

Narrative progress report 2025

Ethiopian Seed Partnership Plus

Ethiopian SEEDPARTNERSHIP

WAGENINGEN UNIVERSITY & RESEARCH

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Contents

1	**Summary sheet**	**2**
2	**Executive summary**	**3**
3	**Introduction**	**5**
4	**What we learned and how we learn**	**6**
5	**Progress towards outcomes**	**7**
6	**Visibility**	**14**
7	**Sustainability**	**15**
8	**Monitoring, Evaluation and Learning**	**16**
9	**Organizational development and human resources**	**16**
10	**Finance**	**16**
Annex 1:	**Indicators and targets**	**17**
Annex 2:	**Risks and mitigation measures**	**20**

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1 Summary sheet

Programme title	Ethiopian Seed Partnership Plus (ESP+)
Mission	Small-scale food producers have increased food security, nutrition, and resilience to shocks and stresses.
Goal	Ensure the delivery of quality seed of adapted varieties to these small-scale food producers across the country.
Intended outcomes	1) Private sector strengthened in its contribution to seed delivery; (2) Uptake of innovations and empowerment of young men and women increased; (3) Responses to seed insecurity are effective and sustainable; and (4) Transformation of the seed sector is enabled.
Country	Ethiopia
Programme duration	6 years (September 10th, 2021 – December 31st, 2027)
Grantee	Stichting Wageningen Research, Wageningen University & Research P.O. Box 88, 6700 AB Wageningen, The Netherlands
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2 Executive summary

a. Results, lessons learned and conclusions

Results towards Outcome 1 – Private sector strengthened – Strong progress achieved. Ethiopian Seed Partnership Plus (ESP+)-supported domestic seed companies and Seed Producer Cooperatives (SPCs) produced 4,054 MT of quality seed (32% increase over 2024), covering 24 crops and 52 improved varieties. Six additional seed companies were selected, expanding the ESP+ portfolio to 15 companies, including the first two in Benishangul-Gumuz.

The Guarantee-to-Grant (G2G) scheme became operational through a partnership with Awash Bank, enabling 13 seed companies to apply for loans. The business incubation programme strengthened a new cohort of three women-led and five youth-led seed enterprises, while the Ethiopian Seed Association (ESA) expanded its membership by six companies, strengthened the capacity of 17 member companies, increased its international visibility, and enhanced member services. We also consolidated partnerships across five nutrition-sensitive value chains and established new partnerships with domestic and international seed companies.

Results towards Outcome 2 – Human resources capacities in the seed sector strengthened – On track. Higher education and professional capacity were strengthened through the MSc research grant programme, demand-driven short-term professional training delivered by Haramaya University, and support to the Business Incubation Centre at Alage ATVET College.

The fourth round of the seed sector internship programme was completed, with 37 young professionals graduating and 31 interns placed with international and domestic seed companies, public seed enterprises, and agricultural research centres. The programme promoted youth employment and entrepreneurship, with 19 internship graduates achieving positive employment outcomes, including 12 securing permanent employment with host organisations, one intern found employment elsewhere and six establishing their own businesses.

Farmers' uptake of Sustainable Agricultural Practices (SAPs) was enhanced by reaching 4,855 farmers (21% women) through demonstration plots and training on quality seed, improved crop varieties, and sustainable production practices. ESP+ also expanded Public-Private Partnerships (PPPs) by selecting five international seed companies to strengthen Ethiopia's oilseed, fodder, and forage seed systems.

Results towards Outcome 3 – Responses to seed insecurity strengthened – On speed. Seed System Security Assessments (SSSAs) were completed in 10 woredas across Tigray, Afar, and Somali, leading to the design of a market-based seed response model. Humanitarian-Development coordination was strengthened through the development and endorsement of the Tigray Seed and Seed Security Response Guideline, promoting the 10 Guiding Principles of Good Seed Aid and a transition from repeated free seed distribution to evidence-based, market-based seed responses. A similar guideline is being validated in Afar.

Farmer- and community-based seed systems were strengthened by supporting 17 SPCs and two Community Seed Banks (CSBs), establishing the first two SPCs in Afar, restructuring six SPCs in Somali, and enabling the production of 926 MT of quality seed. Farmers' access to improved and climate-resilient crop varieties was expanded by promoting 84 varieties through crowdsourcing and Participatory Varietal Selection (PVS) trials in collaboration with Regional Agricultural Research Institutes (RARIs). Essential seed service provision in Tigray was rehabilitated through an investment of ETB 3.2 million, restoring the operational capacity of conflict-affected local seed producers.

Results towards Outcome 4 – Transformation of the seed sector enabled – Strong progress achieved. ESP+ strengthened Ethiopia's seed sector governance by establishing seed coordination bodies in 10 regions, national steering and technical committees under the Ministry of Agriculture (MoA), and digital seed sector monitoring systems. The approval of the Variety Release and Registration Directive, Certificate of Competence Directive, and Quality Declared Seed (QDS) Directive strengthened the regulatory framework.

The Ethiopian Agricultural Authority (EAA) strengthened on Distinctness, Uniformity and Stability (DUS) test and National Performance Trial (NPT), implemented Plant Variety Release and Registration Directive No. 1065/2025, resulting in the registration of four bread wheat and three vegetable varieties under a more transparent, and internationally aligned new variety release system. Barcode-based seed certification expanded to eight regions and 16 crops, certifying 37,692 MT of quality seed using 2.3 million barcode tags and was endorsed for nationwide rollout.

ESP+ also strengthened phytosanitary and digital certification systems and completed a seed carryover study, providing evidence for policy dialogue on seed marketing reforms, including the potential reintroduction of Direct Seed Marketing (DSM).

Lessons learned

- *Institutional ownership is essential for sustainability:* Embedding interventions within the MoA, EAA, ESA, universities, and regional institutions has strengthened local ownership and increased the likelihood that key seed sector functions will continue beyond the programme.
- *Public-private partnerships require sustained engagement:* Building partnerships with international seed companies requires continuous engagement, strong local partnerships, and an enabling business environment to translate interest into long-term investment.
- *Demand-driven capacity development delivers lasting results:* Haramaya University's training, internships, and business incubation highlight that hands-on, market-oriented skill development effectively bridges skill gaps,, but young entrepreneurs still face challenges in accessing start-up funding.
- *Market-based seed response is more sustainable:* Seed System Security Assessments and regional seed response guidelines showed that strengthening local seed markets, SPCs, community seed banks, and private seed enterprises improves resilience while reducing long-term dependency on humanitarian seed aid.
- *Seed sector reform requires simultaneous policy and institutional strengthening:* The impact of new seed directives was maximized by strengthening the EAA's regulatory capacity, laboratory services, digital certification, and regional implementation systems, enabling effective enforcement of the regulatory framework.
- *Adaptive implementation is essential in fragile and evolving contexts:* Experience from Amhara, Tigray, Afar, and Somali demonstrated that flexible planning, diversified production models, stronger local partnerships, and continuous stakeholder engagement are critical for sustaining programme implementation under security and climate-related challenges.
- *Strong government leadership is fundamental for effective seed sector coordination:* While regional and national coordination platforms improved collaboration among stakeholders, their effectiveness ultimately depends on stronger ownership, clearly defined institutional mandates, and leadership from the MoA and Regional BoAs.

Conclusion

Overall, the programme has achieved strong progress in strengthening Ethiopia's seed sector by expanding private sector capacity, enhancing human capital, promoting market-based responses to seed insecurity, and advancing critical policy and regulatory reforms. The programme has strengthened national institutions, established sustainable public-private partnerships, and laid a solid foundation for a more competitive, resilient, and inclusive seed sector. Although security challenges, climate shocks, and institutional capacity constraints continue to affect implementation, ESP has demonstrated strong adaptive management and maintained implementation momentum.

b. Main steering implications for the next reporting period

- *Adaptive implementation:* Maintain adaptive management in response to insecurity in Amhara, Tigray, and Oromia, and climate shocks in Afar and Somali, through flexible planning, diversified production models, stronger local partnerships, and risk-based monitoring.
- *Monitoring of G2G financing:* Closely monitor the implementation of the Guarantee-to-Grant (G2G) scheme with Awash Bank to ensure timely loan and grant disbursement to seed businesses.
- *Address seed carryover:* Advance policy dialogue with MoA, EIAR, Regional BoAs, seed businesses, and development partners to implement recommendations from the 2025 seed carryover assessment, including demand-driven seed planning, and potential reintroduction of Direct Seed Marketing.
- *Operationalize new seed regulations:* Support EAA and regional regulatory bodies to implement the Variety Release and Registration Directive, Certificate of Competence Directive, and Quality Declared Seed (QDS) Directive through capacity building, awareness creation, and enforcement.
- *Strengthen seed security:* Support implementation of the Tigray Seed and Seed Security Response Guideline, validation of the Afar Guideline, development of a similar guideline for Somali, implement market-based seed response models and a Strategic Seed Reserve.
- *Institutionalize seed sector innovations:* Further consolidate the embedding of ESP+ supported seed sector innovations within MoA, EAA, ESA, Haramaya University, Bahir Dar University, Alage ATVET College, Regional BoAs, and private sector actors to strengthen institutional ownership and sustainability.
- *Strengthen PPPs and value chains:* Accelerate the implementation of PPPs with international seed companies in oilseed, fodder, and forage crops, while advancing leafy vegetables, chickpea, young plant propagation, and urban home gardening, and assessing one additional high-potential value chain.

3 Introduction

a. Description of programme and intervention strategy

The goal and intended impact of the Ethiopian Seed Partnership Plus (ESP+) is that small-scale food producers have increased food security, nutrition, and resilience to shocks and stresses through their improved access to quality seeds of adapted varieties. Our investment will improve 1 million small-scale food producers' access to quality seed, progressively decrease the yield gaps of 500,000 of them, and expand the current area under sustainable agricultural practices (SAPs) by 12,500 hectares. The impact will be enhanced and sustained by the effective layering of gender, nutrition, climate, and seed sector interventions.

To achieve this, the following four primary outcomes are pursued: (1) Private sector strengthened in its contribution to food, nutrition, and climate resilience; (2) Uptake of innovations and empowerment of young men and women increased; and (3) Response to seed insecurity and (4) Enabling seed sector transformation.

1. Private sector strengthened: Under this outcome, activities will boost the production and diversify the product portfolio of 25 domestic seed businesses by three quarters. Business planning, technical training, and increased access to finance will improve these businesses' production, seed quality, sales, profitability, and long-term sustainability. An incubator for small- and medium-scale enterprises will strengthen the inclusion and equity of emerging female entrepreneurs in seed businesses and seed-related services. Through collaboration agreements, the programme will increase the uptake of quality seed across six value chains for food security and nutrition. The programme will also support three or more international seed companies to establish or expand local seed production in Ethiopia, creating employment, increasing exports, generating foreign exchange, and improving Ethiopia's balance of trade. In addition, the Partnership will continue strengthening the Ethiopian Seed Association (ESA) by enhancing its organizational capacity and value proposition to the seed sector.

2. Uptake of innovations and empowerment increased: This outcome focuses on strengthening the seed-related curricula and courses of five selected knowledge institutes by the end of the Partnership. A total of 350 youth, of whom at least half are women, will enhance their capacities through education, training, and internships in the seed sector. Equipping young entrepreneurs and graduates with relevant skills will contribute to improved performance and innovation in the seed sector. In addition, 50,000 farmers, half of whom are women, will be trained in sustainable agricultural practices. Led by international seed companies, the programme will strengthen farmers' knowledge of sustainable agricultural practices and improve their understanding of the benefits and returns from investing in quality seed.

3. Seed insecurity response: This outcome responds to growing seed insecurity in Ethiopia, where conflict and disasters have disrupted farmers' access to quality seed of diverse crops and varieties. The programme will facilitate the introduction of 30 new, improved, and climate-resilient varieties through three complementary intervention areas: fit-for-purpose humanitarian seed responses, strengthened farmer and community-based seed systems, and rehabilitation of seed service provision. Activities include Seed System Security Assessments (SSSAs), market-based seed response pilots, Participatory Varietal Selection (PVS), crowdsourcing, strengthened demand-supply linkages, and Community-Based Seed Production (CBSP). In Tigray, the programme will support the rehabilitation of damaged seed service provision.

4. Enabling transformation: This outcome strengthens the enabling environment for a more competitive, resilient, and inclusive seed sector. Performance will be measured through at least 15 improvements in seed policies, regulations, or solutions to systemic constraints benefiting tens of thousands of farmers. The Partnership will support five coordination platforms, improve the service delivery of 10 seed regulatory bodies, and leverage €20 million in trade and investment. It will also strengthen coordination across the humanitarian-development-peace (HDP) nexus, ensuring that humanitarian, development, and peace interventions are better aligned and mutually reinforcing.

b. Review of follow-up measures taken since the last reporting period

- Regular follow-up was conducted to monitor the implementation of the revised curricula at Haramaya University and Bahir Dar University. Performance assessments were carried out after each short-term training to measure learning outcomes and impact. A structured follow-up mechanism was also implemented to track the progress and employment status of former interns. Each cohort of

internship graduates maintains a Telegram group to share updates, experiences, and professional opportunities.
- The proposed Guarantee-to-Grant (G2G) scheme implementation modality, which originally envisaged Awash Bank as a consortium partner, was reviewed following changes in the Bank's internal policy in 2025. Approval was obtained from the Embassy of the Kingdom of the Netherlands for a revised modality, under which Stichting Wageningen Research Ethiopia (SWRE) serves as the implementing partner and Awash Bank is subcontracted by SWRE. Following this approval, the G2G scheme became fully operational.
- Extensive follow-up was undertaken with international seed companies specializing in oilseed, fodder, and forage crops to promote investment in Ethiopia. The ESP+ team engaged bilaterally with more than 22 companies, providing seed market information, business environment and risk assessments, and guidance on seed regulatory provisions. As a result, seven companies formally expressed interest in participating in the Public-Private Partnership (PPP).
- The Monitoring, Evaluation, and Learning (MEL) team reviewed and harmonized data collection systems across domestic seed companies, seed producer cooperatives, and community seed banks supported by different ESP+ partners, improving the consistency and comparability of programme monitoring data.

c. Relevant contextual changes and their potential impact

- Security remained a major contextual challenge, particularly in Amhara, Tigray, and parts of Oromia, affecting programme implementation, monitoring, and private sector operations. In Amhara, two partner seed companies were directly affected: one lost access to production land, while another suffered damage to seed production infrastructure, delaying seed multiplication and increasing production costs. Continued insecurity in Tigray also constrained staff mobility and implementation. Annex 2 provides a detailed assessment of risks and mitigation measures.
- Climate-related shocks, including erratic rainfall, drought, floods, and pests, continued to affect seed production, particularly in Afar and Somali. Uneven and early rains forced one seed producer to re-sow approximately 150 ha, increasing labour and input costs and delaying seed availability.
- Fragile seed systems in Afar, Somali, and Tigray, combined with limited private sector presence, weak humanitarian-development coordination, continued free seed distribution, and limited institutional commitment, continued to constrain sustainable seed market development. In Tigray, rehabilitation of local seed producers and seed services still requires substantial investment and working capital.
- Foreign investment in Ethiopia's seed sector remained modest due to insecurity and delays in implementing key regulatory measures, particularly the Plant Variety Protection (PVP) Act. ESP+ continued promoting investment through targeted awareness raising, bilateral engagement with international seed companies, and dissemination of successful partnership experiences.
- The USAID Stop Work Order reduced opportunities for programme integration with complementary initiatives, while increasing humanitarian needs shifted attention away from long-term seed system development.
- The Business Incubation Centre (BIC) at Alage Agricultural TVET College revised its approach following the absence of a graduating class, redirecting support to trainees from surrounding communities to improve the intervention's relevance and effectiveness.
- Political commitment to seed sector reforms remained mixed. While progress was achieved, varying stakeholder ownership slowed implementation of evidence-based recommendations. ESP continued to strengthen policy dialogue through national and regional coordination platforms, advocacy, and targeted capacity building. Improved access to foreign currency following Ethiopia's market-based foreign exchange policy introduced in July 2024 reduced forex constraints for seed companies and was no longer considered a significant implementation risk in 2025.

4 What we learned and how we learn

- Short-term professional training is an effective and flexible approach for strengthening the capacity of seed sector professionals. Strong demand from both public and private seed companies confirms the value of demand-driven, on-the-job training.
- Agricultural TVETs require a different capacity development approach from universities. Differences in curriculum and training delivery call for tailored strategies to strengthen technical and entrepreneurial skills.
- The internship programme has strengthened youth entrepreneurship, but limited access to start-up capital remains a major constraint. While several graduates established businesses or developed business plans, access to finance continues to limit business creation and growth.

- Investments in seed processing and quality control equipment improve seed quality and reduce post-harvest losses, but sustainable commercialization depends on stronger market linkages. Partnerships with unions, seed inspection authorities, research institutions, and cooperative agencies are essential to secure reliable demand and fair pricing.
- Effective seed quality assurance requires simultaneous investment in human capacity, laboratory infrastructure, and institutional mandates. Training, laboratory equipment, and experience-sharing enabled previously underserved regions to establish or strengthen seed inspection and certification services.
- The Ethiopian Agricultural Authority (EAA) is still lagging behind in consolidating Distinctness, Uniformity and Stability (DUS) and National Performance Trial (NPT) and continue relying on collaboration with public research institutions for implementation. The successful evaluation and release of bread wheat and tomato varieties, alongside the recruitment of a plant breeder and the approval of the Plant Variety Release and Registration Directive No. 1065/2025, demonstrate positive institutional progress. However, dependency on development partners for fund remains a key challenge.
- Continuous awareness raising, joint planning, and coaching of humanitarian and development actors can successfully shift humanitarian seed responses from traditional seed aid towards market-based approaches, while creating opportunities for last-mile local seed production and supply in fragile regions.
- Regional ownership and enforcement of context-specific seed aid guidelines are critical for institutionalizing market-based seed responses. In Tigray, enforcement of the regional guideline and the 10 Guiding Principles of Seed Aid has encouraged humanitarian actors to begin aligning their seed response plans with market-based approaches, although these practices have yet to be fully institutionalized.
- Sustainable growth of community-based seed producers depends not only on production capacity but also on reliable access to finance and markets. Uncoordinated direct seed distribution continues to undermine market opportunities for local seed producers, particularly in Tigray.
- Effective seed sector coordination requires stronger ownership and leadership from the Ministry of Agriculture (MoA) and Regional BoAs. Structural constraints continue to limit their coordination role, while unclear roles and responsibilities among sector actors reduce the effectiveness of coordination platforms. Experience also showed that the MoA and BoAs are often engaged in operational functions that overlap with other stakeholders, rather than focusing on their core coordination mandate.

How we learn: ESP+ continued to generate evidence to validate the assumptions underpinning its Theory of Change and inform adaptive programme management through its learning agenda. Learning was facilitated through research, technical studies, stakeholder consultations, workshops, seminars, study visits, and continuous engagement with seed sector actors.

In 2025, ESP+ staff published three peer-reviewed scientific articles, while six staff participated in the International Seed Conference in Wageningen as presenters and panellists. Organizational learning was further strengthened through the annual ESP+ Annual Retreat in Hawassa, bringing together staff from all implementing partners, and 12 technical learning sessions delivered by five cross-partner thematic working groups, translating lessons into improved coordination and programme implementation.

5 Progress towards outcomes

a. Progress towards our outcomes

Outcome 1: Private sector is strengthened in its contribution to increased seed delivery

Output 1.1: Seed production increased and diversified

Seed production: Six additional seed companies were selected in 2025, increasing the ESP+ portfolio to a total of 15 domestic seed companies. Tarekegn and Rodas became the first two seed companies established in Benishangul Gumuz, producing quality seed of key food security crops. The aggregated seed production of the supported thirteen seed businesses in 2025 has reached to 3,930 metric tons for the 23 crops and 49 improved varieties which is 28% increase in seed production than in 2024 (Table 1).

Table 1 Seed production volume by domestic seed businesses

Business	Location	Number of Crops	Number of varieties	Total seed production (MT)
Adisoget Agricultural PLC	Oromia	1	1	35.30
Anatoli animal forage and plant seed supplier enterprise	Oromia	13	13	125.12
ATM general agricultural work PLC	Oromia	3	4	498.00
Biniyam Mulat seed enterprise	Amhara	2	2	265.30
Borer agricultural development PLC	Central Ethiopia	4	10	849.70
Burka agricultural PLC	Oromia	3	12	920.70
Gudeta Gonfa Wari Farm	Oromia	3	4	184.00
Habtamu Desta Befe	Central Ethiopia	1	1	50.00
Hulume plant and seed multiplication PLC	Central Ethiopia	1	2	152.60
Loma Enazmir PLC	Amhara	1	1	182.90
Migra Trading PLC	Amhara	1	1	252.00
Rodas agricultural development PLC	Benishangul-Gumuz	1	2	362.90
Tinsae Zerfu agricultural PLC	Central Ethiopia	1	2	51.00
Total				**3,930**

In addition to the seed companies, in 2025, ESP+ further strengthened support to the 11 Seed Producer Cooperatives (SPCs) in Tigray and East Hararghe, which produced a total of 124 metric tonnes of seed across 6 crops (sorghum, wheat, bread wheat, teff, potato, common bean) and 8 improved varieties (Table 2).

Table 2 Seed production volume by Seed Producer Cooperatives

SPCs	Location	Number of crops	Number of varieties	Total seed production (MT)
Haji Faji	East Hararaghe, Oromia	1	1	0.84
Bontu Saba	East Hararaghe, Oromia	2	2	40.64
Lalisa Ifadin	East Hararaghe, Oromia	1	1	15
Gamechis	East Hararaghe, Oromia	1	1	3.3
Misoma Igu	East Hararaghe, Oromia	1	1	2.5
Embeba-atsela	Tigray	1	3	11.4
Biruh-tesfa	Tigray	1	3	12.53
Fireweini-shimta	Tigray	1	3	9.1
Tinkish	Tigray	1	3	1.51
Fireselam	Tigray	1	3	15
Firesiwuat	Tigray	1	3	11.75
Total				**124**

Strengthening the capacity: Newly selected seed companies underwent capacity assessments and received tailored action plans, while existing seed businesses were supported through training, coaching, business planning, and loan proposal development. To strengthen seed quality and market development, six seed companies received seed quality testing laboratory equipment. Demonstration plots, field days, and Maize National Performance Trials (NPTs) with the Ethiopian Institute of Agricultural Research (EIAR) promoted improved varieties, strengthened market linkages, and enhanced companies' capacity to introduce new varieties. Access to EGS was strengthened through partnerships with EIAR, public seed enterprises, and private EGS producers.

In Tigray and East Hararghe, ESP+ strengthened the technical, organizational, and business capacities of SPCs, diversified their seed portfolios, and provided seed equipment to reduce post-harvest losses and improve compliance with seed quality standards. Participatory Variety Selection trials on mung bean, groundnut, potato, barley, field pea, and faba bean stimulated demand for improved varieties and supported the selection of farmer-preferred varieties

Access to finance: The Guarantee-to-Grant (G2G) scheme was launched through a partnership with Awash Bank, with €400,000 deposited as collateral and a five-member G2G Supervisory Committee established to oversee implementation. Following training and coaching, 13 seed companies submitted loan applications, and Awash Bank completed due diligence for seven applicants, with loan disbursement expected in the first quarter of 2026. Implementation was delayed by inconsistent bank procedures and new National Bank of Ethiopia requirements, which were resolved jointly by Awash Bank and the G2G Supervisory Committee.

A new cohort of three women-led and five youth-led seed and seedling enterprises was selected through our business incubation programme. The enterprises received tailored training, coaching, exposure visits, and business pitching opportunities to strengthen their business and technical capacities, improve market access and financing readiness, and foster peer learning and alumni networking.

Output 1.2: Private sector organized

The Ethiopian Seed Association (ESA) strengthened the capacity of 17 member companies through seed business management training and expanded its membership by six seed businesses through advocacy. Participation in the African Seed Trade Association (AFSTA) Congress 2025 enhanced knowledge exchange, international visibility, and partnerships. ESA also upgraded its website, profiling all member companies to improve transparency, stakeholder engagement, and member outreach.

Output 1.3: Performance of value chains for nutrition improved

ESP further expanded its work on five value chains (forage, animal feed, leafy vegetables, chickpea, and young plant propagation), while the modality for the sixth value chain, grass pea, was revised. Key progress made in 2025 is presented below.

- *Forage:* Collaboration agreements were signed with two companies, Nigist and Mulualem, to strengthen the forage value chain and improve the availability and adoption of quality forage seed. With Nigist, we supported variety demonstrations and procured laboratory equipment to strengthen internal quality control systems. With Mulualem, we facilitated the recruitment of an agronomist to provide technical oversight and coordinate forage production and related activities across the company's operations.
- *Animal feed:* A consultancy trajectory was established with Eucord, a Dutch non-profit organisation with an office in Ethiopia and a strong track record in strengthening oilseed production across Sub-Saharan Africa. Eucord established a successful connection with Kenya Seed Company (KSC) to explore sunflower seed production in Ethiopia under the Public-Private Partnership modality. Several domestic seed companies were also identified as potential local seed multipliers.
- *Leafy vegetables*: A collaboration agreement was signed with Damascene to establish a seedling nursery in South-West Ethiopia and train female farmers on Good Agricultural Practices (GAP) in vegetable production. Damascene hired a dedicated project manager to oversee implementation. However, activities were delayed due to personal circumstances affecting staff. Preparations for nursery construction started at the end of 2025, and construction will be completed in 2026. Subsequently, GAP training by Rijk Zwaan and demonstration days will be organised.
- Further progress was made in a pilot on urban vegetable home gardening. Through collaboration agreements with two incubatees from the Gender and Youth Incubator, three vegetable home-gardening systems were designed and piloted in Addis Ababa. Households were selected across five sites, and construction of the systems will commence in 2026.
- *Chickpea:* Chickpea: ATM, Burka, and Tinsae were selected as key partners in the chickpea value chain. A multi-stakeholder workshop aligned priorities on variety selection, seed sourcing, and export market demand. The next steps include piloting variety trials, establishing a nucleus farmer–outgrower model, and conducting consumer testing with selected off-takers.
- *Young plant propagation:* A scoping mission was organised to fruit and vegetable seedling nurseries for Growpact Global, a Dutch cooperative that establishes nursery systems across Sub-Saharan Africa. Growpact is exploring opportunities to replicate its model by partnering with local entrepreneurs and providing infrastructure and capacity-building support for high-quality vegetable seedling production. ESP is also engaged in discussions with other partners, such as HortiLife, to determine the next steps for establishing the Growpact model in Ethiopia.
- *Grass pea:* Together with the University of East Anglia (UEA), a business case was developed for establishing a grass pea value chain which highlighted local seed businesses (LSBs) offer the most suitable pathway for expanding improved grass pea varieties in Ethiopia. However, due to the lack of public research institute support for the registration of new varieties, we decided not to pursue grass pea as an intervention value chain.

Outcome 2: Human resources capacities in the seed sector are strengthened

Output 2.1: Performance of selected knowledge institutes improved

The programme continued to strengthen higher education capacity through its MSc research grant programme. In 2025, seven MSc research grant recipients, including six female students, successfully completed their studies at Bahir Dar, Haramaya, and Wollo Universities. In addition, the programme was advertised at five universities (Haramaya, Hawassa, Bahir Dar, Jimma, and Arsi), resulting in the award of five new MSc/MA research grants.

To address critical skills gaps in the seed sector, ESP+ supported Haramaya University to deliver demand-driven, practice-oriented 15 days long intensive training for mid-career professionals from public and private seed enterprises, universities, and agricultural research centres. During the reporting period, 17 professionals completed the Seed Production and Business Management training, while 21 professionals completed the Governance of Seed Sector Development training.

ESP+ also established a partnership with Alage ATVET College to strengthen its Business Incubation Centre (BIC). A formal collaboration agreement was signed, and the Centre's capacity was strengthened through two rounds of Training of Trainers (ToT), greenhouse rehabilitation, and the provision of operational inputs to promote youth entrepreneurship in the seed sector.

Output 2.2. Young graduates enrolled in seed sector internships

We completed the fourth round of the youth internship programme. A total of 37 young professionals graduated from the seed sector internship programme after completing two rounds of training covering soft skills, personal development, motivation, work ethics, business management, and entrepreneurship. Of these, 31 interns (8 female) were placed with international and local seed companies, public seed enterprises, and agricultural research centres.

A total of 19 internship graduates achieved positive employment outcomes. Of these, 12 interns (2 female) secured permanent job with their host organizations, 1 intern gained employment elsewhere using the skills acquired during the internship, and 6 interns (one female) established their own small businesses. These results highlight the programme’s contribution to promoting youth entrepreneurship and supporting employment opportunities within the seed sector.

Output 2.3: Uptake of sustainable production practices increased

Sustainable agriculture practices: International seed companies and their local partners promoted improved crop varieties and Sustainable Agricultural Practices (SAPs) through demonstration plots and farmer training on quality seed, crop rotation, integrated crop protection, safe pesticide use, and Personal Protective Equipment (PPE). In 2025, 4,855 farmers (21% women) were reached.

Second batch of PPP: ESP+ launched a new Public-Private Partnership (PPP) call targeting oilseed, fodder, and forage crops to address critical gaps in Ethiopia's seed sector and strengthened collaboration with the International Seed Federation (ISF) to attract international seed companies. Two ESP+ staff participated in the ISF World Seed Congress in Türkiye in May 2025 to promote investment opportunities. However, attracting interest proved challenging, as many specialized oilseed and forage seed companies had no prior experience operating in Ethiopia and expressed concerns about market uncertainty, particularly in the fodder and forage seed sector.

Despite these challenges, the ESP+ team contacted more than 100 international seed companies, resulting in bilateral discussions with 22 companies. As a result, seven companies submitted proposals under the PPP call, and five international seed companies were selected for partnership based on the quality and relevance of their proposals. Details of the selected companies, target crops, and partnership objectives are presented in Table 3. LIDEA has already initiated hybrid sunflower variety trials through its local partner.

Additionally, collaboration continued with the Horti LIFE-III project to implement soil test–based nutrient management trials. Soil samples were collected from intervention areas, and the trials are currently underway. Based on the trial results, a pilot business model for soil testing kit–based service provision to farmers in major vegetable-producing areas will be developed and tested.

Table 3: Partners international seed companies in the second batch of PPP

International seed companies	Country origin/ Headquarter	Crops	PPP objective
LIDEA	France	Sunflower, soyabean, dual purpose sorghum	Variety registration, variety promotion, farmers capacity building, seed distribution network, future ambition of local seed production
DLF	Denmark	Forage sorghum, Alfalfa, Fodder beet, Brachiaria, Italian ryegrass	Variety registration, variety promotion, farmers capacity building, seed distribution network, future ambition of local seed production
Barenburg	The Netherlands	Rhodes grass, Alfalfa	Variety registration, variety promotion, farmers capacity building, seed distribution network
Kenya Seed Company	Kenya	Sunflower, Soyabean, Sesame, Sudan grass	Variety registration, variety promotion, farmers capacity building, seed distribution network, future ambition of local seed production
Selected Seed	Australia	Rhodes grass, Alfalfa	Variety registration, variety promotion, farmers capacity building, seed distribution network
Atlas Thoum	Turkey	Soyabean, Peanut	Variety registration, variety promotion, farmers capacity building, seed distribution network

Outcome 3: Responses to seed insecurity are effective and sustainable

Output 3.1: Humanitarian seeds aids are based market-based seed response approach

- *Seed system security assessment:* A Seed System Security Assessment, informed by the Context Analysis Tool (CAT), was completed across 10 woredas in Tigray, Afar, and Somali. The assessment found persistent seed system vulnerability linked to conflict, climate change, weak institutions, underdeveloped markets, limited access to improved varieties, weak private sector participation, and repeated free seed distribution. It recommended a shift to market-based seed responses, and the findings were disseminated through regional workshops, leading to the development of a market-based seed response model.
- *Seed and seed security response guidelines:* To address the negative impacts of Direct Seed Distribution (DSD), ESP+ supported a consultative process led by the Tigray Regional Bureau of Agriculture (BoA) with the Integrated Seed Sector Development (ISSD) Africa Community of Practice, engaging the Food and Agriculture Organization of the United Nations (FAO), the World Food Programme (WFP), and other partners. This resulted in the Tigray Seed and Seed Security Response Guideline, approved in May 2025, which promotes the 10 Principles of Good Seed Aid and a shift to evidence-based, market-based seed responses. A similar guideline is under validation in the Afar Region.
- *Strategic seed reserve:* We completed a review of Strategic Seed Reserve (SSR) experiences across Africa, Asia, and Latin America, providing an evidence base for piloting SSRs in Ethiopia's fragile regions. The review found that, although recognized in the Ethiopian Seed Policy, operational modalities are lacking and the distinction between SSRs and Community Seed Banks remains unclear. India's operational SSR system was identified as a useful model, and a study visit is planned to support the design and piloting of SSR models in Ethiopia.

Output 3.1: Farmers and community-based seed system in fragile are strengthened

- *Crowding sourcing and PVS trials:* To increase farmers' access to a wider range of crop varieties, six crowdsourcing and six participatory variety selection trials were implemented in collaboration with the Regional Agricultural Research Institutes (RARIs) across the Somali, Afar, and Tigray regions. A total of 84 improved varieties of wheat, sorghum, maize, teff, faba bean, and haricot bean were promoted with the participation of 850 farmers (404 female).
- *Seed producers' cooperatives:* To enhance the local availability of quality seed of adapted varieties, 17 SPCs received technical and institutional support, including access to EGS, coaching, and market linkages through joint planning, field days, and contract agreements with cooperative unions building the capacity of 182 SPC members (101 female). In the Afar Region, two SPCs—the first formally established in the region—and one Common Interest Group (CIG) were established to engage in seed multiplication. In the Somali Region, ESP supported the institutional restructuring of six SPCs in collaboration with the Regional Cooperative Promotion Agency by strengthening their governance and

internal quality control systems. As a result, cooperative membership increased from 3,252 (786 female) to 3,805 (1,004 female).

- *Community seed banks (CSBs):* In Tigray, two CSBs were strengthened through training and the provision of essential equipment. The CSBs have 190 farmer members (55 female) and produce seed of 11 crops and 29 varieties. In summary, as a result of these interventions, the supported farmer and community-based seed systems (SPCs and CSBs) produced 926 metric ton of quality seed in 2025.

Output 3.2: Rehabilitation of seed service provision supported

Most seed service facilities of seed producers in the Tigray Region were severely damaged or looted during the conflict, significantly disrupting the formal and intermediary seed systems and reducing the local supply of quality seed. An assessment of eight SPCs, two CSBs, and one cooperative union estimated the total damage to seed service facilities at ETB 12 million.

Based on the assessment findings, ESP+ supported the rehabilitation of essential seed service facilities to restore the operational capacity of the seed producers. With an investment of ETB 3.2 million, the programme provided essential equipment and materials, enabling seed producers to resume their seed production and service activities.

Outcome 4: Transformation of the seed sector is enabled

Output 4.1: Seed sector is governed more collaboratively

- *Strengthening seed sector coordination:* ESP+ supported the establishment of seed coordination bodies in ten regions—Oromia, Amhara, Central Ethiopia, Sidama, South Ethiopia, Southwest Ethiopia, Benishangul-Gumuz, Tigray, Afar, and Somali—as well as national seed sector steering and technical committees under the MoA. Roles and responsibilities of key stakeholders were clearly defined and harmonized to strengthen coordination and accountability across the seed sector. To promote a shared vision for sector transformation, ESP+ facilitated a National Seed Forum that brought together key stakeholders to align strategic priorities and implementation approaches.
- *Approval of new seed directives:* Three major directives supported by ESP+—the Variety Release and Registration Directive, the Certificate of Competence Directive, and the Quality Declared Seed (QDS) Directive—were approved strengthening transparency and accountability within Ethiopia's seed regulatory framework.
- *Strengthening seed governance in fragile regions:* Regional seed coordination platforms in Benishangul-Gumuz, Afar, Somali, and Tigray facilitated six strategic actions to strengthen seed systems. These included licensing and supporting private seed producers and cooperatives, implementing context-specific seed response guidelines, establishing a seed regulatory entity in Afar, and improving market linkages for emerging seed enterprises. In Tigray, Afar, and Somali, the Humanitarian–Development–Peace (HDP) Nexus approach was promoted into seed sector coordination, bringing together humanitarian and development partners to support more resilient seed systems.
- *Advancing digital seed sector monitoring and information systems:* The design of a national seed sector performance dashboard with online monitoring indicators was completed and is ready for piloting. Progress was also made towards the implementation of the Ethio-Seed Hub as a national platform for seed information exchange, with agreement reached for regional use. Further administrative actions by the MoA and integration with the EAA's digital seed certification platform are required to enable full operationalization.
- *Carryover seed assessment:* In 2025, Ethiopia faced a seed carryover of over 41,275 tonnes (about 25% of total seed supply). A joint MoA–EIAR–ESP+ assessment identified systemic constraints, including the quota-based seed allocation system and the discontinuation of Direct Seed Marketing (DSM). The findings will inform a national policy dialogue in 2026, including consideration of reintroducing DSM to reduce future seed carryover.

Output 4.2: The provision of seed regulatory services enhanced

4.2.1 Improving seed quality assurance

- *Strengthening barcode use for seed certification:* To address the growing challenge of counterfeit seed, ESP expanded the barcode-based seed certification system to five additional regions in 2025, bringing the total number of participating regions to eight: Amhara, Oromia, Central Ethiopia, Southwest Ethiopia, South Ethiopia, Benishangul-Gumuz, Sidama, and Tigray. Through the provision of equipment and technical training, the initiative strengthened regional capacity for seed traceability and certification.

- ESP provided technical and financial support to the National Seed Quality Control Platform, held in February 2025 in Adama, which reviewed progress on harmonizing seed quality assurance across regions. The platform recognized the barcode-based seed certification system, piloted in three regions with ESP support, as a best practice and endorsed its nationwide rollout, with implementation for at least one crop in each region. As a result, barcode-based seed certification expanded to 16 crops and over 2.3 million barcode tags used to certify 37,692 metric tonnes of quality seed in 2025.
- *Strengthening seed quality assurance:* ESP+ strengthened regional seed quality assurance systems by providing laboratory equipment to seed laboratories in Afar, Benishangul-Gumuz, Somali, Sidama, Tigray, and South Ethiopia, based on needs assessments and regional requirements, enabling two laboratories to become operational. In Afar and Somali, seed analysts and inspectors were assigned and trained through orientation and practical exposure at the EAA Central Laboratory to initiate seed testing and certification services. Additional training on seed field inspection and varietal characterization was provided to seed inspectors and analysts in Afar, Somali, South Ethiopia, and Oromia, strengthening regional inspection and certification systems. In Benishangul-Gumuz, ESP provided two motorbikes to improve field inspection services, while two vehicles were supplied to the EAA to enhance the efficiency of seed regulatory operations.
- *E-certification:* Support was provided to advance the operationalization of the electronic seed certification (e-certification) system through a joint consultation involving the MoA, EAA, and AGRA, which identified key implementation challenges and agreed on follow-up actions. In addition, seed regulatory staff from regional laboratories received practical training on online seed certification data management using Google Sheets, improving the quality and timeliness of reporting.

4.2.2 Support Variety testing and registration

- *Consolidation of DUS, NPT and adaptation trials:* ESP+ continued to support the EAA by supporting the recruitment of a plant breeder to strengthen its day-to-day technical capacity. It also supported the implementation of Ethiopia's new variety testing and registration system, contributing to the approval of the Plant Variety Release and Registration Directive No. 1065/2025. The project further consolidated Distinctness, Uniformity and Stability (DUS) and National Performance Trial (NPT) testing within the EAA. In addition, adaptation trials for vegetable crops conducted by international seed companies received continuous technical support.
- *Registration of new wheat and vegetable varieties:* As a result, four wheat varieties and three vegetable varieties were successfully registered under the new system. These achievements mark an important step towards a more transparent, efficient, and internationally aligned variety release and registration framework in Ethiopia.
- *Promoting institutionalization and stakeholder capacity:* Consultations with EIAR explored mechanisms for the EAA to access temporary land for DUS testing, a critical step towards institutionalizing the system. ESP+ also organized orientation sessions for Oromia crop breeders and EAA staff on the newly approved directive and DUS/NPT testing protocols, improving technical understanding and the quality and consistency of testing. In addition, an awareness session was held on July 2025 in Bishoftu on new Variety Release and Registration Directive highlighted the need for broader stakeholder awareness, stronger collaboration between EAA and research institutes on equitable germplasm sharing among RARIs and EIAR, clarity on standard checks, and ensuring the EAA’s full independence in data collection, analysis, and reporting.

4.2.3 Upgrade phytosanitary services

- *Awareness creation for customs staff at Bole International Airport:* ESP+ supported an awareness workshop for customs officials, the Post office, Ethiopian Airlines, and EAA officials, and selected farms about the risks of illegal seed trade and the importance of phytosanitary controls. The initiative strengthened stakeholder awareness and highlighted the need for improved coordination and compliance to prevent illegal seed movement and safeguard plant health.
- *Training on inspection and certification on surveillance, auditing and inspection:* To support Ethiopia’s alignment with international standards and facilitate agricultural trade, ESP+ strengthened the capacity of stakeholders in inspection, certification, surveillance, and auditing systems. Training, delivered in collaboration with senior experts seconded to EAA, covered inspection and certification procedures, auditing practices, and the use of digital tools, including Certificates of Conformity (CoC) and SPS e-certification systems. The progamme also supported the development of a quarantine procedural manual and training on SPS digitalization in Bishoftu, enhancing the capacity of phytosanitary experts to implement e-certification tools.

Output 4.3: Trade and investment in the seed sector is leveraged

Facilitation of the Ethio-Netherlands Seed Committee meeting, aimed at promoting business discussions between seed companies and the government, could not take place as planned in December due to members' busy schedules. However, through email communication, members were able to identify the agenda for the next discussion to be held in February 2026.

b. Unintended positive and negative effects of the intervention

Positive unintended effects: The significant seed carryover challenge prompted a joint assessment by the MoA, EIAR, and ESP+, generating evidence on systemic constraints in Ethiopia's seed marketing system and creating a basis for future policy dialogue on the potential reintroduction of the Direct Seed Marketing to improve demand-driven seed distribution.

c. Progress on cross-cutting topics: gender; youth; nutrition; and climate

Gender and youth

We continued to mainstream gender and youth empowerment across its programme components, contributing to higher education, skills development, employment, entrepreneurship, and leadership opportunities. The Business Incubation Programme supported a new cohort of eight women- and youth-led seed enterprises. Through the MSc research grant programme, seven students (6 female) successfully completed their degrees, and five new students were awarded MSc research grants. The internship programme enabled 19 youth (3 female) to secure employment and/or establish their own businesses, while 37 young professionals (8 female) were placed in a new round of internships with seed companies, public seed enterprises, and agricultural research institutes. In addition, 1,566 female farmers benefited from training and demos activities delivered by international seed companies, their local partners, and ESP-supported quality seed production training.

Nutrition

Our strategy is nutrition-sensitive, as it supports the development of seed systems for nutrition-dense crops by working with crop value chain actors. These include crop groups such as forage, leafy vegetables, and chickpea. Another strategy is to collaborate with international seed companies to introduce improved vegetable varieties and build the capacity of domestic seed producers to increase the production and availability of quality seeds of nutrition-dense crops. One example is the introduction of high-iron common bean varieties, including 'Nasir' and 'SER-125/126'. This year, we have also started urban home gardening as pilot with specific objective to contribute the dietary diversity and nutrition.

Climate

Our climate change adaptation strategy focuses on increasing access to and the use of diverse crops and varieties by strengthening different seed systems, including farmer-managed, community-based, public, and private seed systems. The project partnered with Regional Agricultural Research Institutes to increase access to climate-resilient crop varieties. Through crowdsourcing and PVS trials, farmers evaluated and selected climate-resilient crops and varieties best suited to their local conditions. In total, ESP-supported seed producers, trials, and demonstration activities promoted 22 crops and 84 varieties.

Another key strategy is promoting SAPs in partnership with international seed companies. Through demonstration plots and farmer training, the companies promoted climate-resilient crop varieties alongside improved agronomic practices. In 2025, a total of 4,855 farmers gained knowledge and skills on the use of quality seed and various SAPs practices.

6 Visibility

- Three change story videos on women-led seed business incubation have been produced. The videos have been shared vis ESP+ website, YouTube channel and other social media.
- A change story video on the experience of use of barcode to tackle seed counterfeiting has been produced.
- The 11th, 12th, 13th and 14th issues of the ESP+ newsletter were published and shared with more than 1,200 recipients in our Mailchimp register. Soft copies were posted on our website and social media, and 100 copies of each issue were printed and distributed at events.

- News stories of major activities and lessons learned have been shared via our Facebook, X (Twitter), and LinkedIn accounts. Electronic copies of all communication items are stored on our website.
- Other print media items like brochures, leaflets, banners, roll-ups, and stickers were prepared.
- Documentation is an integral part of the any project, as it allows for the preservation of key information and provides evidence of the efforts made. Pictures and footages from events and activities implemented by ESP+ have been documented and archived to provide a historical record of progress. Documents are stored on cloud services and an external hard drive.

Website and social media analytics

The ESP+ website has been visited by 4,494 visitors and 9,415 visits for 27 posts until December 31st, 2025. The website's international reach is reflected in the number of visitors from countries such as the Netherlands, the United States, Germany, China, and others. This highlights the content's broad appeal and importance to a diversified global audience.
Similarly, the ESP+ LinkedIn page has attracted more than 4,500 followers. On ESP+ LinkedIn page in 2025 about 54 items of content posted, including publications, newsletters, photographs, videos, and reposts about ESP+ and its partner activities. These posts have had over 57,122 impressions and engagement.

7 Sustainability

a. **Measures to enhance programme sustainability**

The sustainability strategy focuses on strengthening national institutions, market systems, and local capacities to ensure that key seed sector functions continue beyond the programme period. The programme embeds new approaches within existing public, private, academic, and community institutions, promoting long-term ownership of seed sector development.

Institutional sustainability was further strengthened in 2025 through partnerships with Haramaya University, Bahir Dar University, and Alage ATVET College. Haramaya University successfully introduced demand-driven short-term professional training, which is expected to continue beyond the project period.

The ESA further expanded its membership, improved member services, strengthened its organizational capacity, and increased its visibility through an upgraded website and business management services, positioning the Association to assume a greater leadership role within the seed sector. Continued support to the EAA further enhanced national capacity for seed quality assurance, variety testing, phytosanitary services, laboratory management, and barcode-based seed certification. Newly approved seed directives and regulations, together with strengthened regulatory services, provide a lasting institutional foundation for private sector growth.

Programme sustainability was further enhanced through the operationalization of the G2G financing mechanism in partnership with Awash Bank. The mechanism leverages commercial finance, shares investment risks between financial institutions and seed businesses, and promotes sustainable access to finance for the seed sector.

Across all interventions, partner institutions increasingly contributed staff time, facilities, land, laboratories, and operational resources, strengthening ownership and helping ensure that successful approaches are institutionalized and sustained beyond the project period.

b. Description of exit strategy (if applicable)

Our exit strategy is closely linked to our sustainability approach, focusing on ensuring that programme results continue beyond the project period. Throughout implementation, we have actively engaged key stakeholders, enabling them to gradually assume greater responsibility for planning, implementation, and oversight of seed sector interventions. By working through public institutions, we ensure that programme approaches are embedded within government policies, regulatory systems, and national development priorities. At the same time, our collaboration with the private sector, commercial banks, and other market actors promotes innovation, mobilizes investment, and creates opportunities to scale sustainable solutions. This partnership-based approach strengthens local ownership and provides a solid foundation for sustaining programme outcomes beyond project completion.

8 Monitoring, Evaluation and Learning

In 2025, the Monitoring, Evaluation, and Learning (MEL) team implemented several key activities to strengthen the ESP+ project's planning, monitoring, and learning frameworks. These efforts included the development of tools to harmonize data collection processes across domestic seed companies, seed producer cooperatives, and community seed banks supported by the project. The team also produced comprehensive M&E reports, which were presented to management and project teams to facilitate the reassessment of targets and assumptions and ensure alignment with planned objectives.

The ESP Indicator Tracking Table (ITT) was regularly updated to maintain accurate progress tracking. In addition, the MEL team refined the ESP+ learning agenda based on feedback from the programme team, fostering continuous improvement. Monthly MEL team meetings were held to strengthen MEL processes, complemented by quarterly programme review meetings to assess progress, share lessons learned, and address implementation challenges. These sessions provided a platform to review progress against targets, revisit assumptions, and identify strategies to improve programme performance, with particular attention to increasing the programme's reach among women and youth.

9 Organizational development and human resources

In July 2025, ESP+ partner Mercy Corps delivered practical training on the Market Systems Development (MSD) approach for programme staff. The training strengthened staff capacity to better integrate MSD principles into programme planning, implementation, and reporting through hands-on application using ESP interventions as case studies.

10 Finance

As of 31 December 2025, cumulative project expenditure since the start of implementation on 10 September 2021 amounted to €6,155,864, including €2,278,661 spent in 2025 against an annual budget of €4,234,848. A detailed analysis of the financial progress is provided in a separate financial report.

Annex 1: Indicators and targets

Sr. no.	Indicators	FNS / PSD	Reach 2021-2022	Reach 2023	Reach 2024	Reach 2025	Baseline	EOP target	Cumulative reach	% Reached	Note
1	Number (#) of small-scale food producers with improved access to quality seed		140.348	256.821	415.226	752.239		1.000.000	1.564.634	156,5	
	female		42.104	77.046	124.568	225.672		330.000	469.390	142,2	
	male		98.244	179.775	290.658	526.567		670.000	1.095.244	163,5	
	youth		42.104	51.364	83.045	150.448		330.000	326.961	99,1	
2	Number (#) of small-scale food producers that progressively decrease the yield gap (FNS)	B.1.2.; B.1.3.	70.174	128.410	207.613	376.119		500.000	782.316	156,5	
	female		21.052	38.523	62.284	112.836		165.000	234.695	142,2	
	male		49.122	89.887	145.329	263.284		335.000	547.622	163,5	
	youth		21.052	25.682	41.523	75.224		165.000	163.533	99,1	
3	Area (ha) under sustainable agricultural practices increased (FNS C.1.2.) indicator was: Area under sustainable agricultural practices increased (ha) EOP 48.000 reach 3,850)		54	2,452	2,789	2,428		12,500	7,723	61.8	
1.1	Percentage (%) increase in production (MT) of 25 domestic seed businesses supported (new)		17	26	20.47	45		75	44.90	59.9	
1.1.1	Percentage (%) increase in diversity of crops and varieties in the portfolios of 25 domestic seed businesses (new)		0	54	33	79		50	79	158	A total of 22 crop types and 75 varieties produced by local seed companies in 2025
1.1.2	Number (#) of domestic seed businesses having accessed a blended financial product worth min. € 100,000 ea. (DDE Q) (new)							12	0	0	
1.1.3	Number (#) of women with improved entrepreneurship skills who have been empowered in business management		0	6	12.00	8		30	26	86.7	

1.2.1	Percentage (%) of Ethiopian Seed Association members evaluate services above satisfactory	30	50	70.00	85	70	85	121.4
1.3.1	Number (#) of value chains important for food security and nutrition increasing their uptake of quality seed of adapted varieties	2	2	4	5	6	5	83.3
2.1	Number (#) of human resources with increased capacities	293	9,853	13,454	4,925	50,350	28,525	56.7
	female	88	2,956	4,030	1,006	25,175	8,080	32.1
	male	205	6,897	9,404	3919	25,175	20,425	81.1
	youth	59	1,970	2,687	985	25,175	5,701	22.6
2.1.1	Number (#) of knowledge institutes with new or updated seed-related curricula and courses (FNS D.2.)	-	1	1	1	5	3	60.0
2.1.2	Number (#) of young men and women educated or trained in newly developed seed curricula and courses	0	0	20	35	100	55	55.0
	female	0	0	10	9	50	19	38.0
	male	0	0	10	26	50	36	72.0
	youth	0	0	20	35	100	55	55.0
2.1.3	Number (#) of young postgraduates supported in doing relevant research	16	8	13	4	50	41	82.0
	female	1	8	8	1	25	18	72.0
	male	15	0	5	3	25	23	92.0
	youth	16	8	13	4	50	41	82.0
2.2.1	Number (#) of young graduates enrolled in seed sector internships	17	36	36	31	200	120	60.0
	female	11	22	6	8	100	47	47.0
	male	6	14	30	23	100	73	73.0
	youth	17	36	36	31	200	120	60.0
2.3.1	Number (#) of small-scale food producers having participated in demonstration and training on sustainable agricultural practices (FNS B.2.2.) indicator was: Number (#) of small-scale food producers trained on sustainable agricultural practices	260	9,809	13,385	4,855	50,000	28,309	56.6

	female	78	2,943	4,016	988	25,000	8,025	32.1	
	male	182	6,866	9,370	3,867	25,000	20,285	81.1	
	youth	52	1,962	2,677		25,000	4,691	18.8	
3.1	Number (#) of new, improved, and climate-resilient varieties introduced to seed-insecure areas	-	-		84	30	84	280.0	
3.1.1	Number (#) of seed systems security assessments conducted using the CAT in conflict- and drought-affected areas	-	-		10	10	10	100.0	
3.2.1	Number (#) of districts where participatory variety selection and field days take place	-	-		6	10	6	60.0	
3.2.2	Number (#) of community seed banks established	-	-		2	3	2	66.7	
3.2.3	Number (#) of young women trained in community seed bank management	-	-		4	30	4	13.3	
3.2.4	Number (#) of districts where linkages are facilitated between domestic seed businesses and seed-insecure communities	-	-		4	10	4	40.0	
3.3.1	Number (#) of assets in seed service provision reconstructed	-	-		13	10	13	130.0	In Tigray, 8 SPCs and 2 CSBs were provided with 13 different items of seed services facilities.
4.1	Number (#) of improvements in seed policy and regulation or solutions to systemic problems benefitting at least tens of thousands of farmers (FNS E.1., DDE N)	0	8	5	4	15	17	113.3	
4.1.1	Number (#) of platforms or networks contribute to policy development and implementation, and coordination	1	3	4	1	5	5	100.0	
4.2.1	Number (#) of seed regulatory service providers strengthened in capacity (DDE L)	4	4	6	1	10	7	70.0	
4.3.1	Amount of money (€) invested by domestic businesses, international companies, and development partners in sector-strategic capital (DDE J) indicator was:	11,000,000	2,800,000	11,659,271	6,438,720	20,000,000	31,897,991	159.49	

Annex 2: Risks and mitigation measures

In 2025, programme encountered contextual challenges, particularly in conflict-prone regions like Amhara and different parts of Oromia. These challenges included theft, violence, and kidnappings, which disrupted travel, monitoring, and activity implementation. To mitigate these risks, the project restricted travel to essential trips, utilized remote communication tools, relied on air transport, and maintained communication with stakeholders to stay informed about security updates.

The risk of insufficient political will for reforms was deemed low, as stakeholders demonstrated limited commitment to adopting and integrating evidence-based recommendations aimed at enhancing the seed system. To address this, ESP organized various platforms to coordinate efforts at both federal and regional levels, advocated for policy implementation, and prioritized capacity-building initiatives. In some cases, ESP supported stakeholder activities outside its core priorities to foster positive relationships.

Foreign investment interest in Ethiopia remained modest, primarily due to the security situation and, to some extent, the lack of implementation of key regulatory measures such as Plant Variety Protection (PVP). We addressed these challenges by raising awareness through various platforms and networks, developing information fact sheets on the business environment, investment risks, and new regulatory provisions, promoting successful initiatives through its communication channels, and conducting bilateral meetings with international seed companies.

Agriculture related companies have less access to credit and seed companies are not different mainly because banks categorize agriculture as risky business but also limited cash available for loan. To cope with these challenges, ESP+ arranged Guarantee to Grant scheme that helped some seed companies to access credit. This financial support helped them bridge gaps caused by increasing production costs and enabled them to procure more seeds from out-growers.

While access to foreign currencies had been a concern for company operations, the issue diminished following the introduction of Ethiopia's market-driven forex policy in July 2024. Since then, companies have not identified this as a significant problem.

Contextual risks

Risk	Risk assessment (Low/Medium/High) + motivation	Influence on outputs of activity + motivation	Mitigating measures and residual risk
1. Conflict and incidences of theft, kidnapping, and violence reduces the safety and security of staff and partners to travel to the field	**High:** • Armed conflict in certain areas • Incidences of theft, violence, and kidnappings are increasing • This has negative consequences on safety and security of staff and partners • The root causes of conflict and violence have not been dealt with	**Medium:** • Certain companies were unable to accommodate interns. • As a result of the conflict, some partners, such as the Amhara regulatory authority, decreased the frequency of inspections, leading to noticeable declines in seed quality and a rise in illegal trade.	• Invest significantly in stakeholder capacities • Carry out activities in collaboration with local partners • Seize opportunities to travel • Put in place a system to gather and monitor real-time intelligence on local safety and security • Meet virtually, and communicate by phone, email, frequently

Risk	Risk assessment (Low/Medium/High) + motivation	Influence on outputs of activity + motivation	Mitigating measures and residual risk
2. Lack of political will to implement reforms to encourage private investment in the sector	**Low:** • Level of unwillingness depends on personalities of decision makers • There is interest to control seed as political commodity • There is issue of food sovereignty • However, liberalization is enshrined in multiple policies • Governance and the economy are trending in this direction for some time now • Immense global forces of trade and financing reinforce current trends	**Medium:** • The involvement of the private sector in seed marketing helped decrease the growing quantity of leftover seeds. • Delays in approving service fee regulations impacted the enforcement of other related regulations.	• Direct seed marketing has been re-initiated. • Leveraged social capital to successfully implement planned activities. • Conducted capacity-building training to support policy implementation.
3. Limited political will to mainstream recommendations and generated best practices in the sector	**Medium:** • Bureaucrats want to continue implementing the old system • Participating in different platforms for the sake of participation.	**Medium:** • Government actors show decreased motivation towards executing project priorities. • There is a noticeable decline in motivation to translate recommendations into practice and mainstream good practices	• Engaged in activities outside the core project scope, to maintain positive relationships.
4. Lack of interest from international companies to invest in Ethiopia	**Medium:** • Safety and security are of great concern to foreign investors • Bureaucracy, inefficiency, and corruption are increasingly discouraging • However, Ethiopia's agro-ecological conditions are favourable for forage and oil crops, and the government gives due attention for those crops and thus attractive to seed companies.	**Medium:** • Investment interest is lower than expected. • Some companies are reluctant to visit Ethiopia to find suitable local partners after applying. • International companies offer significant knowledge and technological value. • Prioritizing domestic seed businesses' local investment is crucial for the Partnership	• Focus on finding suitable local partners; for example, Bahrenburg successfully identified its local partner through this method. • Work on establishing partnerships with local companies.
5. Forex reserves remain constrained	**Medium:** • Ethiopia has a large trade deficit • Ethiopia relies on the importation of many basic food items • However, Ethiopia aims to increase exports and substitute imports with local production • Current macroeconomic policy reform may create better opportunity for seed importers	**Low:** Due to the floatation of forex exchange companies do not raise forex availability as an issue	NA
6. Increasing local market inflation	**Medium:** • Stability of the market is a great concern in the trade • Unpredictable market situation may affect the seed businesses	**Medium:** • Input price soared that affected production cost • Farmers incurred increased seed price • The stipend paid for interns was affected due to inflation	• The stipend rate was increased to reduce the effect of inflation on interns • Some companies accessed credit through the G2G finance arrangement which helped them fill the finance gap due to increased production cost and also helped them to collect more seed from out growers.

Programme risks

Risk	Risk assessment (Low/Medium/High) + motivation	Influence on outputs of activity + motivation	Mitigating measures and residual risk
1. Domestic seed businesses cannot access sufficient quality early generation seed	**Medium:** • Unclear mandates, poor task division, and limited capacity result in shortages of EGS • Priority is given to maintenance and multiplication of widely-adapted varieties sought by public seed enterprises • Private sector is disadvantaged in accessing EGS (public seed enterprises get first pick) • Effort is underway to make EGS production on contract basis	**Medium:** • Local companies face challenges in obtaining sufficient EGS, as only about 10% of their requests are fulfilled. • The process for bidding on exclusive user rights for selected public varieties lacks transparency, leading to dominant enterprises monopolizing access. • Domestic seed businesses encounter difficulties in producing certified seeds due to unreliable access to quality Early Generation Seeds (EGS). • The size and business structure of private domestic companies are expected to remain stagnant over the coming years.	• Identifying actual EGS demand was challenging due to companies inflating requests to secure higher volumes. • Supported companies with capacity building and coaching to enable EGS production. • Some companies initiated their own EGS production. • Facilitated the exchange of EGS and certified seed to improve access to EGS and pre-basic seed. • Currently planning a discussion forum to address and resolve outstanding issues.
2. Seed companies unable to fully engage in seed production due to frequent conflict/ insecurity	**Medium:** • Safety and security are of great concern to both domestic and foreign investors • Absence of protection for agricultural investors is increasingly discouraging • The situation is limited to areas under conflict but difficult to predict	**Medium:** • Certain companies had to cease operations at their original locations and relocate to nearby peaceful areas, such as the Amhara region. • Some businesses faced increased production expenses due to additional costs for labor, management, and transportation. • Many companies struggled to regularly monitor their farms and those of out-growers, which impacted quality assurance efforts. • The volume of seed production, the variety portfolio, and overall quality fell short of the companies' plans, particularly in the Amhara region. • Visits by project staff to coach and support these companies were significantly reduced.	• Facilitated companies in these areas to engage more with out-growers • Companies reduced travel by having regular staffs in the production areas • Support and coaching has been done using phone and organizing virtual meetings
3. Formal financial institutes are not convinced to make credit available to domestic seed businesses	**Medium:** • FIs consider Agriculture as a riskier business for credit services • Most small-scale seed businesses do not fulfil collateral requirements for credit services • But collateral guarantee systems, new financial product development, and political support are expanding access to credit	**Medium:** • Compared to the demand most companies are not getting the financial access they need to expand their business • Limited amount of access to finance affected their agricultural production	• Effort has been exerted to facilitate domestic seed businesses access to finance • Companies started accessing finance through the G2G financing arrangement by the project

Risk	Risk assessment (Low/Medium/High) + motivation	Influence on outputs of activity + motivation	Mitigating measures and residual risk
4. Sourcing companies and off-takers are unwilling to enter into agreements with seed producers and/or farmers	**Medium:** • Contract farming is poorly practiced and enforced as there was no legal framework in the past • Default and side selling are common • Relationships and trust need building, which takes time • Business cases are not always clearly defined and communicated • However, demand for products and competition are increasing • Moreover, legal framework was also recently developed regarding contract farming	**Medium:** • Establishing market linkages within the selected value chains proved to be unfeasible, primarily because off-takers failed to specify the required seed variety and the volume needed (e.g., chickpea).	• Exploration has been done to understand exactly what off takers demands are.
5. Less and less students are enrolled in seed science related graduate program	**High:** • Recently, government decided that students entering graduate program has to take exam to be enrolled to a graduate program. As the exam is not related to the subject matter, many could not pass the exam and enrol in the graduate program • Public seed companies and MSc. students have not been fully utilizing the opportunities offered through the ESP project, including MSc scholarship programs and research grants • Applicants have concerns about the allowance rate of the scholarship	**High:** • In 2025, no students enrolled in the Seed Science and Technology department. • The universities were unable to evaluate the updated curricula due to an insufficient number of students.	• Considerable efforts were undertaken to extensively promote the opportunity and engage pertinent organizations and professionals. • The stipend rate was revised in accordance with the current inflation rate to improve its appeal and effectively address the concerns of MSc students for the upcoming year. • A revised payment and incentive structure was implemented to motivate academic advisors to actively assist MSc students in addressing ESP's learning objectives, starting from topic selection through to the completion and submission of their research thesis.
6. Organizations in the seed sector are not interested to host interns	**Low:** • Organizations are in need of capacity and interested to meet young talent • International companies have already expressed great interest to host interns • Local companies do have limited experience in hosting interns • With financial support from the programme, local organizations have expressed the same	**Medium:** • Some companies and public organizations were not willing to host interns, which influenced to achieve our target. • Government organizations rely on an annual budgeting system, making it challenging for them to allocate funds flexibly for hosting interns. • Achieving our target is not possible without organizations willing to host interns. • Investments in education lack synergy if they are not paired with the creation of employment opportunities.	• Supported international companies through some incentives to invest in local capacity for the success of their projects • Engaged organizations in identifying interns who best fit their interests • In some cases the project covered the full cost of interns instead of fifty percent cost. • Facilitated experience sharing event for the best practices of partner seed companies with new host companies to enhance their engagement and participation in the program
7. Education, training, and employment in the seed sector attracts little interest from women	**Low:** • Arguably, agriculture and seed are male dominated disciplines • Traditionally, employment has focused on seed production, which requires in-depth technical know-how and field experience • However, as seed business and marketing develop, private investment and demand for diverse expertise increases	**Medium** • It was unable to get required number of women participation in project activities	• Efforts have been made to prioritize female candidates throughout the advertisement, screening, and placement • A couple-oriented approach has been promoted during training sessions and field visits. • Women business owners and those involved in the seed industry were explored by visiting various government offices at different levels. • Various gender-focused platforms were utilized to seek advice and recommendations for increasing women's participation.

Risk	Risk assessment (Low/Medium/High) + motivation	Influence on outputs of activity + motivation	Mitigating measures and residual risk
8. Seed producers reduce number of demonstration plot because of security concern	**Medium:** • Conflict and insecurity is becoming common in many areas • Companies focus in areas where they feel secure to promote their technologies • Demonstration plots will concentrate only on road side where there is relative safety • Companies will have limited access to land as there are different opportunities for farmers	**Medium:** • Some companies reduced their demonstration plots especially in Amhara and some parts of Oromia region • Number of farmers trained on sustainable agricultural practices reduced	• Some companies shifted their demo site to other ares with their regions • Some companies promoted their crop and variety in towns directly for agro-dealers
9. Seed producers and importers are not incentivized to distribute seed to seed insecure areas	**Low:** • Seed allocation is controlled centrally • Seed insecure areas are often not high agricultural potential and thus get low attention from the government • Distribution in this area is highly subsidized including humanitarian seed aid • NGOs support these efforts and have experience with logistics • Such capacity is within our consortium	**Medium:** • We will offer support to communities in conflict-and disaster-affected areas where seed insecurity is high • The local production and distribution of seed in these areas is tenable • Access to quality seed produced elsewhere is needed to increase seed security • Market incentives are needed to overcome the access issue	• Analyse local contexts thoroughly in identifying the root causes of seed insecurity • Conduct variety trial using crowdsourcing and PVS to identify crops and varieties preferred and adapted to local farming systems • Experiment with market-based responses to seed insecurity • Facilitate linkages between local communities and domestic seed businesses, public seed enterprises, and unions
10. Possibility for layering seed, gender, nutrition, and climate interventions is low	**Medium:** • Whilst existence of these interventions is not limited, coordinating with organizations can be challenging • Development organizations have strong internal accountability mechanisms that create hurdles to adaptive management • Multi-stakeholder platforms are not always facilitated effectively for increasing collaboration • However, we will be facilitating a number of these with this specific interest in mind	**Low:** • We used available resources and facilities to achieve expected outputs • However, it would be a missed opportunity to bring innovations to scale not to collaborate with others • Partners and staff members have a prehistory of collaboration in previous initiatives and the networks and skills to go along with it; we will exercise this capability	• Mainstream knowledge on crosscutting issues in staff • Collaborate with AfD, GIZ, ATI, RAISE-FS, and HortiLIFE to this end • Dedicate resources to activities on crosscutting issues • Facilitate dialogue in the seed sector on these issues for planning and implementation • Communicate our ambitions widely and inclusively of diverse audiences
11. Efforts of others are duplicated or antagonistic to our intended outcomes	**Medium:** • With expanded scope comes expanded risks of duplication of efforts • Our funding partners investments risk duplication and/or antagonism due to a lack of alignment between agencies • In particular humanitarian responses have high sensitivity to such risks • However, we aim to create a humanitarian, development, and peace triple nexus in the seed sector to avoid this from happening	**Medium:** • We have myriad new activities in new geographies, which include humanitarian seed aid • We have allocated significant resources towards these activities and have several corresponding indicators and targets • However, our intention is to be relevant and effective and take an evidence-based approach to piloting interventions • We invest in monitoring, evaluation and learning to this end • And we invest in convening multiple stakeholders in the HDP triple nexus	• Convene platforms on strategic topics of concern • Review modalities for collaboration • Adapt the workplan in a participatory and agile way • Position the Partnership at a strategic level of leadership • Convene humanitarian, development, and peace communities in strategic dialogue and learning • Invest in planning, monitoring, evaluation, and learning

Risk	Risk assessment (Low/Medium/High) + motivation	Influence on outputs of activity + motivation	Mitigating measures and residual risk
12. Different approaches for development among humanitarian and development partners	**Medium** • Building trust among humanitarian and development partners for synergy may take more time than expected • Having different understanding over the system thinking approach • However, we set clear goals and map areas of collaboration that attract all parties	**Medium** • Reduce developments efforts • Lack of competitiveness among different market actors • Difficulty to easily facilitate cross component integration	• Facilitate collaboration platform • Advocate for market-based emergency response (integrating HDP nexus) • Capacity building for technical staff on system thinking approach
13. An unsafe working environment exists, in which staff are not protected from sexual exploitation and abuse (SEAH)	**Low:** • EKN has highlighted the need for procedures to protect staff from sexual exploitation and abuse • As a follow up, ESP partners SWR Ethiopia has taken measures	**Medium** • An unsafe working environment, in which staff are not protected from sexual exploitation and abuse, affects staff both at a personal level as well as professionally	• A one page on protection from Sexual Exploitation and Abuse (PSEA) Core Principles (in several languages) has been developed and incorporated in the SWR Ethiopia HR manual • Staff have been sensitized, and a whistleblower procedure is in place • Mercy Corps has a standard Code of Ethics policy that applies to all Mercy Corps staff and partners to ensure the prevention of sexual exploitation and abuse. • RSLNC Ethiopia has a SEAH guideline and a system of Confidential Advisors • RSLNC Ethiopia has two certified Confidential Advisors (one male and one female) to whom staff can report cases of unacceptable behaviour by colleagues or management. Both advisors have completed official training for this role

Risks of fraud and corruption

	Risk (description) May be multiple risks	Risk assessment (Low/Medium/High + motivation)	Potential impact on outputs of activity (Low/Medium/High + motivation)	Mitigating measures and residual risk
In country of implementation	Fraud and corruption are rife within the environment around the project, making all business dealings and interactions with stakeholders prone to demand for unethical practices	**Medium:** • Ethiopia ranks unfavourably on the global corruption index • Fraud and corruptions are reportedly increasing in occurrence • The project doesn't operate in a vacuum and is not insulated from the environment	**Medium:** • Activities depending on cooperation of stakeholders may be vulnerable to such pressures • Resistance may result in slow progress	• Enforce policy, rules, and procedures and playthings bureaucratically • Insist on constructive agreements and clarity in terms of reference, rules and regulations beforehand • Invest in social capital and relationship building with partners
In project	Within the consortium there are unethical practices subjecting the entire project to risks of fraud and corruption	**Low:** • Organization in the project in country is among consortium partners and within consortium agreement • Consortium partners must audit their project expenditure like WUR does to account to the donor	**Low:** • Roles and responsibilities are distributed among partners and tasks divided along with funds • This diffuses the impact of risks occurring • Certain outputs may be affected if fraud and corruption by consortium partners is not detected early	• ESP+ consortium partners apply a zero-tolerance approach to fraud, corruption, bribery, and other forms of misconduct through its Ethical Standards Policy and internal financial, procurement, and approval procedures. Due diligence is conducted for co-financing recipients. Selection of local partners using transparent criteria and management approval. Implementation is monitored through regular technical and financial reviews, field visits where feasible, and verification of deliverables and

				supporting documentation. Any suspected fraud or misuse of funds is reported through established internal reporting mechanisms, investigated confidentially, and managed in line with internal procedures and contractual obligations, including donor notification where required
Within implementing organisation(s)	Collaborating organization and subcontractors conduct unethical practices subjecting activities to risks of fraud and corruption	**Medium:** • Certain local organizations will be subcontracted • Some are publicly-funded • Sanctions have been applied to such organizations in response to their perceived contribution to conflict • There has been an aid-diversion scandal reported • However, we do need to work with them	**Medium:** • Funds for activities may be misappropriated • Activities will not be performed • Outputs will not be generated • Time and funds will have been lost without the surety of recuperating these losses	• We will administer all funds centrally wherever possible or manage financial advances and settlements on a quarterly basis to mitigate the risk of misappropriation • This is a system trailed in RAISE-FS and approved by the donor • Creating harmony among implementing partners through transparent communication and regular check-ins • Minimize advances to partners and focus on settlements of expenditure

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The mission of Wageningen University & Research is "To explore the potential of nature to improve the quality of life". Under the banner Wageningen University & Research, Wageningen University and the specialised research institutes of the Wageningen Research Foundation have joined forces in contributing to finding solutions to important questions in the domain of healthy food and living environment. With its roughly 30 branches, 7,700 employees (7,000 fte), 2,500 PhD and EngD candidates, 13,100 students and over 150,000 participants to WUR's Life Long Learning, Wageningen University & Research is one of the leading organisations in its domain. The unique Wageningen approach lies in its integrated approach to issues and the collaboration between different disciplines.