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AGRILINKS

ENABLING THE BUSINESS OF AGRICULTURE

AUDIO TRANSCRIPT

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PRESENTERS

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Kelley Cormier:

Good morning from DC and welcome. Thanks to everybody for joining us today for this webinar. The topic is Enabling the Business of Agriculture and it's my pleasure to introduce it. I'm Kelley Cormier. I'm with USAID's Bureau for Food Security in the Office of Market and Partnership Innovations. And I work in support of the Feed the Future initiative.

USAID's involvement with agricultural benchmarking began under the Enabling Agricultural Trade Project and the ... index work that was piloted in ten of the Feed the Future countries. This served as proof of concept and the research and practical lessons learned informed the design enabling the business of agriculture project.

USAID saw the opportunity to scale up this agricultural benchmarking work with a 2012 GA call for comparative tools that benchmarks agribusiness indicators. We joined other donors to support the World Bank to develop the EBA and see it as an important tool in helping Feed the Future to monitor progress and enabling in the agribusiness enabling environment in Feed the Future countries.

Currently, the EBA covers 14 Feed the Future countries and will cover 18 by 2016 into 2016, 2017 and it will cover all new alliance countries. So it's important to note that it's available – it will be available in almost every Feed the Future country. Over the next one and a half hours, you'll learn about the EBA tool, its underlying methodology and its potential uses. And as you'll hear, the EBA tool is still under development and it will be expanding in technical scope and in geographic coverage.

The World Bank EBA team and DFS very much want to hear from you to better understand how this tool can be improved. And during the Q&A, we are very interested in hearing from you about, in particular, how relevant are the topics and findings to your country contacts, how do you see this as potentially useful in your work? What would make it better? What do you wish it would cover that you haven't seen today?

And now it's my pleasure to introduce our speaker, Farbod Youssefi and Federica Saliola are colleagues that I've had the pleasure of working with since the start of the project in 2012. They are with the World Bank Group. Federica is with the Global Indicators group and this group focuses on developing benchmarks. It's the think tank part of the World Bank and it's – and some of the analyses that you might be familiar with, which includes the doing business index, so Federica comes with a lot of

experience from that part of the World Bank.

Farbod Youssefi is from the Agriculture Global Practice where he and colleagues focus on value change in post-harvest efficiency system among other topics and brings that practical experience. And one of the things that I think all of us working on the EBA at its beginning realize is that the development of this tool was really a wonderful opportunity to demonstrate how to integrate these two sets of experiences and practice and I think you'll see that it's resulted in some really good work.

So with that, I'd like to turn to Federica Saliola and Farbod Youssefi to take us through this presentation. Thank you.

Federica Saliola:

Thank you, Kelley, and good morning everyone from DC. I also would like to thank you for joining our webinar today. We totally appreciate this opportunity to present the results of the EBA 2016 report and to get your feedback. I would like to be in our presentation by telling you a little bit about what has inspired EBA.

We are all familiar with I think the challenges that we expect to face, especially the ones related to feeding a world population of nine billion people and the fact that these challenges require policy makers to give more attention to food and agriculture sectors by making them more productive, profitable and sustainable. The ... environment, it's for the business of agriculture, it's a critical element to respond to a world ... market; however, understanding this environment is very challenging given that many factors condition it like policy, infrastructure, climate change, etcetera. And a lot of those factors are not fully investigated.

EBA focuses on one important element of the enabling environment, which is policies and regulations and transaction costs related to complying with those policies and regulations.

So, related to that, there are still a lot of unclear elements related to even the role that policy regulations play within the ... environment and the overall transformation process. For example, you know, there are not so many global data sets that compare across the world quality and regulations or the strength of institutions or the efficiency of administrative procedures, we will – there is no clear investigation of results about you know, what is the relationship between local regulations and certain important outcomes, right, for the activity of the agriculture sector or the transformation process. And more importantly, how do we define good regulations?

So EBA attempts to fill this gap by providing global benchmarks on the enabling environment for agribusiness and also another goal is to trigger more research, again on the role of laws and regulations in the context of agriculture transformation. Kelley mentioned the Doing Business Report has inspired EBA. For those of you who aren't too familiar with the Doing Business Report, let me just give you a few information about it. It's one of the four flagship reports of the World Bank Group.

It has been produced since 2003 and it measures the ease of doing business across 109 economies. And the data I collected every year. Now, two ... many strengths, in fact, it has inspired more than 2,500 reforms over the past ten years. Two very important characteristics of that project that EBA has adopted are the actionability of the indicators, meaning that all the indicators develop under this fear of control of policymakers. So they also capture laws, regulations and transaction costs related to that.

So, for policy makers, it's been very easy to understand which areas need attention in terms of reforms. And also, the comparability is I think the second characteristic that has made so far Doing Business such a powerful tool. And EBA also again has attempted to replicate that by producing comparable indicators across 60 countries.

Let me also give you a little bit of information about the genesis and the timeline of EBA. EBA really started in 2012 although data collection only began in 2013. We tested a number of indicators between 2013 and 2014 in ten countries and the report has been produced and is actually available on our website.

In 2014-2015, we scale up data collection to 40 countries and we were able to publish a second report in January – January 28, 2016 and we will present in a few minutes the most interesting results of that report and at the moment, we are scaling up data collection to 60 countries and the new report will be published in January 2017. I would also like to acknowledge the support we have received from five donors, including USAID. The other four partners, DFID, the Dutch, the Danes and the Bill and Melinda Gates Foundation.

So, EBA is meant to be a tool for improved policy makers and more than anything, an entry point for policy dialogue. EBA identified the most critical barriers for the business of agriculture, taking the standpoint of private sector companies. So the question

is, looking at the agricultural value chain, what are the major regulatory and policy bottlenecks for a company that wants to enter the market and done their operations in the market.

Not only we look at what is in the books, but we also look at the transaction costs that companies face when dealing with those regulations. For example, when we think about the seed sector or the seed registration process, not only do we look at the regulatory framework around that process, but we also look at how many procedures the company has to go through, what is their overall time it takes to register new seed variety and what is the cost?

As I mentioned, EBA works given its global nature, aims to focus on very important proxies that would trigger more reforms and policy dialogue, more policy dialogue.

Now, this slide shows the number of topics that are included in EBA. As you can see, it's pretty comprehensive and that's another reason why we expect this project to trigger reforms. But let me clarify that we piloted six topics. The topics are top of the slide that you are currently presenting, displaying. Those topics are seeds, fertilizer, machinery, finance, transport and markets. Those topics were piloted in 2013-2014 so before they've been scored in the report that we just published in January, EBA 2016. The six topics at the bottom are still under development.

So we tested the methodology for those six indicators. Last year, when we scale up the collection to 40 countries and we are planning to score some of them in the next – the report that will be published in January, EBA 2017. Those are land, water, livestock, ICT, environmental system ... and gender. Let me also clarify that environmental system ... and gender are kind of cross topic types of indicators, meaning that we don't have an indicator for environmental sustainability, but we target environmental sustainability related aspects to land, to water, feed and fertilizer, etcetera.

And we won't go into details now, but we have some additional slides, so if later on, you're interested in learning more about what are the main elements of those indicators, who are those ..., we'll be happy to present more details.

EBA, as I mentioned, in the EBA 2016 report, we presented scores, but the scores are actually – they go in two different directions. So, what we call the ... scores are the scores for each of the six topics that we measure. So, for a country like Burkina Faso

we can see how their country scores for machinery, and we'll present you a lot of results in a few minutes about those scores. But because we think agriculture is so complex that we decided also to have vertical scores, meaning that there are certain aspects that are across all the topics that we measure that are especially relevant for a company when they want to enter the market and ... operations.

There are other aspects that are very important when we think of quality control aspects. Some others are only important or mainly important when a company wants to export or import, for example. So, the ..., we also present scores by operations, quality control and trade. And let me just – this is an example from our report so you can see that a country like Mali or Niger at the top you can see the scores for 56 on seeds, 27.8 on machinery, but at the same time, you can see that Mali doesn't perform well on quality control. In fact, they have a score of 32.8. So it's more informative for policymakers and more than anything helps to focus on uncertain aspects that are relevant for the enabling environment, for agribusiness.

Just very – one important clarification. EBA does not advocate for the regulation. EBA is based on a concept of smart regulations, which consists of advocating for eliminating unneeded staff or projects and procedures making sure that the important safeguards are in place, like when we investigate, for example, the fertilizer sector, we look at the process of purchasing fertilizers, of importing fertilizers, and countries can easily compare how long it takes and what the good practices are. In some countries, it takes more than two years to register fertilizer and it's clearly an impediment for companies to enter that market, but at the same time, if we look at a lot of related elements that have to do with the quality control, like, for example, you know, the legislation in place for selling open bags of fertilizer or about labeling of fertilizers. And again, we'll provide you more details in a few minutes.

This slide presents the country coverage, the geographical coverage of EBA. Now, the countries listed in bold are the ones that we are adding this year so the overall sample of 60 countries is there. So you can only find the countries that are not involved in the report that we publish in January.

One thing I would like to mention, it doesn't show, for some reason, but actually in India, we are testing a sub-national approach. So, in India, not only we collect the data at the country level, but we also target the data collection in four states because

EBA, you know, we would like to test ... in some national approach because for a lot of elements that we measure, it probably matters whether the company is located or where they're trying to register fertilizer, for example. For certain aspects, it's just a national legislation that matters, especially for time related aspects. The state or the region where the process is handled may matter. So we'll test this approach in India.

We've already been asked to test a similar approach in Russia and we'll present the data in the next report. Our respondents come from both the public sector and the private sector. For the public sector, we mainly send our questionnaires to the minister of agriculture, trust for then environment, central bank, state inspector, land registries or, you know ... etcetera. For the private sector, we send our questions to the most important players depending on the topic that we measure. So, we have info companies like fertilizer and machinery, seed and irrigation. We also get responses from trucking companies ... orders, agriculture holdings, lawyers, commercial bankers and etcetera.

I think I already mentioned very briefly the fact that we have two types of indicators. We just wanted to present one more slide to make sure the methodology is actually clear. So EBA targets two types of indicators, the legal indicators and the procedures driving cost. Now, we use the word *de jure* and *de facto* just because the legal indicators have to do with the regulations and legal tax, decisions. It basically targets legal text in a broad brush, from a broad perspective, but it's basically what is in the book.

Now, the procedures ... give us a good idea about how efficient certain processes are and how costly for a private sector to comply with the legal, regulatory environment.

This slide gives you an idea of how the scoring methodology works. This is an imaginary country and it was just made up for, you know, again, just to explain the scoring approach of EBA. So let's assume that this imaginary country has a fertilizer score of 53. Now, if this country adopts good practices that are already in place in other African countries, could improve significantly its score.

For example, if this country has a fertilizer catalog, but the fertilizer catalog is not available online and you know, the change is made, they could add six points to their score. If there is a legislation in place about the import permits, but let's say those import permits last one month, which is actually the case for a lot of African countries, but that period is extended to twelve months,

theta could add three points. Or if there are not penalties for mislabeled bags in place in that country and the reform is passed and those penalties are put in place, then the score could go up by an additional five points.

So by reforming those areas, they could improve from 53 to 68. Again, EBA should be seen as an entry point for policy dialogue. Policymakers pay a lot of attention to, of course, compatibility, and it's also a good way to learn from other countries. We encourage a lot of peer-to-peer exercises because a lot of countries, you know, they can just learn from their neighbors and see what good practices are in place in their country and they might find a way to adopt the same good practices. It's also a way to self-motivate policy makers rather than imposing, you know, reforms or advices to that.

This is just an option from our website, all the data that we collect is publicly available. Our website provides very detailed explanation of our methodology, you know, you can compare countries, you can compare topics, you can see all the reports that we publish and you can also send me feedback in questions.

With that, I will give the floor to my colleague Farbod for a presentation of some interesting results from EBA 2016 report. Thank you.

Farbod Youssefi:

Good morning to everybody or good afternoon, good evening depending on where you are. It's a pleasure to be joining you all. Really delightful to see all your names and all the places that you're connecting from. So, thank you for this opportunity to present. As Federica explained, we've released our report, the 2016 report early this year and thought it might be nice to give you a sense of the kinds of data that we've gathered, the types of indicators we've put together and the early results and findings that we have. At least we won't be able to go in much depth on this occasion, but at least we can give you a flavor of the direction that we're moving.

In the slide in front of you, you'll see perhaps the first layer or the first impression of the results we've been able to collect. You can see on this overview slide that in the rows, we have all the 40 countries that we covered in last year's data collection, this year's report. And in the columns, we have the six topics that we've been focusing on and scoring, initially scoring.

And we've given this imagery using colors. You can see that the

greens in general represent areas where a country's regulation and the scoring for that topic area is above the global average and the reds, pinks illustrate the areas where countries' regulatory framework is scored below the global average. Now, when you look at each of the rows in each of the countries, you'll find a small handful of countries that consistently perform above average when it comes to their regulatory framework. So, countries such as Denmark, Spain, Poland, Colombia and Greece, you'll see that they have these greens across all six topics.

Then you find a small handful of countries, which actually consistently score below the global average. And here you have countries such as Niger, Burundi and Myanmar. But most other countries pretty much all other countries have a mix of performances where in some areas they perform above the global average and in other areas, below the global average.

So, for example, you'll notice that Bosnia and Herzegovina, it combines very solid regulations for domestic plan protection and fertilizer, but it's combined with a lack of any framework related to credit unions or money.

Morocco and Mozambique, for example, have poor or no regulation in agricultural finance, but they actually have very sound and solid provisions when it comes to the registration of new varieties.

You also notice on these coloring codes that the darker greens and the darker reds actually indicate where those countries are especially high performers or especially low performers because they're based on an absolute scale rather than on a relative scale.

So this is really the first layer of our data. If we move to the next slide, we can start looking at what happens at a regional level. Again, this is at the very surface of a very superficial level, but it's always interesting to see these trends, perhaps expect the trends where the OECD countries are the highest performers when it comes to their regulatory frameworks followed by LAC, Latin America and the Caribbean and ECA, and then we find regions such as South Asia, Sub-Saharan African and East Asia in the Pacific lagging a little bit behind.

Now, obviously, and as I mentioned, that is the first surface, the first layer. When you start going into the regions, you see a variation of performances. So if you look at sub-Saharan Africa, you see that Kenya and Tanzania actually perform above the global

average across all topics. And this is primarily driven by good practices, regulatory good practices in the areas of machinery, agricultural machinery and finance. And then you have countries such as Niger and Burundi which in general at the global level are amongst the countries with the fewest regulatory good practices in agribusiness.

I wanted to share this slide with you and refer back to the two types of indicators that Federica had described. As she mentioned, we have these more theoretical de jure indicators, which looks at what's in the books. And then we have the more practice-oriented indicators which looks at the number of steps and the time and the cost it takes to be able to comply with certain regulations, to carry out certain administrative procedures.

And so we've put together this slide to begin referring to this fact that there can be a difference between what happens in the books and what happens in practice, even though in no way are we measuring in exhaustive fashion what's happening in practice, but already, what we do start measuring can be contrasted with what can be found in the books.

And here we see in this graph, for example, we see that two regions, Latin America and, let's say, South Asia actually score very similarly when it comes to the registration of new varieties. But whereas we can say that the regulatory framework behind the registration of varieties is similar in strength, the costs or the efficiency of the administrative procedure varies because it's much more expensive to register a variety in Latin America than it is in South Asia.

So again, it might be the same point in terms of – same level in terms of scoring, in terms of the strength of their regulatory framework in terms of their laws and regulations in the books, but then what happens in practice varies and it's expressed in the different costs for this specific administrative procedure.

This slide here refers to one aspect we were interested in measuring or looking at through our data, which has to do with regulatory discrimination. Discriminatory or non-discriminatory laws or regulations that are in place initially against the private sector. So, we look across topics, for example, the eligibility of private companies to import machinery or for the private sector to be able to register fertilizer or to produce breeder foundation seeds or to be accredited to carry out seed certification. We look at some of these elements that discriminate against the private sector and

their participation in the market. We also look at regulations that discriminate against foreign companies, so, for example the possibility for forty companies to be able to import fertilizer or to be able to carry out transfer activities within a country.

And we also look at discrimination or obstacles that are placed in the regulatory framework for a small player, so for example, if there's a minimum capital requirement to start a farmers' cooperative or a minimum number of trucks to establish a trucking company.

So we look at all the data points that have this component, this discriminatory or non-discriminatory component and we have a total actually of 18 in place or 18 that could be found. And you can see in this slide that there are a few countries, one particularly, where all of these 18 non-discriminatory regulations can be found, several others where almost all of them could be found, but then on the other side of the spectra, we can see countries where a few of these or about half of these non-discriminatory regulations are in place.

If we talk about Africa, for example, we see a country such as Zambia that has 17 of the 18 in place, but then on the other hand, we have Ethiopia that has eight. Now, it's interesting to look at what happens. I'm going to, with your permission, refer much more to the case of sub-Saharan Africa just to give you a sense of how this could be analyzed at a regional and at a national level, but obviously the references that I make and the data that I cite could be applied or could be looked at in each of – any of the regions or even in different income groups. But, for example, when it comes to non-discriminatory regulations ... which is basically the right for a foreign country to transport agricultural products from one point in your country to another, that right is actually granted in only four of the forty countries that we study.

In Sub-Saharan Africa where we include 14 countries, none of the countries grant this right. So that's a non-discriminatory regulation that's absent, hugely absent. Other example of regulations of this type is for example that the private sector is enabled or can be accredited to carry out seed certification. Of the 40 countries we study, only 13 allow the private sector to be accredited to do the seed certification, whereas in sub-Saharan Africa, less than half, six of the fourteen countries.

Non-bank businesses being enabled, being allowed to issue e-money. That happens at about half of the 40 countries that we

study, 21 in fact. And in African, of the 14 countries, only 8 countries allow for that to take place.

Now, in a very similar manner that we look at these data points around discrimination, we also look at data points around information. Basically, that allows for a certain databases and catalogs to be available that grant access to key information sources. And we can see that in the total of ten good practices that we measure related to the access of information, there is a set of countries that have, again, most of these in place. None of them have all of them in place. And then a set of countries that barely have any and you can notice that they're primarily African. IN fact, in Africa, of the fourteen countries, all fourteen countries have five or less of these good practices in place.

And you can see that the bottom five have one or two in place. At the global level, let me give you a few examples. Perhaps one of the most absent good practices is the availability of a pest database, a national pest database which indicates pests that are in the country, what are their status, what is the condition? Only three of the 40 countries that we measure have this database in place. In sub-Saharan Africa, none of the countries offer this.

Another element that we measure, we measure if there is a fertilizer catalog. That's one element that we measure, but we also measure whether this fertilizer catalog is online. So let's say 29 of the 40 countries have a fertilizers catalog, but only 14 of them have the fertilizer catalog online.

In sub-Saharan Africa, seven of the fourteen countries have a fertilizer catalog, but none of them have them available online.

The ability or the channel of electronic applications for transport licenses in the 40 countries, only 5 countries allow for you to apply for a transport license electronically. In sub-Saharan Africa, only two counties, Uganda and Kenya, offer this good practice.

And we could go on and on about these good practices that are absent or present.

Now, we've already mentioned the fact that this is really meant to be a benchmarking tool and in fact, in the early interactions hat we've had with the different countries and governments, there's an interest in quickly seeing how a country is performing in each of these areas against other countries. Many times, they're interested in neighboring countries, in countries of the same region. At other

times, they're interested in countries that are in other regions, but that perhaps they aspire to. I recall not too long ago meeting with government representatives in Vietnam and they were particularly keen on comparing themselves to countries such as Chile, Colombia, Turkey, Philippines. So this graph that you see in front of you was prepared to offer that sort of benchmarking, but here, I've put an example of Africa and perhaps comparing Mali to several African countries.

And again, these are – if we look at the data, really by layers, this is still a very early layer, but you can start seeing that for example in fertilizer, Mali does better than the others. Still has considerable room for improvement, but at least it can compare itself to several countries in the region and notice that it's been doing better.

But when it comes to machinery and mark . . . , it pretty much lags behind the others and can draw lessons from them and clearly lessons from other countries that have strong regulatory frameworks in the areas. In areas such as seed and transport and finance, it does better than most other countries, but it still finds examples of stronger regulations in another country, for example, and seed, it finds examples in Mozambique.

Now, we could go topic by topic. Again, we can't be too exhaustive because of the time that we have available, but we would like to give you a sense or a flavor of what we look at within each topic, what we measure.

Here on this slide, you can see how countries compare to each other when it comes to their scores, when it comes to their scores on the seed sector. Federica mentioned in an earlier slide that we have these twelve topic areas, but one thing that's important to notice is that each of these topic areas have subtopic areas or sub scores, which we call indicators.

And so the score that you see for a topic is actually composed by two or three subtopic areas, which represent key issues within the topic area that we've decided to target. And these are key issues where we've, based on consultations with experts, based on review of the literature, we found that their major obstacles can be found in these areas. So when it comes to seed, for example, the score is based on a sub score and seed – and variety registration, seed variety registration process and a sub score related to seed development and certification processes.

So, I mentioned this also so that when you see those bars, you can

immediately go a step further and see what they're composed by. In fact, you'll notice in this chart that countries mostly score better on seed developments and certification indicators whereas seed registration, which is those triangles, those dark triangles, proves more challenging.

But if you look at Burundi which I've highlighted in red here, so clearly they have a relatively low score when it comes to seed regulations, but then if you see the subcomponents, they actually perform relatively well in seed development and certification if you compare to other countries, they're one of the higher performers. But they perform distinctively low when it comes to seed registration and the average is what gives is its low score.

I could go into some of the details. I won't go into too much details, but in the upcoming slides, I'll mention to some of the data points and some of the elements that we look into within this topic area. One of the elements that we look into is the variety release process. The variety release committee is a key component of this process and this committee approves the results of variety development and, for example, the frequency with which they meet is a key element in measuring how efficient or not they're being in their performance.

You can see on the right side of this slide that there are certain countries – well, there are a few countries that don't have a committee in place. There are some that have a committee in place, but it doesn't meet or it doesn't meet with the required regularity and there are other countries, which demonstrate good practices. They meet on demand or they meet after each ... season.

Clearly, the score for each of these varies, depending on the frequency of their meetings. Another element related to these committees is their – how they're composed. There are some committees that don't allow for or don't open to private sector participation and there's plenty of evidence pointing to the fact that private sector participation in this committee increases the private sector's confidence, increases transparency, increases efficiency. So you can see in this slide that a number of countries don't allow for public sector participation, in fact, eleven of them.

And the ones that do, some of them have less than half of the committee is composed by the private sector and some the majority of the committee is composed by private sector. And here I've included a few countries that fall within each category just for the sake of illustration. You can also see the countries where there is

no committee, African countries where there is no committee or they're not meeting.

Now, again, contrasting what happens in the books or what can be measured in the books and what happens in practice, we can see here that the cost of variety registration in some countries is considerably high. If you look at a country such as Sudan, which actually has quite a high score when it comes to their laws and regulations on variety registration, they're, amongst African countries, a third country in terms of score, but then you look at the cost to register variety in this country and it's extraordinarily high.

There are a few other countries that also have high costs and are above their group average. Same thing when it comes to time of variety registration. You'll notice, I've highlighted in this slide a few African countries. You'll see that Kenya, which is almost in the middle of the slide, and Tanzania have relatively short times for registration, under a year, actually, but then Kenya has a score of 94 for this specific indicator and Tanzania for 56.

So Kenya has much stronger regulations in the books, but when it comes to performance, when it comes to efficiency of administrative procedures, actually the time to be able to register a variety is very similar. Now, Sudan also has a score of 53, very similar to Tanzania, but registration time is much longer, almost two years. And Ghana, you can also see has a very high time for registering variety of 757 days.

Another element that we measure within the seed score is whether certification is required or not and if it is required, if the public sector is accredited, can we accredit it to carry out. There's plenty of evidence that points to the efficiency of allowing a private sector to be able to participate in this process.

And here are some countries that I've included. Fertilizer, another topic area that we measure, again, I've cited here the African countries. Eleven of the fourteen countries that we study in Africa fall below the global average. And then if you look at the subcomponents or the indicators, we have fertilizer registration, we have fertilizer import and fertilizer quality control and there can be quite a difference between the scores on each of these.

Again, if you look at Kenya, you see that they actually do very well, even though they're one of the lowest scoring countries in this topic area, they do very well, perhaps the top performing country when it comes to a score on fertilizer imports. But then

when it comes to fertilizer registration, their score is very low and pulls down the average score for the topic area. This, again, can be contrasted against what happens in practice in the time that it takes to register fertilizer. You see, for example, Uganda and Ghana have the same score for fertilizer registration, 45 points, but there's quite a difference in the efficiencies and processes. Where in Uganda, it takes 691 days, almost two years to register a variety whereas in Uganda, it takes 255 days. So, considerably under a year. But they both have the same score, so they have the same strength of laws and regulations in the books.

We measure several elements related to quality control. One of them is the sale of open fertilizer bags, if it prohibited or not and in those countries where it is prohibited, if there's a penalty for the sale of open fertilizer bags and ... and here, I've also included a number of countries which fall into each of the categories and therefore are scored different ways.

Machinery, another topic area that we measure, nine of the fourteen African countries fall below the global average. Interestingly here, the EAT region, East Asia and the Pacific region rank extraordinarily low. You see the bottom four scores are in that region. Philippines, however, which belongs to that region, is one of the top scoring countries. Again, you see the subcomponents of this score, tractor dealer requirements, tractor import requirements and tractor standards and safety and there can be quite a degree of variation between them.

It always has to be brought against what happens in practice and we have in this case Sudan that even though it has above an average score above the global average, 46 points, you can see that the cost of registering imported machinery is extraordinarily high. And a very similar case, even though the cost is low in Uganda and Tanzania, a similar scenario can be found here.

I've just added this slide to refer to this other element of quality control of standards and safety that we measure in machinery. It can't be found in African countries, but we see that the post sales services required by law can be found in a small set of countries on different elements, different aspects and we just wanted to highlight those. We do show these two countries so that's to kind of see the improvements that can be made or the laws that could be implemented in these areas.

Federica Saliola:

Sol, let me walk you through a few more results for the markets finals and transport topics and then we'll open it for questions.

Regarding markets, this slide actually shows again overall scores and you can also see how, you know, countries perform in terms of the two subcomponents, just to remind you that for my case, we basically focus on two main, let's say sub indicators, one that has to do with production and sales and the second one has to do with crop protection.

Now, it is interesting to see that the countries with high scores like, you know, Chile, Greece, Poland, Spain also have less divergence. In fact, you can see that the two components, there's a sub-component, have a very similar score. When we move to the right hand side, we see that the countries that actually lag behind have also more divergent results. And this is in line with a side that Farbod showed a little earlier where we actually observe that countries with smarter regulations in terms of operations also tend to promote quality control. So it seems that there is a positive correlation and the two are complementary rather than

And you know, we also have a similar good and positive correlation here. The countries – just again, to give you a few additional information about these, the countries that actually lag behind, you know, the common trends that we observe is that they don't have any regulated prime time pass to allow these ... inspection, ... inspections and so on. So there is – we observe, again, some common trend between the, you know, low income and high income countries regarding markets.

Next slide present to you an average of time that it takes to obtain a pre-shipment export documents. And we divided the countries by income group and you can see that it takes twice as much time to obtain documents in low income and low or middle income than in the high-income countries. In fact, you can see that, if you look at the right hand side of the slide, in countries like Denmark, Greece, Poland and Spain, you actually – it takes no time. So, you know, you get the documents the same day you ... the company's request, there's pre-shipment documents.

But it's also interesting to notice that within each group, we actually see significant variation in terms of time and also in terms of cost. So in terms of time, you can see that in the low income, definitely Tanzania has, you know, shown the highest number of days needed to obtain those documents, but then in a country like Mali for example, it only take three days to obtain those documents.

Same thing for lower and middle-income countries where Zambia

and Ghana, it, you know, it seems to take eight and eleven days to obtain those documents, but then a country like, for example, Guatemala, it takes just one day. So there is definitely variation. And we could not add the cost information in this slide just not to clutter it too much, but also on that front we observed a lot of variation.

For example, in the case of Russian Federation, you can see that it takes twelve days and the cost is always ... percent of the income per capita. But then if you look at a country like Laos for example, it takes three days, but the cost is almost ten percent of the income per capita to obtain those documents. Same thing in Zambia, eleven days to obtain the documents, but almost eleven percent of income per capita. So it's really costly and it could be an issue for small and medium sized companies when they would like to trade agriculture products.

Next slide shows some results for the finance topic. Our finance topic is mainly focused on financial inclusion. This slide shows how in a lot of countries, we find discriminative rules for MFIs. Clearly MFIs face different risk, so having different requirements is understandable in a way, but in some cases, we find that actually those rules are too discriminatory. That's the case of nine countries that you can see on the left hand side of the slide where, you know, for example Burkina Faso where we have six ... point difference in terms of their capital requirements for example for MFIs or a country like Niger, same thing.

So, in nine countries, it's really too large and in fact, you know, MFIs struggle more to be established. Then in eight countries, the requirements are exactly the same and in three countries, there is actually surprisingly the requirements, the capital requirements for MFIs are actually lower than the one for commercial banks, which is also another good practice because there is clearly a risk there for financial stability.

The next slide shows you legal regulations on warehouse receipts. Now warehouse receipts are very important, especially for farmers and smaller companies because oftentimes, they lack, you know, the credit or less, you know, traditional forms of collateral to access credit. So the warehouse receipts are usually a good alternative because they can enable farmers to use agricultural commodity as a collateral for loans. But very surprisingly we see that only in 15 countries, there are regulations in place for warehouse receipts and in none of the African countries mentioned except for Ethiopia, Uganda and Zambia, there are such type of

regulations.

And this – our finance indicators are not measured for high-income countries, again, given that the focus is on financial inclusions. We realized that it was not applicable for high-income countries. Now, two more slides on transport. The first one shows the licensing system across the forty countries that we measured.

Now, clearly, the goal of laws and regulation is to – or at least the main goals of a very efficient transport sector should be to have low price and reliable services. Now, because regulations can significantly impact competition and especially the licensing system, EBA focuses on measuring, again, what kind of licenses are required across the forty countries. And we see that there is – there are a lot of differences across the globe. In fact, we see that OECD income countries tend to have just company licenses while in South Asia and sub-Saharan Africa, mainly truck licenses.

Now, the good practice base on research is that company licenses should be in place as they can promote more formal and professional transfer services. Truck licenses are another layer and do not control for the aspects that a company license could actually cover. So, just to summarize, we see that in 12 countries, company license is requested, in 16 is the truck license. In four countries, four licenses are required, which is really overwhelming for companies, and in eight countries, no licenses, which is not considered good practice.

One final slide on transport, it shows how open countries are to ... competition. So, in our transport indicators, we basically look at five different elements or rights that are granted to foreign companies, to foreign truck operators and we see how many countries have five in place or only one or none of them. And overall, you can see that the EU countries demonstrate greater openness to competition.

Some truck operators from the largest agriculture partners and you can see that the South Asia countries are sort of the least open. In fact, they only have two or three of those elements that we measured in place. But one results was striking to us is that ... is only allowed in four countries and capital is a right that consists in allowing a foreign truck operator to pick up goods from one location in the country and transport them to another location in the same country. And this is considered a good sign of openness to competition because in their way, the truck operators of other countries are granted exactly the same rights of domestic truck

operators.

Farbod Youssefi:

So naturally, the whole objective of this work and of this product is to be able to facilitate it, that it be used in policy dialogue, in policy analysis and ultimately policy reform. So we have put this slide in to refer a bit to the engagement that has led to this work and that is now also an outcome of this work. Since the early days of the project, we've been very keen on speaking with stakeholders and involving stakeholders in the development of this project.

And we've had plenty of engagements and interactions not only at the project level, but also at the topic level. So when it comes to seed, we've tried to identify key factors and key experts and key organizations and companies in the discussions which help us to focus and refine our methodology. And we've done the same for all the different topic areas.

Now, engagement has naturally taken place with government representatives. To get an idea of where the needs are, where the challenges are, but also with other stakeholders, such as civil society organizations, private sector representatives, development agencies, academic experts and so we have in the work that's led to this report and we continue to follow through with these engagements, hold meetings, interactions, webinars, exchanges to make sure that we're collecting feedback and collecting the experience of these different types of entities so that it informs the development of our methodology.

Now, at the same time, and especially with the release of the 2016 report, there has been plenty of interest and reactions and engagements around the data that we've been able to collect. And I do want to refer to a question that's been posed to us, so I'm about example of countries where the EBA report findings and recommendations have led to government changes in agricultural policy.

So clearly, our report was released just a few months ago. It's now getting into the hands of our audience, our target audience and we're starting to hold a series of meetings and you see those docs on the map of countries where we're holding some initial meetings adding initial dissemination events. So clearly, it will take some time before this information is understood and is used and is applied and actually results in an impact. What we can share at this early stage of dissemination is that the reactions have been tremendously positive and very encouraging, I dare to say.

Even where there are apprehensions about some of the data points that are measured or that are omitted in our measurements, still, the reaction is we want to do better on our scores. We want to perform well. We want to have higher scores. And there are already examples of countries who are taking certain actions. For example, in one country, the secretary of state has already put together a taskforce to study our work and see what actions can be taking place on the regulatory front to be able to increase their scores.

In another country, in fact, in Vietnam, they're in the midst of a reform in their seed ordinance and so as soon as these results were issued, we've been drawn into the conversations and we provided as our primary role to provide the data necessary that helps them see some of the areas that need to be strengthened in the seed ordinance and so we already see that it's informing the seed ordinance that's the new seed ordinance that's going to be issued this coming summer. So as early as this coming summer, we could see some impact on regulations.

But, again, we're in a very early stage and we look forward to the engagements that we're holding. As you know, it's one of the advantages of this project is as its research component, and the research team behind it, and it also has a very strong operational component, having a global practice of the World Bank involved and many of our colleagues that are on the forefront of these operational conversations, of these policy discussions are starting to embed our data in their conversations, starting to quote, to cite our data and use our data. So we look forward to the impact that this will have in the upcoming months and years.

So with that, we hope to have covered, even if it's at a very quick – I know it was relatively long, but it's really just a layer of what we've done and give the microphone back to our moderator for the questions and discussion.

[End of Audio]

QUESTIONS & ANSWERS TRANSCRIPT

Kelley Cormier: Well, thank you Farbod and Federica for the presentation. I've followed the dynamics of engagement of many of you. We've captured a lot of questions, some of – a couple of which Farbod addressed upon finishing the formal part of the presentation. I'd like to start with a couple of overarching questions. These came in a little earlier in the presentation and I want to turn back to Farbod and Federica just to provide some additional background on the tool so that we can address these questions and then we'll move on to some of the others that we received. So I'm going to ask three questions. We'll answer those and then move on.

There was a question that came in early in the presentation related to how the project handled gender. That was something that Federica shared as part of the project, but I think there's an interest in understanding a little bit more about how it's been considered from the beginning. There was also a question related to how often is the tool updated. Is this tool for advocacy? That came from Kerry Hubble-Melcoreho. There's another overarching question that I'm going to direct at Federica and Farbod is the possibility of accessing raw data and once we cover that, we'll go on. So turning back to Federica and Farbod.

Farbod Youssefi: Yes, so I'm happy to start by referring to the question on gender. From the outset of the project, we were very clear that gender was to be an important component of our work and not only gender, I think this is equally applicable to the environmental sustainability one.

It was, we held discussions on these from early on to see again what are the key issues, what are the key constraints, what are some of the regulations that have an impact on gender and environmental sustainability issues.

However, if you haven't noticed already, we wanted to be very careful and responsible in developing our indicators and so that's why actually first in year one, we had this pilot experience where we measured a bunch of different aspects and areas in ten countries. We wanted to draw some lessons from that and based on those lessons, we wanted to begin focusing on a few topic areas, developing our methodology, testing our methodology, and that's why we selected early on to focus on those six core topic areas that we mentioned.

However, the other topic areas and gender environmental sustainability included have been at the forefront of our minds all along. We've been waiting to see how this year two goes to understand better how to embed it.

And now in retrospect, I think it has been a wise decision because now that we have collected, we had the pilot year experience, we started scoring those six topic areas, we have a better feeling of how we can embed data points into the different topic areas to be able to issue and to share some more significant results on this topic area and again, this is the same thing for environmental sustainability. And what you see, for example in gender is that we have data points embedded in, for example, land – that's a land topic area.

We look at six – disaggregated data and registries and how – we know that when data is presented in ... disaggregated way, this has an impact on targets, on aims and on participation of gender and this is not only in land registries, but also water right registries and financial institutions and cooperative registries. So that's one element that we look into.

We also look at restrictions to women's employment and activity, so, for example, are there restrictions to women driving trucks, so that's within our topic, our transport topic area. Are there restrictions to women producing or handling or using fertilizers, either organic or chemical? So that's in the fertilizer topic area. Or operating agricultural machinery in our machinery topic area. We also look at another aspect we looked at is women's participation and also leadership in collective groups and cooperatives in associations.

So you see as a result, even though we wanted to tackle it early on, as a result of this work that we've been able to do now, now we can embed it much more effectively in those other topic areas so you should probably expect in the next report some interesting results on that topic area and on environmental sustainability.

Federica Saliola:

If I could add to what Farbod just explained, how we developed our indicators, I'd also like to mention that we've been working closely with another group within the World Bank, you might be familiar with they've been producing a report called women business and the law. They've been producing these reports for the past eight years and leveraging a number of reforms. You know, the main result that comes from the report is that actually, business regulations are gender neutral. So they had to look into family law

and the different types of laws beyond the business regulations.

So with partner up with them and make sure we don't duplicate our work, actually that we complement their work so that clearly has an impact on the way we develop our indicators and we try to leverage both data sets and we hope to come up with a more comprehensive, actually, analysis using the data that we produce and then they produce and then will be published for the first time in the report and that will be released in January next year.

Perhaps I can address the question about how often the data is collected. So, the EBA is meant to be a three-year project. Three years that have been used, we are almost close to the end, to the third year, to develop, you know, our methodological approach.

As you can imagine it's been very complex to develop those indicators across twelve topics for agribusiness, especially compared to the indicators that doing business has developed so far. It's been a very complex and challenging exercise. So, we basically agreed with our donors to allow three years of the first cycle of EBA in which we collected data every single year. So again, we'll have yearly reports, two already published and one will be coming in January.

Now, moving to the next phase of EBA, we still don't know how often and if we will be collecting this data. We clearly are know, recognize the importance of monitoring progress and not only because this is a great leverage for policy makers if they implement that reform, they want knowledge, they want that reform to be a knowledge and also the progress to be tracked. So it will be critical, as I mentioned at the beginning, to try to address these questions of what is the impact of laws and regulations on certain important outcomes like agriculture productivity or again, agriculture transformation and it is – can we analyze the impact of those regulations without adding other elements into the picture and what are those other elements?

So, you know, we see the value of continuing collecting this data, regularly not only again to motivate policymakers, but also to better understand certain issues. With that said, though, we really think that collecting data every year is not necessary for EBA, but every other year. You know, those reforms don't take place every month and it takes some time to see the impact of a reform in the agriculture and agribusiness sector. So, that's a potential plan, but there is no decision has been made so far. In terms of accessing the raw data, so on our website, we publish and we make available all

the data points used for scores.

So, if you look at our website and you click on the scores, you can see that all the questions that have been aggregated to obtain the scores are actually available. Now, we collected more data, more data points, way more and those data points are now published on our website, so we'll be happy to provide these data points. There is a – you can reach out to us or just put that request in our website and then we'll be happy to share this addition of data.

Some of them are not fully compatible. Some of them have been collected only for one year. Some of them, you know, turned out to be not relevant or we didn't observe any variance across countries, but we'll be happy to share the full set of data that we collected if you feel interested in requesting it.

And I think earlier you addressed all the questions that you ... Yes?

Kelley Cormier:

Yes ... so I'm going to ask – I'll direct a few more to Federica and Farbod and ask that your responses be brief so that we can get through some of these.

There were a few questions related to content of indicators and I'm going to ask Farbod and Federica to kind of address these via chat, but I'd like to have more of a discussion about kind of some future oriented discussion about how these scores will – what kind of effect these scores will have. We have a couple of questions related to that, one coming from Steven Mank, another from Megan Murphy.

Megan asked, focusing on changing the score could pose some interesting dilemmas in terms of prioritization of reforms. Changing your score with one reform may or may not result in certain other goals for reform. In your discussions with governments, what other questions are coming up on prioritizing reforms for EBA? And I believe related is a question that came in from Steven Mank, as EBA adds countries, what is the increase in the number of people involved in doing the scoring? As this grows, how do you get consistency across scorers so that there's stability across countries in time?

So, I'd like to ask Federica and Farbod to respond to that. So this is – these questions are related to the evolution of the tool and how it's put into practice and used. So I'll let you decide who wants to go first?

Farbod Youssefi:

Very good. Well, we'll combine forces on such a good question. Maybe I'll address at least one of the aspects of this question. Clearly, what our methodology attempts to do is to highlight some priority areas. Amongst the many things we could measure and the many things we could score, it's been the consultation that have led us – consultations with evidence and consultations with experts, which has led us to targeting what our key regulatory good practices that are constraining, value chain processes in a country.

And so, in our discussions with governments, actually, one of the things – they're interested, obviously, in the full data set, what we bring, and they're aware that this is a first stage of this data set. They're very much looking forward to next year's data set in which we will plan to score some of the more practical dimensions that we referred to in the presentation in which we'll bring in a number of other topic areas that are going to be scored and issues related to gender and sustainability.

But even at this early point when they see the data, first of all, they're interested in prioritizing areas where they're below the average, so do you remember that most countries have some areas where they're stronger in and some areas that they're weaker in and clearly, those red dots do generate a reaction and it's the first areas that governments want to look at and want to try to improve. And that is in fact the whole objective of our methodology, of our system is to be able to highlight the areas where there is greatest room for improvement and the greatest need for improvement. And then we actually, in the discussions that take place, in those areas that are – we just dig deeper.

So we go into the specific data points. We share with them our scoring, what areas they scored low in, what aspects are missing and which ones have the highest score or have the highest impact on the score or the lowest impact on the score. And those are the questions that come up that ultimately you can tell that in their thinking and their understanding our data, they're paying most attention to.

So it's very interesting to see this kind of interface between our methodology and the objective of our methodology and the questions they raise and the areas that they're starting to pay attention to base on the data that we present to them.

Federica Saliola:

I would like to try to address Steve's question, which is – I think it's – I think it's a great question, so let me try to explain a little bit how we are trying to – how we're proceeding and how we try to

ensure stability. As I mentioned, we gave ourselves three full years, almost four, actually, to come up with a more stable methodology. So why, you know, it's taking three years to finalize this ... and finalize the methodology, but for a number of reasons.

First of all, every time we scale up data collection and we started testing our indicators, you know, there were some lessons learned. Since the very beginning, we tried to incorporate lessons learned from doing business colleagues, for example, but as we started EBA, we realized there was a completely different animal, so we actually not only we paid a lot of attention to these lessons learned, but we also built on those.

So in fact, you can see significant changes between the results from the pilot and the results for the scale up to the forty countries and you know, we'll see more changes in the next report that we'll be publishing. In fact, last year, we finalized data collection in July 2015 and to come up with the new questionnaires or the refined questionnaire because we try to maintain some consistency across already the pilot year and the second year and the third. It took almost six months for us. So, it was a very in-depth review. We benefited from input from a lot of relevant stakeholders, from work and colleagues and you know, from civil society, etcetera.

So, basically in a nutshell, I would like to emphasize the importance of you know, allowing enough time to come up with a robust methodology. And robust means a lot of things for EBA. Not only is Robust from a technical standpoint, but again, we need to pay attention to how relevant is what we measure and you know, there is no better way to test that than interacting with stakeholders and with policymakers, of course.

But there are a lot, two more aspects that I would like to mention that are critical in keeping – in thinking about our timeline and how and if we get to a stable methodology. In order to develop scores, we clearly needed to refer to internationally accepted good practices. And for some of them, you know, there's a lot of evidence and research. For some of them, it took a lot of time for us because, you know, research is not there. Evidence is not there, so we had to do a huge work of interaction with, you know, a lot of stakeholders, companies, policy makers, civil society, farmers associations, etcetera.

But for a lot of them, they're not good practices and especially for the time and cost indicators. In fact, if we ask ourselves the question, how long it should take to register new seed variety, it's

five days, it's sixty days, it is 600 days. So, we don't know. In order for us to come up with thresholds and be able to score, those very important variables, you know, we need a larger sample. So with a sample of 60 countries this year, we'll do 40 analysis that we already did do in the past two years and again, try to build new evidence and come up with new good practices and be able to score those very important time and cost I mentioned.

Now, we cannot exclude the fact that moving forward, EBA will need more revisions of this scoring methodology. Just as an example, doing business went through three very important refinements of ... methodology, the last one happened during the past two years and in fact, they had to include quality of regulations-related aspects. And it was a big change and, you know, this was a change, but again, to the extent possible, keeping to consideration all the challenges that we face, we believe that after the third year of EBA, we'll be able to maintain stability and profitability across years.

We totally agree it is very important for policymaking purposes and then again for research or just to – for analytical purposes.

Kelley Cormier:

Thank you, Federica and Farbod. The last question to Federica and Farbod comes from Rosemary ... and she asks about the – about how the macro level information that is generated through the EBA tool is linked to grassroots small holder farmers as a way of achieving an inclusive enabling environment in agriculture. This could lead to a lengthy response, but why don't you give us your short answer and then we'll wrap up.

Farbod Youssefi:

Thank you for the opportunity to answer this question. I think it's a very key question and in fact, that comment of macro levels is a very good one. A lot of policy makers and some of our colleagues and different countries have commented that one of the greatest strengths of this work is that it kick starts many discussions.

It puts some issues on the table and to the degree that it links with other data that exists with other analyses that exist, it really gives for a very powerful analysis. Now, how can it be linked to grassroots farmers, small hold farmers?

So one thing to be aware of is this is one of the complexities of agriculture and agribusiness that we have a range not only of countries and conditions of stages of agricultural transformation, but also of the kinds of actors that we have in this and we have a large firms and corporations, multinational and we have small

farmers and producers and they all represent the private sector and we want to make sure we're benefiting them all with some of the regulations that we're looking at. And this is the case. We have made sure that we do cover the range of private sector actors.

In some topics, you'll find that in fact, it's the smaller producers, the smaller actors, the smaller farmers who are more targeted. One example of that is our land indicators, which we haven't presented in this case. You can see some references to it in our report, but everything that has to do with inclusion, with tenure rights, with transparency, with procedural safeguards in case of ... I mean, all the elements that we're looking at have been very highly relevant to small holder farmers. Same with markets.

And markets, as we mentioned earlier in our presentation, one of the aspects that we look at is cooperative action and contracting and being able to connect into domestic markets. So, if you notice the data points associated to that and the regulations that we measure are very relevant for smallholder farmers.

Now, sure, there might be other areas that target larger firms, areas such as fertilizer and inputs, which require some of – some bigger actors, but again, its aim is to ultimately foster the availability of these inputs for the small hold farmers, and there's plenty of evidence that says that by addressing some of these regulations, accessibility is impacted.

So that's just, I mean, trying to stay within the time limits, that's a quick overview of our work and its relevance to small hold farmers.

Kelley Cormier:

Well, thank you Farbod and again, thanks to both Farbod and Federica for the presentation and the thorough responses. We've come to the end of the webinar and I want to thank everybody for your active participation. It's been exciting to see so much interest. I hope that it's sustained interest. A couple of observations I made from following the chat. Seed systems is a big – it gets a lot of our attention. It'll be interesting to see how this tool might inform policy dialogue around changes in the enabling environment for seed systems in particular among a number of other factors and topics that affect the work that we do in the agricultural sector in support of food security.

I'm going to wrap up. A couple of other key takeaways. We've learned and Federica mentioned this at the beginning of her presentation, that the EBA tool is really a starting point. We

already have seen how it's getting policymakers' attention. It can generate momentum for reform, which is great, but we need to make sure that we don't rush to – that governments don't rush to address these scores and that the voices of citizens, private sector stakeholders is not lost.

I've got Tom Sanderson raised a really good point when he reminded us about the role of media, something that we can consider as we think about how these data generated within the EBA tool can inform policy dialogue. That's certainly our expectation and I know we're eager to see how that's going to play out.

So again, the EBA tool, it's a means of sparking policy dialogue. I believe it will be effective at revealing the symptoms of a core enabling environment, but it doesn't diagnose the root cause of these symptoms and I think that Federica and Farbod will also agree that to really get at that and understanding of those root causes requires deeper qualitative analysis of political economy, institutional development, social dynamics. So, excited that this tool can be a part of that process.

And in conclusion, I wanted to note that the Bureau for Food Security's Office of Market and Partnerships Innovations is available to help in addition to – I know the EBA team welcomes feedback and will be responsive to questions. The Feed the Future Enabling Environment for Food Security project has also done in-depth analysis of the methodology and is available as a resource to brief Missions and field questions on aspects of the methodology.

They can assist with understanding how to employ the EBA in the context of Feed the Future programming. They can also be a resource in facilitating stakeholder dialogues. That could potentially be a complement to some of the outreach work that the EBA team has talked about here today.

With that, we'll be sharing post-event resources within a week, so again, thank you so much to everybody for joining the webinar today and for your active participation.

[End of Audio]