



A whole-of-industry approach to adoption: The Strategy for Industry Led Adoption Activities in the Sugar Industry

Ian McBean, Sugar Research Australia
Sean Kenny, Rural Consulting Group



Discussion points

- Background
- Key messages
- Objectives
- Key action areas
- Benefits of the change so far
- Strategic priorities
- Industry strategy

Background

- Extension delivery in the sugarcane industry has been through significant change.
- Prior to 2003, the industry operated in a regulated environment with:
 - Bureau of Sugar Experiment Stations providing RD&E
 - Cane Protection and Productivity Boards (CPPBs) providing pest and disease control services
 - Certainty of funding via compulsory levy.
- Deregulation of the industry meant:
 - Loss of funding via compulsory levy;
 - Establishment of BSES Limited (industry owned 50% Grower: 50% Miller)
 - Dissolution of compulsory CPPBs and formation of industry owned Productivity Service Companies (PSCs).
- Roles remained largely unchanged.
 - BSES - Principal provider of R,D&E to the Australian Sugar Industry.
 - PSCs – pest and disease control with some extension.

Background

- In 2005, the Primary Industries Ministerial Council endorsed the concept of 'National R with Regional D&E'.
- The concept recognised
 - basic and strategic research (R) can be provided from a distance,
 - with regional adaptive development (D) and
 - local extension (E).
- SRA formed in 2013 with above concept endorsed by industry.
- Agreed that all group extension, on-farm extension, variety propagation, diagnostic services and data collection should be a local area responsibility and as such should be scoped, managed and funded in keeping with local priorities.
- Each local area free to decide the range and quality of the service they provide and how these services are delivered.

Background

- Expectation that extension would be delivered by:
 - PSCs
 - Private 'fee for service' sector
- Not as successful as expected.
- Regional extension operating against complex backdrop of
 - various service providers and stakeholders,
 - differences between regions,
 - strengths and weaknesses among stakeholders.
 - differences in terms of scope, funding, capacity and impact.

FUNDERS:

Over \$80 million spent in 5 years

Federal Government - \$24.5 million - 21/22

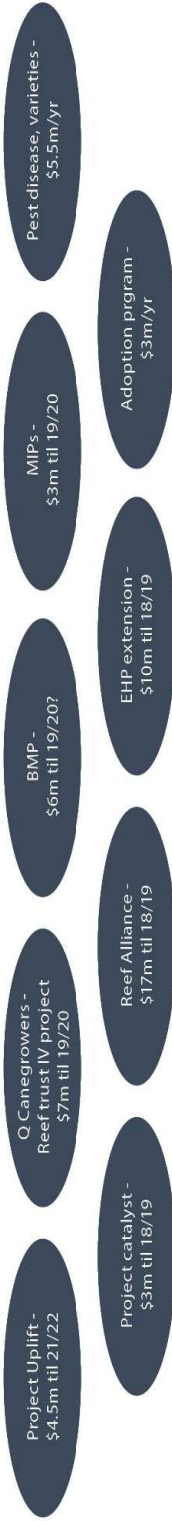
State Government - \$19 million - 19/20

SRA - \$3 million per year

Prod services boards \$5.5 million per year

PROJECTS:

At least 7 major projects. Numerous smaller projects with extension/development elements



DELIVERY PARTNERS:

Over 30 individual organisations engaged in aspects of project delivery



Background

- Industry expressed the need for a new model and approach.
- 2017 SRA Board commissioned RCG to undertake a review of adoption with the objective of coming up with a strategy to support increased uptake and implementation of new and existing technologies in the sugar industry.
- Involved review of successful models in other industries such as Dairy, Grains, Cotton and Bananas.
- Extensive consultation with 40 stakeholder groups and 110 individuals

Key Messages

1. An active but fragmented service delivery environment
 - Wide range of services from a variety of sources through a range of organisations;
 - Rush to secure funds can lose sight of need for coordinated action to achieve large scale improvement;
 - Lack of coherence around key messages critical to sugar industry;
 - Investors are looking for leadership and coordination.
2. Lack of SRA visibility
3. Looking at SRA to coordinate and lead
 - Define SRA role around leadership
 - Coordinate development of regional and industry strategy and investment
4. SRA well placed to coordinate and lead
 - Well resourced, independent, science based and industry wide.
5. Time right for new approach
 - Unified, targeted industry scale approach.
 - Government is supportive

Objectives

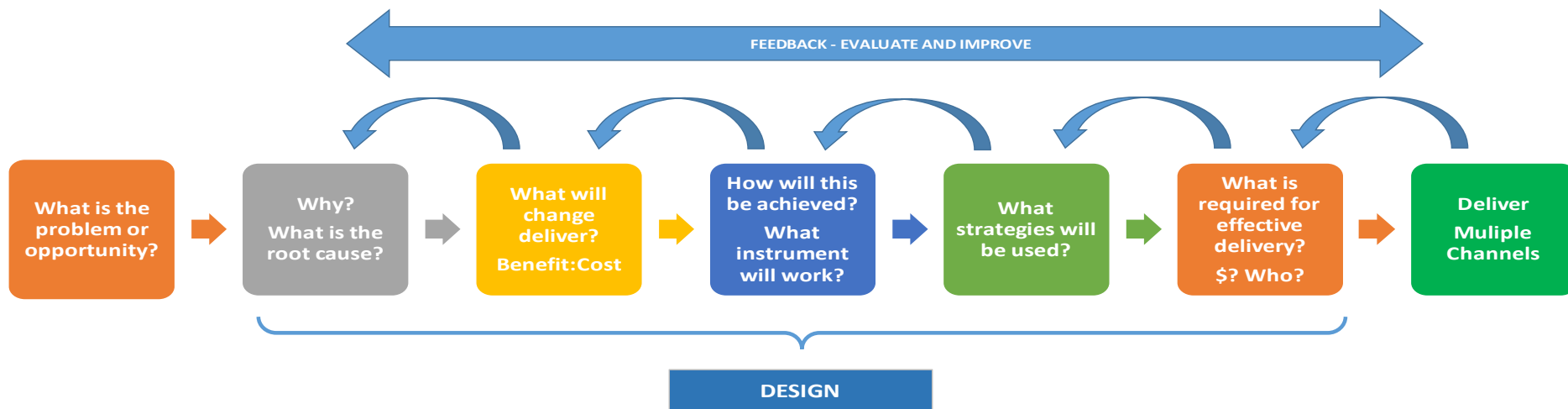
1. Strategy-driven investment in adoption activities leading to more efficient investment overall
2. Greater focus on targeted, measurable practice change
3. Greater connectivity and alignment:
 - Regions to industry
 - Region to region
 - Research to growers and millers
 - SRA with other key investors
4. Improved accountability and attribution

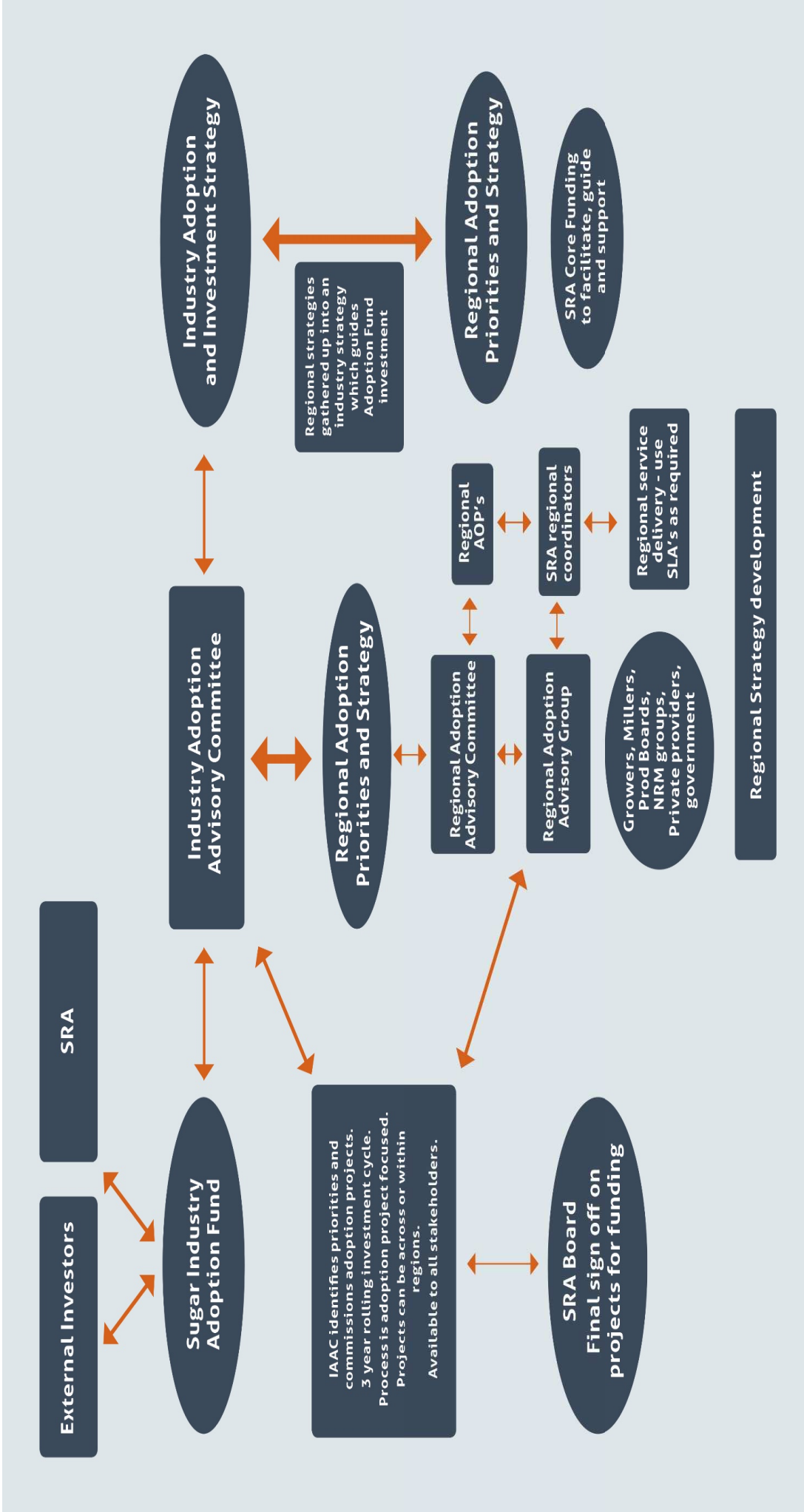
Key Action Areas

1. Collaborative development of strategic investment focused on practice improvement needs and outcomes;
2. Robust adoption priority setting and investment processes based on:
 - a. Regional Structures to
 - identify priorities and develop strategy
 - Oversee implementation;
 - b. Regional Annual Operating Plan
 - Outline all elements of regional delivery;
 - Identify unfunded activities.
 - c. Industry Adoption Advisory Committee
 - Whole of industry view
 - Investment decisions
 - End user engagement

Key Action Areas

3. 2 SRA investment streams:
 - a. **Core Funding** of 27 staff to enable effective delivery
 - b. Contribution to **Industry Adoption Fund**
4. Consistent design and evaluation approach to projects





Benefits of the change so far

- Greater regional focus
- Link from 'grassroots' into SRA via regional co-ordinators
- Increased leverage of current government spend
- Increased focus on collaboration and delivery via third parties
- Increased focus on grower and miller needs driving the adoption strategy
- Better consultation and involvement through regional adoption advisory group structures
- Clarification of roles and responsibilities

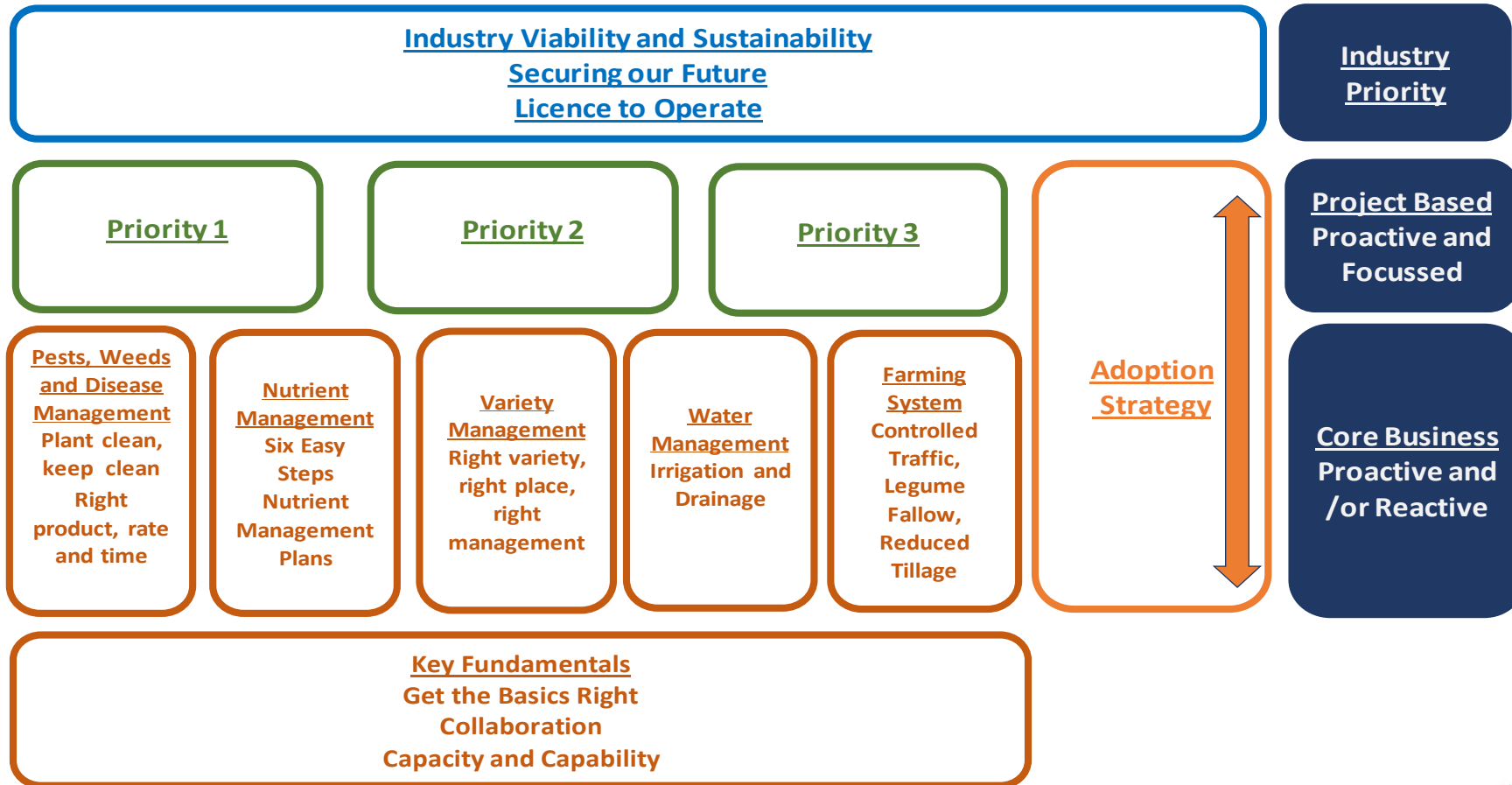
Benefits of the change so far

- Ability to leverage existing investment to enable appropriate scale;
- Strong focus on capacity and capability to deliver;
- Career pathways and professional development;
- Cross-regional co-ordination;
- More effective, efficient and coordinated service delivery.

Strategic Priorities

- More cane and sugar in a profitable and sustainable way.
- Targeted investment to achieve meaningful and measurable improvement in specific priority areas.
- Improving management of the cane by:
 - Improved effectiveness of extension resources and activities;
 - Focus on scale – 30% of growers produce 70% of the cane
 - Coordinate the extension effort
 - A strong focus on getting the basics right;
 - Building capacity and capability in the growing and extension sectors.

Industry Strategy



Thank You.