatory) and one consolidated (Research & Technology transfer) for more clarity (see Table 5).

Table 4: Agricultural services categories used in the 2023 survey

Resource access	Market access related services	Off-farm infrastructure
Resources acquisition services	Market information	Regulatory
Farm planning services	Strategic information	Research and technology transfer
Social services	Veterinary services	

Table 5: Nine agricultural services categories and colour codes used in the 2014 survey

Research	**Farm planning**	**Strategic Information**
Technology transfer	**Market access**	**Off-farm infrastructure**
Resources acquisition	**Market Information services**	**Social Services**

Overall ranking of services categories per farmer category

The data reveals that the five most valued service categories for commercial farmers (large, medium, and small) are Resource Acquisition, Social Services, Resource Access, Farm Planning, and Market Access, as shown in Table 6.

Table 6: Ranking of top 12 Services Categories per commercial farmer category

Commercial Large (R22.5 million +)	**Commercial Medium** (R13.5 m - R22.5 million)	**Commercial Small** (R2.5 million - R13.5 million)
Resources acquisition	**Social services**	**Social services**
Social services	**Resources acquisition**	**Farm planning**
Resource access	**Farm planning**	**Resources acquisition**
Farm planning	**Resource access**	**Resource access**
Market access	**Market access**	**Market access**
Regulatory	Regulatory	Market Info
Research	Research	Regulatory
Off farm infrastructure	Market Info	Research
Market Info	Strategic Info	Off farm infrastructure
Strategic Info	Off farm infrastructure	Veterinary
Veterinary	Veterinary	Strategic Info
Other	Other	Other

The five leading service categories (highlighted in green) identified by smallholder and subsistence farmers closely match those of commercial farmers. Essential services for both groups include Social Services, Farm Planning, Resource Acquisition/Access, and Market Access, underscoring their importance across all farming categories (see Table 7).

Table 7: Ranking of top 12 Services Categories per smallholder and subsistence farmer categories and overall ranking

Smallholder with commercial aspirations	**Smallholder Lifestyle**	**Subsistence**	**All**
Farm planning	**Resources acquisition**	**Market access**	**Social services**
Social services	**Social services**	**Farm planning**	**Resources acquisition**
Market access	**Farm planning**	**Social services**	**Farm planning**
Market Info	**Market access**	**Resource access**	**Market access**
Resources acquisition	**Veterinary**	**Resources acquisition**	**Resource access**
Veterinary	Off farm infrastructure	Market Info	Market Info
Resource access	Research	Strategic Info	Regulatory
Regulatory	Market Info	Veterinary	Research
Research	Regulatory	Research	Veterinary
Off farm infrastructure	Strategic Info	Off farm infrastructure	Off farm infrastructure
Strategic Info	Other	Regulatory	Strategic Info
Other	Resource access	Other	Other

Detailed ranking of services needs per farmer category (2023 vs 2014)

In this section the 2023 survey results are compared with the 2014 results per farmer and services category. In all the tables, colour codes and a ranking of 1 to 10 of the services (where 1 is high and 10 low) are used to indicate the priority of the services. A lower ranking does not necessarily imply that the service is not important, it only indicate that there are other services with a higher priority. **Note:** *There was no "Micro commercial" farmers category in the 2014 survey. However, to standardise the tables, the column is included for 2014 results.*

Most selected **Least selected**

Resource access services needs

Not surprising, in the 2023 survey (see Table 8), access to electricity is regarded as a major constraint by most of the farmer categories. Smallholder farmers with commercial aspirations have a need for electricity supply to grow their businesses. Access to fertilizers is also a constraint for commercial farmers (not only because of costs, but also availability).

Table 8: Rating of resource access services needs 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Electricity	2	3	6	9		6	4	3	
Fertilizer	7	10	10	10			2		
Herbicides	6	10	10	10				3	
Labour	8	10	10				4		
Pesticide	7	10	10	10					

In 2023, subsistence farmers that produce some surplus also indicated that access to fertilizer is a major obstacle (mainly because of lack of funding and knowledge). In 2014, similar to 2023, electricity (reliability and cost) was regarded as a strategic input for wine and especially fruit farms (cold storage and packaging). Access to fertilizer, herbicides and pesticides was regarded as a major constraint for smallholder and subsistence farmers (see Table 9).

Table 9: Importance of resource access services indicated in the 2014 survey

RESOURCE ACCESS 2014	Commercial				Smallholder		Subsistence
	Large	Medium	Small	Micro	Lifestyle	With commercial aspirations	
Electricity	X	X					
Fertilizer						X	X
Herbicides						X	X
Labour			X				
Pesticide						X	X

Trend: No significant change since 2014. However, in 2014 electricity supply were not indicated as a high priority for smallholder and subsistence farmers.

Resources acquisition services needs

The resource acquisition service is defined as any assistance or service to acquire agricultural resources. In the 2023 survey (see **Error! Reference source not found.** 10), similar to 2014, water right acquisition was again pointed out as a major constraint (supported by the inputs of farmers during group sessions) by most farmer categories. Smallholder farmers with commercial aspirations and urban/peri urban subsistence farmers indicated that land use rights acquisition are problematic. Environmental Impact Assessment processes were mentioned in almost all the group sessions as a major obstacle towards agricultural development. Processes are simply too expensive and too cumbersome; hence, there is a need to reduce the cost (in both finance and effort).

Table 10: Rating of resource acquisition services needs 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Water rights acquisition	1	7	6	8	3			3	
Farm valuation	8	10	10		4		4		
Land use rights acquisition	8	10				6			5

Farmers across the board of farmer categories and enterprises indicated that services to enhance land use and water rights are of critical importance to ensure the growth and stability of the agricultural sector.

Groundwater supply was pointed out specifically by the livestock farmers (many in the Karoo) as a key need (new sources and testing of existing sources). The key difference between the subsistence/small holders and the commercial farmers is that the latter is past the stage of acquisitioning of basic resources. The services needs of commercial farmers are to a large extent for expansion/growth.

During 2014 (see Table11), farmers across all the farmers categories indicated that acquisition of water and land use rights was a problem.

Table 11: Importance of resource acquisition services indicated in the 2014 survey

RESOURCES ACQUISITION 2014	Commercial				Smallholder		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Water rights acquisition	X	X	X		X	X	X
Farm valuation							
Land use rights acquisition	X	X	X		X	X	X

Trend: No significant changes since 2014. However, farm valuation services were not indicated in the 2014 survey as a high priority.

Farm planning services needs

A clear distinction of the priority of farm planning services needs between commercial and smallholder and subsistence farmers is evident from the survey results of 2023 (see Table 12).

The key priorities for large scale commercial farmers are water availability and quality advice, land use / soil health and labour relationships and conflict resolution. It is of interest to note that Medium Scale Commercial farmers in general rate budgeting, financial advice and water availability services high. This can probably be explained by the fact that they aspire to grow their farming operations. Small commercial farmers have a number of farm planning services needs with the highest priority related to budgets, land use / soil health and water availability and quality advice.

Smallholder farmers with commercial aspirations key services needs are very similar to medium scale commercial farmers. The services related to budgeting and financial advice (amongst others application for grant funding) scored the highest. Subsistence farmers producing some surplus indicated that budgets for cashflow, budgets for whole farm planning, climate information and irrigation equipment technical advice are priority needs.

The primary needs of survival subsistence farmers encompass guidance on budgeting, crop production benchmarks, irrigation infrastructure, livestock management, and water availability and quality. For micro commercial farmers, the most critical areas of focus are budget management, livestock technical support, and advice on water availability and quality.

It's noteworthy that urban and peri-urban subsistence farmers place a significant emphasis on services related to budgeting. This trend likely stems from the severe constraints on funding they experience, necessitating careful prioritization of their available resources. Irrigation infrastructure advice is also a high priority since the availability of land is a huge limitation and applying irrigation can contribute significantly to boost production on crops like vegetables and reduce the risk of crop failure.

Table 12: Rating of farm planning services needs 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Budgets - Whole farm planning	5	2	7	1	4	3	4	3	1
Budgets - Cash flows	4	5	4	2		5	3	3	4
Water availability and quality advice	2	5	5	5		7	4	3	
Labour relationships and conflict resolution	3	6	6	7	3		4	3	5
Land use and soil health	3	10	5	9		7	4		
Bio-safety - Soil health	4	10	6	10	4	7	4		5
Climate information	5	7	9	9	4		2		
Labour use norms (per activity)	5	8	10	6	4	6		3	5
Financial - Advice	8	4	10	7		6	3		
Alien clearing	5	9	9	10	2	7	4		
Irrigation scheduling	4	7	9	10	4				
Budgets - Crop & Livestock	7	10	10	4		7	2	3	2
Soil health advice	5	8	10		4	6			5
Irrigation infrastructure advice	8	9	9	9		7	4	3	3
Financial - Business plans	8	10	9	9		4	3		5
Irrigation equipment technical advice	8	10	10	9	4		1		5
Crop production benchmarks	6	10	8	10		7		3	
Financial - Bank application assistance	7	10	9	9	4	5	4		
Financial - Grant application assistance	8	10	10	8		2	3		5
Financial - Feasibility studies	8	10	9	10	4	5			
Buildings/Equipment state of repair & functionality	7	10	10	8		7		3	
Budgets - Capital	6	10	10	6		7			4
Financial - Management info interpretation	7	10	10	10			4		5
Irrigation engineering service	8	10	10	8	4		4		
Soil Productivity advice	7	10	10	9	4		4		
Livestock production benchmarks	8	10	10	9		6	4		
Livestock technical advice			10	5		7	3		
Financial - NFI/ Profit benchmarks	6	10	10			6			5
Agricultural engineering service	7	10	10	8		7	3		
Land preparation advice		10	10	10		7	4		
Land use suitability - Long term crops		10	10						5
Machinery cost norms		10	10	10					
Environmental impact assessment	8	10	10	10					
Crop quality benchmarks	8		10				4		
Mechanical engineering service			10	10					
Land use suitability - Short term crops	8	10		10					5
Livestock quality benchmarks		10						3	

It was clear during the 2014 survey (see Table 13) that subsistence and small holder farmers (commercial aspirations) needed basic services related to access to inputs and production practices. More advanced commercial farmers did not regard access to input services as a key priority since they already have access. Two key services were highlighted by commercial farmers - all services related to labour and human resources planning, and the replacement of fencing for livestock farmers. It was indicated that fencing should be regarded as a public good to be subsidised since a deterioration of the current state of affairs will ultimately result in environmental challenges (over grazing, reduced livestock production, erosion, impact on biodiversity etc.).

Veterinary services were pointed out across all farmer categories as a critical service for the sustainability of the livestock industry. Commercial livestock farmers (mainly in the Karoo region) pointed out that services to eradicate intruder plants and vermin control are crucial for profitable and sustainable livestock production. All the commercial farmer typologies indicated that a service to develop independent crop and livestock budgets (e.g. Combuds) is extremely important. This is not only for farm planning purposes but also to negotiate with other stakeholders in the industry (buyers, in court cases, to react to micro and macro impacts etc.). Similarly, the Guide to Machinery Cost (KZNDOA) is an important service to be used in farm planning (budgets) and when negotiating hourly machinery and equipment hire rates.

Another important service mentioned by most categories of farmers was assistance with applications for funding, with either commercial institutions or grant funding. It is interesting to note that all the commercial farming categories indicated a need for assistance for grant funding which was possibly an indication of the support from commercial farmers for land reform and BEE projects to benefit their farm workers at the time.

Also interesting to note is that technical services were not high on the priority list of large commercial farmers, probably because they have their own technical personnel.

Table 13: Importance of farm planning services needs indicated in the 2014 survey

FARM PLANNING 2014	**Commercial**				**Smallholder**		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Agricultural engineering service	X	X	X				
Alien clearing	X	X	X				
Bio-safety - Soil health							
Budgets - Capital							
Budgets - Cash flows							
Budgets - Crop & Livestock		X					
Budgets - Whole farm planning	X	X	X				
Buildings/Equipment state of repair & functionality		X					
Climate information							
Crop production benchmarks		X				X	
Crop quality benchmarks							
Environmental impact assessment							
Financial - Advice							
Financial - Bank application assistance	X						
Financial - Business plans	X	X				X	
Financial - Feasibility studies							

FARM PLANNING 2014	Commercial				Smallholder		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Financial - Grant application assistance	X	X	X			X	
Financial - Management info interpretation							
Financial - NFI/ Profit benchmarks		X					
Irrigation engineering service							
Irrigation equipment technical advice					X		
Irrigation infrastructure advice							
Irrigation scheduling			X				
Labour relationships and conflict resolution	X	X					
Labour use norms (per activity)	X	X					
Land preparation advice			X				
Land use and soil health							
Land use suitability - Long term crops		X	X		X		
Land use suitability - Short term crops							
Livestock production benchmarks		X			X	X	
Livestock quality benchmarks							
Livestock technical advice		X	X		X	X	
Machinery cost norms		X					
Mechanical engineering service							
Soil health advice							
Soil Productivity advice		X					
Water availability and quality advice						X	

Key farm planning services needs trends (2014 compared to 2023):

- Apart from whole farm budgeting in 2014, the trend for 2023 indicate that budgeting in general is a high priority especially for smaller scale farmers and specifically for subsistence farmers.
- The results of the 2023 survey also indicate that there is a decline in the need for assistance for grant funding for commercial farmers. In general this can be explained by farmers frustration with the bureaucratic processes and many failures reported on land reform projects. Commercial farmers are still committed to land reform but they have learned many lessons. They mostly now rely on private sector support with limited reliance on government (observation from group sessions).
- Labour relationship and conflict resolution remains a high priority.
- Technical services are not high on the priority list of large commercial farmers, probably because they have their own technical personnel.

Social services needs

During the 2023 survey (see Table 14) farm security services were indicated as a high priority by almost all the farmer categories (top of all social services). This is also no surprise given the high occurrence of farm attacks and crime in general in rural areas.

The results are consistent with the findings of the recently completed Rural Crime Baseline Survey (2021).

Short courses and training services is also regarded as extremely important by all farming categories (also highlighted during the group discussions).

Table14: Rating of social services needs 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Farm security	1	1	1	4	1	7		1	5
Short courses and training	4	5	3	3	4	1	2	2	4
Transport	4	10	10		4			3	
Encouraging woman and youth	5	10	10	9		6		3	5
Health care	7	10	10	10	3				
Human resource development	6	10		9			4		
Literacy	8	10	10	10			4		
Empowerment projects	6	10							
Land reform	8	10							
Access to Schools	8								

During the 2014 survey (see Table 15), farm security was also indicated as a high priority. Medium commercial, lifestyle and subsistence farmers regarded training and education, health care as important. Access to schools were also indicated a high priority. Almost all the commercial farmers (especially fruit and wine farmers, and medium as well as large farmers) rate social services as crucial for a sustainable agricultural sector. This is not surprising since they employ the majority of farm workers and their farms are located in regions in the Western Cape that can be regarded as socio-economic "hot spots". The seasonality of employment on these farms contributes to the socio-economic problems in these regions.

Table 15: Importance of social services indicated in the 2014 survey

SOCIAL SERVICES 2014	Commercial				Smallholder		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Farm security	X	X			X		X
Short courses and training		X			X		X
Transport	X	X					
Encouraging woman and youth							
Health care	X	X			X		X
Human resource development		X					
Literacy	X	X			X		X
Empowerment projects	X	X					
Land reform	X	X	X				
Access to Schools	X	X	X		X		X

Trends: In general, social services are still regarded as very important. It seems, with the increase in crime since 2014, that farm security services have become even more important in 2023. The merits of short course and training in general also seems to be regarded as more important compared to 2014.

Market access related services needs

Market access is a high priority for most farmers categories (except for subsistence farmers) especially for smallholder farmers with commercial aspirations (see Table 16). Since most commercial farmers already comply with food safety regulations most of them did not indicate that food safety services are a high priority. However, one of the major barriers to improve market access for smallholder farmers with commercial aspirations is to comply with food safety regulations, thus, these services are relatively important to them.

An interesting finding is that food safety services are also relatively important for subsistence survival farmers and even more so for subsistence urban/peri-urban farmers. This result can probably be explained by the fact that in general consumers (even in rural and urban areas) are more food safety conscious. Market compliance services are not so important for commercial farmers since they already comply. However, for smallholder farmers with commercial aspirations and subsistence urban/peri-urban farmers (probably with aspirations to enter formal markets) market compliance assistance is regarded as important.

Table 16: Rating of market access related services needs 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/ Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Market access	4	8	9	9	4	5	3		
Food safety	8	10	10	10		6	4	3	5
Market compliances assistance			10			7			5

The 2014 survey results (see Table 17) indicated that market access services were important for all categories of farmers. At the time, food safety and market compliance assistance was not pointed out as a need by most farmer categories, apart from medium commercial farmers. The 2014 survey also indicated that a major distinction between small holders and commercial farmers is the emphasis on different market destinations. For the majority of small holders the emphasis is on access to the local market. The issue of compliance was also mentioned in several group sessions as a key area to be addressed (albeit on different levels).

A notable discovery is the challenge faced by commercial livestock farmers in tapping into informal livestock markets. They indicated that there is a need for this service since in many cases informal markets are more profitable compared to formal markets. Medium and large commercial farmers place a higher emphasis on services in order to maintain existing and grow new export markets.

Table 17: Importance of market access related services 2014

MARKET ACCESS 2014	Commercial				Smallholder		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Market access	X	X	X		X	X	X
Food safety		X					
Market compliances assistance		X					

Trend: The 2023 survey indicated that in general market access and food safety services have become more important for all small and subsistence farmers compared to 2014.

Market information services needs

Market information can assist farmers in negotiations with traders. In the longer term it should also provide farmers with the opportunity to plan and diversify their production in line with market demand and to schedule deliveries to the market at times when returns are most rewarding. The 2023 survey results (see **Table** 18) indicates that in general market information services are regarded as less important to commercial farmers (since they already have access) and more important by smallholders and subsistence farmers (probably because many of them have not been exposed to these services). However, the results does not imply that market access is not important to commercial – there are just other services that are a higher priority that are not currently satisfied.

Table 18: Rating of market information services needs 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Market info - Export volume and price	8	10	9	8					
Market info - Livestock prices and numbers	8	10	10	8			4	3	
Market overviews (International/National)	7	10	10				4		
Market info - Local volume and price	7		10	9				3	
Market potential studies	8			10	4	6	4		
Market info - Processed volume and price		10		10					
Market info - Stocks	8			10					

Table 19 clearly shows that in 2014 subsistence and small holder farmers were, not surprisingly, really interested in market information services.

Table 19: Importance of market information services 2014

MARKET INFORMATION 2014	Commercial				Smallholder		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Export volume and price	X	X	X				
Livestock prices and numbers		X	X				
Market overviews (International/National)	X						
Local volume and price		X	X				
Market potential studies	X				X		
Processed volume and price							

Trend: The results of the 2023 survey indicate that there is increasing interest amongst smallholder and even subsistence farmers in market information.

Strategic information services needs

Most commercial farmers have access to strategic information via the internet or from farmers associations and commodity organisations. The 2023 survey results (see Table 20) indicates that livestock numbers have become important for smallholders and subsistence farmers. It is interesting to note that the impact of compliance to standards and regulation have become important for urban / peri-urban farmers.

Table 20: Rating of strategic information services 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban /Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Strategic Policy impacts	7	10						3	
Livestock numbers						7	3	3	
Impact of external factors	8	10	10						
Tree & Vine census	8	10							
Sanitary & Phytosanitary measures and impact	7								
Crop estimates		10							
Impact of compliance to standards and regulations	8				4				5
Plant material sales		10							

The 2014 survey (see Table 21) indicated that large and medium commercial farmers express more interest in strategic information services compared to smaller farmers. It is of interest to note that lifestyle farmers showed keen interest in the impact of agricultural policies and the impact of external factors on agriculture. Fruit and wine farmers (more complex in many cases more progressive) showed a keen interest in both market information and strategic information.

Table 21: Importance of market information services 2014

MARKET INFORMATION 2014	Commercial				Smallholder		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Policy impacts	X	X			X		
Livestock numbers		X					
Impact of external factors	X	X			X		
Tree & Vine census	X	X					
Sanitary & Phytosanitary measures and impact	X	X					
Crop estimates	X	X					
Impact of compliance to standards and regulations	X						
Plant material sales	X						

Trend: During the 2014 survey strategic information were not indicated as an important service by smallholder or subsistence farmers. The 2023 survey indicated some interest, albeit not significant.

Veterinary services needs

A shortcoming of the 2014 survey was that veterinary services was not a category on its own. This category was introduced in the 2023 survey (see Table 22). The results indicate that this service is very important for micro commercial, smallholder farmers with commercial aspirations and also for subsistence farmers producing some surplus. For most commercial farmers veterinary services are easily accessible and not indicated as high priority. However, during the group discussions there was a great concern raised about the availability of vaccines from Onderstepoort Biological Products and the sustainability of the institute in future. Some farmers indicated that the Western Cape should consider establishing its own vaccine production facility.

Table 22: Rating of veterinary services 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Disease diagnostics	8		10	6		5	1		
Farm inspections			10	10	4				
Movement permits		10				7			
Abattoir plan approval		10		10		7			
Laboratory service	8	10							
Testing for controlled diseases	8			10					

Off-farm infrastructure services needs

The majority of commercial farmers categories, lifestyle farmers and subsistence farmers producing some surplus indicated road maintenance as a priority Off-farm infrastructure service. Port services are important for commercial farmers since many of them depends on efficient services at the harbour for imports of inputs and export of produce (in particular the fruit and wine industry).

Small commercial farmers indicated that all off-farm infrastructure services are important to them. This makes sense since many small farmers do not have economies of scale to have their own cooling, packaging and processing facilities (see Table 23.

Table 23: Rating of off-farm infrastructure services needs 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Road maintenance	6	10	10	10	4		4		
Port Services - Effective Harbour	6		10	10					
Off farm cooling		10							
Off farm packaging			10						
Off farm processing									

In 2014 (see Table 24), neither smallholder Lifestyle nor micro commercial farmers indicated a need for Off-farm infrastructure services. However, all the other farmer categories indicated (similar to 2023) that road maintenance is a key service. Small holder farmers with commercial aspirations regard processing, packaging, cold storage and mechanisation services as equally important since they probably do not have economies of scale to provide their own services.

Table 24: Importance of off-farm infrastructure services 2014

OFF FARM INFRASTRUCTURE 2014	Commercial				Smallholder		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Road maintenance	X	X	X			X	
Mechanisation			X			X	X
Off farm cooling						X	
Off farm packaging						X	
Off farm processing			X			X	X

Trend: Not much changed since 2014. However, in 2014 there seemed to be more off-farm infrastructure services needs from smallholder farmers with commercial aspirations in off-farm infrastructure compared to 2023.

Regulatory services needs

The results of the new category "regulatory services" that were introduced in the 2023 survey are presented in Table 25 It is clear that services related to labour laws and regulations are important for all commercial farmers and smallholder farmers with commercial aspirations followed by Bio-Safety – Chemical compliances. Smallholder farmers with commercial aspirations indicated the importance of livestock identification mark registration (probably because of the high incidence of stock theft). In general the results indicate that large commercial farmers, followed by medium commercial farmers have more regulatory services needs compared to the other categories of farmers. It can be postulated that the other farming categories will share the same sentiments as they progress to a commercial scale.

Table 25: Rating of regulatory services needs 2023

Farmer Category	**Commercial**				**Smallholder**		**Subsistence**		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban /Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Labour laws and regulations	2	2	2	5		7			
Bio-safety - Chemical compliance	8	10	10	10					
PPECB	6	10	10						
GMO activity approval	6	10	10						
Animal health		10	10		4	7			
Livestock identification mark registration				10		5			
Intellectual Property Rights	8	10							
Export permits	8			10					
Product standards		10							
Other services	8	10							
Plant protection - Imports of plants and plant products	8								
Plant breeders' rights application	8								
Registration of veterinary export facilities	8				4				

Research and technology transfer services needs

Most farmer categories indicated a need for services related to transition from conventional to regenerative agriculture (see **Table** 26). All commercial farmer categories indicated a need for marketing and production research. Subsistence farmers also indicated a need for services related to regenerative agriculture and also of interest for marketing (this result is consistent with the result of the group discussions where subsistence farmers indicated, as one of their objectives, to progress from subsistence to small commercial). It's crucial to highlight that across all categories of farmers, farm visits are the most preferred method for technology transfer, followed by electronic media and farmers' days (see Table 28).

Table 26: Rating of research services needs 2023

Farmer Category	Commercial				Smallholder		Subsistence		
	Large	Med	Small	Micro	Lifestyle	Commercial aspirations	Some surplus	Survival	Urban/Peri-urban
No of respondents	**158**	**114**	**223**	**70**	**17**	**24**	**31**	**17**	**13**
Transition from conventional to regenerative agriculture	6	10	10		4	7		3	
Marketing	8	10	10	10				3	
Production	7	10	10	10					
Agricultural economics	8	10							
Mechanisation			10	10					
New energy sources									

The key findings of the 2014 survey are presented in Table 27. It is clear that subsistence and small holder commercial aspiration farmers indicated significantly less research needs compared to the broad commercial category. The reason for this is probably the fact that many of these farmers have not been exposed to research to the same extent as commercial farmers. The conclusion nevertheless is that agricultural research is a cross cutting service between all categories of farmers. Within the broad concept of research it is not necessary to have a separate research service for different farmer categories. However, between commodity groups there are clear differences that are directly linked to the characteristics of farming within the commodity group, especially between crops and livestock.

Table 27: Importance of research services 2014

RESEARCH 2014	Commercial				Smallholder		Subsistence
	Large	Med	Small	Micro	Lifestyle	With commercial aspirations	
Transition from conventional to regenerative agriculture							
Marketing		X			X		
Production	X	X	X			X	X
Agricultural economics		X					
Mechanisation		X					
New energy sources							

Trend: The most significant trend is the keen interest in 2023 for services related to regenerative agriculture for most of the farmer categories. During the 2014 survey, none of the farmer categories indicated this need for services. The 2023 survey also confirmed that farm visits and farmers days remains the preferred method of technology transfer.

It is interesting to note that many of the farmers (contrary to belief) still prefer personal attention through farm visits, information days and study groups (see **Table** 28).

Table 28: Technology transfer service's needs (2023)

Technology Transfer 2023	Commercial			Smallholder Lifestyle	Smallholder with commercial aspirations	Subsistence
	Large	Medium	Small			
Information days	4	3	3	3	3	3
Farm visit	1	1	1	1	1	1
Electronically	2	2	2	2	2	2
Reports	5	5	4	5	3	6
Printed media	7	6	7	7	5	5
At a central place	6	4	5	4	4	4
Other	3	4	6	6	4	7

Noteworthy is that extension services were identified as essential for effective technology transfer by all farmer groups, including commercial farmers. In group discussions, detailed later in this report, numerous commercial farmers emphasized that the WCDoA and its extension officers should serve as the primary contact point for land reform and other Black Economic Empowerment (BEE) initiatives. The results of the 2014 survey are similar to the 2023 survey. However, the need for electronic technology transfer services seems to be increasing.

Table 29: Technology transfer (2014)

Technology Transfer 2014	Commercial			Smallholder Lifestyle	Smallholder with commercial aspirations	Subsistence
	Large	Medium	Small			
Information days	x	x	x		x	X
Farm visit	X	x	x		x	x
Electronically	X	x	x	X		
Reports/ Scientific Journals	x	x	X			
Printed media						
Extension Officer	x	x	x			x
Study Groups	x	x	x			

Trend: In 2023, all the farmer categories indicated a strong preference for electronic technology transfer, even the subsistence farmers (Covid 19 probably played a role).

Rating of the top 5 services required per farmer category and provided by Who?

Tables 30-32 shows the rating of the top 5 services required per farmer category and who should be providing the services. The following abbreviations are used to indicate who should provide the services: Government National & Provincial (GVT

N&P), Independent Service Provider (ISP), Commodity Organisation (CO), Organised Agriculture (OA), Agri-Business (AB), Water User Association (WUA).

Table 30: Commercial farmers Top 5 services needs and provided by Who?

Commercial Large	**158**	**Service Category**	**Best Positioned**
Farm security	1	Social services	GVT N&P, Security companies
Water rights acquisition	1	Resources acquisition	GVT N&P
Labour laws and regulations	2	Regulatory	GVT N&P, ISP
Water availability and quality advice	2	Farm planning	GVT P, CO
Electricity	2	Resource access	GVT N&P / Private Co. Eskom
Commercial Medium	**114**	**Service Category**	**Best Positioned**
Farm security	1	Social services	GVT N&P, OA
Labour laws and regulations	2	Regulatory	GVT, ISP, Labour Consultant
Budgets - Whole farm planning	2	Farm planning	GVT P,CO, AB, ISP,
Resource access - Electricity	3	Resource access	GVT N, ISP, Eskom
Financial - Advice	4	Farm planning	CO, AB
Commercial Small	**223**	**Service Category**	**Best Positioned**
Farm security	1	Social services	GVT N&P, ISP, Farm watch, SAPD
Labour laws and regulations	2	Regulatory	GVT N&P, ISP, AB
Short courses and training	3	Social services	All
Budgets - Cash flows	4	Farm planning	AB, ISP, Auditors, Banks,
Water availability and quality advice	5	Farm planning	Gvt N&P, ISP,AB, WUA
Commercial Micro	**70**	**Service Category**	**Best Positioned**
Budgets - Whole farm planning	1	Farm planning	CO, ISP
Budgets - Cash flows	2	Farm planning	Gvt N&P, ISP, AB
Short courses and training	3	Social services	All
Farm security	4	Social services	Gvt N&P, ISP
Budgets - Crop & Livestock	4	Farm planning	AB (co-op)

Table 31: Smallholder farmers Top 5 services and provided by Who?

Lifestyle	**17**	**Service Category**	**Best Positioned**
Farm security	1	Social services	Gvt N&P
Alien clearing	2	Farm planning	Gvt N&P
Labour relationships and conflict resolution	3	Farm planning	Gvt P
Water rights acquisition	3	Resources acquisition	Gvt N
Social services - Health care	3	Social services	Gvt P
Smallholder with Commercial aspirations	**24**	**Service Category**	**Best Positioned**
Short courses and training	1	Social services	Gvt N&P, ISP
Financial - Grant application assistance	2	Farm planning	Gvt, AB
Budgets - Whole farm planning	3	Farm planning	Gvt N&P
Financial - Business plans	4	Farm planning	Gvt N&P, Banks
Market access	5	Market access	Gvt P, AB

Table 32: Subsistence farmers Top 5 services and provided by Who?

Subsistence: Some surplus	31	Service Category	Best Positioned
Irrigation equipment technical advice	1	Farm planning	Gvt P, AB
Veterinary - Disease diagnostics	2	Veterinary	Gvt P
Short courses and training	3	Social services	Surplus People Project
Climate information	3	Farm planning	Co-op
Budgets - Crop & Livestock	3	Farm planning	Co-op
Subsistence: Survival	**17**	**Service Category**	**Best Positioned**
Farm security	1	Social services	Gvt P
Short courses and training	2	Social services	Gvt P
Budgets - Crop & Livestock	3	Farm planning	Gvt P
Budgets - Cash flows	3	Farm planning	Gvt P
Strategic info - Livestock numbers	3	Strategic Info	Gvt N
Subsistence: Urban/Peri-urban	**13**	**Service Category**	**Best Positioned**
Budgets - Whole farm planning	1	Farm planning	Gvt P&N
Budgets - Crop & Livestock	2	Farm planning	Gvt P
Irrigation infrastructure advice	3	Farm planning	Gvt N&P
Short courses and training	4	Social services	Gvt P
Budgets - Cash flows	4	Farm planning	Gvt

GROUP SESSIONS

A detailed standalone report "A REPORT OF THE DISCUSSIONS (WITH THE DIFFERENT FARMER GROUPS) AND THE MAIN FINDINGS OF THE FOCUS GROUP DISCUSSIONS" is available in **Appendices 1**. For the sake of brevity only the key highlights are reported in this section.

Commercial farmers consolidated Logframe analysis

STRATEGIC OBJECTIVE WITH AGRICULTURAL SERVICES

A STRONG COMPETITIVE, PROFITABLE, SUSTAINABLE AGRICULTURAL SECTOR CONTRIBUTING TO JOB CREATION AND WELFARE IN THE PROVINCE IN A SAFE ENVIRONMENT

The commercial farmers participants identified 54 potential outcomes if it is possible to reach the identified strategic objective. In summary the key identified outcomes are:

1. Sustained job creation.
2. Growth of the Western Cape and National economy and wealth creation
3. Improved profitability
4. Improved rural safety, health and political stability
5. Improvement in South African market share and market access
6. Social cohesion and a healthy community
7. Improved access to water, water security and improved quality

8. Improved efficiency and productivity
9. Relevant and good quality research
10. Improved infrastructure (harbour, transport, electricity)
11. Competitive Western Cape agricultural sector
12. Effective disaster management
13. Access to strategic veterinary vaccines
14. Increase in the success rate of land reform projects
15. Sustained job creation and reduction in unemployment
16. In general, an increase in the success of small businesses.

The commercial farmers mentioned 106 activities to reach the defined strategic objective. For the convenience of the reader a summary of the key activities are provided:

- A number of activities can be linked to communication / coordination between the different spheres of government, government departments and coordination between divisions / sections within government departments. The lack of communication and coordination often result in unnecessary "red tape". A need for stronger relationships / partnerships were also expressed between the public and private sector. Activities to improve effective governance and to reduce "red tape" were also highlighted.
- Improved communication with consumers to raise awareness of the importance of the agricultural sector in the Western Cape.
- There is also a number of cross cutting activities that were mentioned such as rural development in general, good relations, honesty, trust, and a conducive environment for the agricultural sector.
- Following on a number of disasters that struck the Western Cape since 2014, disaster management improvement activities are suggested.
- Activities to improve electricity supply and reliability and to promote the development of renewable energy.
- Activities to improve sustainable agricultural farm practices specifically during farm planning.
- A number of activities to improve farm security.
- Sustainable and all-inclusive / comprehensive funding for land reform projects, for irrigation and research activities.
- A high emphasis on the improvement of human resources capacities and skills development.
- Activities to improve and maintain infrastructure (transport – mainly road & rail, harbours, electricity).
- Numerous activities relating to the improvement of labour relations and productivity and labour regulations to be conducive of creating employment and to enhance efficiency were mentioned. The issues around the employment of foreign nationals were also highlighted.
- Activities to improve both local and export market access.

- Policies to provide stronger support and protection to the agricultural sector and the devolution of power.
- Research on the impact of climate change - especially on long-term forecasting, farm level practises, on agriculture to develop renewable energy, integrated of technology services and research on the sustainability of current crops and future crops adapted to climate change.
- Social services activities (schools / cheches and improvement of health clinics)
- Many activities related to transformation in general (farmer support, access to resources, skills development). It is important to note that commercial farmers expressed the importance of improving the balance between supporting smallholder farmers and commercial farmers - current focus is skew - we need more black commercial farmers,
- Several activities were mentioned to improve water resources management in general (e.g. advise, water quality, riverbank restauration processes to mitigate flood damage, rectify the skew distribution of contribution to maintenance cost of infrastructure, improve invoicing by the DWS). Very important for the WCDoA to review crop factors to calculate gross irrigation demand of crops
- The communication between provinces and national government to streamline the licensing of water entitlements - reduce the backlog. And finally reducing the restrictions on Water Users' Association that impact on their efficient operations (currently to rigid).
- An enabling environment in which they make decisions regarding strategic directions, acquiring services and reaching markets determines their success and reaching their ultimate goals. Much of the stated needs were directed towards public goods type of support as private goods services/commercial services are generally readily accessed through the well-developed local market structures serving agriculture. public sector/government support to access global markets (regulatory advocacy, etc, were highlighted).
- Another important finding relates to the interest of this type to engage in social support and rural development activities - stabilising farm worker environments. the need for type of "rural development foundation activities at farm level" was often mentioned.

Smallholder farmers consolidated Logframe analysis

STRATEGIC OBJECTIVE WITH AGRICULTURAL SERVICES TO HAVE COMMERCIAL BUSINESS AND SUSTAINABLE PROFIT, PROGRAM ACTIVITIES IMPORTANT - INCOME FROM FARMING: SELF EMPLOYED, SELF RELIANCE

The smallholder farmers participants identified 11 potential outcomes if it is possible to meet the identified strategic objective. In summary the key identified outcomes are:

1. Produce food for our people
2. Produce food under regulations (comply)
3. Sustainable crop and livestock production

4. Safe environment
5. Produce sustainable quality and quantity
6. Access broader markets
7. To create jobs
8. Leaving a Legacy
9. Many people will be willing to farm, good image of agriculture
10. The playing field will be levelled
11. More young people in farming

Smallholder farmers mentioned 69 activities to reach the strategic objective and outcomes. They are summarised in seven categories as:

Farming Support: Activities around livestock support services, access to water and energy, specialised technical advise, incubation program, supportive legislation, reducing production costs, establishment of a agri-hubs, farm based development planning, diversification, farm security and financial management and planning.

Human Resources, Favourable Practices , Training: Giving small farmers support and training to grow, budgeting and costing, production and marketing practices, hazardous alerts.

Environmental: Soil erosion control, fixing farm dams, carrying capacity improvement and predator control.

Land: Collateral / Land ownership, user rights on communal land, veld management, more land, water use rights.

Improved market access: Better markets, support with mohair and wool certification, training on meat classification, value adding, horizontal alliances (look for and negotiate markets), fair business practices, government to focus more on local products than imports, contract farming.

Funding: Funding support, cutting the Red Tape, slow funding and not enough support.

Implementing support: Needs good mentorship, Inter Departmental collaboration.

Institutionalisation: Farming research and analysis, cross pollination of research for commercial and emerging commercial farmers, Dep of Agric must be more involved with small farmers, school level involvement agricultural training and exposure and proposed a high level committee including industry and farmers.

IMPORTANT NOTIONS:

- A prime focus on food security- producing to support the family nutrition as a priority
- A secondary but important need focused on market access – basic production inter alia through government contracts.
- Property rights security - land rights to enable collateral for funding; farm security- protecting produce and homes
- Human capital development and training, farm technology – and management skills.

- Financial support to bridge difficult climatical periods.

Subsistence farmers consolidated Logframe analysis

STRATEGIC OBJECTIVE WITH AGRICULTURAL SERVICES
TO BE ABLE TO PRODUCE SUFFICIENT PRODUCE TO SUSTAIN HOUSEHOLDS, PROVIDE FOOD SECURITY AND TO COMBAT POVERTY. WHERE THERE IS SURPLUS PRODUCTION, WE SHOULD BE ABLE TO SELL INTO THE TOWNSHIP MARKET AS A MEANS OF INCOME GENERATION.

The subsistence farmer participants identified 9 potential outcomes if it is possible to meet the identified strategic objective. In summary the key identified outcomes are:

1. Produce sustainable harvests and grow livestock herds
2. Maintain a reasonable standard of living
3. Migrating from subsistence farming to small commercial production
4. Generating sufficient wealth as a means out of poverty
5. Our people Our Food, Food Security, For eating and raise their children
6. Reduced poverty levels
7. Good food culture
8. Improved health
9. Food security and reduced dependency

Subsistence farmers identified 16 activities to reach the strategic objective and outcomes. They are summarised in five categories as:

- **Farming Support:** Extension and planning, access to farming resources (funding, water, land, seedlings, fertilizer), technical support to grow crops, indigenous knowledge development, knowledge and information to be provided to farmers.
- **Human Resources, Favourable Practices , Training:** Participatory and indigenous focus.
- **Land:** Sufficient access to more land and other farming resources.
- **Improved market access:** Open access to the informal and other markets to sell surplus production – also collaboration to pool volumes.
- **Funding:** Not enough funding to support subsistence farmers to produce food and to provide employment opportunities for households. Grant funding must be provided to assist subsistence farmers.

IMPORTANT NOTIONS:

- Household food security.
- Access to land and farm resources.
- Support to "escape the poverty trap" of subsistence farming towards commercial production.

Synopsis of group discussions

Commercial farmers

In general commercial farmers focus on and require services on:

- Innovation and technology through private /public partnerships.
- Quality education and skills development to improve productivity.
- To develop a positive agricultural image "as a caring industry – not exploiting labour, the environment, etc.
- Revitalizing a rural development agency such as the old "Rural Foundation" to deal with labour and social development in cooperation with government agencies.
- Competitiveness policies, trade support, etc. in the greatly "unequal" global economic environment.
- Social support services.
- International market access.
- Services that reduce "red tape" (e.g. EIA, water use entitlement registration).

Particular concerns were noted with regard to "red tape" (excessive bureaucracy), conservation legislation application and the ramifications of "slow decision making" with environmental impact studies and applications for water use rights. The urgent need for a "transformation support" structure was highlighted, in particular to gain a coordinated approach to BEE (one desk service) and land reform initiatives linked to secure land occupation rights in order to promote the concept of "share schemes", partnership agreements, mentorships and internships. The strain of current un-coordinated efforts by government regarding policies on energy, labour, law enforcement, infrastructure development, etc. was highlighted, requesting much improved "government support coordination".

Smallholder farmers

Smallholder farmers do operate in a very similar environment as fully fledged commercial farmers and the emerging group also aspire to similar services, outputs and expected outcomes.

Particular focus areas related to their unique situation on the commercial farming development trajectory are "financial support", "agricultural education and training", "farm business and technical extension services" and "policy and operational measures" to promote access to land and water resources in order to scale up towards commercial farming. This indicates that a focussed strategy should be introduced for the group, incorporating fundamental issues such as farmer support and development, market information, access to markets, social support services (transport for learners), animal health care, research information (improved genetic material), etc.

Subsistence farmers

The subsistence group's main focus is to sustain their households through sufficient access to resources (which is similar to the 2014 results). The services they require are of a basic nature and include among others:

- Access to land and water.

- Subsidies/grants on basic inputs (seed, manure, compost, fertilizer, pesticides etc.).
- Technical production support – basic knowledge of production aspects.
- Fencing to protect their crops from animals in the townships.
- Some of these farmers also have the aspirations to migrate from subsistence to smallholder commercial farmers.

General conclusions from group discussion

In spite of the different needs and expectations that the groups espouse based on the state of evolvement of their business enterprises, commonalities link them into a cohesive, homogenous entity, i.e. agricultural practitioners with a common destiny. These include:

- **The uncoordinated approach to agricultural transformation**. This aspect will require an entire rethink on the development strategy and trajectory of different farmer types. Collaboration between farmers, government and service providers will be vital and the idea of a regional New Farmer Development Initiative (referred to as an Agricultural Development Company by some participants) need to be considered seriously (similar to 2014). This will mean the formulation of a regional strategic plan for land reform and the development of new farmers and that the institution to execute the plan should be an "Agricultural Development Company" (ADC). The shareholders of the ADC should be farmers of different farmer categories, agri-businesses and key government departments or agencies. Permanent staffing should be limited to a small managerial and secretarial core and capacity mobilised on a per project basis.
- **Uncoordinated actions by government** and its agencies leading to time delays, red tape and ineffective action.
- **The "negative image" of agriculture**. A clear collaborative strategy is required to promote a positive view by the public as well as of career prospects amongst the youth. More directed young farmer development "incubators" need to be introduced.

Services per farmer category – Regional analysis (2023)

A detailed regional analysis of the agricultural services needs of farmers are available.

The highlights are presented in graphic format just to highlight the differences between regions (not per farmer category).

Note: The score on the vertical access for Logframe and Survey Weight cannot be compared since they are calculated differently.

Log frame scores: The activities in the Logframe (as identified spontaneously by the participants- no predetermined listed services, as in the survey, to select from) were matched to the services list. Example: "Government to increase investment for improved local (across provincial borders) and international market access" identified in the logframe, was matched with the predetermined Market Access Service category IN THE SURVEY. The score is the **frequency** that the derived service/activity were indicated.

Survey Weighted scores: For each service category there are a number of services that could be selected. For example Farm planning has 38 services and Market Access only 3. If Farm planning is selected a 100 times the weighted score will be 100/38 = 2.6 and if market access is selected 10 times the weighted score will be 10/3 = 3.33.

They merely provide an indication of the importance attached to the services category.

The analysis indicate that in many cases the relative importance of the categories of services highlighted in the Survey is consistent with those in the Log Frame analysis (groups discussions). However, there are some differences. In all the regions, services were identified in the survey that was not mentioned in the Log Frame Group discussions.

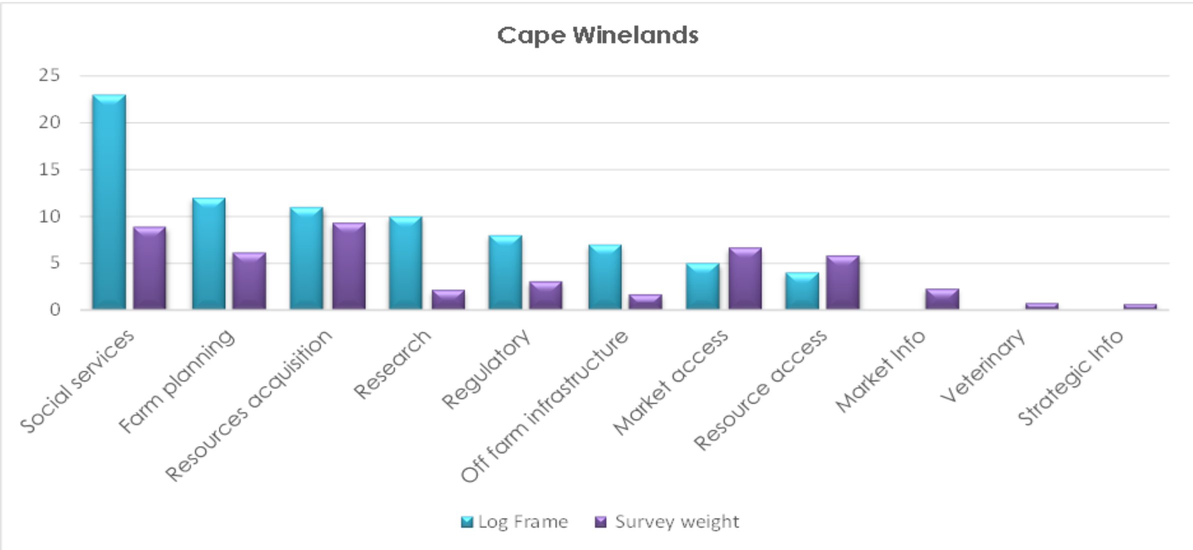

Figure 2: Regional analysis – Cape Winelands

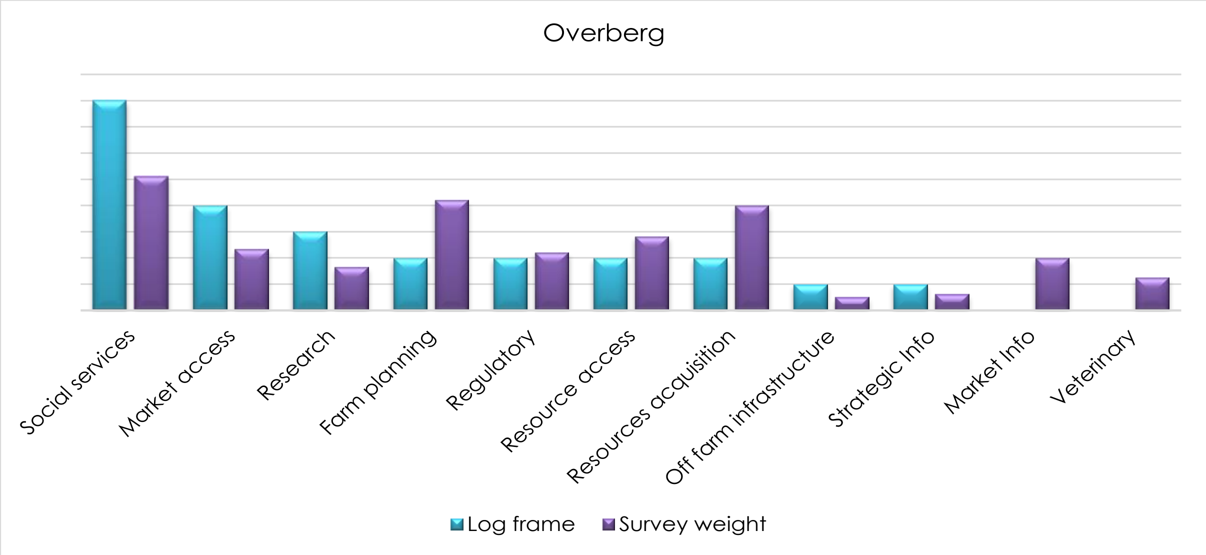

Figure 3: Regional analysis: Overberg

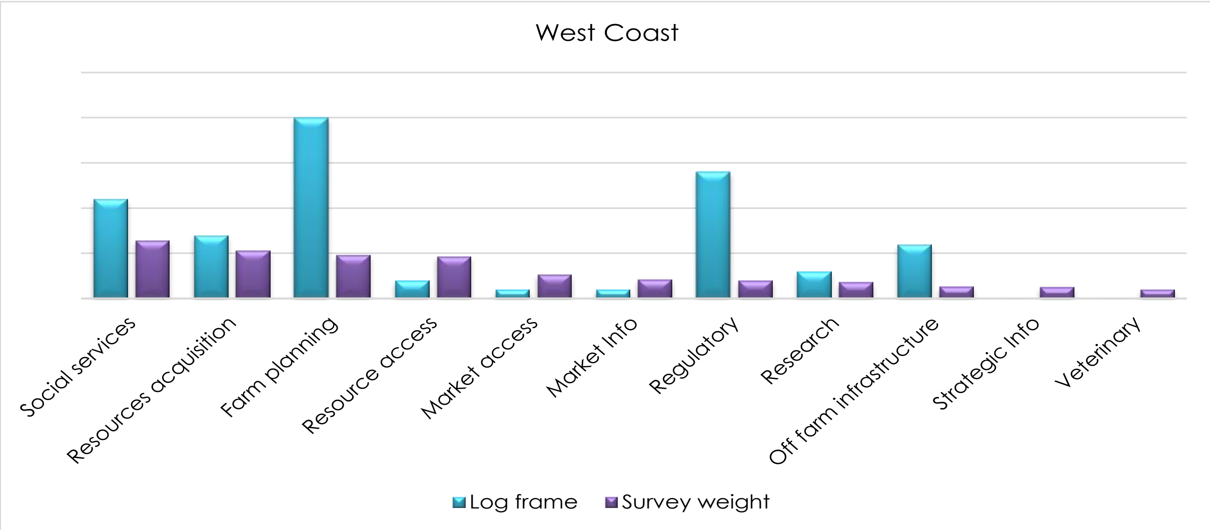

Figure 4: Regional analysis: West Coast

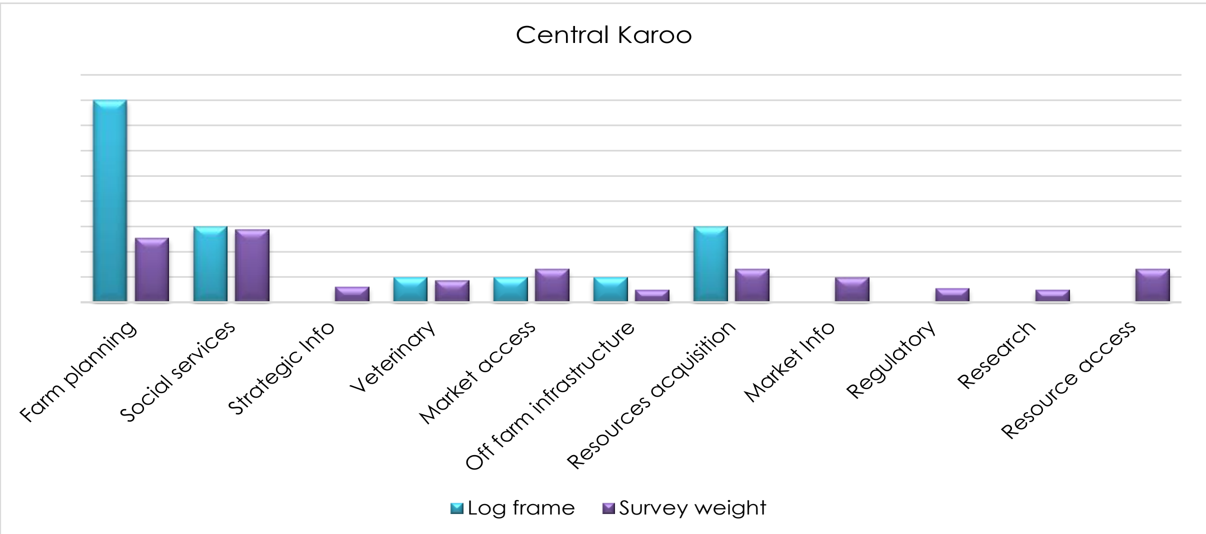

Figure 5: Regional analysis: Central Karoo

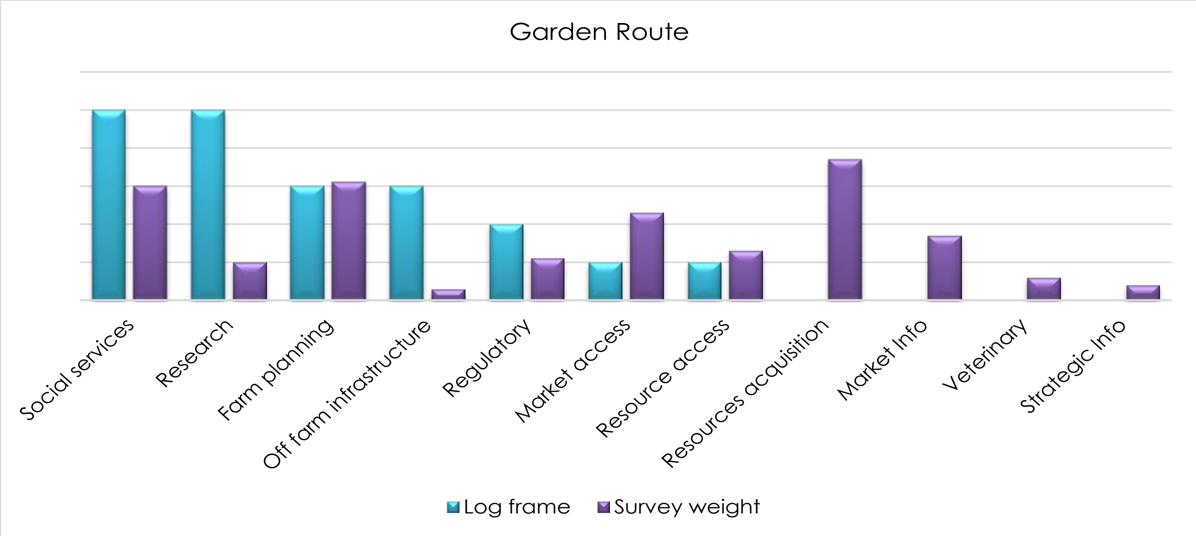

Figure 6: Regional analysis: Garden Route

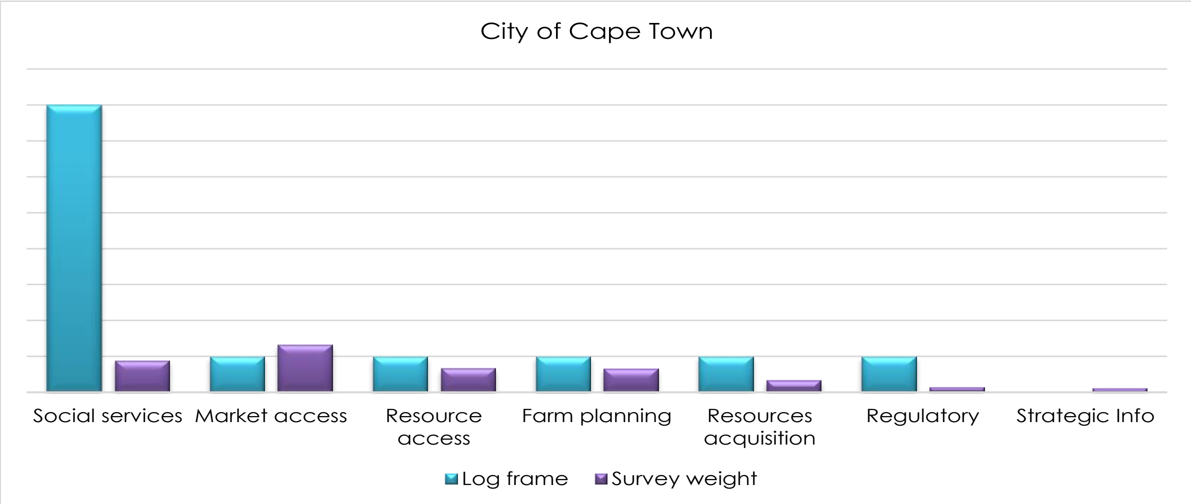

Figure 7: Regional analysis – City of Cape Town

Services per category – Commodity analysis (2023 survey)

A detailed analysis of the agricultural services needs of selected commodities are available in **Annexure B**.

The highlights are summarised in **Table** 33. The top 5 service categories for the Sheep, Fruit, Beef, Vegetable and Wine commodity groups that were highlighted in the survey are:

- Social services
- Farm planning
- Resources acquisition
- Resource access
- Market access

The Small Grain and Dairy commodity groups are similar but they also indicated regulatory services and did not express a need for market access related services:

- Social services
- Farm planning
- Resources acquisition
- Resource access
- Regulatory

Table 33: Summary of commodity analysis per service category (2023)

Rank	Sheep	Fruit	Beef	Wine	Small Grain	Dairy	Vegetables
1	**Social services**	**Resources acquisition**	**Social services**	**Social services**	**Social services**	**Farm planning**	**Resources acquisition**
2	**Farm planning**	**Social services**	**Resources acquisition**	**Resources acquisition**	**Farm planning**	**Resources acquisition**	**Market access**
3	**Resources acquisition**	**Market access**	**Farm planning**	**Resource access**	**Resources acquisition**	**Social services**	**Farm planning**
4	**Resource access**	**Resource access**	**Market access**	**Farm planning**	**Resource access**	**Market Info**	**Resource access**
5	**Market access**	**Farm planning**	**Resource access**	**Market access**	**Regulatory**	**Regulatory**	**Social services**
6	Market Info	Regulatory	Market Info	Regulatory	Research	Research	Regulatory
7	Regulatory	Market Info	Regulatory	Market Info	Market Info	Resource access	Research
8	Research	Research	Off farm infrastructure	Research	Veterinary	Veterinary	Market Info
9	Veterinary	Off farm infrastructure	Research	Off farm infrastructure	Off farm infrastructure	Market access	Strategic Info
10	Strategic Info	Strategic Info	Veterinary	Strategic Info	Strategic Info	Off farm infrastructure	Veterinary
11	Off farm infrastructure	Veterinary	Strategic Info	Veterinary	Market access	Strategic Info	

ANNEXURE B: DETAILED REGIONAL ANALYSIS OF THE 2023 SURVEY

Cape Winelands

Table 0-1: Ranking of Services Category per farmer category - Cape Winelands

Commercial	Smallholder with commercial aspirations	Smallholder Lifestyle	Subsistence
Resources acquisition	Resource access	Social services	Resources acquisition
Social services	Social services	Resources acquisition	Research
Market access	Market access	Farm planning	Resource access
Farm planning	Market Info	Regulatory	Farm planning
Resource access	Farm planning	Veterinary	
Regulatory	Veterinary		
Market Info	Off farm infrastructure		
Research	Research		
Off farm infrastructure	Regulatory		
Strategic Info			
Veterinary			

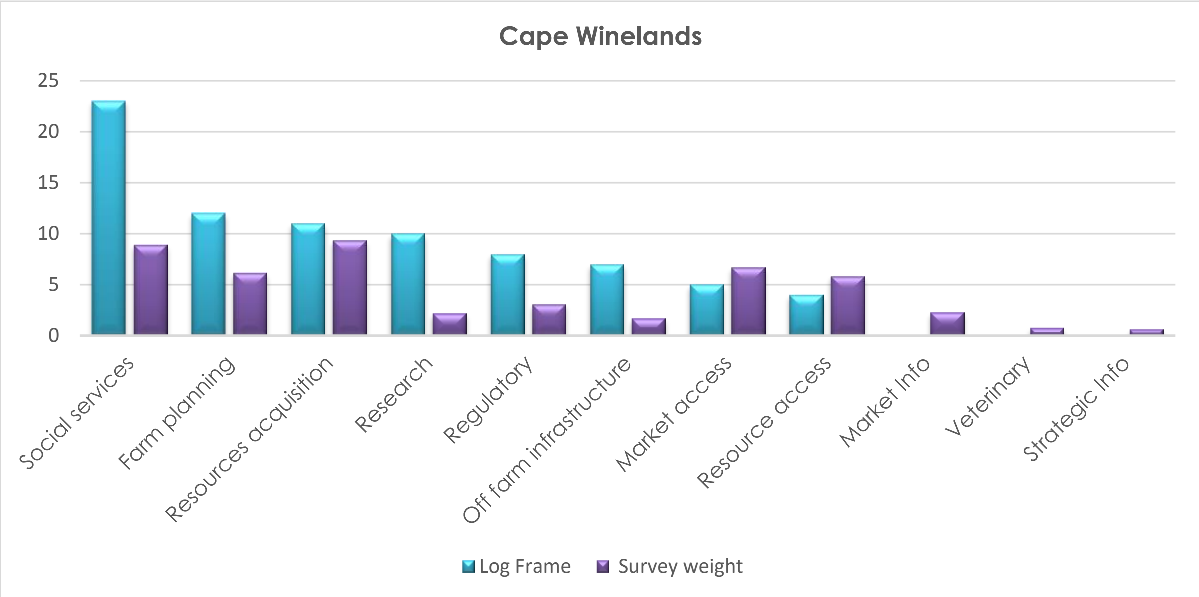

Figure 0-1: Comparison of electronic survey vs log frame – Cape Winelands

Table 0-2: Ranking of Services within each category – Cape Winelands

Category	Log frame count	Electronic survey weight
Farm planning	**12**	**6.13**
	Financial - Grant application assistance	Bio-safety - Soil health
	Labour relationships and conflict resolution	Budgets - Cash flows
	Water availability and quality advice	Irrigation scheduling
	Budgets - Whole farm planning	Labour relationships and conflict resolution
	Irrigation infrastructure advice	Water availability and quality advice

Category	Log frame count	Electronic survey weight
Market access	**5**	**6.67**
	Market access	Market access
		Food safety
		Market compliances assistance
Market Info	**0**	**2.29**
		Export volume and price
		Market overviews (International/National)
		Market potential studies
		Livestock prices and numbers
		Local volume and price
Off farm infrastructure	**7**	**1.67**
	Port Services - Effective Harbour	Port Services - Effective Harbour
	Road maintenance	Off farm cooling
		Off farm packaging
		Road maintenance
Regulatory	**8**	**3.07**
	Labour laws and regulations	Labour laws and regulations
	Other services	Chemical compliance
	Product standards	PPECB
		Other services
		Product standards
Research	**10**	**2.17**
	Production	Transition from conventional to regenerative agriculture
	Transition from conventional to regenerative agriculture	Marketing
		Agricultural economics
		Production
		Mechanisation
Resource access	**4**	**5.83**
	Electricity	Electricity
	Labour	Labour
		Fertilizer
		Pesticide
		Herbicides
Resources acquisition	**11**	**9.33**
	Water rights acquisition	Water rights acquisition
	Land use rights acquisition	Land use rights acquisition
Social services	**23**	**8.89**
	Human resource development	Farm security
	Empowerment projects	Short courses and training
	Farm security	Transport
	Short courses and training	Health care
	Encouraging woman and youth	Encouraging woman and youth
Strategic Info	**0**	**0.63**

Category	Log frame count	Electronic survey weight
		Sanitary & Phytosanitary measures and impact
		Crop estimates
		Impact of external factors
Veterinary	**0**	**0.75**
		Disease diagnostics
		Farm inspections
		Laboratory service

Central Karoo

Table 0-3: Ranking of Services Category per farmer category – Central Karoo

Commercial	Smallholder with commercial aspirations	Smallholder Lifestyle	Subsistence
Social services	Farm planning	Market access	Social services
Resources acquisition	Resources acquisition	Off farm infrastructure	Farm planning
Farm planning	Strategic Info		Market access
Off farm infrastructure	Market access		Resources acquisition
Market access	Resource access		Market Info
Strategic Info	Research		Strategic Info
Research	Market Info		Resource access
Resource access	Off farm infrastructure		
Regulatory	Regulatory		
	Social services		

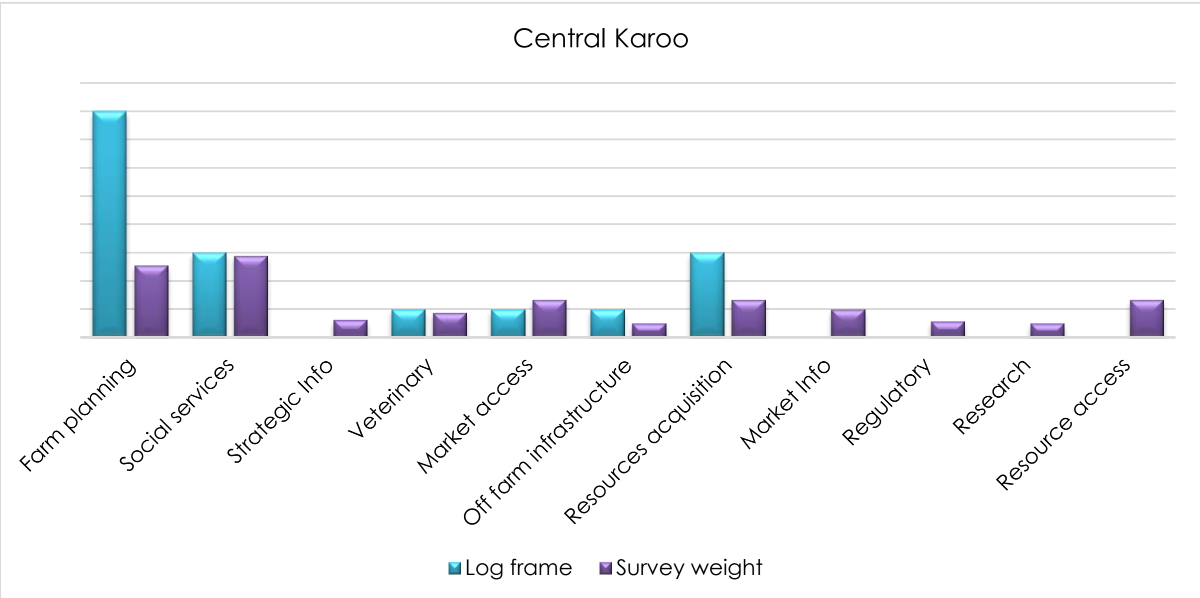

Figure 0-2: Comparison of electronic survey vs log frame – Central Karoo

Table 0-4: Ranking of Services within each category – Central Karoo

Category	Log frame count	Electronic survey weight
Farm planning	**8**	**2.55**
	Cross cutting	Budgets - Whole farm planning
	Financial - Grant application assistance	Livestock technical advice
	Improvement of Soil health	Labour relationships and conflict resolution
	Irrigation engineering service	Budgets - Crop & Livestock
	Land use and soil health	Buildings/Equipment state of repair & functionality
Market access	**1**	**1.33**
	Market access	Market access
Market Info	**0**	**1.00**
		Livestock prices and numbers
		Export volume and price
		Market potential studies
		Local volume and price
		Livestock prices and numbers
Off farm infrastructure	**1**	**0.5**
	Off farm processing	Road maintenance
Regulatory	**0**	**0.57**
		Labour laws and regulations
		Bio-safety - Chemical compliance
		Regulatory - Animal health
		Livestock identification mark registration
Research	**0**	**0.5**
		Marketing
Resource access	**3**	**1.33**
	Land use rights acquisition	Electricity
	Electricity	Labour
		Fertilizer
Resources acquisition	**3**	**1.33**
	Cross Cutting	Water rights acquisition
	Water rights acquisition	Farm Valuation
		Land use rights acquisition
Social services	**3**	**2.89**
	Cross cutting	Farm security
	Human resource development	Short courses and training
		Human resource development
		Encouraging woman and youth
		Literacy
Strategic Info	**0**	**0.63**
		Livestock numbers
		Policy impacts
		Impact of external factors
Veterinary	**1**	**0.88**
	Laboratory service	Disease diagnostics

Category	Log frame count	Electronic survey weight
		Abattoir plan approval
		Movement permits
		Farm inspections

City of Cape Town

Table 0-5: Ranking of Services Category per farmer category – City of Cape Town

Commercial Farmers	Small holder with Commercial Aspirations	Smallholder Lifestyle	Subsistence
Resources acquisition	Farm planning	None	Market access
Social services	Social services		Social services
Farm planning			Farm planning
			Resource access
			Strategic Info
			Regulatory

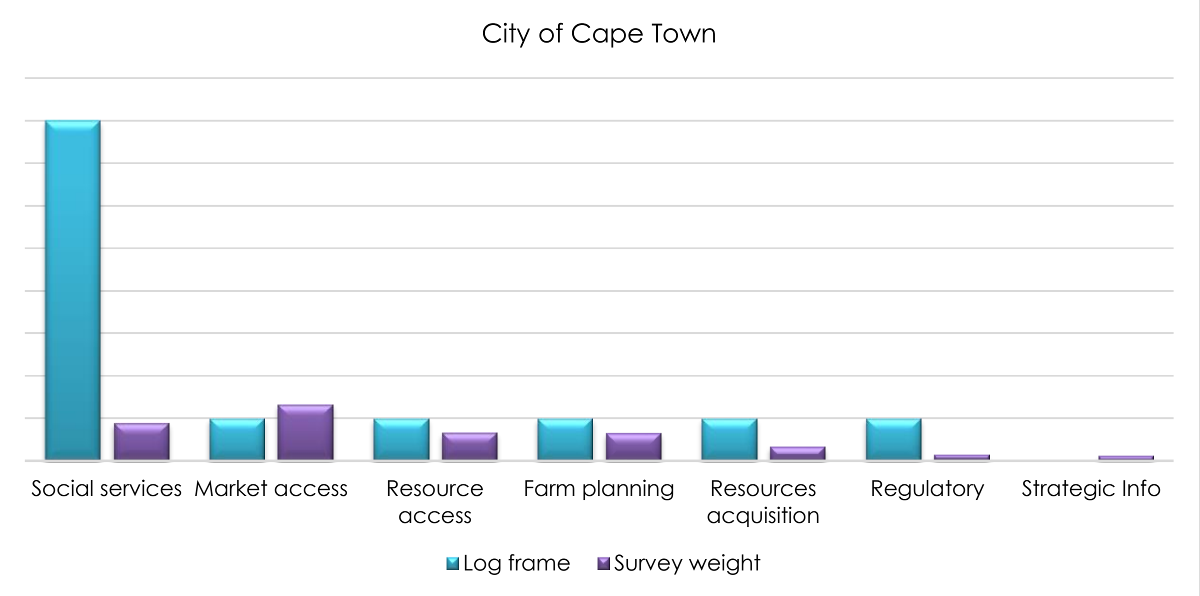

Figure 0-3: Comparison of electronic survey vs log frame – City of Cape Town

Table 0-6: Ranking of Services within each category – City of Cape Town

Category	Log frame count	Electronic survey weight
Farm planning	**1**	**0.66**
	Financial - Grant application assistance	Irrigation infrastructure advice
		Budgets - Whole farm planning
		Budgets - Crop & Livestock
		Labour use norms (per activity)
		Soil health
Market access	**1**	**1.33**
	Market access	Food safety
		Market compliances assistance
		Market access

Category	Log frame count	Electronic survey weight
Regulatory	**1**	**0.14**
	Other services	Export permits
		Labour laws and regulations
Resource access	**3**	**0.67**
	Cross-cutting	Labour
		Herbicides
		Electricity
		Fertilizer
Resources acquisition	**1**	**0.33**
	Land use rights acquisition	Water rights acquisition
Social services	**8**	**089**
	Cross cutting	Short courses and training
	Human resource development	Short courses and training
		Encouraging woman and youth
		Farm security
Strategic Info	**0**	**0.13**
		Impact of compliance to standards and regulations

Garden Route

Table 0-7: Ranking of Services Category per farmer category – Garden Route

Commercial Farmers	Small holder with Commercial Aspirations	Smallholder Lifestyle	Subsistence
Resources acquisition	Strategic Info	Resources acquisition	Market access
Farm planning	Regulatory	Social services	Farm planning
Market access	Farm planning	Farm planning	Social services
Social services	Social services	Market access	Resource access
Market Info	Research	Veterinary	Resources acquisition
Resource access	Market Info	Off farm infrastructure	Market Info
Regulatory	Resources acquisition	Research	Strategic Info
Research		Market Info	Veterinary
Veterinary		Regulatory	Research
Off farm infrastructure		Strategic Info	Off farm infrastructure
Strategic Info			Regulatory

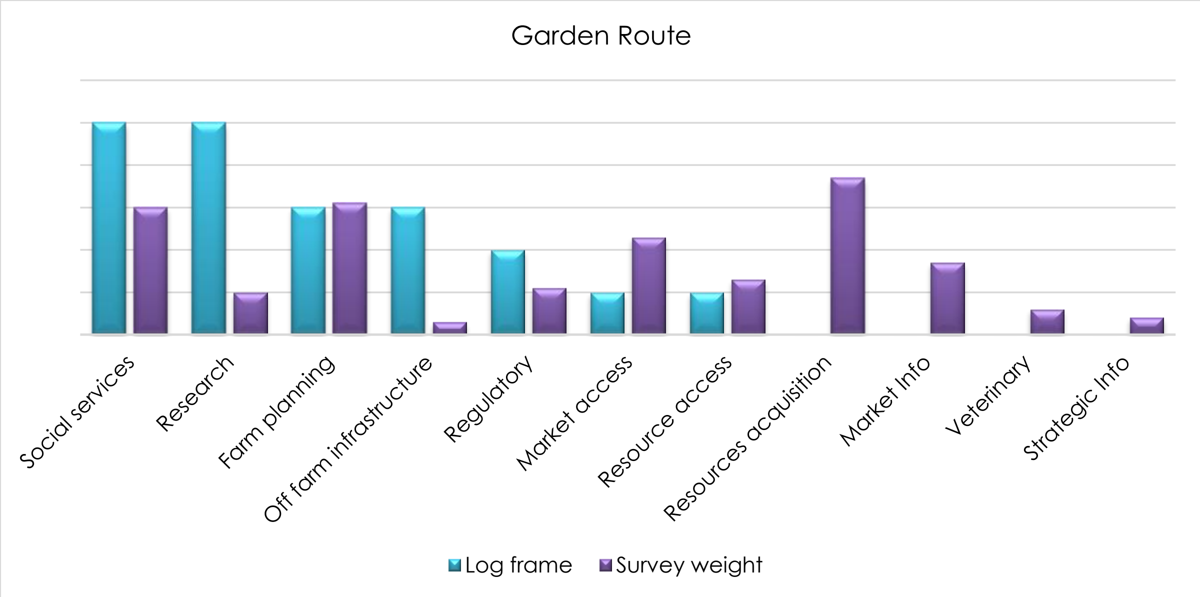

Figure 0-4: Comparison of electronic survey vs log frame – Garden Route

Table 0-8: Ranking of Services within each category – Garden Route

Category	Log frame count	Electronic survey weight
Farm planning	**3**	**3.13**
	Budgets - Cash flows	Budgets - Cash flows
	Climate information	Soil health
	Financial - NFI/ Profit benchmarks	Water availability and quality advice
		Land use and soil health
		Budgets - Whole farm planning
Market access	**1**	**2.33**
	Market access	Market access
		Market compliances assistance
Market Info	**0**	**1.71**
		Export volume and price
		Local volume and price
		Livestock prices and numbers
		Market potential studies
		Market overviews (International/National)
Off farm infrastructure	**3**	**0.33**
	Off farm processing	Port Services - Effective Harbour
	Port Services - Effective Harbour	Off farm infrastructure
	Road maintenance	Road maintenance
Other	**0**	**0.5**
		Waste Removal
Regulatory	**2**	**1.14**
	Cross cutting	Labour laws and regulations
	Labour laws and regulations	GMO activity approval
	Regulatory - Other services	Regulatory - Animal health

Category	Log frame count	Electronic survey weight
		Bio-safety - Chemical compliance
		Intellectual Property Rights
Research	**5**	**1.00**
	Marketing	Transition from conventional to regenerative agriculture
	New energy sources	New energy sources
	Production	Production
		Agricultural economics
		Marketing
Resource access	**1**	**1.33**
	Electricity	Pesticide
		Herbicides
		Fertilizer
		Electricity
		Pesticide
Resources acquisition	**0**	**3.67**
		Water rights acquisition
		Farm Valuation
		Land use rights acquisition
Social services	**5**	**3.00**
	Human resource development	Short courses and training
	Short courses and training	Farm security
	Encouraging woman and youth	Land reform
	Land reform	Encouraging woman and youth
		Literacy
Strategic Info	**0**	**0.38**
		Impact of compliance to standards and regulations
		Tree & Vine census
		Policy impacts
Veterinary	**0**	**0.88**
		Movement permits
		Laboratory service
		Auction/sale yard health attestation
		Disease diagnostics

Overberg

Table 0-9: Ranking of Services Category per farmer category – Overberg

Commercial	Smallholder with commercial aspirations	Smallholder Lifestyle	Subsistence
Social services	Market access	Resources acquisition	Veterinary
Resources acquisition	Veterinary	Farm planning	Farm planning
Farm planning	Farm planning		Market Info
Resource access	Social services		
Regulatory	Market Info		
Market Info	Regulatory		
Market access			
Research			

Strategic Info
Veterinary
Off farm infrastructure

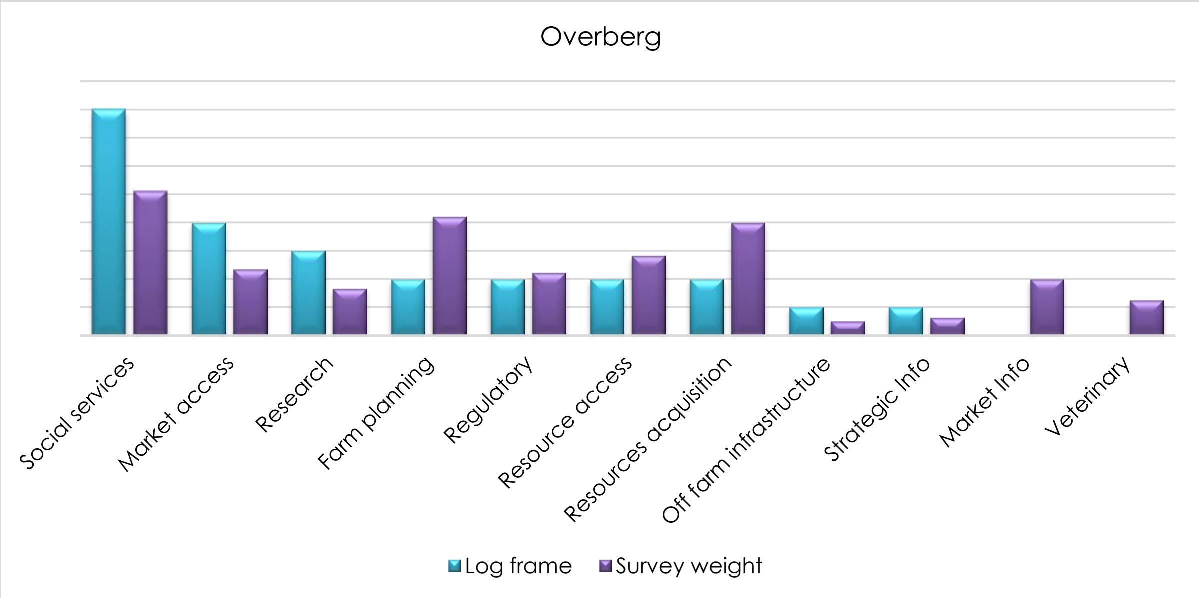

Figure 0-5: Comparison of electronic survey vs log frame – Overberg

Table 0-10: Ranking of Services within each category – Overberg

Category	Log frame count	Electronic survey weight
Farm planning	**3**	**3.13**
	Budgets - Cash flows	Budgets - Cash flows
	Climate information	Soil health
	Financial - NFI/ Profit benchmarks	Water availability and quality advice
		Land use and soil health
		Budgets - Whole farm planning
Market access	**1**	**2.33**
	Market access	Market access
		Market compliances assistance
Market Info	**0**	**1.71**
		Export volume and price
		Local volume and price
		Livestock prices and numbers
		Market potential studies
		Market overviews (International/National)
Off farm infrastructure	**3**	**0.33**
	Off farm processing	Port Services - Effective Harbour
	Port Services - Effective Harbour	Off farm infrastructure
	Road maintenance	Road maintenance
Other	**0**	**0.5**
		Waste Removal
Regulatory	**2**	**1.14**

Category	Log frame count	Electronic survey weight
	Cross cutting	Labour laws and regulations
	Labour laws and regulations	GMO activity approval
	Regulatory - Other services	Regulatory - Animal health
		Bio-safety - Chemical compliance
		Intellectual Property Rights
Research	**5**	**1.00**
	Marketing	Transition from conventional to regenerative agriculture
	New energy sources	New energy sources
	Production	Production
		Agricultural economics
		Marketing
Resource access	**1**	**1.33**
	Electricity	Pesticide
		Herbicides
		Fertilizer
		Electricity
		Pesticide
Resources acquisition	**0**	**3.67**
		Water rights acquisition
		Farm Valuation
		Land use rights acquisition
Social services	**5**	**3.00**
	Human resource development	Short courses and training
	Short courses and training	Farm security
	Encouraging woman and youth	Land reform
	Land reform	Encouraging woman and youth
		Literacy
Strategic Info	**0**	**0.38**
		Impact of compliance to standards and regulations
		Tree & Vine census
		Policy impacts
Veterinary	**0**	**0.88**
		Movement permits
		Laboratory service
		Auction/sale yard health attestation
		Disease diagnostics

West Coast

Table 0-11: Ranking of Services Category per farmer category – West Coast

Commercial Farmers	Small holder with Commercial Aspirations	Small holder Lifestyle	Subsistence
Social services	Market access	Social services	Resource access
Resource access	Resources acquisition	Farm planning	Social services
Resources acquisition	Farm planning		Market access
Farm planning	Social services		Resources acquisition
Research	Market Info		Farm planning

Regulatory	Regulatory	Market Info
Market access	Veterinary	Strategic Info
Market Info	Off farm infrastructure	Veterinary
Off farm infrastructure	Research	Off farm infrastructure
Strategic Info		
Veterinary		

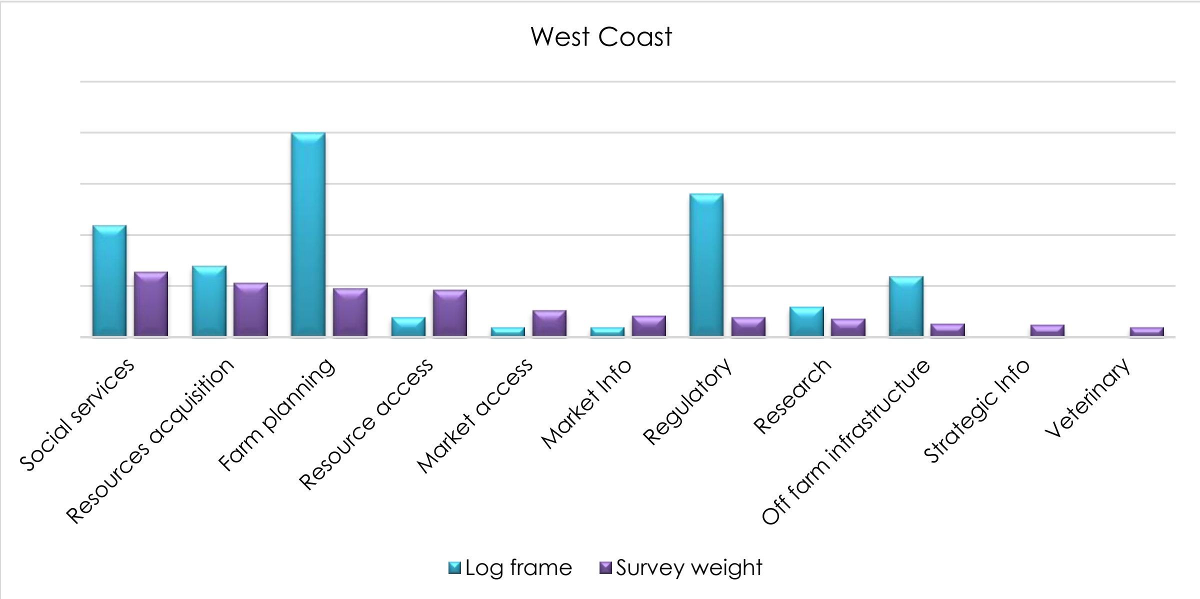

Figure 0-6: Comparison of electronic survey vs log frame – West Coast

Table 0-12: Ranking of Services within each category – West Coast

Category	Log frame count	Electronic survey weight
Farm planning	**20**	**4.8**
	Water availability and quality advice	Budgets - Whole farm planning
	Financial - Advice	Budgets - Cash flows
	Financial - Grant application assistance	Water availability and quality advice
	Financial - NFI/ Profit benchmarks	Land use and soil health
	Environmental impact assessment	Financial - Advice
Market access	**1**	**2.7**
	Market access	Market access
		Food safety
Market Info	**1**	**2.1**
	Market overviews (International/National)	Market info - Local volume and price
		Market info - Export volume and price
		Market potential studies
		Market overviews (International/National)
		Market info - Livestock prices and numbers
Off farm infrastructure	**6**	**1.3**
	Off farm processing	Road maintenance

Category	Log frame count	Electronic survey weight
	Off farm packaging	Off farm processing
	Port Services - Effective Harbour	Port Services - Effective Harbour
		Off farm packaging
Regulatory	**14**	**2.0**
	Labour laws and regulations	Labour laws and regulations
	Regulatory - Other services	Regulatory - PPECB
		Intellectual Property Rights
		Livestock identification mark registration
Research	**3**	**1.8**
	Production	Transition from conventional to regenerative agriculture
	Marketing	Production
		Marketing
		Mechanisation
Resource access	**2**	**4.7**
	Electricity	Electricity
		Fertilizer
		Labour
		Herbicides
		Pesticides
Resources acquisition	**7**	**5.3**
	Water rights acquisition	Water rights acquisition
	Land use rights acquisition	Farm Valuation
		Land use rights acquisition
Social services	**11**	**6.4**
	Farm security	Farm security
	Short courses and training	Short courses and training
	Empowerment projects	Transport
	Human resource development	Encouraging woman and youth
		Human resource development
Strategic Info	**0**	**1.3**
		Crop estimates
		Tree & vine census
		Livestock numbers
Veterinary	**0**	**1.0**
		Disease diagnostics
		Farm inspections
		Testing for controlled diseases
		Abattoir plan approval

ANNEXURE C: SERVICES PER CATEGORY – COMMODITY ANALYSIS (2023)

Table C - 1: Service categories ranked per commodity

Rank	Sheep	Fruit	Beef	Wine	Small Grain	Dairy	Vegetables
1	Social services	Resources acquisition	Social services	Social services	Social services	Farm planning	Resources acquisition
2	Farm planning	Social services	Resources acquisition	Resources acquisition	Farm planning	Resources acquisition	Market access
3	Resources acquisition	Market access	Farm planning	Resource access	Resources acquisition	Social services	Farm planning
4	Resource access	Resource access	Market access	Farm planning	Resource access	Market Info	Resource access
5	Market access	Farm planning	Resource access	Market access	Regulatory	Regulatory	Social services
6	Market Info	Regulatory	Market Info	Regulatory	Research	Research	Regulatory
7	Regulatory	Market Info	Regulatory	Market Info	Market Info	Resource access	Research
8	Research	Research	Off farm infrastructure	Research	Veterinary	Veterinary	Market Info
9	Veterinary	Off farm infrastructure	Research	Off farm infrastructure	Off farm infrastructure	Market access	Strategic Info
10	Strategic Info	Strategic Info	Veterinary	Strategic Info	Strategic Info	Off farm infrastructure	
11	Off farm infrastructure	Veterinary	Strategic Info	Veterinary	Market access	Strategic Info	

Table B- 2: Services ranked per category – Commodity analysis

Colour scale

Most selected	**Least selected**

RANK	SHEEP	FRUIT	BEEF	WINE	SMALL GRAIN	DAIRY	VEGETABLES
Farm planning							
1	Budgets - Cash flows	Water availability and quality advice	Budgets - Cash flows	Water availability and quality advice	Budgets - Cash flows	Alien clearing	Budgets - Cash flows
2	Budgets - Whole farm planning	Budgets - Cash flows	Land use and soil health	Budgets - Whole farm planning	Budgets - Whole farm planning	Water availability and quality advice	Budgets - Whole farm planning
3	Budgets - Crop & Livestock	Labour relationships and conflict resolution	Climate information	Budgets - Cash flows	Climate information	Labour relationships and conflict resolution	Irrigation infrastructure advice
4	Land use and soil health	Labour use norms (per activity)	Water availability and quality advice	Land use and soil health	Budgets - Crop & Livestock	Bio-safety - Soil health	Soil health advice
5	Climate information	Bio-safety - Soil health	Budgets - Whole farm planning	Bio-safety - Soil health	Land use and soil health	Budgets - Cash flows	Bio-safety - Soil health
6	Financial - Advice	Irrigation scheduling	Budgets - Crop & Livestock	Labour relationships and conflict resolution	Water availability and quality advice	Irrigation equipment technical advice	Alien clearing
7	Labour relationships and conflict resolution	Land use and soil health	Crop production benchmarks	Soil health advice	Financial - Advice	Irrigation infrastructure advice	Budgets - Capital
8	Alien clearing	Budgets - Whole farm planning	Alien clearing	Financial - Advice	Crop production benchmarks	Budgets - Whole farm planning	Labour relationships and conflict resolution
9	Water availability and quality advice	Alien clearing	Financial - Advice	Irrigation scheduling	Bio-safety - Soil health	Irrigation engineering service	Financial - Grant application assistance
10	Crop production benchmarks	Financial - Advice	Labour relationships and conflict resolution	Labour use norms (per activity)		Irrigation scheduling	Budgets - Crop & Livestock

RANK	SHEEP	FRUIT	BEEF	WINE	SMALL GRAIN	DAIRY	VEGETABLES
Market access							
1	Market access	Market access	Market access	Market access	Market access	Market access	Market access
2	Food safety	Food safety	Food safety	Food safety			Food safety
3	Market compliances assistance	Market compliances assistance	Market compliances assistance				Market compliances assistance
Market Info							
1	Livestock prices and numbers	Export volume and price	Livestock prices and numbers	Market overviews (International/National)	Market overviews (International/National)	Local volume and price	Market overviews (International/National)
2	Local volume and price	Market overviews (International/National)	Market overviews (International/National)	Market potential studies	Local volume and price	Market overviews (International/National)	Local volume and price
3	Market overviews (International/National)	Local volume and price	Local volume and price	Export volume and price	Livestock prices and numbers	Market potential studies	
4	Market potential studies	Livestock prices and numbers	Stocks	Local volume and price	Stocks		
5	Export volume and price	Processed volume and price	Market potential studies	Processed volume and price			
6	Stocks	Market potential studies	Export volume and price				
Off farm infrastructure							
1	Road maintenance	Port Services - Effective Harbour	Road maintenance	Port Services - Effective Harbour	Road maintenance	Road maintenance	
2	Off farm processing	Off farm cooling	Port Services - Effective Harbour	Off farm packaging	Port Services - Effective Harbour		
3	Port Services - Effective Harbour	Off farm packaging		Road maintenance	Off farm processing		
4		Road maintenance		Off farm cooling			

RANK	SHEEP	FRUIT	BEEF	WINE	SMALL GRAIN	DAIRY	VEGETABLES
Regulatory							
1	Labour laws and regulations	Labour laws and regulations	Labour laws and regulations	Labour laws and regulations	Labour laws and regulations	Labour laws and regulations	Labour laws and regulations
2	GMO activity approval	Bio-safety - Chemical compliance	Bio-safety - Chemical compliance	Bio-safety - Chemical compliance	GMO activity approval	Animal health	Export permits
3	Animal health	PPECB	Animal health	PPECB	Bio-safety - Chemical compliance	Other services	Bio-safety - Chemical compliance
4	Bio-safety - Chemical compliance	Export permits	Intellectual Property Rights	GMO activity approval	Intellectual Property Rights	Bio-safety - Chemical compliance	PPECB
5	Livestock identification mark registration	Other services	PPECB	Livestock identification mark registration	Animal health		Other services
6	Intellectual Property Rights	Product standards	GMO activity approval	Animal health	Registration of veterinary export facilities		Product standards
7	Plant breeders' rights application	Intellectual Property Rights	Export permits	Registration of veterinary export facilities	Other services		GMO activity approval
8	Plant protection - Imports of plants and plant products	Livestock identification mark registration	Plant breeders' rights application	Other services	Export permits		Livestock identification mark registration
9	Registration of veterinary export facilities	Plant breeders' rights application	Livestock identification mark registration		Plant protection - Imports of plants and plant products		
10	Export permits	Plant protection - Imports of plants and plant products			Plant breeders' rights application		

RANK	SHEEP	FRUIT	BEEF	WINE	SMALL GRAIN	DAIRY	VEGETABLES
Research							
1	Transition from conventional to regenerative agric	Marketing	Transition from conventional to regenerative agric	Transition from conventional to regenerative agric	Transition from conventional to regenerative agric	Production	Transition from conventional to regenerative agric
2	Marketing	Production	Marketing	Marketing	Marketing	Transition from conventional to regenerative agric	Production
3	Production	Transition from conventional to regenerative agric	Production	Agricultural economics	Production		Marketing
4	Agricultural economics	Agricultural economics	Agricultural economics	Production	Agricultural economics		New energy sources
5	Mechanisation	Mechanisation			Mechanisation		
Resource access							
1	Electricity	Electricity	Electricity	Electricity	Electricity	Electricity	Electricity
2	Fertilizer	Labour	Fertilizer	Labour	Herbicides		Labour
3	Herbicides	Pesticide	Pesticide	Pesticide	Fertilizer		Fertilizer
4	Pesticide	Fertilizer	Herbicides	Fertilizer	Pesticide		Pesticide
5	Labour	Herbicides		Herbicides			
Resources acquisition							
1	Water rights acquisition	Water rights acquisition	Water rights acquisition	Water rights acquisition	Water rights acquisition	Water rights acquisition	Water rights acquisition
2	Farm valuation	Farm valuation	Farm valuation	Land use rights acquisition	Farm valuation		Land use rights acquisition
3	Land use rights acquisition	Land use rights acquisition					

RANK	SHEEP	FRUIT	BEEF	WINE	SMALL GRAIN	DAIRY	VEGETABLES
Social services							
1	Farm security	Farm security	Farm security	Farm security	Farm security	Farm security	Farm security
2	Short courses and training	Short courses and training	Short courses and training	Short courses and training	Short courses and training	Short courses and training	Short courses and training
3	Encouraging woman and youth	Transport	Transport	Transport	Transport	Literacy	Transport
4	Human resource development	Encouraging woman and youth	Encouraging woman and youth	Empowerment projects	Encouraging woman and youth		Encouraging woman and youth
5	Literacy	Health care	Health care	Literacy	Literacy		Human resource development
6	Transport	Human resource development	Empowerment projects	Encouraging woman and youth	Human resource development		Empowerment projects
7	Empowerment projects	Empowerment projects	Human resource development	Human resource development	Empowerment projects		
8	Health care	Land reform	Literacy	Health care	Health care		
9	Social - Access to Schools	Literacy			Social - Access to Schools		
Strategic Info							
1	Livestock numbers	Sanitary & Phytosanitary measures and impact	Impact of external factors	Policy impacts	Impact of external factors	Policy impacts	Impact of compliance to standards and regulations
2	Policy impacts	Crop estimates	Sanitary & Phytosanitary measures and impact	Tree & Vine census	Policy impacts		Crop estimates
3	Impact of external factors	Impact of external factors	Policy impacts	Sanitary & Phytosanitary measures and impact	Livestock numbers		
4	Impact of compliance to standards and regulations	Policy impacts	Tree & Vine census	Impact of external factors			
5	Tree & Vine census	Tree & Vine census	Plant material sales	Crop estimates			

RANK	SHEEP	FRUIT	BEEF	WINE	SMALL GRAIN	DAIRY	VEGETABLES
6		Impact of compliance to standards and regulations		Plant material sales			
Veterinary							
1	Disease diagnostics	Disease diagnostics	Disease diagnostics	Disease diagnostics	Disease diagnostics	Laboratory service	Disease diagnostics
2	Farm inspections		Farm inspections	Laboratory service	Laboratory service	Movement permits	
3	Abattoir plan approval		Testing for controlled diseases	Farm inspections	Abattoir plan approval		
4	Laboratory service		Auction/sale yard health attestation		Movement permits		
5	Movement permits		Animal slaughter		Testing for controlled diseases		
6	Testing for controlled diseases				Farm inspections		
Other							
1	Waste Removal		Waste Removal		Waste Removal	Waste Removal	
2	Effective Cell phone reception						

ANNEXURE D: RACIF MATRIX – LINKING SERVICE PROVIDERS TO SERVICES

Please note that it is not possible to include the Matrix in this report (to detailed). The matrix is submitted in a Excel spreadsheet:

“Services categories and needs linked to service provider RACIF final Feb 2024.xlsx”

See example below:

List of services needs	Subsist					Smallholder					Smallholder										Logic - By who?
						Lifest 1					Lifestyle					Com. Asp					
	R	A	C	I	F	R	A	C	I	F	R	A	C	I	F	R	A	C	I	F	
Production																					
Resources acquisitioning																					
Land use rights	CON/ PROD	CON/ PROD	DALRRD/ DEADP/ WCDOA/ DALRRD/ LG	DALRRD/ DEADP/ WCDOA/ DALRRD/ SSFI/ LG	DALRRD/ SSFI/ LG	CON/ PROD	CON/ PROD	DALRRD/ DEADP/ WCDOA/ DALRRD	DALRRD/ DEADP/ WCDOA/ DALRRD/ CFI	DALRRD	CON/ PROD	CON/ PROD	DALRRD/ DEADP/ WCDOA/ DALRRD	DALRRD/ DEADP/ WCDOA/ DALRRD/ CFI	PROD	CON/ PROD	CON/ PROD	DALRRD/ DEADP/ WCDOA/ DALRRD	DALRRD/ DEADP/ WCDOA/ DALRRD/ CFI	DALRRD	The producer is accountable in obtaining the necessary right to use land. The consultant involved in any prospective project should verify these rights before embarking on any project and is therefore also accountable. DRLDR and financial institutions should only finance projects if the user right is secured. This applies to all farmer categories.
Water rights	CON/ PROD	CON/ PROD	DALRRD/ DEADP/ WCDOA/ DALRRD/ DWS	DALRRD/ DEADP/ WCDOA/ DALRRD/ DWS	DALRRD/ SSFI/ LG	CON/ PROD	CON/ PROD	DALRRD/ DEADP/ WCDOA/ DALRRD/ DWS	DALRRD/ DEADP/ WCDOA/ DALRRD/ DWS	DALRRD	CON/ PROD	CON/ PROD	DALRRD/ DEADP/ WCDOA/ DALRRD/ DWS	DALRRD/ DEADP/ WCDOA/ DALRRD/ DWS	PROD	CON/ PROD	CON/ PROD	DALRRD/ DEADP/ WCDOA/ DALRRD/ DWS	DALRRD/ DEADP/ WCDOA/ DALRRD/ DWS	DALRRD	rights. The consultant involved in any prospective project should verify these rights before using water rights in any feasibility study or business plan and is therefore also responsible and accountable. DALRRD and financial institutions should only finance projects if the water right is secure. This applies to all farmer categories.
GrounDWSter supply - boreholes - including testing of boreholes	PROD/ AB/ DALRRD/ DEADP/ WCDOA	PROD/ AB/ DALRRD/ DEADP/ WCDOA	DWS/ WRC/ AB	DWS/ WRC/ AB	WCDOA/ DALRRD/ SSFI	PROD/ AB/ DALRRD/ DEADP/ WCDOA	PROD/ AB/ DALRRD/ DEADP/ WCDOA	DWS/ WRC/ AB	DWS/ WRC/ AB	WCDOA/ DALRRD/ SSFI	PROD/ AB	PROD/ AB	DWS/ WRC/ AB	DWS/ WRC/ AB	PROD	PROD/ AB/ DALRRD/ DEADP/ WCDOA	PROD/ AB/ DALRRD/ DEADP/ WCDOA	DWS/ WRC/ AB	DWS/ WRC/ AB	WCDOA/ DALRRD/ SSFI	Agri Businesses should drill these boreholes on request for Subsistence, Life Style 1, Commercial Aspirations and Small Commercial farmers. It should be financed or at least subsidised by the DALRRD, DEADP or WCDOA. Other category farmers should organise it for themselves and also pay for the service.
Farm valuation						CFI/ CON	CFI/ CON	CFI/ CON	CFI/ CON	WCDOA/ DALRRD	CFI/ CON	CFI/ CON	CFI/ CON	CFI/ CON	PROD	CFI/ CON	CFI/ CON	CFI/ CON	CFI/ CON	WCDOA/ DALRRD	From Lifestyle 1 to Large Commercial farmers there is a need for valuations of land and it could be provided by CFI and consultants - they are responsible and accountable for the valuation. The cost for the valuation will be for the producer in the case of Life Style 2, Med and Large Commercial Farmers. The rest of the farmer categories should get financial assistance from DALRRD and or WCDOA.
Financial assistance	WCDOA/ DALRRD/ DALRRD/ GA	PROD	WCDOA/ DALRRD/ DALRRD/ GA	WCDOA/ DALRRD/ DALRRD/ GA	WCDOA/ DALRRD/ DALRRD/ GA	WCDOA/ DALRRD/ DALRRD/ GA	PROD	WCDOA/ DALRRD/ DALRRD/ GA	WCDOA/ DALRRD/ DALRRD/ GA	WCDOA/ DALRRD/ DALRRD/ GA	DALRRD/ WCDOA	PROD	DALRRD/ WCDOA	DALRRD/ WCDOA	DALRRD/ WCDOA	WCDOA/ DALRRD/ DALRRD/ GA	PROD			WCDOA/ DALRRD/ DALRRD/ GA	The whole spectrum of farmer groups need financial assistance at some stage. This should be provided by WCDOA, DALRRD,GA and DALRRD to Subsistence, Life Style 1 and Commercial Aspiring Farmers. These farmers should be accountable for the service received. Commercial farmers also require this support from DALRRD and WCDOA. They will also be accountable for the assistance received.
Infrastructure in general	LG/ DALRRD	LG/ DALRRD	LG/ DALRRD	LG/ DALRRD	LG/ DALRRD	LG/ DALRRD	LG/ DALRRD	LG/ DALRRD	LG/ DALRRD	LG/ DALRRD						WCDOA/ DALRRD	WCDOA/ DALRRD	WCDOA/ DALRRD	WCDOA/ DALRRD	WCDOA/ DALRRD	WCDOA and DALRRD should be responsible for infrastructure and supply the finance where needed. This is the case with Subsistence, Life Style 1, Aspiring Commercial Farmers and in some instances Small Commercial Farmers.

ANNEXURE E: KEY SERVICES TO BE PROVIDED BY THE WCDOA

Service delivery area	Nature and extent of services to be supplied by the Department	Which of these services should be provided to each farmer category?	Why is the WCDoA most appropriate?	Reason why this service is a public good	Rationale: why the delivery of this service by a public institution will support national and provincial priorities?	Most appropriate delivery mechanism
Agricultural Producer Support and Development	The Department should be the first point of entry for this delivery area	Commodity specific extension & advisory services	Independent institution with a footprint in all the districts of the WC.	Only a public good where there is extension failures. Services should be delivered through PPP (with commodity organisations)	An integrated and inclusive rural economy. Supports one of the key objectives of the NDP - to create jobs.	Change agents (read extension officers) who farmers trust and interact with **regularly**
	Although smallholder support should be the key focus, the objective of most of these farmers is to be commercial farmers. Thus, the WCDoA should not only focus on smallholders - there should also be a strong focus on commercial farmers	One desk information services	Since the Department is an independent institution - should be the first point of entry for stakeholders	Definitely a public good since it is in the interest of all the citizens of South Africa. However there is a strong need for PPP	A provincial priority is that at least 70% of all land reform projects should be successful. This can only be achieved with strong support to new entrants AND THOSE that support them (commercial farmers and their organisations). Land reform is one of the building blocks of the WCG Growth for Jobs Strategy	PPP with commodity organisations, farm visits, information days and electronic technologies (especially cell phone technologies). Provision of commodity-specific extension support

Service delivery area	Nature and extent of services to be supplied by the Department	Which of these services should be provided to each farmer category?	Why is the WCDoA most appropriate?	Reason why this service is a public good	Rationale: why the delivery of this service by a public institution will support national and provincial priorities?	Most appropriate delivery mechanism
Sustainable Resource Use and Management	Facilitation of processes to expedite EIA	Sustainable Resource Use and Management are cross cutting. EIA process needs to be addressed urgently to ensure continued growth of the commercial farmers in the Western Cape	In general Sustainable Resource Use and Management is a public good. Since the WCDoA is the first point of entry for all farmer categories, the Dept is the most appropriate to provide these services	Environmental protection is globally regarded as a public good	This service is key to achieve the objectives of the NDP and provincial strategies. Without these services achieving the objectives cannot be done sustainable	Sustainable natural resource policies go beyond the scope of single government agencies and require the collaboration of a number of agencies, preferably coordinated by a lead agency.
Research and Technology Development Services	Research: Main focus should be on research (applicable to Western Cape agriculture and district specific where applicable) that is important but not attractive to be funded by the private sector (e.g. impact of climate change). WCDoA should play a key role in testing / demonstrating new technologies.	Cross cutting	Footprint and facilities in all the districts of the WC to perform regional specific primary research. However, the WCDoA should not duplicate research conducted by the ARC and other institutions - need for communication / coordination.	What countries spend on generating new knowledge, products, services, and processes is important for economic growth and technology innovation, and vital for national security and international competitiveness and thus a public good	This service support economic growth and job creation which is both a national and provincial priority	Complementarity: To give recognition to the mandates and strengths of the different role players to complement rather than compete with each other in RTDS through well-defined / demarcated service delivery programmes

Service delivery area	Nature and extent of services to be supplied by the Department	Which of these services should be provided to each farmer category?	Why is the WCDoA most appropriate?	Reason why this service is a public good	Rationale: why the delivery of this service by a public institution will support national and provincial priorities?	Most appropriate delivery mechanism
Veterinary Services	Publicly funded veterinary services are expected to be responsible for providing services (i) where no free-market incentive justifies (or creates demand for) a service, e.g. public health; (ii) where there is a free-market incentive but there are economies of scale, externalities, or professional or biological determinants that dictate how best to deliver specific services, e.g. disease eradication by area-wide vaccination; or (iii) when services are provided based on the collective assent of the governed as to the need for specific services and how much the public is willing to pay (be taxed) for them, e.g. quality control of biologicals. Where these principles do not apply, selected services can be legitimately divested to the private sector.	Cross cutting	Legal mandate for executing these functions is vested in the Animal Disease Act, 1984, and the Meat Safety Act, 2000.	These services benefits accrue to the entire population, not simply those who pay for them. However, a balanced perspective are required where the veterinary profession can make even greater contributions to the public good while also meeting the societal demand for private good services.	Builds on the priority outcomes as defined by government, the Constitutional and legislative mandate, the National Development Plan as well as the international conventions and guidelines of the World Organization for Animal Health (Office international des Epizooties- OIE), Food agriculture organization of the United Nations (FAO) and Codex Alimentarius. Key among these priorities is an effective and efficient biosecurity systems.	Rationalizing the delivery of public good veterinary services while divesting those services that can be commercialized and that benefit individual owners of livestock. Securing overall stability through regulation, monitoring and the provision of an enabling environment.

Service delivery area	Nature and extent of services to be supplied by the Department	Which of these services should be provided to each farmer category?	Why is the WCDoA most appropriate?	Reason why this service is a public good	Rationale: why the delivery of this service by a public institution will support national and provincial priorities?	Most appropriate delivery mechanism
Agricultural Economics Services	Al the services currently provided are extremely valuable.	For smallholder farmers and small commercial farmers : Market access related services. All commercial farmers - strategic information	There is no other institution in the Western Cape that will provide this service since it comes at a high cost and those that do provide some agricultural economic services are not willing to share this information (not readily available)	Independent agricultural economic related services are not readily available in the Western Cape. All involved in the agricultural sector (upstream & downstream in the VCs) benefit from these services.	Agricultural economic services is key to contribute to both the objectives of the NDP and the provincial priorities. There is no other Dept of agriculture in the Western Cape that provide this comprehensive service and this surely contribute to the low success rate of land reform in these provinces (less than 10%) compared to the high success rate in the WC (80%)	Electronically (website) and personal interaction with farmers, conferences, publications.
Agricultural Education and Training	Service should be retained. However, there is a need to increase the skills of farmworkers by revitalising the Kromme Rhee facility or similar	This service is cross cutting over all farmer categories.	WC district footprint and facilities available / accessible to farm workers and farmers	Should be available to all and don't exclude individuals	Supports equitable participation in agriculture, improved productivity, growth of the agricultural sector and employment which are key National and Provincial strategies.	Practical farm workers training by extension offices. Higher education by Elsenburg College.

Service delivery area	Nature and extent of services to be supplied by the Department	Which of these services should be provided to each farmer category?	Why is the WCDoA most appropriate?	Reason why this service is a public good	Rationale: why the delivery of this service by a public institution will support national and provincial priorities?	Most appropriate delivery mechanism
Rural Development	Participant in a coordinating role to deal with rural poverty effectively through the optimal use and management of natural resources through an integrated agrarian transformation and the strategic investment in economic and social infrastructure that will benefit rural communities.	Mainly focus on farm workers on commercial farms and assisting smallholder and subsistence farmers	Independent institution with a footprint in all the districts of the WC.	Quality public and private services are essential for rural economic growth. The provision of rural public goods is important for realizing rural sustainability, and is also necessary for realizing farmers' prosperity. Government has at least two important roles: Providing services and supporting economic activity through good economic governance. Important rural services include infrastructure and agricultural and social programs.	This approach links directly to the Joint District Approach (JDA) model for joint planning and implementation of governmental services (National and Provincial)	Cooperation / coordination with all the relevant Government Departments and NGOs. Strategic leadership, consultation, co-ordination, resource allocation, capacity and skills; and monitoring and evaluation. An integrated approach is possible only if there is a great deal of genuine decentralisation of decision-making and if representative local government bodies are strong enough to co-ordinate and guide the development efforts at the local level.

Service delivery area	Nature and extent of services to be supplied by the Department	Which of these services should be provided to each farmer category?	Why is the WCDoA most appropriate?	Reason why this service is a public good	Rationale: why the delivery of this service by a public institution will support national and provincial priorities?	Most appropriate delivery mechanism
	Facilitation of Regional Coordination Committee (RCC) engagements throughout the province, towards improving the socio-economic conditions and livelihoods of rural communities. Including awareness programs on substance abuse and labour rights responsibilities. Facilitation of unique initiatives to improve the image and perceptions of work on farms, within the agricultural industry, as menial and not requiring technical ability (e.g., Western Cape Prestige Agri Wards	Agri worker support is cross cutting for all categories of farmers	The WCDoA is the direct independent link to farm workers in the WC. However, this service must be in consultation with Agri Western Cape	Contributing to international market accessibility and economic growth will benefit all in the WC	See note above	See note above
	Facilitating a referral System for agri workers to relevant programmes within government departments to access services	Agri worker support is cross cutting for all categories of farmers	WCDoA has a broad network relevant to farm workers	WCDoA has a responsibility to also facilitate support services for farm workers (not only farmers.	See note above	See note above
	Provision of pertinent intelligence to government for strategic planning on agri worker needs as a result of the census	Cross cutting – all farmer categories	Self-explanatory. For all Government intelligence, the WCDoA is the first point of entry.	It is in the interest of the public at large to have a stable and happy farm worker force.	It is not possible to achieve the NDP and Provincial objectives without addressing the needs of farm workers – the backbone of an	Face to face engagement and effective use of communication technologies (cell

Service delivery area	Nature and extent of services to be supplied by the Department	Which of these services should be provided to each farmer category?	Why is the WCDoA most appropriate?	Reason why this service is a public good	Rationale: why the delivery of this service by a public institution will support national and provincial priorities?	Most appropriate delivery mechanism
					efficient and productive agricultural sector.	phone e.g., Survey Monkey or similar)
	An effective communication interface between government and agri-workers can strengthen government responsiveness and deepen agri-workers engagement	See notes above	See notes above	See notes above	See notes above	Face to face engagement and effective use of communication technologies (TV, Radio, cell phone)
	To participate in partnerships and collaboration to ensure the safety of the citizens of the Western Cape. Collaborative nature in which the South African Police Services (SAPS), the Western Cape Government (WCG) and community structures are working towards advancing rural safety.	Cross cutting	Independent institution with a footprint in all the districts of the WC.	All citizens in the Western Cape benefit. Farmers, farmworkers and rural communities are the backbone of the agricultural economy in the Western Cape. Agriculture has very strong forward and backward economic linkages.	Safe rural communities will contribute to continued investment and growth of the agricultural sector in the WC and thus support national and provincial priorities for economic growth and creating jobs	Partnerships, communication, adequate funding, use of technology innovations

Service delivery area	Nature and extent of services to be supplied by the Department	Which of these services should be provided to each farmer category?	Why is the WCDoA most appropriate?	Reason why this service is a public good	Rationale: why the delivery of this service by a public institution will support national and provincial priorities?	Most appropriate delivery mechanism
	Need for youth development initiatives in the Western Cape, particularly in essential sectors such as agriculture (interns at the WCDoA, career awareness initiatives, bursaries, communication with beneficiaries and external host employers)	Cross cutting	The WCDoA has strong partnerships with most of the commodity organisations in the Western Cape. This service is a public good and WCDoA is the first point of entry to Government in the WC for the Agricultural sector	It contribute to create an environment conducive for employing skilled youth workers in the private sector and to grow the economy and to reduce unemployment- key role of government.	Support both the national and provincial priorities for women and youth employment	Develop overarching goals and targets for all Programmes with youth development initiatives and strengthen record-keeping capabilities for improved future monitoring and evaluation; Expand the network of external host employers and provide training; Create opportunities for beneficiaries to network and build relationships with the private sector.
	Sharing of rural safety information. Facilitate engagement between affected stakeholders and other relevant National and Provincial Departments (including local government)	Cross cutting	Same as above	Same as above	Same as above	Face to face engagement, electronic media

ANNEXURE F: Scoring of efficiency of agricultural services in the Western Cape based on IFC features

Element (IFC, 2015)	Non ideal state	Desired state of service delivery model	Western Cape Score (Score of 1-5)	Note
Target group	Non-discriminatory	Rewards best performers	5	National Farmer of the year award, Young farmer of the year award, Agri Worker of the Year, Western Cape Prestige Agri Awards, New Entrant to Commercial Agriculture, Agriculturalist of the Year
		Excludes worst practices	4	Code of conduct is in place (e.g., Agri Western Cape, Fairtrade, GLOBALGAP etc.) but there are acquisitions of misconduct. However, the penalty for not complying is very high - potential loss of market access.
Who finances service delivery?	Donors		4	Insignificant donor funding contribution
	Government	Private sector	3.5	Still a relatively high contribution of Government (WCDoA, ARC and others). However, there is no model in the World where the financial and the private sector finance "public goods" services and all "merit goods". Commodity organisations, agri input providers, retailors and other private sector organisations makes a significant contribution to finance service delivery
	Private sector	Financial sector	4	The financial sector also makes a significant contribution to finance service delivery in the Western Cape (e.g., commercial banks and insurance companies). Examples: Old Mutual Masisizane Fund, Santam Agriculture, Nedbank Sustainable Agriculture Programme, ABSA Agricultural Growing-to-Market Project/Food Security Programme etc.
Who pays for the services?	Donors	Farmers	3.5	All commercial farmers pay for the services, smallholder farmers with commercial aspirations make proportional contribution (only if they can). Subsistence farmers cannot pay for the services
	Government	Private sector	3.5	The private sector do make significant contributions, al beit these contributions are directly or indirectly linked to farmers and the commodities that they produce -the product pay for the services
Availability and accessibility	Limited and scattered	Supply meets demand	4	In general there is not a shortage of private sector service providers in most locations of the Western Cape. However, supply does not meet demand for many social services provided by District and Local Municipalities

Element (IFC, 2015)	Non ideal state	Desired state of service delivery model	Western Cape Score (Score of 1-5)	Note
	Often far away from farms	Available near or on farms	4	Apart from remote locations in the WC (Karoo), most services are available near farms
Competition between providers	Non-existent	Existent; alternatives can be used	3.5	There are many input and logistic service providers in the Western Cape - for most services strong competition. However, for some critical services (e.g., harbour & electricity supplies) a number of government utilities have a monopoly - very service delivery and in some cases collapsing - no competition.
Quality	Low	High	3.5	High quality services are available but see note above. Commercial orientation of service providers can maximise cost-effectiveness and minimise inefficiencies.
	Not monitored	Transparent	4	Most services are transparent
Approach	Top-down, driven by supplier (NGOs and private sector)	Demand driven	4	In the WC services are demand driven
	Proliferation	Participatory	4	Most of the agricultural service providers in the Western Cape are focused and client satisfaction. They regularly consult their clients to improve services
		Consistent throughout sector	4	There are standards for many of the professional services provided (e.g., engineering, irrigation, soil & water sampling, accreditations etc.)
Duration	Differs	Repetitive	5	Services are repetitive
		Continuous available	4	Most services are continuously available apart from reliance of electricity supplies and continuous fluctuation in service delivery at the Cape Town harbour
Delivery model	Not bundled	Bundled services	2.5	Integrated package of services are available from some service providers (e.g., inputs, credit and training delivered as one package, extension and training affects and informs the inputs used, which is in turn shaped by access to credit). However, there is often complaints that support by the WCDoA / Casidra and commodity organisations to small scale farmers is not in the form of a comprehensive support package that cover all the required elements for success (land & water rights, technical support and training, finance, market access).

Element (IFC, 2015)	Non ideal state	Desired state of service delivery model	Western Cape Score (Score of 1-5)	Note
Note: 1= lowest score, 5 = highest score. Scored based on the research team expert knowledge of the WC agricultural sector				
Max score			**90**	
Western Cape score			**70**	
Western Cape % score			**78%**	