

Synergy Green Paper Executive Summary

The case for change is clear: the seed system of today is organizationally fragmented, limits innovation, is difficult to navigate and costly to administer, and it does not adequately provide for the value creation necessary to sustain the innovation that fuels the sector. Major change is needed, and it is needed now. If industry stakeholders delay and fail to reach a workable program for immediate reform we risk allowing the system to collapse, and foregoing our opportunity to plot a course for the future.

The Seed Synergy Collaboration Project has developed a comprehensive vision for the Next Generation Seed System. At its core the Synergy vision is one of:

A reformed, industry-led, government-enabled seed system that effectively attracts investment, fosters innovation, and delivers new and tailored seed traits to customers efficiently.

The vision of the Next Generation Seed System is based on four key functions: Research & Development, Market Entry & Commercialization, Production & Processing, and Sales & Distribution. The entire system vision is supported by a renewed governance structure, that sees industry associations play a larger leadership role, and make major changes to coordinate and consolidate their own operations. Lastly, the seed system of the future will enable innovative and practical solutions in the area of value creation, creating a viable and robust economic model that will put seed innovation in Canada on a sustainable competitive footing, and allow a range of business both large and small to compete.

The end result will be a system that delivers more for Canadian seed professionals, and Canadian agriculture in general. More investment in innovation. More choice and tailored products. A clearer regulatory environment that adapts to change. More efficient and effective industry leadership.

To articulate and test this vision, the Seed Synergy Collaboration Project Team has authored a Green Paper. The Green Paper describes in detail:

- The context and case for change
- The big picture of what the Synergy Project aims to achieve
- Analysis and specific proposals for each of the functions of the seed system
- The Synergy vision
- The path forward: consultation and detailed analysis

By way of summary, we have included here the bottom-line answers to the question “what changes are you proposing?” organized by each of seed system functions. The full context and explanation of these proposals can be found in the Green Paper.

WHO ARE THE SEED SYNERGY ORGANIZATIONS?

The Seed Synergy Collaboration Project consists of six major national seed industry organizations: the Canadian Seed Growers’ Association (CSGA), the Canadian Seed Trade Association (CSTA), the Canadian Seed Institute (CSI), the Commercial Seed Analysts Association of Canada (CSAAC), the Canadian Plant Technology Agency (CPTA) and CropLife Canada.

SEED SYNERGY PROPOSALS

RESEARCH AND DEVELOPMENT

- Regulatory approval requirements today are unpredictable, require more information than is necessary to deliver a good outcome, and treat every innovation the same, regardless of risk
- Today's system is particularly difficult for smaller businesses to navigate, as they lack the resources required for lengthy and uncertain regulatory processes
- We propose a new, risk-based assessment model, that sets regulatory requirements commensurate with the projected risk of new products
- Government will continue to lead oversight of the system, and government-sectoral coordination needs to be enhanced to define regulatory standards that make sense

MARKET ENTRY & COMMERCIALIZATION

- Current regulations and requirements outside of safety – intellectual property, variety registration, stewardship – are difficult to navigate, administered by multiple agencies, and the rules are slow to adapt to change
- We propose a leadership role for the sector in setting cutting-edge standards and ensuring processes make sense for users, and particularly a greater role for crop value chains
- We propose replacing the current variety registration and variety eligibility for certification regimes with an integrated system, anchored in a product profile for all approved seed products, containing all regulatory and commercial information relevant to that product in one, easily accessible place or virtual space, with access to confidential business information about a product limited to those granted explicit access to it
- We propose a single online front end for the submission of data for all regulatory and quasi-regulatory approval processes associated with market entry

PRODUCTION AND PROCESSING

- Today's pedigreed seed system needs to be more flexible and responsive to evolving technology, production practices and market opportunities
- We propose a modernized pedigreed seed system that will facilitate an increase in pedigreed seed use and a reduction in incentives for common seed production, as new high performing protected varieties replace older ones
- We propose an expansion of options for producing seed under comprehensive quality management systems that do not require third-party crop inspections but which are backed by third-party audit frameworks. This model would meet the highest levels of international scrutiny.
- We propose flexibility in the application of crop production purity standards where seed cleaning capabilities can be employed to meet grade standards
- We propose that pre-market assessment of varieties for cultivation and use remain an option in some form, where respective crop value chains require it.

SALES AND DISTRIBUTION

- Not all seed sold in Canada is of known identity or quality, buyers may be assuming liability of which they are unaware, and value creation opportunities are limited in many areas.
- We propose a universal seed lot listing system, where seed available for sale is listed, along with at least a declaration of identity and quality
- Doing so will strengthen and expand the traceability that is today a core of the pedigreed seed system, to all seed sold in Canada, and allow for the efficient management and removal of unwanted varieties

VALUE CREATION

We believe that the proposals detailed in the Green Paper can, if carefully developed, refined, and ultimately implemented, contribute significantly to enabling successful value creation and profitability, through:

- A more responsive and risk-based regulatory system that reduces unnecessary compliance costs
- A governance model that places the sector and value chains in design and decision-making leadership roles
- A modernized pedigreed seed and associated value creation system that enables technology transfer and innovation, particularly in the cereals sector, and drives economic growth
- A seed sale listing system that brings increased transparency and utility to seed sales across the country, and allows for more efficient protections of intellectual property rights and commercial transactions

SEED SECTOR GOVERNANCE AND COORDINATION

- Today's governance structure is fragmented, and divides scarce resources amongst too many unique organizations
- We propose increased coordination amongst all seed sector players on priorities, beginning immediately
- We propose that the six Seed Synergy organizations coordinate and harmonize their largely complementary advocacy agendas, to amplify the voice of the sector to government
- We propose the serious examination of permanent changes to the enabling organizational model of the sector, that would see either a single organization, or a formal cluster take on greater responsibility for seed sector governance

We invite you to read the full Green Paper, and to engage with the ideas and proposals we have put forward. We have endeavoured to articulate a bold, compelling, and realistic vision for the future of Canada's seed system, without shrinking from suggesting significant change that might challenge our assumptions or established practices. It is our hope that, as we discuss these ideas with a wide variety of members, stakeholders, and partners, we will refine our vision and move forward to implement changes to bring about a Next Generation Seed System that benefits everyone, creates space for small and large businesses, and drives growth in the broader Canadian agriculture sector.

– The Seed Synergy Collaboration Project Team