

BCI Outcome Evaluation

- Turkey, August-September 2016 -



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Cotton statue, Bergama. Photo: Mike Read

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Executive Summary

This independent evaluation was commissioned to assess achievements of the Better Cotton Initiative (BCI) at the outcome level in Turkey, to investigate whether these results contribute to BCI's overall desired impacts, to highlight any unintended effects, to identify lessons learned, and to provide recommendations to guide BCI, and its partner IPUD.

The evaluation is broad, from smallholders' agronomic inputs to the leadership model of BCI's country partner. Yet contractual requirements, the timing of the evaluation at the start of the harvest season and just before a long public holiday in Turkey meant that preparation and fieldwork time was condensed and limited. As a consequence, some aspects of the evaluation are more successful than others. Clear insights were gained into long-term constraints and prospects, some success in investigating changes in agricultural practice and awareness of key issues, but limited success with establishing outcomes for worker conditions. It should also be noted that comments and conclusions offered in this evaluation report are only intended to apply to Turkey, and may only have applicability in the Turkish context.

Cotton growing and trade in Turkey work in a multi-dimensional array of economic, legal, political, climate, business, social, historic and cultural influences, and some of these influences are in a state of flux. This clearly presents evaluation challenges in attributing reported changes in cotton production practices and trade to the work of BCI and its country partner IPUD.

Although the picture is patchy, reported benefits of BCI's involvement in Turkey include the following.

- Overall improvement of Better Cotton farmers' awareness of environmental, safety and social issues.
- Some improvement in production practices, such as appropriate pesticide use and reduced water consumption, although in part this was attributed to involvement with the Turkish 'ITU'¹ certificate, or to legal requirements.
- A small number of farmers reported that involvement with Better Cotton was good for business, although responses were mostly neutral.
- Some benefits were reported in developing relations with other stakeholders.
- Assistance and advice from Production Unit Managers and Field Facilitators was valued by farmers.

However the benefits reported and future prospects are presently limited by a number of factors.

1. **Limited short-term financial benefits** at farmer level of involvement with Better Cotton. There may even be perceived net costs e.g. associated with extra labour requirements, documenting activities, or more expensive pest control. In the context of a farming sector that provides a precarious livelihood, especially for smaller farms, this is a significant disincentive to engaging with Better Cotton, and appears to be a major factor in the observed drop-out from the system.

It appears that such demand as exists for Better Cotton from retailers, brands and manufacturers is not being transferred adequately through the value management chain to perceived benefits for farmers, either through improved income or reduced input costs. So,

¹ ITU which translates as GAP in English, and is broadly equivalent to GLOBALGAP.

while there is general goodwill to the concept of Better Cotton, there are also doubts or even cynicism about the perceived economic benefits that are - or can be - realised. In emerging economies, just as in developed economies, economic incentives are likely to be more powerful than environmental or social incentives. And this certainly appears to be the case in the precarious Turkish agricultural sector, perhaps even more so with smaller farms.

2. Mismatch between supply and demand.

Much of the licensed Better Cotton production in Turkey is not sold as Better Cotton due to limited demand. There is also a degree of mismatch between the characteristics (e.g. in terms of fibre length, degree of contamination) of Better Cotton produced in Turkey and what is required by processors and manufacturers in Turkey. For instance cotton spinners who are supplying sports brands such as Nike and Adidas do not need the high quality fibres that are being produced in Turkey.

3. IPUD's structural and resource challenges.

IPUD's income basis is limited and uncertain, and its perceived lack of engagement in marketing, promotion and advocacy is affecting how it is perceived by ginners and Production Unit (PU) Managers, and even by some of the farmers. Moreover IPUD has to be both 'good cop' - training and supporting - and 'bad cop' - checking performance and issuing or withdrawing licenses.

4. Structural problems in the Turkish agricultural sector.

A number of factors make progress more difficult for Better Cotton in Turkey. For instance, appropriate Turkish government subsidy and support structures for farms are often lacking or unpredictable, or relatively poor compared with other cotton producing nations. There is also heavy reliance on imported agricultural chemicals and seed (in recent years the Turkish Lira has lost much of its value against the US Dollar which has had a great impact on production costs), combined with a lack of control of chemical companies, etc. Steep rises in electricity bills are also particularly troublesome for cotton farmers in regions, such as Şanlıurfa, that depend on pumped water for irrigation.

5. Sometimes good-quality pre-existing practices.

Many of the farmers best placed for involvement with Better Cotton were already practicing agriculture in a reasonably efficient, well-informed manner prior to their involvement with Better Cotton. So not only is it difficult to attribute good practices to involvement with better Cotton, but further improvements may be more difficult.

There are a number of regional differences, such as input and labour costs, cultural diversity and work habits, but in the evaluation team's view these have very slight impact on the overall findings of the evaluation.

Perhaps unsurprisingly, recent growth in Better Cotton production has thus been limited, and what has been achieved is somewhat jeopardised by the dissatisfaction - certainly at farmer and ginner level - with limited or absent net benefits from involvement. This is evidenced by the significant turnover of farmer involvement.

Better Cotton aims to work with farmers of all sizes, in the belief that all farmers can improve, and is open to work with all cotton farmers in all locations. At least in Turkey, such a broad approach may well require more resources, and flexibility to respond to needs of different groups. A more strategic, phased, targeted approach might be beneficial.

In summary, while Better Cotton in Turkey is raising awareness of important issues, and leading to some improvements in production practices, expansion of Better Cotton in Turkey faces three major challenges.

- Lack of or insufficient premium, especially to farmers, which is perceived by most as an essential motivator.
- Unpredictable and generally low levels of government support.
- Limited market development and facilitation.

It is possible to envisage success with any one of these, more difficult with two, but while all three apply significant progress would appear to be very challenging indeed.

So far as possible, detailed recommendations are made for the identified major challenges. These centre on the following aspects.

1. BCI should keep an eye on and analyse farmer, PU and ginner *turnover* in Turkey as well as total numbers.
2. BCI should consider changes and improvements to the Assurance and M&E Systems in Turkey.
3. BCI should revisit and strengthen emphasis, roles, responsibilities and resources for market development, advocacy and government liaison in Turkey.
4. BCI and IPUD should consider what support and income can be generated to allow IPUD to strengthen its roles.



1. Objectives and Scope

1.1 Background

The Better Cotton Initiative (BCI) was established as an independent organisation in 2009 to make global cotton production 'better for the people who produce it, better for the environment it grows in and better for the sector's future', by developing Better Cotton as a sustainable mainstream commodity.

In 2011, leading actors in the Turkish cotton sector approached BCI with the aim of starting production of Better Cotton in Turkey. It was agreed that the most effective way to start producing Better Cotton in Turkey was to establish a non-governmental organisation to represent multiple stakeholders. As a result, İyi Pamuk Uygulamaları Derneği (IPUD, the Good Cotton Practices Association) was founded in September 2013. IPUD's mission is 'to improve cotton production in Turkey for the benefit of cotton producers and the regions where cotton is grown and for the future of the sector'.

As BCI's Strategic Partner, IPUD is responsible for the implementation of the Better Cotton Standard System and the production of Better Cotton in Turkey. IPUD is also focused on creating Better Cotton supply and demand in Turkey and along with its membership – which includes farmers, ginners, agricultural sales unions, manufacturers, civil society organisations, and other industry actors – and is striving to communicate across the sector in order to ensure Turkish cotton can become a sustainable mainstream commodity.

1.2 Objectives

This independent evaluation was commissioned to:

1. Assess the achievement of the Better Cotton Initiative (BCI) at the outcome level in Turkey.
2. Investigate whether these results contribute to BCI's overall desired impacts of strengthened environmental, social, and economic sustainability.
3. Highlight any unintended effects (positive or negative).
4. Identify lessons learned, and provide recommendations to guide BCI, and its partner IPUD, in improving implementation.

1.3 Scope

More specifically the evaluation set out to examine the following.

- The leadership model for Better Cotton in Turkey, its effectiveness and prospects for long term engagement in the country's cotton sector.
- The business case of Better Cotton for Turkish Farmers.
- The benefit of Better Cotton to the Turkish Cotton sector beyond the farm (for ginners, spinners, manufacturers).

- Farm-level practices being used that contribute to sustainability and how these have changed since farmers' involvement with Better Cotton.
- Agronomic inputs used and margins in the previous season for Better Cotton farmers, and whether this data validates what was reported to BCI.
- Changes in participating farmers' lives on the farm, at home, and in their communities since becoming involved with Better Cotton.
- How women are involved in cotton production in the BCI project areas, how and why are they included (or not) in project activities, and gender dynamics that BCI's partner could work to address.
- The extent to which BCI's local partner IPUD has established local partnerships or undertaken other activities to address key sustainability issues in cotton cultivation.
- Any regional differences for all of the above.

1.4 A Note on the Evaluation and BCI's Assurance System

BCI's Assurance System is not directly part of this outcome evaluation, but the evaluation team felt there are two key ways that the Assurance System needed to be considered within the evaluation.

1. **The requirements of the Assurance System are relevant to the business case.**
Especially where benefits are perceived to be limited, 'burdens' placed on farmers and Production Units (PUs) by the Assurance System may act as a deterrent to involvement.
2. **The Assurance System is relevant to perceptions of IPUD's leadership role.**
A substantial part of Production Units² and farmers' contact with IPUD is through IPUD's 2nd party checks. The nature of the Assurance System thus affects these stakeholders' perceptions.

The evaluation was thus designed to consider these issues, and where relevant to provide policy-relevant information for any redesign of BCI's Assurance System.

² A Production Unit is defined as a 'spatial area or areas submitted for BCI licencing with clearly defined boundaries managed according to a set of management objectives which are expressed in a management plan. This area or areas include(s) all facilities and area(s) within or adjacent to this spatial area or areas under legal title or management control of, for the purpose of contributing to the management objectives'. (BCI 2015)

2. Context

2.1 Agriculture in Turkey

Agriculture is still the occupation of the majority in Turkey, yet for many farming is a precarious business, in some ways especially so for cotton farmers.

Rapid industrialization of Turkey after the 1930s, and subsequent government policies caused agriculture's share of Turkey's GNP to decline. It was almost 50% in 1950, 25% in 1980, and 15.3% in 1990. Since the 1990s, the government has encouraged farmers to adopt modern techniques and mechanization and has provided some infrastructural support for irrigation and cultivation. The most important of these projects is the Southeast Anatolia Project (GAP). However agriculture's share of GNP has continued to decline, to 11% in 2005, and as little 7.4% in 2014. The associated fall in living standards for farmers has contributed to emigration from rural to urban areas.

2.2 Cotton growing in Turkey

Turkey remains one of the major cotton growers of the world, and textiles and clothing are among the most important sectors of the Turkish economy. However in recent years there has been a considerable fluctuation, and an overall decline in cotton production in Turkey.

Year	Production Area ('000 ha)
2002	694
2003	637
2004	640
2005	547
2006	591
2007	530
2008	495
2009	420
2010	481
2011	542
2012	488
2013	451
2014	468
2015	434

The reasons for this decline are diverse, but can perhaps be categorised as below

1. Input costs are high and increasing³.
2. Limited government support, compared with other cotton producing countries.
3. Low cost imported cotton.

³ Most agricultural chemicals and seeds are imported and expensive, and in some regions sharply rising electricity costs for pumped irrigation – important for cotton production – are critical.

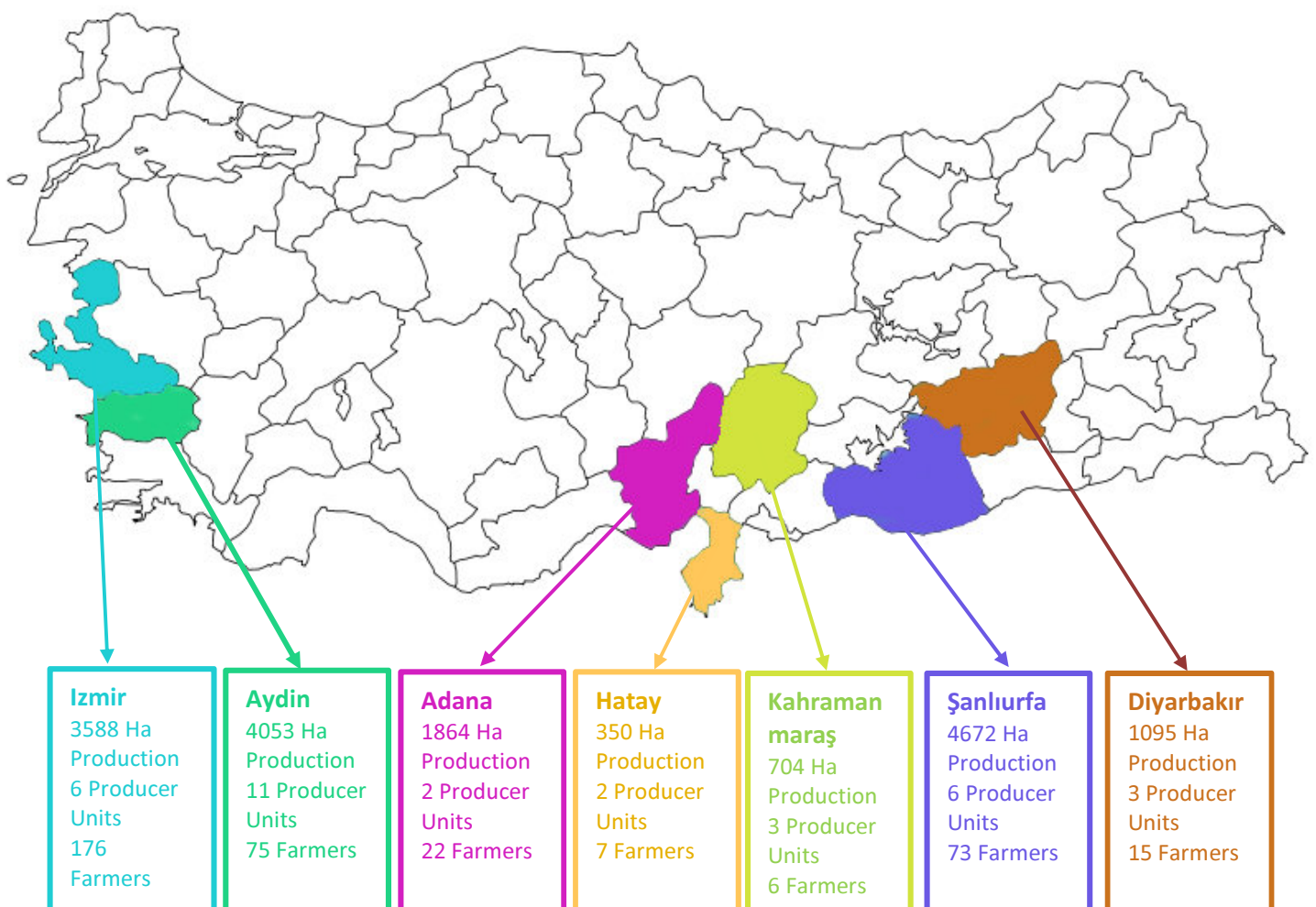
4. Small farms being divided into parcels too small for efficient agriculture.
5. Insufficient or ineffective marketing.
6. As with other crops, climate change, including the frequency and intensity of extreme weather events.

As a consequence margins for cotton farmers are often very low indeed. In regions, such as the Şanlıurfa area, where alternative crops are considered viable there is actually no guarantee that producers will keep farming cotton in coming years. Elsewhere, for instance around Söke, there is almost no other choice so farmers keep producing cotton.

A much more detailed analysis of the structure and status of the cotton sector in Turkey can be found in *Better Cotton in Turkey: Identification Stage Report*, produced by Ergon Associates Ltd in February 2013.

2.3 Better Cotton Production in Turkey

At present, Better Cotton production is only 3-4 % of the total Turkish cotton production. The following map, and charts in Annex B, give an indication of the scale and distribution of Better Cotton production, Production Units and farmers across the cotton-growing areas of Turkey



3. Methodology

3.1 Evaluation Design

The evaluation was designed, in consultation with BCI and IPUD, over a period of two weeks in August 2016. The resulting design comprised in-country fieldwork between August 29 and September 9, 2016, complemented by phone and email contact, and follow-up enquiries after the fieldwork. The evaluation took place in three cotton-growing regions in order additionally to evaluate any region-specific differences. Please refer to the map in the preceding section.

- Between August 29 and September 2 in the Aegean Region.
- Between September 5 and September 9 in the Çukurova Region (Adana and Kahramanmaraş).
- Between September 5 and September 9 in the Şanlıurfa Area.

Face-to-face interviews were complemented by a few telephone interviews with additional key staff and board members of IPUD and BCI staff in the UK and Turkey.

The evaluation endeavoured to span all major stakeholders in the value chain in Turkey, i.e. farm workers, farm owners, cotton processors, cotton traders, cotton manufacturers, and industry groups. In practice the majority of respondents were farmers, farm owners, Better Cotton Field Facilitators and PU Managers, and ginners.

Evaluation questions were focused primarily at 'outcome' level aspects of BCI's Theory of Change although some impact level issues such as economic viability were also included. The evaluation was not designed directly to validate or invalidate practices previously reported to BCI. It can thus only be based on changes reported by those interviewed, in response to questions designed to help confirm if information provided on practices is feasible and likely to have happened. A set of questionnaires was developed, tailored to individual stakeholder groups. In-depth, semi-structured interviews were used, based on these questionnaires, with a total of 70 individuals, spanning 23 Production Units across the three regions included in the evaluation.

This evaluation is remarkably broad, from smallholders' agronomic inputs to the leadership model of BCI's combined Implementing Partner and Strategic Partner, IPUD. However, the fieldwork schedule was strongly influenced by a desire for it to be completed before a major Turkish religious holiday in September, and so far as possible before the start of the harvesting season at which point farmers would be less likely to spare time for interviews and meetings. Consequently preparation and fieldwork time were condensed and limited. In addition to the two weeks for design, there were a total of 23.5 evaluator-days for fieldwork, including travel, sometimes in challenging conditions. This is therefore perforce a relatively swift evaluation covering an unusually diverse range of issues, in challenging circumstances, and should be interpreted as such.

The evaluation team interviewed twelve PU managers, ten Field Facilitators, two PU Manager/Field Facilitators, two PU Manager/Farmers, thirteen Farmer/Farm Owners, seven Farmers, twenty Ginners (several of which also had some role in PU Management), two Spinners, one Spinner/Manufacturer, and one Manufacturer, altogether spanning twenty-three Production Units.

In addition a number of meetings and phone conversations were held with BCI and IPUD staff and board members.

3.2 Anonymity

In order to enhance prospects for receiving information that was credible and candid, all respondents were informed that their responses were confidential and would be anonymised. Given the politically charged atmosphere in Turkey at the time of the evaluation, it was deemed especially important to minimise the possibility of attribution of comments to individuals. Consequently, given the small 'sample' sizes for some stakeholder groups in some regions, in the reporting of responses in Annex A, the terms 'none', 'a few', 'some', 'many', 'most' and 'all' are used rather than giving specific numbers. Explanation of how these terms may be interpreted is also given in Annex A.

3.3 Selection bias

Every effort was made within the constraints of time and geography to ensure the representativeness of interviewees, but the sample chosen cannot necessarily be considered as statistically significant or necessarily representative. Moreover, evaluation and analysis is inevitably somewhat influenced by those who the evaluation team were actually able to contact. This was exacerbated by the limited time (sometimes just a few days) between contact details being available and the deadline for an interview taking place⁴. Timing and scheduling also had an effect on the ability to interview seasonal or migrant labourers. This was not possible at all in the Aegean region where harvesting had not started at the time of the evaluation. However a few interviews were possible in the Şanlıurfa area.

3.4 Self-assessment, Comparisons and Counterfactuals

It should be noted that the evaluation is also largely based on self-assessment, i.e. information and opinion reported by interviewees at pre-arranged visits and meetings, with limited opportunity for the evaluation team to validate what was reported. And it is also important to bear in mind that 'comparison' interviews with farmers and others in the value chain who had never been involved with Better Cotton, and interviews with those who have dropped out of involvement with Better Cotton, were beyond the scope of the evaluation.

3.5 Labourers

For a variety of reasons it proved very difficult to obtain information from farm labourers. A few labourers were interviewed in the Şanlıurfa area, but overall their experiences are not well represented in the present evaluation. Three factors were probably at play.

- Some farmers and PU Managers may be reluctant to help evaluators to contact labourers. In particular, an impression was gained that PU Managers and others may be – rightly or wrongly - wary of the child labour issue.
- Most labour is required during planting, hoeing, thinning, etc. whereas the evaluation was at a time when relatively few labourers are required, i.e. prior to harvest. Even during harvest it

⁴ Indeed, IPUD was unable to make contact with some of the producer units the evaluation team wanted to include, such as Genel Pamuk in EGE region and Gokay from Şanlıurfa region.

might be difficult to interview seasonal and migrant labourers, partly as they and farm owners would probably not welcome distraction from their work.

- In some regions, mechanisation has led to a significant reduction in the requirement for hired labour.

3.6 Information, Opinion and Influence

In such an evaluation it can be difficult to distinguish information from opinion, and to account for influences on individuals' responses. Therefore a number of factors need to be borne in mind when assessing and interpreting the responses received.

- Efforts were made to put interviewees at their ease, to reassure that responses would be anonymised, and that the purpose of the exercise was to gather information to enable improvements, but there is a cultural reluctance to reveal details of one's life and business, especially to strangers.
- Presence of others during an interview (maybe family members, business partners or those who might become business partners, or those judged to be senior, or in a position of influence) will colour responses. Wherever possible conversations were held individually, but given the constraints of time and cultural norms this was by no means always possible. Although their independence was made clear, the evaluation team were *de facto* ambassadors for BCI so they needed to avoid causing offence that might arise by asking for individual interviews. Especially in the Aegean region, many people were often present during an interview, sometimes from different stakeholder groups. On occasion it was difficult to talk with farmers that were not either in effect selected by their PU Manager or with their PU Manager present. And even when interviews were carried out individually, respondents may not have fully believed assurances of confidentiality.
- The influence of perceived audiences can work in a number of ways, both towards more negative and more positive response. Some may wish to provide positive, enthusiastic responses out of courtesy, or in the belief that this will enhance their future prospects for business, or through perceived political expedience. On the other hand, interest expressed by 'outsiders' can be an opportunity to share difficulties that are being experienced. In any supply chain it is not unusual to be told that too much is charged for inputs, too little paid for outputs, and that problems are usually someone else's fault.
- Opinions may be strongly influenced by respondents' most recent experience with Better Cotton or with IPUD. And where this is some time ago they may not take account of any changes to how Better Cotton and IPUD work since that last contact.

Slightly different questioning and analysis techniques were used in each region reflecting the local context and opportunities and the optimum way of working for the field evaluators. The evaluation team's experience has also been used in interpreting and assessing the information and opinion received, and where appropriate the evaluation team's own observations have been incorporated in this report.

4. Findings, Observations and Analysis

Notes

Interpretation and Applicability

Cotton growing and trade in Turkey works in a complex multi-dimensional array of economic, legal, political, climate, business, social, historic and cultural influences. Furthermore some of these influences are in a state of flux. This clearly presents evaluation challenges in attributing reported changes in cotton production practices and trade to the work of BCI and its country partner IPUD.

Comments and conclusions offered in this evaluation report are only intended to apply to Turkey, and may only have applicability in the Turkish context. A summary of the main findings from the evaluation is presented below, drawn entirely from the questionnaire-based semi-structured interviews. The observations and analysis sections that follow also draw on wider and valuable conversations that were initiated by interviewees, the evaluation team's experience in the agricultural, development and NGO sector in Turkey, and additional meetings and telephone conversations with IPUD and BCI staff and board members. A fuller presentation of the evaluation questions and responses can be found in Annex A.

GAP

Many farms that are now involved with Better Cotton were previously - and still are - involved with producing to the Turkish equivalent of the GAP⁵ requirements, so were presumably already achieving relatively high standards of production. So for aspects where limited or zero improvements were reported this may reflect that pre-existing practices such as integrated pest management were already sound, as a result of farmers' involvement with GAP. This makes it especially difficult to attribute any positive change to a 'Better Cotton effect'. It is also worth noting that GAP may be perceived as more important than Better Cotton by farmers as according to some sources it can link to financial advantages such as low-interest farming bank credits.

A detailed analysis of the relative merits of the Better Cotton and GAP and the interactions between them is not within the bounds of the present evaluation, but is recommended as an important step to take.

⁵ It is actually local Turkish 'ITU' certificate which translates as GAP in English, and is broadly equivalent to GLOBALGAP. Further information about GAP in Turkey can be found at: https://www.researchgate.net/publication/237651514_Good_Agricultural_Practices_GAP_and_Its_Implementation_in_Turkey and at: <http://www.tarim.gov.tr/Konular/Good-Agricultural-Practices>

4.1 The Business Case for Better Cotton for Turkish Farmers

Summary of Findings

Observed change in yield

Mostly no change was reported, although a few reported an increase. Changes were likely to be attributed to seed quality, weather and agricultural advice. The latter is partly provided by IPUD, but also by other players.

Is Better Cotton involvement good for business?

Responses were mostly neutral, with a few positive.

Change in input costs since involvement in Better Cotton?

Generally no change was reported, but occasionally a slight decrease, or even an increase, attributable to increased labour costs and the need for more spraying of less dangerous chemicals.

How much production gets a better price because it is sold as Better Cotton?

A rather variable response, with no strong regional theme other than for Adana where generally none was reported as getting a better price.

Has the Better Cotton Field Book been helpful?

Responses were generally neutral or slightly positive. In many cases neutral responses were apparently attributable to pre-existing good practices, especially through farmers associated with GAP.

Have results indicators been useful?

This question was asked to only PU Managers. Most found the indicators helpful to some degree.

Field books were generally available for the evaluation team to look at and most were complete or largely so.

Value of assistance from PU Manager or Field Facilitator

All considered this assistance valuable, especially field visits and training.

Observations and Analysis

The business case for farmers is by no means widely established, as evidenced by the number of farmers - and even whole PUs - that have dropped out of the Better Cotton system (see page 26). These may have been replaced by others, perhaps better placed to take advantage of potential benefits, or perhaps just with the initial aspirations of those who subsequently dropped out. There appears to be no significant difference between regions in the business case, or absence thereof. The strongest case may be for the Şanlıurfa area where Better Cotton might conceivably

become tied to regional marketing, although this might also require a lot of co-operation and improvement work with ginners, and a strong regional organizational partner would also be required.

Business Case: Training, Advice and Learning

Training provided by IPUD is clearly appreciated. Indeed farmers generally are seeking more and better agricultural advice. In this regard it may be difficult to distinguish between the effects of higher-level training provided by IPUD and day-to-day technical advice (e.g. on how to deal with a pest or disease outbreak) that might be provided by a chemical supplier, or PU Manager (who in some cases may have a close business relationship, or even be the same person). To what extent any benefits accrued (or, perhaps more likely, problems avoided) is attributable to involvement with Better Cotton is difficult to gauge.

For many, receipt of agricultural advice may be the core of their 'business case' for staying involved. Arguably this is less likely to be the case for large farms where it might be assumed that farm managers may not see as much agronomic benefit from the training that participation in Better Cotton provides, as they already have well-established day-to-day technical support.

It was frequently reported to the evaluation team that 'Farmers' Field Books are not actually completed by farmers. Instead they are kept by PU Managers or Field Facilitators and the costs are also calculated by them. Farmers may thus not appreciate and understand any changes in costs as well as PU Managers. Farmers' learning may also be much less than expected as a consequence.

Business Case: Economic Benefits

BCI's Theory of Change rests largely on farmers reducing input cost, increasing productivity and thus benefiting economically. However farmers generally reported no significant increase in yield or income attributable to BC (although that does not necessarily mean that no increase has actually taken place).

It is worth recalling that many farmers in Turkey view their own situation as precarious. Quite apart from trends in frequency and intensity of extreme weather events, there are ever-changing government policies and relatively limited subsidies, accompanied by high and unpredictable costs for imported chemicals, fertilizers and equipment. Moreover, farmers cannot be sure of the price they will be selling their crops for as there is no minimum price or any other kind of market regulation that may protect them. And there is little strategic planning or guidance, with minimal national or regional supply and demand management for crops. Consequently, farmers cannot be sure of their future, and are constantly looking for other and better opportunities.

In this context most farmers were looking for a premium to be paid on Better Cotton production, and commonly voiced concerns about whether they would or could continue their involvement in the absence of a premium.

Business Case: Value-Chain Links

In some cases it appears that the business case for farmers is simply that their immediate customers, ginners or their agents with whom they have long-standing business relationships, have become involved with Better Cotton, and are looking for suppliers. If ginners can find a discerning market for Better Cotton then relationships with farmers - and the business case that goes with it - are likely to be maintained. However if ginners fail to see an ongoing benefit then the incentive for farmers

rapidly diminishes. And in the few cases where ginners report receive a premium, this may not always be transferred to farmers.

4.2 Changes to Farm-level Sustainability Practices, Agronomic Inputs and Margins

Summary of Findings

Changed practices to protect the natural environment

Occasional improvements were noted in most areas, such as use of fewer agricultural chemicals and reduced water consumption, and more careful use of pesticides and disposal of chemical containers. However where improvements were noted to have occurred over recent years, some of these were attributed to involvement with GAP rather than Better Cotton, and generally no change was reported in the Kahramanmaraş area.

Changes in plant protection practices

Generally an evenly balanced response between changes and no changes was reported. Changes reported mostly referred to appropriate pesticide use.

Changes in fertiliser use

Most reported no change but a few reported a reduction. Generally the fertilisers used are synthetic, apart from the Aegean Region where roughly equal numbers reported using synthetic and organic fertiliser.

Changes in irrigation methods

Most reported no change, apart from the Adana area where there was an equal split between change and no change reported, although part of the change - largely to drip irrigation - may pre-date involvement with Better Cotton.

Observations and Analysis

Overall, farmers and PU managers interviewed reported that inputs are little changed (and may have increased as well as decreased), and any change to margins generally attributed to factors other than involvement with Better Cotton. Also, in some cases it appears that increases in yield that may be attributable to better and more careful practices are counter-balanced by an increase in labour and other costs. For instance some farmers reported now using several different low impact but less dangerous insecticides, as a result having to spray more frequently than they would have before.

Previous practice

In addition to the complication of previous and/or ongoing involvement with GAP, changes to agronomic inputs are likely to be difficult to determine accurately if they were not recorded accurately prior to involvement with Better Cotton.

External factors

Agronomic inputs, and margins, may well be more influenced by year-to-year changes in climate and input costs, and by pest and disease outbreaks, than sustainability practices introduced to achieve the Better Cotton standard. For example the effect of rapidly rising electricity prices on the irrigation cost, or the banning of one chemical leading to the use of more than one or larger quantities of a replacement.

It is also understood that a further problem is the limited water management structure in Turkey, which makes it difficult to ask farmers to make meaningful or measurable changes.

The extent of external factors would seem to make comparison with farmers not involved with Better Cotton the only possible way to assess the farm-level outcomes of BCI's involvement. However, such farmers lie outside the scope of this evaluation.

BCI's Annual Harvest Report does report changes in Results Indicators relative to comparison farmers. The rationale for this may be sound, however it is understood that PU Managers are responsible for collecting information from comparison farmers. This presents a possible conflict of interest, as it is arguably in PU Managers' interest to record comparison farmers' performance in a poorer light.

PU Managers and Field Facilitators are providing recommendations to Better Cotton farmers about all manner of agricultural matters, directly or not directly related to Better Cotton criteria and some PUs employ agricultural advisors who can help farmers reduce their costs. However, provision of agricultural advice to farmers varies considerably from place to place across Turkey. In the Şanlıurfa area government support has been significantly reduced but advisors are still active even though their income has significantly reduced, acting in the hope that success for Better Cotton will help secure their ongoing employment.

Reliance on Farmers' Field Books

In determining agronomic inputs, some reliance seems to be placed within BCI's Assurance System on Farmers' Field Books. However doubt could be expressed about the credibility of Field Books, despite their apparent completeness (see page 30).

4.3 Changes in Participating Farmers' Lives and Communities

Summary of Findings

Changes to lives and communities

In general, respondents indicated no significant change, other than that associated with better *awareness* of cotton production issues, including health and safety, such as use of personal protection equipment and disposal of chemical containers. A few respondents also mentioned the less tangible benefits of feeling part of a broader, international system.

Changes in health and safety

In the Aegean region mostly no change was reported. Elsewhere the response was notably more positive, although this some of this was attributed to legal or GAP requirements.

Are workers employed?

Apart from the smallest farms, most farms employ workers both permanent and seasonal. A maximum of 2,500 labourer/days per year was reported.

Is infrastructure provided for labourers?

Generally, facilities are provided for permanent workers, but for day labourers generally only transport water and food, especially if working at distant locations.

Are the ages of workers a consideration?

The answer was uniformly 'yes' where relevant, although some also reported not asking the ages of workers and one reported that the hiring agent did not care about ages. Cessation of child labour has apparently been a fairly strongly-implemented government initiative. This has made some families with children unwilling to work on farms.

Changes in working conditions and practices

Generally no change was reported, although a few reported a slight change.

Has involvement with Better Cotton led to changes in practice?

Respondents mostly replied 'no'.

Are there changes you would like to make but are finding difficult?

A mixed response, mostly 'no' in the Adana and Kahramanmaraş areas, mostly better irrigation in the Izmir area.

What are BCI and IPUD doing best for you?

Responses were mixed. Learning about health and safety and what is good for the environment were fairly often reported. Developing relations with other stakeholders less so, and economic benefits much less so. Several respondents answered 'nothing'.

What have you learned from involvement in BC?

Responses were mixed, referring variously to awareness of health and safety and environment issues, decent work and record keeping.

Observations and Analysis

The close link between replies to questions on what BCI and IPUD are doing best and what has been learned confirm that learning is often the most highly valued aspect of involvement with Better Cotton. However, beyond increased awareness, relatively little was learned about actual changes to farmers' lives and communities, and very little that is clearly attributable to involvement with Better Cotton. Other than child labour issues, very limited change was reported regarding workers' conditions and working practices.

4.4 The Involvement of Women in Cotton Production

Summary of Findings

Are women involved in production?

Women were generally reported as not involved or only in activities such as hoeing or thinning.

What issues for girls and women could Better Cotton address?

All respondents said 'maybe' or 'don't know', but none made any specific suggestions.

How many women have received training?

Responses were very variable, many saying 'none' but others reporting specific numbers involved.

Have women benefitted from the Better Cotton programme?

Answers were generally 'no' or 'a little', with any benefits reported associated with field training.

Observations and Analysis

Disappointingly little could be determined during the evaluation about outcomes for women involved in Better Cotton production. This was partly due to the limited accessibility of farm workers and labourers during the evaluation period. There are some female Field Facilitators, PU Managers and Farm Owners. Otherwise, at farm level, women generally support as housewives, or work as day labourers. The present evaluation was not able to make a rounded assessment of any changes to conditions for day labourers, so it is difficult to make detailed comments on conditions for women. Women involved in Better Cotton (and cotton production generally) at farm-level broadly fit into three categories.

- 1. Women who own farms.**
Educated women, successfully managing the business of their farming enterprises, and fully involved in Better Cotton production.
- 2. Female family members of family-owned small farms.**
Mostly working in the kitchen and their main responsibilities are housekeeping. They generally do not work at the field and do not receive any training related to Better Cotton, i.e. are not involved at all.
- 3. Women day labourers.**
Employed for hoeing and thinning during the growing season. They are generally not educated and receive very little training when they work at the field. In some cases it may be that farm owners do not want them to be paid for non-productive time spent in training. On some farms most of the daily labourers are women.

Few if any regional differences were reported or observed. Women managing a farming business would likely be especially rare in the Şanlıurfa region where women's involvement is mostly as day labourers.

4.5 The Benefit of Better Cotton to the Turkish Cotton Sector Beyond the Farm

Note: questions in this section were asked only to ginners, spinners and manufacturers. However findings, observations and analysis presented here relate mainly to ginners as the evaluation team had less opportunity to interview spinners, manufacturers or retailers.

Summary of Findings

Has business improved since BC?

Respondents in Izmir and Kahramanmaraş areas mostly replied ‘no’, as did all from Adana and Şanlıurfa areas.

What is better about ‘Better Cotton’?

Generally environmental and social benefits were referred to, apart from Kahramanmaraş where quality and profit were referred to.

Do you pay or receive a premium?

A mixed response to paying a premium (generally ‘yes’ in Adana and Kahramanmaraş, but ‘no’ in Izmir and Şanlıurfa), with fewer receiving a premium.

Could Better Cotton be promoted or marketed better?

Responses were uniformly that promotion and marketing could be better, ginners generally suggesting that working with spinners was necessary.

What has been learned or has surprised?

Training including decent work and record keeping were mentioned. Some surprise was expressed about the low level of IPUD’s work with spinners and brands.

Observations and Analysis

Of the licensed Better Cotton that ginners purchase, they report selling a variable amount as ‘Better Cotton’. Between 0% and 90% were reported, but generally very low and sometimes declining percentages. According to several ginners that the evaluation team visited in Söke, there is an increase in the number of ginners⁶ in the Aegean region so some of the increased demand for Better Cotton may simply be that ginners are keen to buy any cotton of sufficient quality.

Ginners either do not report any premium for Better Cotton sold to spinners, or only a limited premium that they pass on to farmers. Ginners routinely comment that more work is required with marketing and promotion, especially with large Turkish brands. A number of PUs, ginners and farm owners expressed the intention to scale back their involvement with Better Cotton, or to leave entirely if financial benefits did not materialise or improve. Given the turnover already discovered with the system in Turkey, this is an intention that is worth taking seriously. Some ginners have already ceased their involvement, having perceived little or no benefit from their involvement, with no or limited specific demand for the licensed Better Cotton they have available. Some of these

⁶ For more on recent history of ginners in Turkey, the following may be valuable:
<http://acikerisim.ksu.edu.tr:8080/xmlui/bitstream/handle/ksu/288/10067425.pdf.pdf?sequence=1>

ginners however also report that they might reapply in subsequent years if they see an improvement and market demand for Better Cotton.

More work with government is also often mentioned, for instance co-operation with the Ministry of Agriculture and Rural Affairs (MARA) to bring financial benefits to Better Cotton farmers, and to make use of MARA's district offices to spread and support Better Cotton more widely.

4.6 The Leadership Model for Better Cotton in Turkey

Summary of Findings

To what extent have BCI and IPUD established local partnerships? Asked to only PU Managers)?

A mixed response was received, some having limited or no knowledge of any local partnerships, others (especially in the Kahramanmaraş area) being generally positive about local partnerships. Overall the distinction between BCI and IPUD was not clear to most.

What could BC and IPUD do better?

Again a very mixed response, but common themes were more marketing and more work with government. Also mentioned several times was more training.

What are the most important issues for IPUD to address? Asked to only ginners, spinners and manufacturers.

A very uniform response that the business case needed to be addressed.

Observations and Analysis

It is understood from IPUD that good relations have been established with Government Extension Services (although it varies from one place to another), with the Fair Labor Association, with government research initiatives and with independent researchers.

However very mixed levels of awareness and views of Better Cotton in Turkey and of IPUD were observed and reported by interviewees. While the concept of 'Better Cotton' is widely supported, in the current context many respondents were not hopeful for its wide adoption in Turkey in the near future. IPUD acknowledge that they have relatively little contact with spinners and manufacturers, but are planning to increase this over the next three years.

It is not always easy for stakeholders at any level to distinguish between BCI and IPUD. Some seemed to know more about BCI than IPUD, and some more about IPUD than BCI. Overall BCI is seen as driving improvements in social and environmental practice and IPUD is seen as:

- providing training that was generally welcomed,
- providing Field Books and Results Indicators that were also generally welcomed by those that used them, and
- conducting 2nd party checks and other assurance that was occasionally welcomed, but more generally just tolerated or not welcomed.

Some misunderstandings or difficulties with IPUD were reported across all stakeholder groups interviewed, possibly attributable to some IPUD personnel not having significant experience in the agricultural sector. These reported difficulties took the form of impractical suggestions (e.g. disposal of pesticide containers where no facilities exist), or misuse of technical language.

With no other visible and active organisation involved in promoting better cotton production, IPUD is seen as the responsible body. In this context, rightly or wrongly, reservations and frustration were also expressed, sometimes strongly. These focussed on IPUD's limited role or success in advocacy with government, or in supporting marketing and market development to stimulate demand, and even a lack of coherent vision for the future of Better Cotton in Turkey.

Such criticisms must of course be seen in the context of the limited resources presently available to IPUD, which may not always be taken into account by stakeholders. Moreover in the context of factors listed in the following section it would be extremely difficult for a new, non-governmental organisation with limited resources to take a leadership role. Likewise, many factors that affect prospects for long-term engagement presently lie largely outside IPUD's influence.

4.7 Prospects for long-term engagement

Summary of Findings

Likely increase or decrease in cotton production

A mixed response was received regarding intentions; generally a slight increase was expected, but also a decrease from farmers in the Adana area. Intentions appeared to be linked to fluctuating unpredictable government subsidies and uncertain demand.

Prospects for long-term engagement by Better Cotton in Turkey. Asked to only ginners, spinners and manufacturers.

A mixed and cautious response. The possibility of long-term success was linked by some to having awareness and buying into Better Cotton.

Observations

IPUD's effectiveness faces significant challenges, some possibly unique to the Turkish context, discussed below.

Difficult start

Normally when beginning involvement in a new source country, BCI would seek an established country partner, with good networks and a strong, stable financial situation. Indeed 'activities have the greatest impacts where they harness existing structures, services or resources'⁷. However, IPUD was actually created to be BCI's partner, and therefore runs the risk of lacking the necessary networks and financial robustness.

In fact IPUD has established some networks, both national and local, based in part on the contacts and knowledge of its Board members, and in part on the influence of PUs. Networks include

⁷ Ergon report to BCI, October 2013.

Government Extension Services (although this varies from one place to another), the Fair Labor Association (who provide Decent Work training), government research initiatives, and independent researchers. Moreover, the National Cotton Council is on IPUD's Board.

However, financial strength has not been achieved, and IPUD does not have significant guaranteed income. This may continue to make it difficult for IPUD to establish a leadership role.

IPUD's split role makes leadership more difficult

Unusually IPUD is both a BCI strategic partner and a BCI implementing partner. These roles are potentially conflicting, with IPUD required to provide not just support but also oversight of practice and control of licensing. Arguably IPUD also thus faces *potential* conflicts of interest. IPUD depends on retaining farmers, but it also decides which PUs, and large farmers, are awarded licences. Many of the Production Units are also members of IPUD. Members pay a membership fee to IPUD and have the right to choose IPUD Board members.

None of this is suggesting that IPUD has ever issued a licence to a farmer where this should not have happened. Indeed IPUD appear to be at least as much focussed on credibility and quality as on the number of farmers involved or licenses issued. However, this context may present challenges in terms of building trust at production level, and may make leadership more difficult.

Great impact of external factors

IPUD faces a complex and evolving array of influences, many of which IPUD with its present level of resources can have little prospect of influencing, but that will continue to have a significant bearing on uptake of Better Cotton production and trade. These include political influence and volatility, economic uncertainty (e.g. regarding subsidies, provision of agricultural support services), as well as climate change. Also important is the pre-existing prevalence and influence of other, overlapping agricultural 'sustainability' systems especially GAP, which may be perceived as more important by farmers due to financial advantages such as low-interest farming bank credits.

Training

The level of knowledge on sustainability issues, environmental or social, is very variable in Turkey. Where knowledge is limited - which is rather often the case - the training provided by IPUD or its subcontractors can have a huge benefit, and a leadership role for IPUD in sustainability training in the cotton sector can readily be envisaged. So far as it is able IPUD appears to be taking a strong lead in this and providing a good service. Respondents were almost uniformly complimentary about the training provided (although it is not always clear whether the training referred to is supplied directly by IPUD, or by PUs and their agricultural advisors).

Market facilitation

Many stakeholders consider IPUD to be weak on marketing and demand creation with manufacturers. Several ginners, as well as spinners and manufacturers expressed surprise that there was no apparent significant work with major Turkish brands such as De facto, Cotton, LC Waikiki, Mavi, and Mudo.

Summary

For many of those interviewed, ongoing engagement with IPUD and with Better Cotton hinges on business benefits, and especially economic benefits in the short-medium term, perhaps 1-3 years. In this context it might be suggested that prospects for long-term engagement and success depend on two key issues.

1. How much influence IPUD and BCI can bring to bear nationally and internationally to create demand, and with it at least a temporary price premium that is experienced by those making the decision to attain or to retain a Better Cotton licence.
2. Linking Turkish spinners' and manufacturers' current Better Cotton demand with Turkish Better Cotton production. IPUD have set up a web site to help with this but it is very new and not widely known by the sector. Moreover a mismatch between the quality of the Better Cotton produced and the cotton required will need to be addressed.

5. Discussion of Key Issues

5.1 Better Cotton and Financial Benefits

The lack of, or limited nature of financial benefits from involvement with Better Cotton was mentioned frequently by almost all the stakeholders interviewed. Indeed a number expressed exasperation that there were no mechanisms to reliably deliver such benefits.

BCI's approach to market intervention thus becomes very relevant to this evaluation. The evaluation team's understanding is that BCI do not interfere in financial aspects of markets, and expect the market to drive change with eventually sufficient influence that it eventually becomes difficult to sell non-Better Cotton. Such an approach would appear to depend in part on the following three key components.

- 1. Sufficient benefit passing along the value chain to those who make the decision to ensure appropriate practices and to acquire a Better Cotton licence.**

As yet there appears to be very limited evidence that this is happening, indeed some stakeholders are dropping out. The reliance on the market to create farmer-level economic benefits may be particularly questionable for smallholders who may well have the least bargaining power in such a value chain.

- 2. Farmers having the incentive and resilience to stick with Better Cotton production while a discerning market develops.**

Incentives appear to be important at all farm sizes. For small farmers it may be a combination of advice and financial benefit. For large farmers even a small percentage premium could make an important change in their earnings and they would welcome such an opportunity. However resilience is also critical, with small farmers generally having much less income resilience than large farmers, i.e. needing a much swifter return on even a small additional investment in farm inputs (including their time).

- 3. A high percentage of farmers' Better Cotton production actually being sold as Better Cotton.**

As yet there is limited progress with this.

The business development model of Better Cotton aims to reach a point where such a high demand exists for Better Cotton that it effectively becomes difficult to sell non-Better Cotton. In Turkey however, in the absence of an economic incentive (a market where either a premium is paid for Better Cotton or such a high demand exists for Better Cotton that it effectively becomes difficult to sell non-Better Cotton), environmental and social benefits alone seem unlikely to lead to a much wider adoption of Better Cotton in Turkey. In other words, without a premium it may be very hard for BCI to achieve their objectives in Turkey as farmers will keep dropping out when they do not see a benefit. Therefore, reaching a tipping point where being licensed for Better Cotton becomes a *de facto* pre-requisite for most Turkish cotton production, seems a distant prospect.

Farmers may benefit from training, but in the absence of a premium for Better Cotton, once a farm owner has learned about better production practices, the question could also be asked as to what is their motivation to remain with Better Cotton.

No recommendation has been provided regarding the limited short-term benefits to farmers as this would require a revisiting of BCI's operational model. However, in Turkey this may prove to be both the most critical and the most intractable issue.

5.2 Supply Chain Influence

The supply chain is more interconnected or vertically integrated than it might first appear. Business or family interests may span more than one link in the chain. For instance, PUs are often, in effect, managed by ginners. Some farmer involvement may thus simply be due to encouragement from ginners with whom they have close relationships. If those ginners tire of their involvement as hoped for financial benefits do not transpire, it is likely that more farmers will drop out.

Indeed it is worth asking how much choice farmers really have in the level and nature of their involvement with Better Cotton. Farmers may well have close, established, almost obligate relationships with ginners (who may also be their PU Manager). And the ginner may have close business links elsewhere, e.g. with an agrochemical supplier. Indeed with one large farm included in the evaluation, the farm owner also owns the chemical supplier, and the PU manager also manages the chemical supplier.

It is also perhaps worth noting that not all 'farmers' as listed by IPUD are actually practicing farming, as sometimes a family uses another family member's land. Consequently in this evaluation distinctions between 'farmer' and 'farm owner' need to be treated with caution.

5.3 High Farmer Drop-out and Turnover

The numbers of farmers involved, and the areas in Better Cotton production are relatively static in Turkey. A careful analysis of data provided by IPUD reveals that this is actually accounted for in part by relatively high levels of both drop-out and recruitment. This evaluation also revealed that dropout is likely to continue, unless perceived benefits increase.

Some of this may be purposive with IPUD shifting focus from regions and PUs where objectives were less likely to be met. However a significant part appears to be farmers', PU's and ginners' disappointment with the level of benefit associated with involvement with BC and its relation to the cost of their involvement (e.g. repeated questions, visit and checks, need to complete Field Books and other paperwork). This is either because no premium is paid for cotton sold as Better Cotton, or much more cotton is produced by licensed producers than can be sold as Better Cotton⁸. The role of ginners is also implicated in farmer drop-out. If PUs drop out their supplying farmers will also drop out, and if ginners drop out the effect may be similar.

The following tables and charts present some information on Better Cotton performance regarding PU and farmer number and drop out. Although it is beyond the scope of the present evaluation, it is suggested that it may be critical for deeper analysis to be carried out, ideally on an annual basis to analyse drop-out and any relation to farm size, region, etc.

⁸ It is not uncommon with other sustainability standards for the supply of certifiable materials to significantly exceed demand. However with many such systems a price premium, or at least a price 'floor', may be in place.

	Initial number of farmers at the starting year
	Indicates an increase in the number of farmers compared to the previous year
	Indicates the number of farmers staying same for a consequent year
	Indicates a decrease in number of farmers compared to the previous year
	The year PU dropped out of the system

PU	PU Name	Farmers		
		2014	2015	2016
TRAD01	Adana Ticaret Borsası	17	34	21
TRAD02	Çukobirlik	86	0	
TRAD03	Biltar			1
TRAN01	Antbirlik		20	0
TRAY01	Birpaş	16	17	16
TRAY02	Cengiz Akgün		9	8
TRAY03	Dvs Tarım		8	4
TRAY06	Sökeyağ		30	13
TRAY07	Tuntaşlar		7	6
TRAY08	Vimtaş		12	17
TRAY09	Condur			2
TRAY10	Özaltın Ege			1
TRAY11	Yalnızlar			3
TRAY12	İ. Hulusi Özbaştak			1
TRAY13	Davas			4
TRDY01	Bismil Tarım			8
TRDY02	Özaltın Gap			6
TRDY03	Fereşin Altay			1
TRHA01	Nalçabasmaz	32	0	
TRHA02	Progen	4	2	2
TRHA03	Mıstıkoğlu		5	5
TRIZ01	Akasya	9	0	
TRIZ02	Akasya	92	0	12
TRIZ03	Celepler	19	14	2
TRIZ04	Celepler	14	12	0
TRIZ05	Pütaş	65	63	50
TRIZ06	Tariş	59	56	51
TRIZ07	Tariş	68	76	55
TRIZ08	Demircioğlu		41	0
TRIZ09	Genel Pamuk		6	6
TRKA01	Kipaş	4	2	4
TRKA02	Görpa	1	0	
TRKA03	Arıkan		1	1
TRKA04	Balsuyu			1
TRUR01	Akkucak	43	23	21
TRUR02	Yusufcan	5	0	

PU	PU Name	Farmers		
		2014	2015	2016
TRUR03	Şanlıurfa Ticaret Borsası			6
TRUR04	Yeşilpınar		3	12
TRUR05	Bülbül Tarım			5
TRUR06	Gökay			28
TRUR07	Reşit Gümüş			1

TRAD = Adana

TRIZ = İzmir

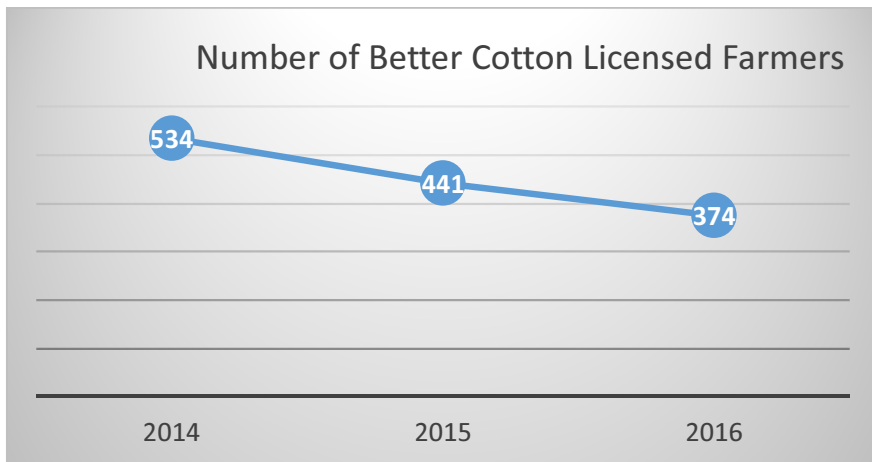
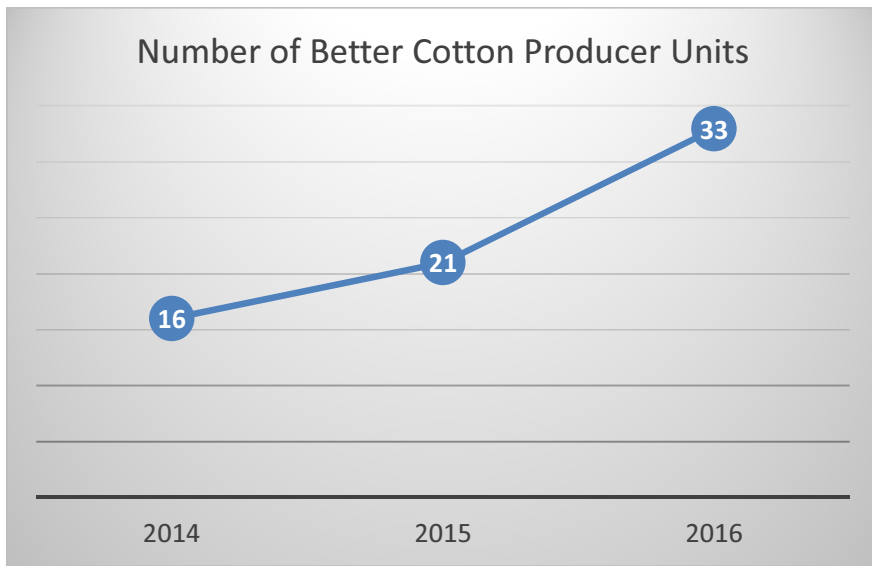
TRKA = Kahramanmaraş

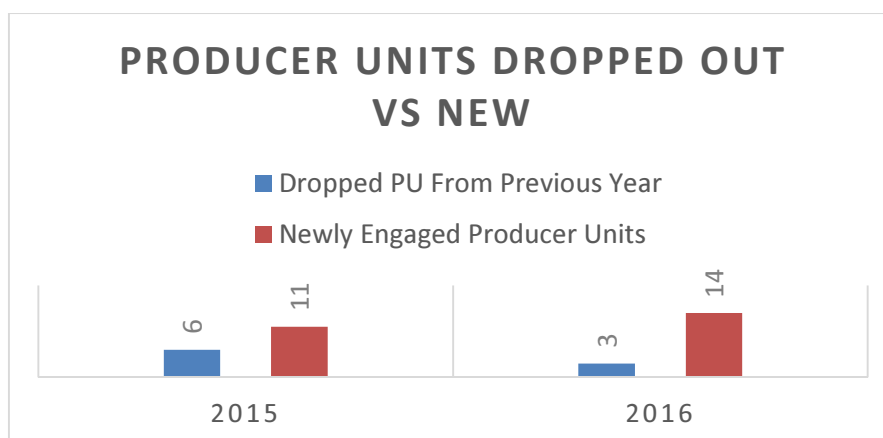
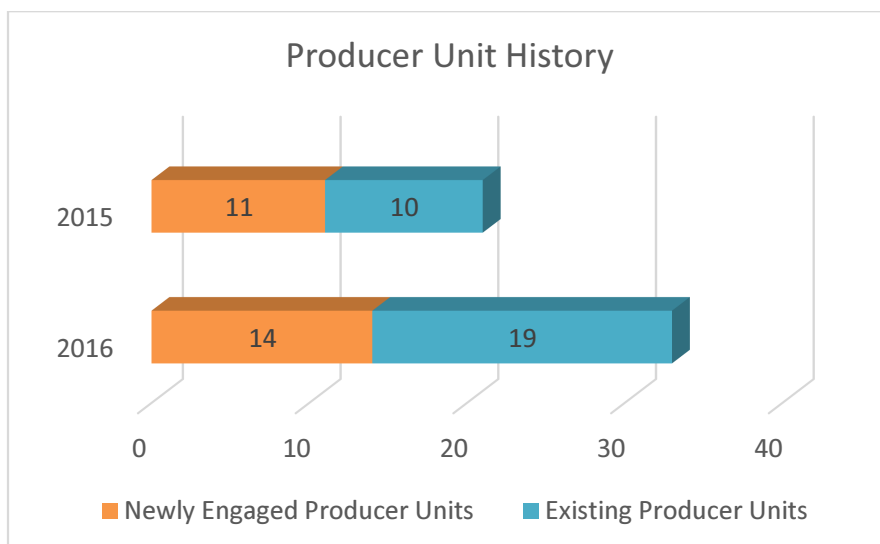
TRAY = Aydın

TRUR = Şanlıurfa

TRDY = Diyarbakır (GAP Region)

TRHA = Hatay (Çukurova area)





In a hard-pressed agricultural sector any new idea that appears to offer benefits may well get a warm welcome. And generally farmers new to the Better Cotton system reported high expectations, whereas those who have been involved for a few seasons often reported disappointment. Given the significant turnover of farmer involvement in Better Cotton in Turkey⁹, it would have been very valuable to meet a number of farmers whose involvement with Better Cotton had ended. However with the constraints on time this proved impossible.

In addition to putting a spotlight on problems related to motivation and incentive, farmer drop out presents a reputation risk. Bad news travels fast, and IPUD might need to work harder to get someone back than to get them involved the first time.

5.4 Cotton Quality

Every country where BCI is active will present unique challenges and opportunities. However there is at least one particular difference for Turkey that is relevant to the evaluation questions.

⁹ It is worth noting that farmer numbers are difficult to track with complete accuracy. Perhaps especially in the Şanlıurfa region, not all the farmers in IPUD's database are actually working on farms in Turkey. For instance they may be family members who own a share in the land but not involved in farming.

There is a mismatch between the characteristics of the cotton produced in Turkey and the cotton used in Turkey. This results in the odd situation of much of the Better Cotton being used in Turkey being imported while much of the Better Cotton produced in Turkey fails to find a discerning market and is simply sold along with normal cotton. In the Aegean region, production is generally of cotton with high quality fibre, whereas most demand for Better Cotton in Turkey is of lower (and thus cheaper) quality.

This situation is compounded by the Turkish region with most potential to produce Better Cotton of the quality required by spinners in Turkey (and probably with the most potential social and environmental benefits to be derived) being the South-east. This is where it may be perceived that BCI and IPUD could have the greatest difficulty in working more intensively due to refugee problems, language and cultural issues, the Syrian civil war, government policies in Turkish cities with high Kurdish populations, ISIS terror attacks in eastern Anatolia and Kurdish rebel attacks on government officials and buildings.

However, it was notable during the evaluation that such issues did not emerge as a big problem for stakeholders in the region, especially around Şanlıurfa. Production Unit managers there informed the evaluation team that the situation is not as bad as those from outside the region might think, and that this also applies to the Diyarbakır area. A closer analysis of options in this region might well be warranted.

5.5 Who Completes the Farmer Field Book?

It appears from the evaluation that across all regions 'Farmers' Field Books are rarely being completed by farmers themselves. This may be due to limited literacy and the complexity of the Field Books but just as likely farmers may have minimal incentive to get involved at this level, or it may be in the PU Managers interest to take on the task. Often the Field Facilitator or Production Unit Manager fills in the book.

This is a matter of potential concern from three perspectives.

1. It affects the amount that farmers are learning from using a Field Book.
2. It throws some doubt on the credibility of the information. The Field Book may be filled in many days after the activity that is being recorded, and PU Managers have an interest in presenting a positive account of activities. It is not unusual for PU managers or their business partners to have business relationships with local chemical suppliers, and for farmers to apply chemicals as advised by their chemical supplier.
3. A relatively heavy reliance is placed on the Field Books in the Assurance System both for 2nd party checks and 3rd party verifications.

5.6 BCI Assurance System

Compared with other systems, BCI's Assurance System relies relatively lightly on 3rd party verification, and quite heavily on 2nd party checks, i.e. by its own partner organisation in Turkey. These 2nd party checks also rely to some extent on PU documentation, including Farmers' Field Books on which some doubt may be thrown. This places quite a burden on IPUD both in terms of

resources and stakeholder relations. Also the 3rd party verifiers are in effect accredited by BCI itself rather than an independent accreditation body.

The evaluation team have seen little evidence that 3rd party verification is effective or used in a formal or undocumented way as a learning process to identify flaws in the 2nd party checking system (or that 2nd party checks are used to improve the 1st party self-assessments).

A number of alternative assurance systems might be devised that strengthen credibility while controlling cost. Such an approach might free up IPUD to work on important strategic priorities, and could improve some stakeholder relations.

5.7 Balancing Progress on Different Components

Success for any standards system, such as Better Cotton, depends on three difficult things happening more or less at the same time. All of these were questioned to a greater or lesser extent by respondents, and in the evaluation team's view the prognosis for these is as below.

1. Increase in Better Cotton **production capacity** e.g. through farmer training and changes in production practice.
There appear to be no major external climatic, cultural or political factors that would prevent increased production in the regions studied.
2. Increase in **demand** for Better Cotton, with a robust value chain **providing motivation along the chain for all supply chain stakeholders**, i.e. significant access to a discriminating market for producers.
Benefits such as risk reduction and social responsibility can be important to supply chain stakeholders, but in many contexts financial benefits are likely to be the greatest motivation. However selective demand seems to be limited, or even wholly absent in some places.
3. A **credible Assurance System** that provides confidence to customers that the benefits of Better Cotton are genuine and realised.
The evaluation team considers that questions remain about the requirements and robustness of the Assurance System, and how it influences perceptions of IPUD and involvement with Better Cotton.

5.8 IPUD has an Especially Difficult Task

As summarised in various parts of this report, IPUD faces a particularly difficult challenge.

1. It was not a pre-existing, well-financed and well-connected organisation.
2. It remains insecurely financed.
3. It is attempting to be both Implementing Partners and Strategic Partner.
4. It is attempting to influence a sector which faces complicated and deep-rooted cultural and socio-economic challenges.
5. Arguably the feasibility study which preceded the launch of IPUD gave insufficient consideration to the potential value chain for Better Cotton production that would lead to what is required by manufacturers, especially with regard to cotton quality.

In this context IPUD's achievements are arguably remarkable.

5.9 Other Questions

A number of questions were raised during the evaluation which the evaluation cannot readily comment on but are phrased here as issues that BCI and IPUD may wish to consider further.

- Will Better Cotton end up only working with farmers who find it relatively easy to achieve the standard?
- Do farmers have to continually demonstrate improvement? Is this feasible in medium-long term, especially for a farmer whose practices are already good?

6. Recommendations

A number of changes might be made that, in the view of the evaluation team, could help to enhance the outcomes of BCI and IPUD's work in Turkey. These are summarised below.

Learn from Farmer Turn-over

1. BCI should regularly analyse farmer, PU and ginner turnover as well as total numbers. This could provide warning signs of problems, and insight into perceptions and motivations. Analysis could include why they have dropped out and whether there are common themes, such as lack of perceived benefit, relation to farm size, location, premium achieved, quality of fibre produced, length of involvement, quality of pre-involvement practices (already good or too great a leap to acquire a licence?). Also, what lasting changes and benefits are retained by those who leave?

Market Influence, Development, Advocacy and Liaison

2. BCI should revisit and strengthen emphasis, roles, responsibilities and resources for market development, advocacy and government liaison in Turkey. The following options should be assessed.
 - Consider how best to research and influence the market to increase and maintain involvement with Better Cotton in Turkey. This could be through:
 - A better understanding of market structures, requirements, leverage points, and incentives for change.
 - Refreshed focus on supply chain links and turning demand into farmer profitability.
 - More involvement in marketing to create exchanges that will satisfy farmers' requirements for an economic incentive.
 - Improve and accelerate communication with brands who sell cotton products, bringing Turkish brands more swiftly into the system to create Turkish demand for Turkish BC production.
 - Establish a closer working relationship and communication with government.
 - A focus on working with more economically resilient large farms while a discerning market of sufficient scale develops, followed by a shift focus to smaller farmers.
 - Closer co-operation with other international standard systems, or with GAP.
 - Detailed analysis of the relative merits of the Better Cotton and GAP and the present and potential interactions between.
 - Investigate whether the National Cotton Council could be a more effective government-level advocate for IPUD.
 - Regional implementing partners.

Revisit the M&E and Assurance System

3. BCI should consider changes and improvements to the Assurance and M&E Systems. The following options could be assessed.
 - Strengthen the learning aspect of M&E. What do 3rd party assessments reveal about the qualities of self-assessments and 2nd party checks?
 - Reduce 2nd party checks (or even eliminate in due course), and strengthen 3rd party verification, perhaps with a simple cost-control, risk-based sampling scheme.

- Introduce independent accreditation of 3rd party verifiers.
- More clearly separate IPUD's support and checking roles. Should they be separated organisationally? Could the role/s that the Turkish Cotton Council might play be revisited in this light?
- Learning from other standard systems' multi-site or group certification schemes.
- Expend more effort on checking segregation of Better Cotton by ginners¹⁰.

Ways to strengthen IPUD's financial situation

4. BCI and IPUD should consider what support and income can be generated to allow IPUD to strengthen its roles. Options could include:
 - Encouraging more membership, especially with no manufacturers or brands, to increase income.
 - Establishing a closer link between IPUD membership and BCI membership in Turkey.
 - Developing other income sources.
 - More development support from BCI, perhaps via the Growth and Innovation Fund.
 - Prioritising one region to work in, perhaps in the south-east to allow a more concentrated use of resources.

¹⁰ Although the evaluation team were unable to verify this, some concern was expressed by farmers in Söke about whether ginners adequately separate Better Cotton in storage from other cotton. Ginners were also expressing that it is not easy to separate Better Cotton.

7. Acknowledgments

All responses in this report are anonymised, so no individual respondents are listed here, nonetheless sincere thanks are given to all those who contributed time, experience and opinions.

Mike Read would also like to personally thank Şemsi Toprak and Sema Atay for the many ways in which they went above and beyond the call of duty to make this evaluation as successful as possible in the time available.

ANNEX A

Notes

- The table below in Annex A is in two parts. The first is at 'farm-level' presenting what was reported by **Farmers (F) / Farm Owners (FO), Field Facilitators (FF) and Production Unit (PU) Managers**. The second is 'from-the-farm-gate', presenting the views of **Ginners, Spinners and Manufacturers**.
- '*Şanlıurfa*' is used to refer to the **Güneydoğu Anadolu Projesi (GAP)** region to avoid confusion with Good Agricultural Practices (**GAP**) standards.
- '*Krş*' is Kuruş, i.e. Turkish Lira. At the time of writing 1TL = £0.26 (26p), so 1 krş = 0.0026 (0.26p).
- The terms '*one*', '*a few*', '*some*', '*many*', and '*most*' are used when referring to responses received. This is a mechanism to maintain confidentiality by reducing the attributability of comments to individuals. '*One*' and '*all*' are self-evident. Generally '*a few*' can be taken to mean significantly less than half, '*some*' is more than a few but still less than half, '*many*' is around or slightly more than half, and '*most*' is significantly more than half but not all.

Aegean Region

- Farm-level evaluation is based on interviews with five Production Unit Managers, five Field Facilitators one PU Manager/Field Facilitator, one PU Manager/farmer, four Farm Owners, and five Farmers. All were men apart from one FF, and altogether representing twelve Production Units.
- From-the-farm-gate evaluation based on interviews with ten ginners, several of which also have roles as PU Managers. Several were women.

Çukurova Region: Adana

- Farm-level evaluation is based on interviews with eight Farm Owners, one Farmer, one PU Manager, one Field Facilitator and one PU Manager /Field Facilitator, altogether representing two Production Units.
- From-the-farm-gate evaluation based on interviews with four ginners and one manufacturer.

Çukurova Region: Kahramanmaraş

- Farm-level evaluation is based on interviews with one Farm Owner, two Farmers, three PU Managers and one Field Facilitator.
- From-the-farm-gate evaluation based on interviews with two ginners and three spinners (including one manufacturer).

Şanlıurfa

- Farm-level evaluation is based on interviews with eight Farmers, three Production Unit Managers, three Field Facilitators and one PU Manager /Farmer, altogether representing six Production Units. Two field facilitators are women.
- From-the-farm-gate evaluation based on interviews with four ginners.

	I: Izmir	A: Adana	K: K'maraş	Ş: Şanlıurfa	Further Comments
F, FO, FF, PU					
Farm size?	8 to 343ha	14 to 1,600ha	15.5 to 393ha	20 to 1,260 ha	
1. No. BC harvests?	0-4, mostly 2	0-3, mostly 2-3	0-3	0-2 ,mostly 0	
2. Likely increase or decrease in cotton production?	Very variable response, mostly slight increase	Variable response, mostly decrease	Variable response, overall slight increase	Variable response, mostly slight increase	Reported intentions linked in significant part to government financial support which varies from year to year, and also to perceived demand.
3. Observed change in yield since involvement in BC?	Mostly no change. Some an increase	Mostly no change	Mostly no change	Mostly no change. A few an increase	Any changes observed were likely to be attributed to factors including seed quality, weather and good agricultural advice. This advice may be provided by FFs but other sources of advice are available to many farmers.
4. BC involvement good for business?	Mostly neutral, a few positive	Mostly neutral, a few good	Mostly neutral, one good	Mostly neutral, a few positive	I: One negative response. A: One respondent regarded the benefits as for ginners, not farmers.
5. Change in input costs since involvement in BC?	Generally no change or slight reduction	Generally no change	Generally no change	Generally slight reduction, some a slight increase.	Limited or no change related in some instances to existing involvement with GAP. In a few cases a slight <i>increase</i> was reported, attributable to labour costs or increased use of chemicals and fertilisers. K and Ş: Significant increase in electricity costs associated with irrigation pumping.
6. How much production gets a better price because it is sold as BC?	Mostly 'less than half' some none at all	Generally none	Varied from none to all	Farmers from one PU report all sold.	I: Premiums generally reported as between zero and 0.05TL/kg. One farm owner reported a 0.25TL/kg premium, but this seems very high. Reports of premiums no longer being received. Ş: For most interviewed this is the first season so no info yet available.
7. Has the BC Field Book been helpful?	Variable responses evenly distributed between neutral, slightly and very helpful	Generally slightly helpful, with a few neutral or very helpful	Generally neutral	Mostly neutral, or slightly helpful	I: For some this is a first time to use such a Field Book. Some found it a good way to track expenditures and hence profits. Some reluctance by farmers was reported to share information from a Field Book on the basis that it might lead to reduced government support. A: Most neutral responses attributable to previous experience with GAP. K: Neutral responses attributable to pre-existing good practice.

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Have Results Indicators been useful? (PU Managers Only)	Variable responses	Slightly or very helpful	Slightly helpful	Mostly slightly helpful	I: Responses vary from 'very helpful' to 'we work in our own way with farmers who are already aware and conscientious'.
Availability of 2015 Field Books? (PU Managers Only)	Mostly available	One yes, one no	Mixed	Mostly available	Those that could be seen were, generally, very complete or mostly completed. One had even been printed out with the BCI logo and information about the BC system. One was clearly not complete, and one farmer had 'stopped using'. K: One available mostly complete, one not available, one not willing to share, possibly not having a proper Field Book.
8. Assistance from PU Manager or Field Facilitator?	Valuable	Valuable	Valuable	Valuable	Assistance was reported to be welcomed and valued. Visits to farms were frequent and recommendations and training were being provided.
9. Life and community changes?	Two farm owners reported no change, others were positive.	Generally no change reported	Generally no change reported	Generally no change reported	I: Mention was variously made of improved awareness of safe and environmental production, and of feeling part of a shared movement. A: One reported increased income. K: one reported better awareness.
10. Changed practices to protect natural environment?	Roughly equal reporting of no change or positive changes, often since involvement with BC	Some improvements regarding fewer agricultural chemicals and reduced water consumption.	Mostly not.	Some improvements regarding fewer agricultural chemicals and reduced water consumption	I: Positive changes reported generally using fewer agricultural chemicals and improving soil health mostly reported, although these processes were sometimes underway before BC involvement. Less clear picture with water consumption. A very limited reporting of reduced water consumption. Ş: Improvements in the disposal of chemical containers. A: Some of the changes are attributed to experience with GAP. K: respondents generally claims to always having been careful with the natural environment.
11. Changes in plant protection practices?	Roughly equal reporting of no change or change.	Roughly equal reporting of no change or change.	Even split between no and more awareness of pesticide use.	Mostly report changes	I: A mixed picture. For instance one respondent working with a local academic to improve practices, another actually reporting an <i>increase</i> in pesticide use. A: Change reported generally being better awareness of appropriate pesticide use. K: One report of starting to use 'semi-

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					organic' pesticides.
12. Changes in fertiliser use?	Almost uniformly reported unchanged (or a slight reduction).	Mostly no change, but some report a reduction of up to 50%	No change	Almost uniformly reported unchanged	I: Roughly equal numbers using synthetic, or both organic and synthetic fertiliser. A: Most using synthetic. Reductions attributed to change in irrigation or building soil organic matter. Ş: Two report reduced use, one increased. Only one report of using anything other than synthetic fertiliser. K: All use synthetic, one synthetic and organic.
13. Changes in irrigation methods?	Almost uniformly no change	Roughly equal split between yes and no	Mostly no, some yes	About two-thirds unchanged, one third changed.	I: One respondent had changed from flood to furrow irrigation. A: Some changing to drip irrigation. K: Some changes to drip irrigation, some of this predating involvement with Better Cotton.
14. Changes in health and safety?	Mostly no change	Mostly better	Mostly better, some no change	Mostly better	I: A few respondents reported improvements. A: Some report improvements are due to legal or GAP requirements, rather than Better Cotton.
15. Are workers employed?	Roughly even split between 'no workers' 'permanent workers' and 'day labourers'	All employ workers	All employ workers, both permanent and day labourers	Most employ permanent workers, day labourers and seasonal labourers	I: In this region most farms are family-owned and employ no or few external workers. The largest farm employs 3 permanent workers and a maximum of 10 day labourers. A: responses range from 1 permanent and 20 day labourers to 20 permanent workers and many more day labourers. A maximum of 2,500 labourer-days/year was reported. K: Between 6 and 17 permanent workers and between 100 and 2,000 labourer-days/year.
16. Infrastructure provided for labourers?	Mixed response	Yes	Yes for permanent workers	Yes	Facilities generally provided for permanent workers, but only very basic facilities for day labourers, especially if working at distant locations. Ş: One comment that 'it's always been like this, almost nothing changed because of Better Cotton'. K: Day labourers only provided transport, clean water and food at the fields.
17. Are the ages of workers a	Yes, where relevant	Yes	Yes	Yes	I: Some reported not asking the ages of workers. A: One report that the hiring agent doesn't care about ages. Ş:

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consideration?					Cessation of using child labour viewed as a positive because children do not work as efficiently. However this has made some families unwilling to work on the farms.
18. Changes in working conditions and practices since BC?	Generally no change reported	No, or yes a little	Mostly no, some 'yes a little'.	Mostly no., some report a small change	I, K: Generally an enthusiasm to report 'equal wages'. A: Also reporting now working with, and preferring to hire experienced workers.
19. Are women involved in production?	Generally reported as not involved or involved in some but not all activities	Generally reported as involved in some but not all activities	Generally reported as involved in some but not all activities	Generally reported as involved in some but not all activities	When employed, women are more likely to be employed for hoeing and thinning, or very occasionally in irrigation. A: One reported that women are not involved at all. Ş: One reported that women are not involved at all. Several that women are not involved in training. Another that they 'haven't done anything specific about women's issues and don't plan to'.
20. What issues for girls and women could BC address?	No issues reported	No issues reported	No issues	Mostly maybe don't know, but two no and three yes	A, I and K: All respondents said 'maybe' or 'don't know'.
21. How many women have received training?	Very variable	Very variable	Between 40 and 90 per farm reported, twice or more often/year		I: Answers varied from none, to 'some received field training' to '70 in 2016'. A: Answers varied from none, to about 10-15/year.
22. Have women benefitted from the BC programme?	Generally, no or yes a little	Generally, no or yes a little	Yes a little	No	A: benefits reported 'from field training'. Ş: One report that 'none of the seasonal workers' wives or other women working at farms involved in Better Cotton attend training'.
23. What are BC and IPUD doing best for you?	Mixed responses	Learning about what is good for health and the environment and developing	Mixed responses	Mixed responses	I: 'Learning about what is good for health and the environment' frequently reported; 'developing relations with other stakeholders' less frequently; 'increased access to economic opportunities' reported even less frequently. Several reported 'nothing'. A: Only one reported 'increased access to economic opportunities'. Ş: Fairly evenly divided by 'learning about what is good for health

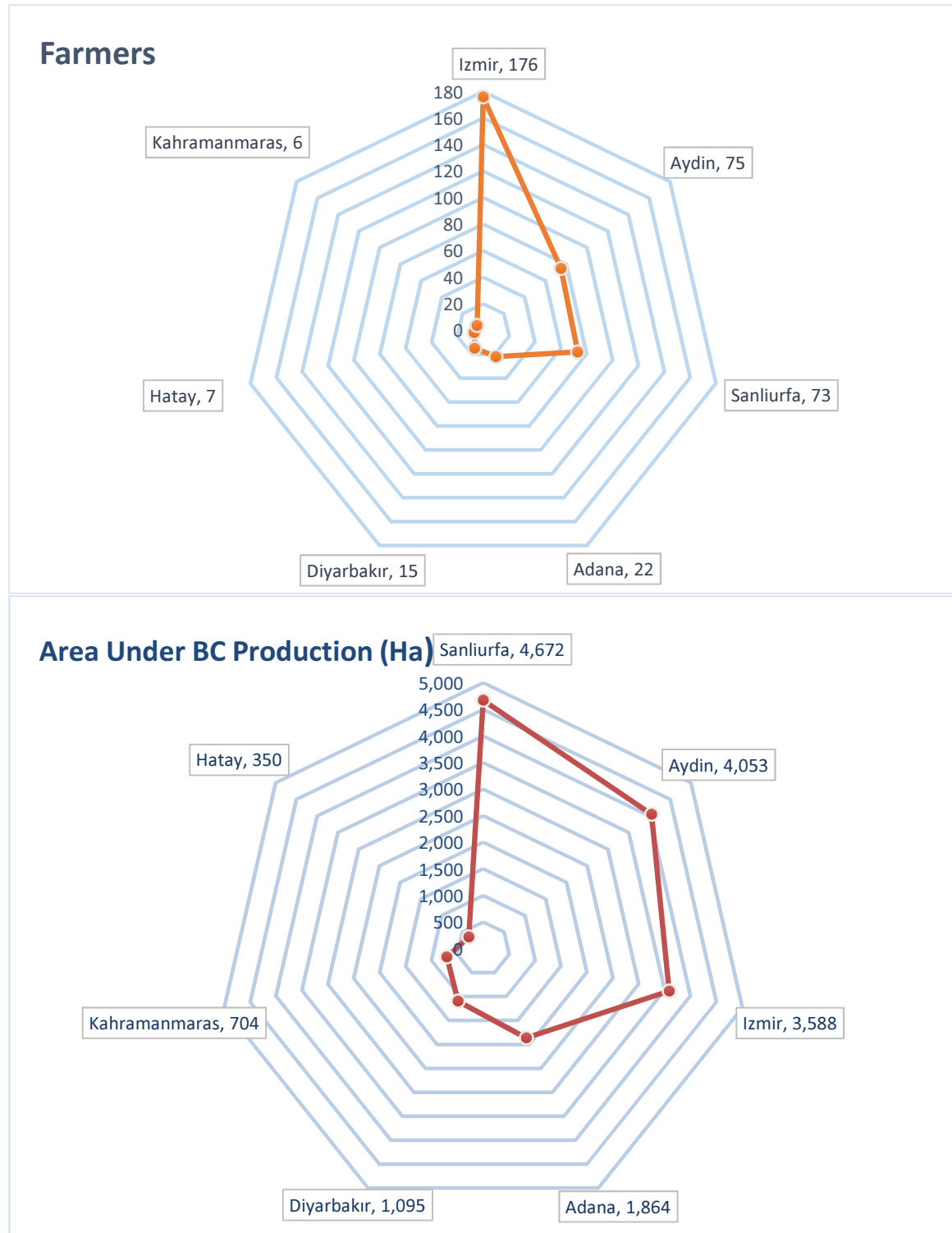
	I: Izmir	A: Adana	K: K'maraş	Ş: Şanlıurfa	Further Comments
		relations with other stakeholders			and the environment', 'developing relations with other stakeholders', and 'increased access to economic opportunities'. K: Fairly even split across all benefits
24. To what extent have BCI and IPUD established local partnerships? (PU Managers only)	Mixed response	Limited awareness of any local partnerships	Generally positive	Mixed response	I: Some reported good relationships, some hoped for better in the future. A: One FO with two years' experience reported never having met IPUD, and not planting cotton in 2016 for economic reasons .
25. What could BC and IPUD do better?	Mixed response	Mixed response, mostly related to improving business case	Mixed response	Mixed response	I: More marketing was the most frequent response, followed by more work with government, then more training. Several requests for more direct contact with farmers (as distinct from FFs or PU Managers) and one for more frequent auditing to aid credibility. A: more partnerships, and work on price policy, e.g. reduce costs in cotton growing, lobby for a premium for BC, marketing and promotion to stimulate demand from brands in Turkey. Also more training. Ş: More advocacy and work with government. K: more training, more marketing and more work to ensure the whole chain benefits.
26. What have you learned from involvement in BC?	Mixed response	Mixed response. 'Not much' to 'innovative changes'	Better knowledge.		I: Responses generally referred to acknowledging the importance of human and environmental health. Being part of an international system was also noted. A: better awareness of sustainability and decent work issues mentioned by some. Also better record keeping. K: Various better knowledge of decent work, and sustainability issues.
27. Has this led to changes in practice?	Generally no	Mostly no, a few yes	Mostly no.		I: Some said yes, most said no (in part because good practice is apparently already in place, in part because changes such as to irrigation are too expensive). A: A few mentioned a change to drip irrigation. K: One report of better health and safety practice.
28. Are there changes	Most	Mostly no, a	Mostly no		I: Many would like to switch irrigation system. One

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you would like to make but are finding difficult	responses refer to irrigation	few yes			respondent referred to the lack of infrastructure for safer disposal of pesticides and containers. A: Some reported variously better health and safety, developing a labour corporation and better record keeping.
Ginners/Spinners					
1. First heard about BC	Through business connections	Through the Adana Stock Exchange or business connections	Through customers		
2. Length of involvement	0-5 years, generally 2-3	Reportedly between 0 and 8 years	2-3 years	1-3 years	
3. Has business improved since BC?	Mostly no	No	Mostly no	No	I: A few report 'yes a little', and some indication of improvement from one ginner in early years, but not recently. Ş: Indications that some may drop out next year. K: One 'yes a little'.
4. What is 'better' about BC	Mostly social benefits, also environmental	Nothing, or social and environmental benefits	Mostly better quality and profit.	Mostly environmental, some social benefits	I: One ginner reported quality benefit, one no benefits in any aspect. K: One reported environmental and social benefits.
5. How does Turkish BC compare with imported BC	Most have never seen imported BC	No observations	Mixed response	Have never seen imported BC	I: One reported Turkish BC as better quality. K: Reports that Turkish cotton better than some, worse than others, and that Turkish has better quality fibre, but more contamination.
6. Do you pay a premium to buy?	Mostly no, or no longer	Yes.	Yes	No.	I: Two report paying a premium. A: generally small premiums of 1-2% or of 5-20krş/kg, premium also rarely related to quality (lower contamination). K: Variously 3%, 15-30 krş/kg and 3-5 cents/kg.
7. Do you receive a premium when you sell?	Mixed response, mostly no	No, or equivalent to what is paid to	Two no, one yes	No.	Ş: One ginner reports demand from a major customer.

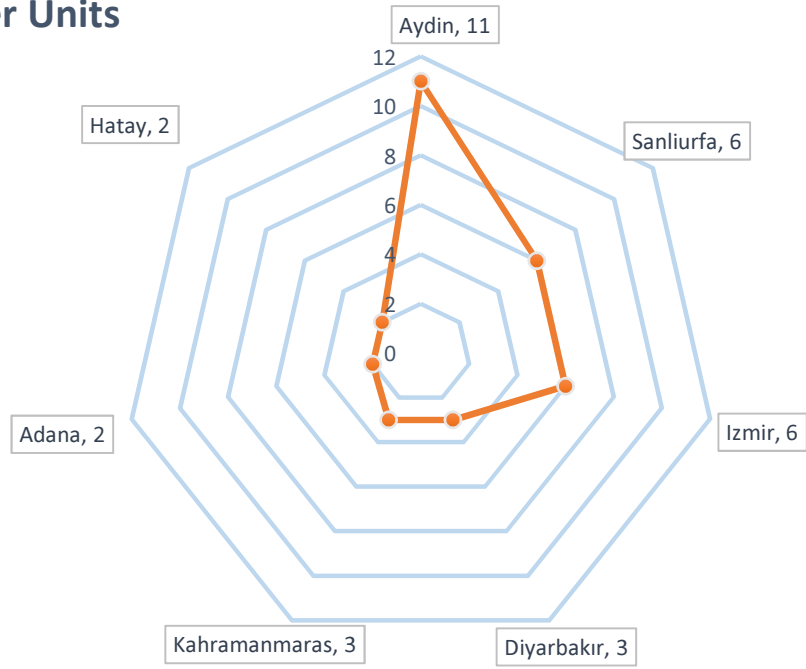
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		farmers.			
8. Could BC be promoted and marketed better	Yes	Yes	Yes.	Yes	A: Involve more spinners, manufacturers. Create demand and improve marketing. I: Various ideas, more publicity and promotion, more work with spinners, and more work in the west of Turkey.
9. Extent of local, partnerships established by IPUD	Mixed response, mainly nil	Apparently limited knowledge of any partnerships	Varied response		A: Report of good partnerships at farmer level (although farmers unhappy), but less at ginner level at not above that level. Some acknowledgment that IPUD's resources are limited. I: Some respondents quite critical of IPUD. K: Mostly complimentary but needs more.
10. Prospects for long-term engagement by BC in Turkey	Mixed response	Cautious response	Cautious response	Mixed response	I: Very mixed across 'don't know', so-so', fairly good' or 'not hopeful'. A: Any long-term prospects seen as dependent on more work with spinners and brands, or with small farmers. Ş: Mix from 'fairly bad' to 'fairly good'. K: Depends on awareness and brands buying into Better Cotton
11. What has been learned or surprised?	Mixed response	Mixed response	Much learned		I: Decent work, impressive training, extent of record keeping, lack of premium. A: learning about decent work, and surprise at minimal engagement with brands. K: Surprised that BC has so little control at spinner level.
12. Most important issue for IPUD to address	Business case	Business case	Business case	Increase demand, and better promotion.	Very uniform response. Suggestion to 'encourage the industry'. One respondent: Reduce pressure on producers. One respondent also mentioned worker's conditions, natural environment and gender issues.

ANNEX B

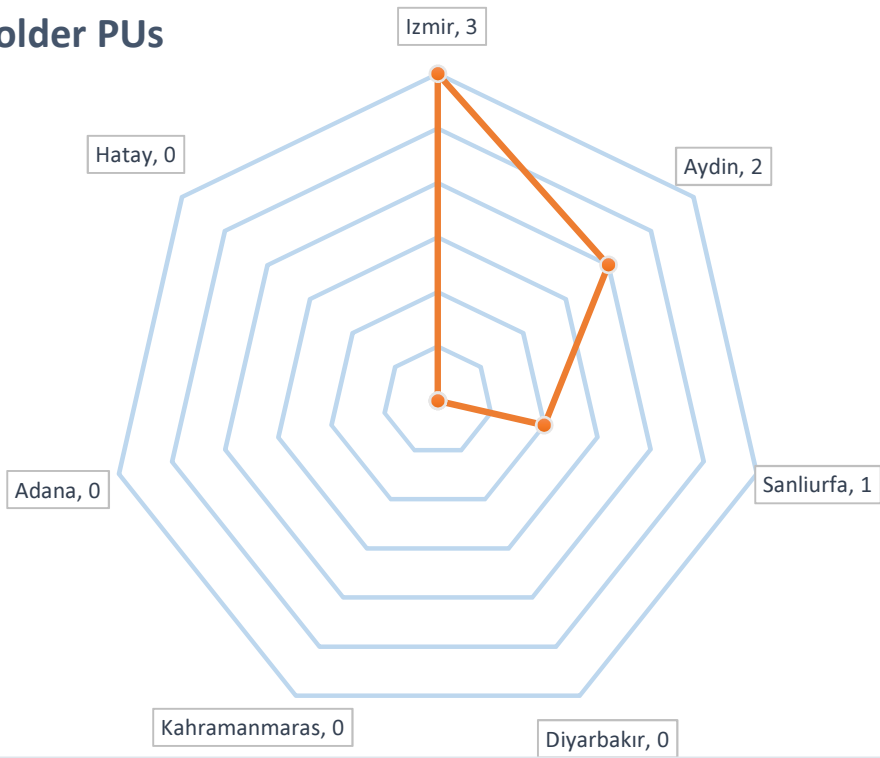
The following charts show the distribution of Better Cotton farmers, and production area across Turkey's major cotton-growing areas.



Producer Units



Smallholder PUs



Medium Size PUs

