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Action Plan for the Implementation of the Alliance for Seed Industry in West Africa (ASIWA)



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ACRONYMS

ACA	Africa Cashew Alliance
AFSTA	African Seed Trade Association
AgIn	Agriculture Input Supplier
AGRA	Alliance for a Green Revolution in Africa
APFOG	APEX Farmers Organization of Ghana
ASIWA	Alliance for Seed Industry in West Africa
ASPRODEB	Association Senegalaise pour la Promotion du Developpement a la Base
CAADP	Comprehensive Africa Agriculture Development Programme
CGIAR	Consultative Group of International Agricultural Research
CILSS	Comité permanent inter-État de lutte contre la sécheresse au Sahel
CORAF/ WECARD	Conseil Ouest et Centre Africain pour la Recherche et le Développement Agricoles/ West and Central Africa Council for Agricultural Research and Development
CSIR	Council for Scientific & Industrial Research
CSIR-SARI	Savannah Agricultural Research Institute
DCS	Directorate of Crop Services
DFID	Department for International Development
ECOWAP	ECOWAS Agricultural Policy
ECOWAS	Economic Community of West African States
EUMOA	West African Economic and Monetary Union
FANA	All Farmers Association of Nigeria
FAO	Food & Agricultural Organization, United Nations
FMARD	Fed Min of Agriculture & Rural Development
GAIDA	Ghana Agri-Input Dealers Association
GLDB	Grains & Legumes Development Board
GOG	Government of Ghana
GON	Government of Nigeria
GOS	Government of Senegal
IAR&T	Institute of Agricultural Research and Training
ICRISAT	International Crops Research Institute for the Semi-Arid Tropics
ICT	Information and Communications Technology
IFAD	International Fund for Agricultural Development
IFDC	International Fertilizer Development Center
IITA	International Institute of Tropical Agriculture
INGO	International NGO
InSup	Input Supplier
M&E	Monitoring and Evaluation
NAFDAC	Nat'l Agency Food & Drug Admin & Control
NAIDANigeria	Agro-Inputs Dealers Association
NARI	National Agriculture Research Institute
NASC	National Agricultural Seed Council
NCRI	Nat'l Cereals Research Institute
NGOs	Nongovernmental organizations
NSTA	National Seed Trade Associations
OPV	Open Pollinated Variety
PCE	Projet de Croissance Economique - USAID
PPRSD	Plant Protection & Regulatory Services Directorate
RegOrg	Regional Organization

SAA/SG2000	SASAKAWA Africa Association
SEEDAN	Seed Development Association of Nigeria
SEEDPAG	Seed Producers Association of Ghana
SODEFITEX	Societe de Developpement et des Fibres Textiles
SP	Seed Producer
USAID	United States Agency for International Development
WAAPP	West Africa Agricultural Productivity Program
WACOT	West African Cotton Co. Ltd
WASA	West Africa Seed Alliance
WASP	West Africa Seed Program
WCF	World Cocoa Foundation
WECARD	West & Central African Council for Agricultural Research & Development

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1. INTRODUCTION TO ASIWA SCOPING AND DESIGN

Background on WASP and ASIWA Concept

With funding from USAID/West Africa, the West Africa Seed Program (WASP) seeks to promote the sustainable improvement of agricultural productivity in West Africa through the increased availability of certified seed. Implemented by the West and Central African Council for Agricultural Research and Development (CORAF/WECARD), WASP works with national governments, regional organizations, and private sector companies to expand the production and supply of open pollinated variety (OPV) seeds and hybrid seeds over a period of five years. The program supports ECOWAS Agricultural Policy (ECOWAP), CAADP, and USAID Feed the Future initiatives in achieving the CAADP target of 6% growth in regional agricultural productivity by 2015. Expanded use of quality-improved seed is critical to boost yields on existing farmland. WASP exists to address the many barriers to seed certification, production, trade, distribution, and use in West Africa.

WASP plans to establish an Alliance for Seed Industry in West Africa (ASIWA) to engage a broad cross-section of key stakeholders and drive WASP objectives at scale. This Alliance will facilitate dialogue with national-level policymakers, regional trade groups, farmers' organizations, and, critically, national and multinational private sector seed companies. This alliance will serve as an essential forum for the discussion of challenges facing the expanded use of OPV and hybrid seeds, a key advocate for national and regional seed policy reform, and platform for market-led private-public-donor solutions towards fostering seed sector development.

In building ASIWA, CORAF/WECARD aims to address chronic issues that have hindered the widespread production, supply and utilization of quality-improved seeds in the region. The present alliance effort is not the first of its kind, and ASIWA can draw on past experience and lessons learned from earlier attempts at building partnerships for seed in West Africa. A regional partnership known as the West Africa Seed Alliance (WASA) was formed in 2009 to address many of the same obstacles that continue to face the regional market for seeds. Learning from the challenges faced by WASA in terms of management and governance may prove invaluable as ASIWA begins to take shape.

Scoping Objectives

The ASIWA Scoping Activity explores the possibility and viability of establishing a sustainable, inclusive and effective partnership among an array of private, public and development stakeholders to expand the production, supply and use of quality seed in West Africa. Such a partnership, or alliance, should complement and reinforce activities currently being carried out under WASP and other development programs focused on the seed sector and improving agricultural productivity in the target maize, rice, sorghum and pulse value chains in West Africa. In this context, special emphasis is placed on building an Alliance that is able to effectively leverage the motivations, resources and ideas from private sector partners with an interest in seed sector development in West Africa.

The scoping and design activity focuses on the following objectives:

Defining a clear value proposition for a new Seed Alliance that reflects the interests and challenges of multiple stakeholders while adding value to existing initiatives focused on seed sector development;

Mapping out the spectrum of possible ASIWA stakeholders and their respective motivations and roles;

Identifying factors and challenges to consider in structuring ASIWA and strengthening its relevance, efficacy and sustainability, including lessons from the now-defunct WASA; and Providing recommendations for structuring a Seed Alliance that aligns stakeholder interests and continues beyond the WASP performance period, with specific emphasis on intensifying the role of the private sector not only in ASIWA but also in broader seed development efforts.

Using the information gained through stakeholder engagement, seed sector analysis and SSG Advisors' experience in alliance building, the Scoping Activity suggests next steps for establishing and operationalizing ASIWA over 2014.

Scoping Activities

To understand where ASIWA could best serve stakeholder interest and spur tangible impact on West African seed development, ASIWA Scoping and Design Study involved:

- ***Meetings in Dakar, Senegal, with CORAF and WASP staff***– An SSG Consultant traveled to Dakar to meet with CORAF and WASP staff to understand WASP activities and respective expectations for the structuring and establishing ASIWA.
- ***Field visits to Senegal, Ghana and Nigeria*** – These three West African countries were selected in conjunction with CORAF to interview over 60 private, public and development partners with existing or potential interest in ASIWA. The field visits were designed to gain insight on stakeholders' perspectives on a new Seed Alliance, their respective interests, priorities, challenges and objectives that overlap with WASP and ASIWA. Annex A lists the stakeholders met during the course of these field visits. Perspectives of different stakeholders are represented under the stakeholder map in Section 4 below. Meetings during the field visits took two forms—(1) multi-stakeholder group meetings organized by CORAF staff in each sample country that included representatives from National Agriculture Research Centers, National Seed Committees, National Seed Trade Associations (NSTAs), private seed companies, farmer associations and others; and (2) individual interviews focused on gaining more individualized feedback on challenges and perspectives within the seed market chain.
- ***Participation in CORAF/WASP's Consortium Meeting in Burkina Faso*** – On December 13 and 14, 2013, an SSG Consultant participated in WASP 2013 review and 2014 work planning sessions. He received feedback on initial recommendations for structuring ASIWA, and gained further insight into progress and planned WASP activities and how the ASIWA could be structured to complement these efforts.

Field activities were supplemented by interviews with seed sector experts, lessons learned in Alliance Building in West Africa and elsewhere, and insights from a variety of analyses of the African Seed Sector.

Report Roadmap

The remainder of this report proceeds as follows. Section 2 delineates the West African seed context and ASIWA's value proposition. Section 3 describes how to structure ASIWA. Section 4 maps stakeholders and their roles. Section 5 considers budget factors. Finally, Section 6 proposes next steps.

2. THE CASE FOR A SEED ALLIANCE IN WEST AFRICA

Before initiating a discussion on *how* to establish ASIWA, it is important to outline *why* establishing a seed alliance makes sense given existing challenges in the West African Seed Sector and the shared values of multiple seed stakeholders. This section provides (a) a brief context of West Africa's seed sector, tracing the need for private-public-donor collaboration; and (b) outlines a series of possible alliance functions that together present a strong value proposition for establishing ASIWA.

West African Seed Context

Although West Africa's agricultural sector is poised for rapid growth and improvements in food security, chronic issues within the seed sector (and the broader agriculture ecosystem) impede the production, supply and utilization of quality-improved seeds and other inputs needed to optimize yields and overall production levels. These issues include:¹

Gaps in production and supply of quality seeds –For decades, the limited availability and perceived high cost of these seeds have constrained farmers' adoption of improved varieties of well-adapted crops. The availability of improved seeds is determined by factors across the seed supply chain, from research and development and breeding, to production, to distribution and extension services. Often National Agriculture Research Systems (NARS) lack the finance, infrastructure and human resources to develop sufficient supplies of well-adapted, quality breeder and foundation seeds. NARS and seed units responsible for foundation seed production often lack timely and accurate market information on the demand for a given seed variety. As such, NARS and foundation seed producers tend to 'guess' towards producing on the low side to avoid having unsold/unused seeds. Even if adequate information was available, publicly funded research institutes, universities and others often lack resources and capacity to produce sufficient volumes of breeder and foundation seeds. In both cases, seed companies that must purchase breeder and foundation seeds from research institutes, universities and other approved entities are unable to commercially multiply sufficient amounts of quality seeds to serve market demand.

There is an interest on the part of both public and private stakeholders to (a) expand the role of private sector (including farmers' associations) in the production of foundation and certified seeds and (b) reduce the financial and technical burden currently placed on the public sector. Doing so requires significant efforts in seed enterprise development (i.e., new business incubation, access to finance support and capacity building); investments in modern seed production, cleaning, and sorting equipment; and technical assistance in quality control.

In many cases, inadequate storage facilities on the part of seed companies and agro-dealers undermine the availability and quality of improved seeds. Seed companies often lack the facilities to store large inventories of seeds for extended periods of time, resulting in supply shortages, delayed supply (as seed producers aim to have seeds ready at the beginning of the season), and spoiled/poor quality seeds entering the market. Investments in new storage capacity could have an immediate and widespread impact on the quality and volume of seeds available during planting period. This, of course, requires seed companies to

¹Note: The purpose of the scoping study and subsequent recommendations was not to carry out a comprehensive analysis of West Africa's seed sector. It is assumed that the audience for this study (namely CORAF, the WASP Consortium, ECOWAS and USAID's West Africa Regional Mission) is aware and knowledgeable of conditions within the seed sector. Rather, this brief analysis aims to present a context of issues within the seed sector that could be addressed within a new seed alliance.

access finance, a challenge given high interest rates and perceptions in the banking sector of agriculture's high risk.

Challenges in breeding, producing, storing and supplying improved seeds—combined with occasional unscrupulous suppliers who market poor seed as quality-improved seed—have undermined farmers' confidence in quality seeds and their corresponding adoption rates. As a result, building farmers' trust in the value and authenticity improved seeds must accompany any efforts to strengthen supply. Building trust might involve a formal regional seed quality and certification program that assures the quality of seeds, and provides farmers with channels for recourse in the event they are sold poor quality or counterfeit seed.

Various development programs, including CORAF/WECARD/WASP, have put financial and technical resources towards building the infrastructure to produce quality breeder and foundation seed, strengthening the capabilities of seed companies, facilitating investments in seed enterprises and developing the capacity for an effective seed certification program. Greater collaboration among private, public and development partners across West Africa is necessary to enhance these programs' effectiveness in two areas.

Challenging seed policy environment – Multiple policy constraints contribute to the availability of improved seeds and overall seed sector development across West Africa, including inconsistent and inappropriate national seed regulations across the region and gaps in institutional capacity. These policy constraints add time and cost to the process of placing new seed varieties on the market, which can take up to 5 years in some countries. The inconsistency and non-reciprocal nature of seed trade regulations within West Africa often prevent seed companies from engaging in regional seed trade, sometimes discouraging the introduction of new seeds all together. The policies themselves are often unclear or poorly communicated, which makes the process of market entry and registration difficult and unpredictable for seed entrepreneurs.

Current programs, including WASP, aim to harmonize regional seed policies under the auspices of ECOWAS member states and CILSS countries. Implementation of the ECOWAS Regional Seed Regulations is mixed, due to lack of capacity and in some cases lack of political will. Without the complete alignment of regional seed variety release and cataloguing, seed certification standards, accreditation and seed import/export issues across ECOWAS, EUMOA, and CILSS member countries, it will be difficult to achieve the desired impact of regional seed policy harmonization. In this context, collective regional efforts are needed to advocate continued alignment of national seed policies and accelerate harmonized seed policy implementation.

Underdeveloped seed markets – West African seed markets and the output markets they serve are generally too small and fragmented to attract the level of investment and commercial seed enterprise development that helped drive seed sector development in Eastern and Southern Africa. Given regulatory obstacles to regional seed trade, growing local seed companies can only target small national markets, making it hard to justify investments in modern technologies and capacity to produce quality seed, let alone achieve the economies of scale needed to produce seeds at prices affordable for farmers. Similarly, international seed companies are unable to leverage a broader regional market to justify large investments in regional distribution systems, let alone investments in regionally adapted varieties.

At the same time, output markets (e.g. markets for maize and rice) in West Africa are also small and fragmented, making it difficult to link seed entrepreneurs with actual seed consumers. This not only contributes to gaps in the market information needed to inform foundation seed production, but also makes it harder for seed enterprises to develop sound business growth strategies and access finance. As West African agriculture markets mature, so will West African seed markets.

While well intentioned, some government seed subsidy programs have also negatively impacted seed sector development. Seed subsidy programs put downward pressure on seed prices and distort markets, making it harder to justify investments in quality seed production capabilities. If poorly implemented, subsidy programs result in supply delays for farmers, such that farmers either (a) have poor results due to late planting, or (b) choose to rely on traditional saved landrace varieties rather than improved seed varieties.

Farmers' low adoption rate for quality seeds corresponds to lower demand for quality seeds. Many farmers are more comfortable cultivating with landrace varieties than commercial seeds. In addition, farmers who are sold poor quality or counterfeit seeds resulting in failed crops are less likely to trust, and therefore purchase, seeds marketed as 'high quality' in the future. The same is the case for farmers who purchased quality seeds but did not have access to the extension services needed to ensure proper cultivation, harvest and post-harvest practices. Furthermore, farmers who have traditionally saved landrace varieties may not be comfortable using hybrid and OPV seeds that they cannot harvest and replant, and instead require buying new seeds every season.

To a larger extent, however, the cost of improved seed limits adoption. While use of quality improved seeds can significantly increase yields and incomes, many small farmers cannot afford to purchase improved seeds up front. These financing needs are exacerbated when the benefits of certain seed varieties are only cost-effective when used in conjunction with fertilizers, crop protection products and modern production techniques. It is unlikely that adoption rates will increase without appropriate agriculture input finance solutions, preferably linked to extension services, output markets, and quality assurance.

Many obstacles to robust seed sector development mentioned above are linked. Fragmented output markets make it hard for farmers to access finance to improved hybrid or OPV seeds, thus lowering seed demand and investment in new seed breeding and production capabilities. Gaps in the production and supply of quality and certified seeds entering the market lower farmers' confidence and adoption in new higher yielding seeds. In this context, challenges and solutions to seed sector development are linked to multiple stakeholders across the seed market chain, creating a clear rationale for developing a platform like ASIWA.

ASIWA's Value Proposition

ASIWA will allow interested stakeholders to convene and collaborate in efforts to increase the production, supply and utilization of quality seeds in West Africa. The joint participation of private sector firms, national and regional government agencies, and development stakeholders will ensure that ASIWA captures the respective needs, goals, and resources of each of these groups and responds with informed programming that leads to further development of West Africa's private seed sector. ASIWA could add significant value to seed development efforts in various domains described below:

Convening Point for Seed Stakeholders

One of ASIWA's most important functions is to serve as a convening point for stakeholders with direct or indirect interest in seed sector development. Like other alliances, ASIWA can foster consultation, coordination and collaborative troubleshooting among stakeholders across the seed market chain. ASIWA is also well poised to help capture and leverage synergies among the multitude of projects, initiatives and partners involved in seed development and agricultural productivity. In particular, bringing together a wide range of stakeholders focused on a common interest will make it easier to coordinate and encourage the involvement of private sector in seed sector development efforts. Furthermore, as the convening point

for a broad range of seed industry stakeholders from throughout West Africa, ASIWA has the potential to serve as a policy advocate on key issues that are identified by its members. Where appropriate, ASIWA could establish a relationship with COASem as a policy advocacy partner.

Communications Hub

As a focal point for activities in the seed sector, ASIWA could serve as a platform to exchange and disseminate ideas, experiences, and best practices in seed development, within the context of a Community of Practice as well as through more traditional communications tools. ASIWA would serve as a trusted source of seed industry information for stakeholders throughout West Africa, allowing companies, government agencies, NGOs, and development partners to share relevant content across borders, across the public-private divide, and throughout the certified seed value chain. Importantly, SSG proposes that ASIWA also serve as a forum for dialogue and debate to address challenges that are common to the seed trade throughout the region. National ASIWA Affiliates will provide a space for discussion, knowledge-sharing, and collaborative learning that pertains to country-specific seed industry issues.

Market Facilitation and Industry Development

Multiple stakeholders during the field study suggested that ASIWA could use its convening power to find market-led solutions (at national and regional levels) that foster the development of a private sector seed industry. These would consist of private-private and public-private initiatives at the national and regional levels to spur the adoption of improved seed by West African farmers, and therefore the growth of the West African seed market. Such initiatives may include:

- Strengthening the capacity of private seed enterprises (including farmer associations interested in foundation seed production) through investment, technical assistance and technology transfer;
- Working with stakeholders to jointly develop market-driven solutions (e.g., financing) to expand and improve seed production and supply; and
- Collaborating with farmer associations, seed companies and other input suppliers to deploy input packages (possibly combined with extension services) with seeds, fertilizer and crop protection.

Further details on how to operationalize these functions through ASIWA are presented in the sections that follow.

3. BUILDING BLOCKS FOR STRUCTURING ASIWA

Given the current context of West Africa's seed sector and potential to add significant value to ongoing and future seed sector and agriculture development efforts, there is a strong case for CORAF/WECARD-WASP to pursue launching a new seed alliance that achieves both private sector and development objectives while mitigating existing risks and challenges to its success. This section discusses multiple building blocks for structuring ASIWA, including (a) ASIWA's vision; (b) prospective results framework based on shared value from both private sector and development perspectives; (c) proposed strategic principles; (d) proposed organizational structure; and (e) map of regional and national stakeholders that CORAF/WECARD-WASP should engage in the further design and launch of ASIWA.

Vision for ASIWA

Based on the scoping exercise and engagement with stakeholders across the seed market chain, SSG Advisors propose that ASIWA be structured to serve as *a sustainable, inclusive, effective platform to facilitate consultation and dialogue among West African seed industry actors, enable expanded cooperation between public and private seed stakeholders, and drive collaborative learning to expand production, supply and use of quality seed in West Africa*. This platform would involve both regional and national aspects, with the regional platform playing a more strategic role, and national platforms playing a more tactical role in supporting and coordinating seed development across the region and specific country contexts (more details on these distinctions are provided below).

ASIWA would pursue an inclusive approach in engaging a spectrum of private sector stakeholders (seed users, end buyers, seed trade), science and research institutes (public and private), and government agencies involved in seed research production and regulation. Heeding lessons learned from past alliance efforts, the interest of members/stakeholders in the broader seed ecosystem would drive ASIWA and ensure its institutional relevance, operational effectiveness, and sustainability, with the development community offering initial institutional support and financial resources.

Prospective ASIWA Results Framework based on Shared Value

ASIWA's results framework should incorporate both the interests of the development sector and private sector. Figure 1 and Table 1 below present a prospective results framework to incorporate into ASIWA objectives and design, with a brief summary of how each result area contributes to shared values.

Figure 1. ASIWA Results Framework

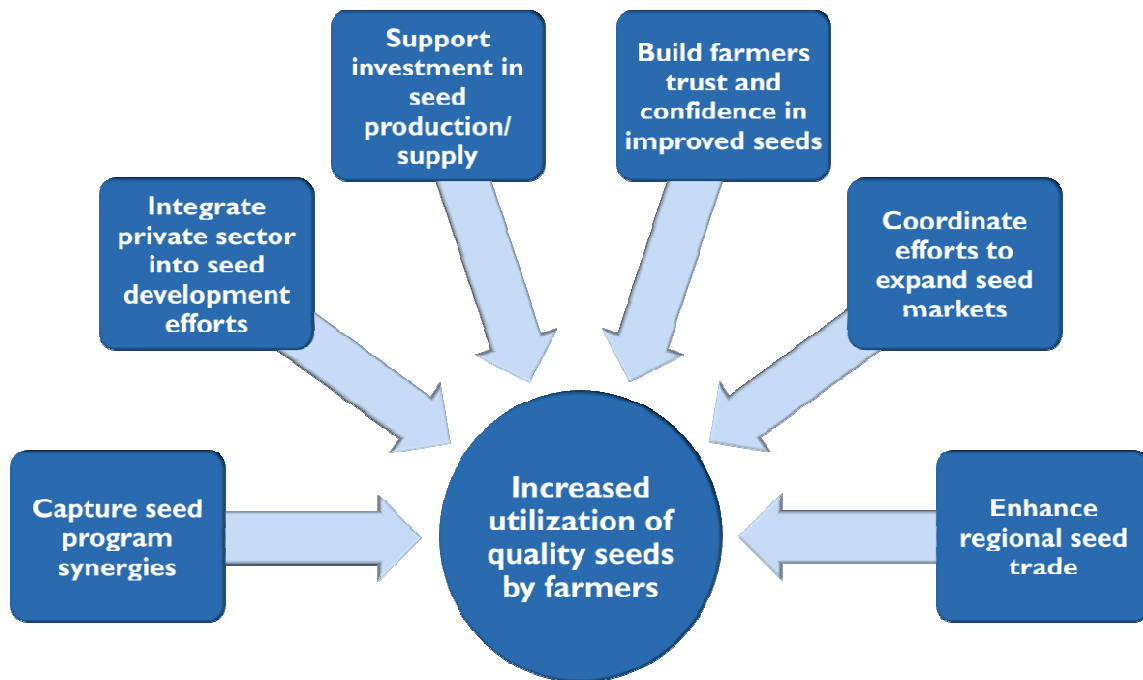


Table 1: Shared Value by Result Area

Result Area	Private Sector Benefits	Development Benefits
<i>Increase utilization of quality seeds by farmers</i>	<ul style="list-style-type: none"> • Higher productivity and incomes for farmers. • Increased production. • Expanded market for seed companies. 	<ul style="list-style-type: none"> • Improved food security and livelihoods through higher farmer productivity.
<i>Enhance regional seed trade</i>	<ul style="list-style-type: none"> • Increased access to greater variety of quality seeds for farmers. • Market growth opportunities for export-ready seed companies. 	<ul style="list-style-type: none"> • Enhanced regional food security.
<i>Coordinate efforts to expand seed markets</i>	<ul style="list-style-type: none"> • Increased availability and diversity of improved seed for seed users, with more affordable prices due to competition and larger markets. • Market growth opportunities for seed companies. 	<ul style="list-style-type: none"> • Potential to leverage efforts of multiple projects and seed stakeholders to increase access and use quality seeds, resulting in higher food security and smallholder livelihoods.
<i>Build farmer's confidence in improved seeds</i>	<ul style="list-style-type: none"> • Increased demand for quality seed, creating market for development, breeding production and distribution, and benefitting enterprises (and research institutes) across seed supply chain. • Increased interest in investing in quality seed research, production, storage, financial solution and distribution system. • Increased yields and incomes for seed users who switch to improved seeds. 	<ul style="list-style-type: none"> • Increased number of farmers adopting new seed technologies and production practices, resulting in higher productivity. • Growing market to sustainably develop a private seed sector.
<i>Support investment in seed production/supply</i>	<ul style="list-style-type: none"> • New market/investment options for banks, impact and equity funds. • Private seed companies able to grow and move into new seed and geographic markets, with reduced spoilage from poor infrastructure. 	<ul style="list-style-type: none"> • Growing more capable private seed sectors able to better serve farmers' need to access improved seed markets. • New job creation through seed enterprise investment.
<i>Integrate private sector into seed development efforts</i>	<ul style="list-style-type: none"> • Private seed enterprisers, seed users and end market buyers able to better leverage financial and technical support targeting seed development. • Private sector better able to inform seed development efforts actually result in outcomes that strengthen the seed market chain and business interests therein. 	<ul style="list-style-type: none"> • Easier for development partners to leverage finance, technology transfer and knowledge of the seed sector to increase utilization of improved seeds on the part of farmers. • Increase the scale of impact possible through available development resources.
<i>Capture program synergies</i>	<ul style="list-style-type: none"> • Private seed sector spends less time and resources being engaged by different seed development programs. • Private seed sector able to more efficiently and effectively take part in development efforts focused on seed sector development 	<ul style="list-style-type: none"> • Development partners and donors able to optimize and leverage staff and financial resources and build upon complementary and supplementary initiatives, and achieve outcomes difficult to achieve separately.

Challenges in Establishing ASIWA

While a new seed alliance could translate to tangible value for West African development initiatives, several mitigating factors must be considered in deciding whether to establish ASIWA and planning its structure, activities, and governance.

Market Dynamics Considerations

One key factor is that many ingredients found in other promising agriculture-based alliances in West Africa may not exist in the region's seed sector. Alliances efforts such as the African Cashew Alliance (ACA), Global Shea Alliance, and the WCF African Cocoa Initiative involved higher value products with relatively well-structured private-sector-driven value chains with large local, regional and/or international buyers to create sufficient incentive (if not need) for stakeholders to become involved. These alliances often involved a select number of anchor buyers with the largesse, credibility and importance in the sector to create a pull effect that not only brought others into the alliance, but also had a vested interest in ensuring the success and sustainability of alliance efforts. In this context, a proposed seed alliance faces multiple challenges in achieving that critical 'pull effect.'

Seeds are not a 'high value product' – While critical to producing value through their yields, seeds in West Africa are not generally seen as a valuable product with large buyers that attract stakeholder buy-in. The ACA has been successful partly due to the fact that it represents a growing, high value market with regional and international buyers interested in expanding the supply of cashews through an African sector able to meet their standards. These large buyers are willing to invest in the Alliance to secure supply, while local cashew companies needed to join ACA and comply ACA standards to obtain access to the growing market for African cashews. In this case of cashews, the risk of inaction is greater than the risk of action—a clear incentive to attract private sector involvement. However, in the case of seeds, such a connection to market value is difficult to articulate, creating a potential risk in ASIWA's ability to attract sufficient interest from private sector stakeholders.

ASIWA targets multiple seed markets within fragmented grain markets in multiple countries – Other alliance concepts in West Africa have focused on one specific product and value chain, which makes it easier to engage key market stakeholders, incentivize changes in practices, and drive industry investments. Given WASP's focus on maize, rice, sorghum and pulses, ASIWA will target multiple seed markets serving different grain value chains in multiple countries, which correspond to different seed users, different end markets, market dynamics and potential champions.

Even with well structured national and regional grain markets, any effort to organize demand, align interests and leverage the interests of champions across multiple market chains would be challenging. In West Africa grain markets are fragmented, such that even efforts to develop a West African Grain Alliance could face issues bringing together stakeholders and finding initiatives that would be relevant across value chains and markets.

This dynamic creates multiple challenges for ASIWA. First, there are only a few clear commercial champions able to play the influential role needed to 'bring others along' across the various markets and create a critical mass of proactive and engaged members. Second, it will be difficult to align interests and focus on collective efforts across seed sectors, which will complicate raising sufficient stakeholder interest for specific initiatives to be successful. Finally, unless the Alliance is able to focus on initiatives across the different seed market chains, there is a risk that ASIWA could become focused on specific seed markets (i.e., rice versus sorghum), thereby adding to the scope and complexity of ASIWA activities.

The private seed market is underdeveloped – One key concern of SSG's scoping team and West African seed experts in launching a 'private sector oriented' alliance is that West Africa's private seed sector is relatively small, with few local or regional champions positioned to play a leading role in establishing and influencing ASIWA activities and impact. This dynamic may require an Alliance that while private sector oriented, is initially managed and led by development partners, with a strategic focus on expanding and strengthening private seed sector and using ASIWA activities to help nurture and encourage potential local and regional seed champions.

WASA Lessons Learned

In addition to challenges stemming from market dynamics within the seed sector, any new alliance will need to address a number of lessons learned and perception challenges from the now defunct WASA that could impact the ability to attract a critical mass of interest in a new alliance.

Many stakeholders, presently and during past evaluations, perceive WASA as donor- and government-driven. Specifically, feedback suggests that WASA did not do enough to effectively engage the private sector as partners, focusing more on NGOs, development projects, science and research institutions and public agencies. Many potential ASIWA private sector partners feel uncertain as about whether taking part in a new alliance is in their interest because they remain skeptical about whether a new alliance could indeed be private sector-oriented.

WASA is also perceived by many within the West African seed sector to have a limited focus on smaller seed companies, relative to larger multinational seed companies. The value of involving the multinational seed companies is not disputed in terms of knowledge and technology transfer and the commercial relationships multinationals develop with local seed and input distribution networks. Local seed companies, however, appear unsure as to how a new alliance would benefit them, further raising concerns as to whether ASIWA could onboard them as members or partners.

Another more challenging legacy of WASA, linked to the lack of private sector orientation, is that the Alliance was not seen to bring any tangible benefit to seed sector stakeholders. Instead of being a mission-driven organization serving the West African seed sector, WASA was associated more with organizing conferences among development partners. As a result, a number of potentially valuable private stakeholders or ASIWA ‘champions’ have indicated they will take a ‘wait and see’ approach before actively engaging in a new alliance.

Responses to Challenges

Any effort to establish a new alliance will face a number of efficacy and sustainability challenges, so the considerations presented above should not necessarily be seen as reasons not to move forward with the ASIWA concept. Rather, the decision to formally pursue ASIWA and any subsequent designs must incorporate these factors and others that will impact how successful it will be in the long-term. Key steps to mitigate challenges include:

Identify means to aggregate market demand and attract market champions to create a sufficient demand pull to attract enough private stakeholders for effective and inclusive engagement. One way to do this is to focus on issues that impact stakeholders across various seed and grain markets, such as seed quality, regional seed policies, finance and investment, and seed enterprise development. Another tactic would be to focus on end market champions that have an interest in sourcing more production from West African farmers (as opposed to importing product). End market champions could include large grain traders (such as those based in Kano, Nigeria), breweries, millers, and feed producers. Recognizing the fragmentation of West African grain markets, this might require a market-by-market, country-by-country approach. Ideally, these end market champions would realize the value in collaborating with the seed sector as a way to expand production along a specific grain value chain. Bringing market champions into ASIWA would make it easier to attract other relevant stakeholders within a seed market chain, help

West Africa Seed Alliance (WASA)

The West Africa Seed Alliance began in 2009 as a collaborative effort between USAID/West Africa, the Alliance for a Green Revolution in Africa (AGRA), the African Seed Trade Association (AFSTA), and ECOWAS to promote the growth of the seed sector and related agro-industry in West Africa. Lessons from the now-defunct WASA should be regarded as essential guidelines for ASIWA in terms of private sector engagement and internal partnership governance.

organize a real market demand for crop production using quality seeds, and incentivize seed users and seed companies alike to adjust their practices accordingly.

Incorporate a clear private sector orientation into ASIWA's design and early activities .Private sector stakeholders, if properly engaged, can be central drivers of sustainability within industry alliances. However, alliances need to be focused on delivering real value to private sector stakeholders in order to attract and hold their interest. Unlike public sector partners, whose interests are often reflected in the development aims of an alliance, private sector firms must see a direct or indirect business opportunity to justify their long-term involvement. If private sector partners, large and small, can see how a seed alliance would positively impact their day-to-day business, market and growth opportunities and profitability, they will be more apt to actively participate in ASIWA activities. This can be achieved by orienting ASIWA initiatives that prove the Alliance's added value across the seed market chain and convince private sector stakeholders that private-public-donor engagement will result in tangible, beneficial outcomes for them.

Utilize robust communications and stakeholder engagement. Given the legacy of WASA and general skepticism among many in the field study, it is critical that WASP carry out an early and robust communications campaign aimed at articulating ASIWA's potential value to different types of stakeholders (e.g., seed companies versus end users), along with efforts to actively engage stakeholders across the seed market chain, with a focus on previously overlooked champions in local seed sectors. One potential tactic for demonstrating ASIWA's value early on (as well as establishing a communications tool to publicize future ASIWA activities), would be to launch a Community of Practice as soon as possible, providing a virtual forum for dialogue and knowledge-sharing among West African seed industry stakeholders.

The proposed design and structure of ASIWA incorporate the factors and risks discussed above and include strategies and organizational structures to mitigate the potential impact they could have on ASIWA's successful launch and sustainability.

Strategic Principles for the Launch and Operation of ASIWA

Based on feedback from the scoping mission, interactions with the CORAF/WECARD-WASP Team during the work planning meetings, and lessons from previous experiences in building multi-stakeholder alliances in Africa and elsewhere, three key strategic principles should be incorporated into ASIWA's design, launch and operations:

Private Sector Orientation

As noted throughout this document, it is critical that ASIWA's structure and activities are oriented towards the needs of growing private seed enterprises and create an environment conducive to increasing the role of the private sector across the seed supply chain. From the start, ASIWA activities should demonstrate the added value of private-public-development partnership in seed sector development to attract the critical mass of members needed for the Alliance to be effective and sustainable.

Given underdevelopment of the private seed sector, it will be challenging for ASIWA to be private-sector-led from the start, even if private sector oriented. Within this context, WASP and early ASIWA management should place an early emphasis on identifying and encouraging private sector 'champions' to emerge within the private seed sector to play ever-larger roles in the Alliance's direction and management.

Focus on the Value of ‘Convening’

Despite the wide spectrum of potential (and needed) interventions that could ‘increase utilization of quality seeds by farmers’ in West Africa, it is important that ASIWA focuses on realizing the most important value proposition of most Alliances: convening power. In this context, SSG proposes that ASIWA leverage this convening power to:

- Connect stakeholders across multiple WASP and other seed initiatives;
- Enable communications needed to build awareness across stakeholders;
- Facilitate coordination to capture synergies and optimize programs targeting seed development and productivity improvement in staple value chains; and
- Foster collaborative learning among private, public and development partners and generate cooperative solutions requiring multiple partners.

It is important that ASIWA does not try to do too many things, or try to implement initiatives that would be carried out better by other development projects in West Africa. For example, while ASIWA could help stakeholders develop solutions to ensure that farmers have access to the extension services to optimize yields, the Alliance should be careful about becoming directly involved in the delivery of specific services. Focusing on leveraging its convening potential will ensure that ASIWA’s long-term cost structure does not rely on large programming budgets, while remaining relevant to private sector stakeholders.

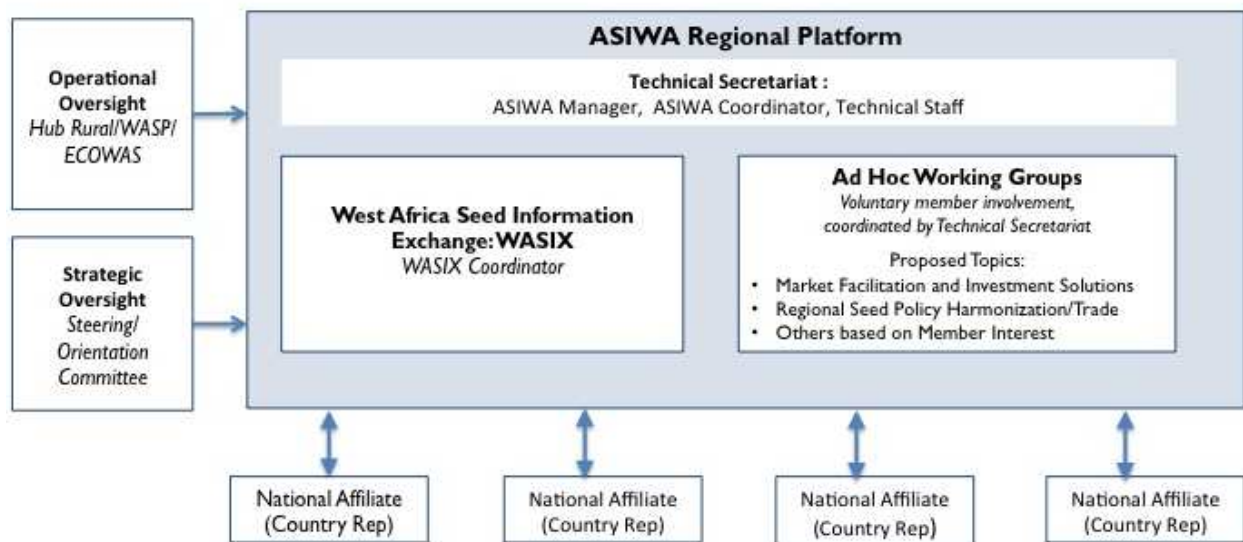
ASIWA as a Source of Continuity

As a transparent, effective, and adaptive partnership, ASIWA will convene private, public, and development stakeholders at the national and regional levels in West Africa to increase the utilization of improved seed by West African farmers. Unlike many development initiatives in West Africa, ASIWA is not tied to a particular project timeline. That being the case, ASIWA can be an important source of continuity for seed industry development in West Africa. By drawing on the body of knowledge that ASIWA collects, existing development programs can develop synergies with one another and engage key private partners. Future development projects can ensure that their work is not duplicative, and that they act on lessons learned by those in the past. Similarly, private sector companies can turn to the ASIWA community to seek partners for new business ventures. ASIWA should aim to capitalize on its potential value as a source of long-term sustainability for West African seed industry development efforts.

4. PROPOSED ASIWA STRUCTURE

As noted above, the proposed vision involves a platform with both regional and national platforms integrated by a number of common functions and objectives. Figure 2 below presents a basic organizational structure of ASIWA, followed by details on proposed elements of the ASIWA organization. Specific staffing considerations within this framework are discussed under Section 5, Budget Considerations.

Figure 2: ASIWA Organization Chart



ASIWA Regional Platform

The core of ASIWA activities would be led and coordinated by a small technical secretariat that would initially report to WASP management with involvement from a steering/orientation committee of ‘champions’ with an interest in seed sector development. This steering/orientation committee would be selected by ASIWA members and involve a cross section of private, public and development partners with an interest in seed sector development (including private sector seed users and end market buyers in the four grains markets served by ASIWA and WASP). Over time, WASP management would play a decreasing role in the direction of ASIWA, with the steering committee playing a larger role overseeing the ASIWA management and direction.

Led by the ASIWA Technical Secretariat, the regional platform would serve as the convening point for regional seed development coordination, dialogue, advocacy, learning, creation of solutions and capturing synergies and lessons learned of regional seed initiatives. The Technical Secretariat would also coordinate ad-hoc working groups (see below) focused on issues of common interest amongst ASIWA stakeholders.

Another key function of Regional Platform would be to manage a proposed *West African Seed Information Exchange, or WASIX*. WASIX would serve as a communications hub, information clearinghouse, and platform for knowledge sharing and collaborative learning on issues related to seed development. Specifically, WASIX would:

- Foster development of a West Africa Seed Community of Practice to facilitate the exchange of ideas, experiences, and best practices among stakeholders interested in seed sector development;
- Gather and disseminate information on seed demand and supply across markets;²
- Carry out discrete analyses on seed markets, seed market development, lessons learned, best practices, etc.;³ and
- Facilitate the exchange of information and lessons learned across ASIWA regional and national membership bases and Initiative-Based Platforms.

National Affiliates

Most stakeholder engagement and participation would take place at the national level, through national ASIWA Affiliates (e.g., ASIWA Nigeria, ASIWA Burkina Faso), which would serve as national platforms involving the private sector (seed companies, NSTAs, agro dealers, seed users, farmer associations, grain end buyers, finance), government, research partners and relevant development projects or donor partners. National affiliates would serve as a convening point for dialogue on seed policies (e.g., implementation regional seed policy harmonization), seed quality and certification. They would facilitate linkages among seed companies, seeder users, end buyers, and service providers (e.g., banks, marketing companies), in addition to linkages between the commercial sector and research institutes that catalyze market and industry development solutions. Depending on their respective capabilities, these national affiliates could be hosted by NSTAs or National Seed Committees, building upon WASP activities focused on NSTA capacity building.

ASIWA Ad-Hoc Working Groups

Although the regional platform and national affiliates will play a critical role in the areas of convening and coordinating, SSG proposes creating demand-driven Ad-Hoc Working Groups made up of stakeholders or champions with a vested interest contributing time and resources toward a specific objective or initiative. These voluntary working groups will be led by ASIWA members and facilitated by the ASIWA technical team as needed. Specific groups could pursue advocacy initiatives or use interactions between interested stakeholders to collectively troubleshoot and address challenges in seed sector development. Depending on stakeholder buy-in and available donor budgets, initiatives coming out of the working groups could be funded or supported by governments, donors, or international organizations. Alternatively, Ad Hoc Working Groups could serve as consultative forums for development partners working in a specific area. In some cases, an Ad Hoc Working Group could involve WASP activities integrated within ASIWA.

WASP can expect that many of ASIWA's more interesting outcomes from the Ad-Hoc Working Groups, which by nature have greater potential to be more results-oriented than a regional or national platform, especially with sufficient stakeholder buy-in, ownership and focused collaboration. Possible Working Groups for initial consideration by CORAF/WASP include:

Market Facilitation and Investment Solutions Group

Market Facilitation and Investment Solutions Groups at both the regional and national levels could facilitate relationships to create technical, market and financial solutions needed to (a) expand the role of the private sector in seed production and supply; (b) facilitate investment in seed companies needed to expand the production, storage and distribution of quality seeds; and (c) improve the ease with which seed users can access and pay for quality seeds. Examples of potential initiatives within a regional or national Market Facilitation and Investment Solutions Group include:

² This is an activity currently carried out under WASP that could be a valuable service provided by ASIWA.

³ Same as above.

- Providing financial, technical and business development services to incubate new private seed businesses and support emerging seed enterprises (including farmer associations);
- Working with banks to develop credit solutions to meet the financing needs for emerging seed businesses (e.g. working capital, investment in production, cleaning, storage);
- Working with seed companies, agro dealers and banks to develop credit solutions to enable farmers to access quality inputs;
- Working with other input providers (e.g., fertilizer, crop protection) to develop technical packages targeting smallholder farmers, and organize demonstration plots to promote modern cultivation techniques and technologies;
- Work with ICT companies and mobile carriers to find innovative means to integrate ICT solutions into seed distribution, extension services and market information systems.

The Market Facilitation and Investment Solutions concept could easily be integrated into current WASP activities focused on providing business and financial services to seed enterprises, and easily link with other development projects working with seed companies, seed users and end buyers alike, as a means to help better structure grain markets. The various types of solutions coming out of this group could also help drive ASIWA's value proposition in the ideas of stakeholders across the seed market chain.

Regional Seed Harmonization and Trade Group

With ongoing efforts to coordinate regional seed harmonization with governments on the part of ECOWAS, EUMOA and CILSS efforts, the ASIWA Regional Seed Harmonization and Trade Group would serve as a venue to enhance private sector feedback and dialogue in the process. The Group could work alongside ECOWAS, EUMOA and others partners to pressure national governments and agencies to speed up the pace of seed policy harmonization and implementation (which often lags) and to identify gaps in implementation or non-compliance. The Group could also play a role in promoting an overall environment conducive for regional production and trade of quality seeds and inputs.

As part of the next phase in establishing ASIWA, SSG Advisors proposes CORAF/WECARD-WASP engage potential private sector partners, ECOWAS/EUMOA, development partners and others to identify other possible working group concepts and prioritize/select working groups based on buy-in, potential impacts and synergies with other seed and agricultural development initiatives.

5. ASIWA STAKEHOLDER MAP

To be effective and sustainable in the long-term, ASIWA must engage the entire spectrum of stakeholders within the seed market chain. This not only means inclusive engagement with stakeholders⁴ with a direct interest in seed production and supply (e.g., research institutes, breeders, seed companies and agro-dealers) and relevant development programs, but also the broader eco-system of partners with an interest in increased seed trade, greater availability and authenticity of quality seed, and overall growth in yields and productivity in key grain markets within West Africa.

Stakeholder Map

Research and scientific institutes—They include National Agriculture Research Institutes (NARIs) and public universities involved in the research, development and production of new germplasm, breeder and foundation seeds. Given budgetary and capacity strengths, these institutes struggle to meet the demands of the market and are often cited as a cause of seed supply and quality issues. In many cases, research and

⁴ As part of the field study, SSG's consultant met with stakeholders from Senegal, Ghana and Nigeria. A list of interviewed stakeholders is in Annex A. The Field Report is provided in Annex C.

scientific institutes are not allowed to subcontract breeder seed production to private enterprises and are generally responsible for foundation seed production as well. With CORAF/WECARD-WASP support, there are ongoing efforts to transfer a larger role of foundation seed production to the private sector, and where possible encourage the private sector to go into breeder seed production enabling these institutes to focus more on the research and development of regionally adapted quality improved seed varieties in collaboration with international research institutes such as IITA, ICRISAT, AfricaRice and others within the Consultative Group of International Agricultural Research (CGIAR).

Local seed companies—They include companies involved in the commercial production, marketing and trading of seeds to agro-dealers and farmers. These seed enterprises are often blamed for issues related to the quality and volume of seeds entering the market. While local seed companies often lack adequate technologies and practices to produce, clean, sort and store quality seeds, seed companies are also affected by other stakeholders in the seed supply chain. Seed companies rely on breeders (NARIs, Seed Units and Universities) to procure the foundation seed needed to produce seeds for multiplication, such that gaps in the quality and volume of foundation seeds have a large impact on their business. Seed companies are also the interface between government seed subsidy programs, and thus are impacted by resulting price distortions and delays in subsidy program implementation. Unscrupulous seed companies that market counterfeit or fake seeds also affect upstanding seed companies. Local seed companies engaged by ASIWA will have an interest in activities that (a) develop their own capacity to produce and supply seeds (through business development services, access to finance, and technical assistance), (b) improve the quality and availability of foundation seeds, and (c) enhance the adoption (and thus demand) of quality improved seeds on the part of farmers. Larger seed companies will also be interested in efforts to accelerate regional seed policy harmonization that would enable them to market seeds throughout West Africa.

National seed trade associations – Many seed companies are represented by NSTAs, several of which are members of the African Seed Trade Association. Stronger NSTAs could lead National ASIWA affiliate platforms. Weaker NSTAs could leverage the affiliate platforms and institutional support from AFSTA, WASP and the ASIWA regional platform to build their credibility and capacity within respective markets.

International seed companies—They include large multinational seed companies (e.g., Monsanto, Syngenta, Dupont/Pioneer) and African-wide seed companies (e.g., Zimbabwe-based SeedCo), both with varying presences in the West African region, in part due to challenges in market access (i.e., seed approval processes in absence of regional seed policy implementation), the smallholder nature of farming in West Africa, the fragmentation of West Africa staple crop markets, and low utilization/interest in improved seeds and hybrids. International seed companies have previously shown an interest in several facets of seed sector development—working with development partners and seed sector stakeholders to develop varieties adapted to West African climates; supporting the adoption of new varieties through demonstration plots and extension services; and developing distribution networks, often involving technology and knowledge transfer. International seed companies also have an interest in supporting a more conducive regional seed market that will help them introduce new varieties, develop new market channels and target new seed users.

Agro dealers—They include agricultural input suppliers of all sizes and from all areas (including remote rural ones) that serve as a primary interface with seed users. Agro-dealers store and market seeds, fertilizers, and crop protection products often while serving an unofficial source of market information and extension services. Agro-dealers often face the brunt of farmers’ complaints surrounding poor quality seed, and are often forced to refund the price of ‘improved seeds.’ Agro-dealers would be interested in receiving seed enterprise development support as well as contributing to the development of credit solutions that would (a) finance their storage and procurement of inputs; and (b) enable farmers to increase the value and volume of quality improved seed through their storefronts.

National agricultural public sector agencies –They include a range of government bodies involved in seed production, use and regulation, including Ministries of Agriculture, National Agricultural Research Institutes (NARIs), National Seed Committees, National Seed Variety Release Committees, National Seed Quality Control and Certification Agencies and Plant Protection and Regulatory Services and Extension Services. Tasked with ensuring that commercial seed products are reliable and safe, these national public sector agencies are expected to help ensure food security and sovereignty and serve farmers’ interests. These government organizations have a larger influence on the availability of quality seeds entering West African markets, as well as on the production of breeder and foundation seeds through NARIs seed units and regulating the extent to which new seeds enter the market (via imports and/or new seed varietal release). National governments have demonstrated a commitment to reduce barriers to regional seed trade through the ECOWAS Regional Seed Regulation, although varying levels of organizational capacity may slow the pace of adoption and implementation. There is also a growing interest on the part of governments to share more of the burden of producing foundation seeds and certifying seed quality. In this context, these governmental agencies will be relevant and critical ASIWA stakeholders, even if the Alliance is designed to be private sector oriented.

Development partners, intergovernmental organizations and international organizations– They include a multitude of stakeholders with national or regional programs aimed at supporting seed sector development or agricultural productivity improvements, e.g., intergovernmental organizations such as ECOWAS, EUMOA and CILSS; regional organizations such as CORAF/WECARD and the Rural Hub; members of collaborative groups such as WASC/COASem; international research organizations such as IITA, ICRISAT, AfricaRice and others within the Consultative Group of International Agricultural Research (CGIAR); international donors such as USAID, World Bank, DFID, and IFAD and their respective projects; and other development partners such as AGRA. Although many programs funded and/or implemented by these partners complement each other, coordination is necessary to leverage synergies and resources, avoid duplication, and build upon lessons learned from existing programs. In this regard, ASIWA will provide a venue for program coordination, information and experience exchange and effective engagement with various public and private stakeholders in seed development activities.

Seed users – They include smallholder farmers producing both for subsistence and sale in local markets; small, medium and large commercial farms; and farmers associations that may either serve as apex farmer groups (e.g.,ROPPA, All Farmers Association of Nigeria, APEX Farmers Organization of Ghana/APFOG), or represent farmers from a specific staple value chain. In the face of the prevalence of poor quality and counterfeit seeds and subsequent crop failures and low yields affecting livelihoods and incomes, farmer associations have an interest in working with governments, seed suppliers and development partners to enhance the availability, authenticity and affordability of quality seeds for their members.

Output end buyers– Relevant end-buyer stakeholders include medium to large grain traders, millers, food processors, breweries, livestock and poultry feed producers who need to secure reliable and quality sources of grains to supply their operations regularly. Due to fragmented grain markets and limited dependability of local production values, many larger grain users have used imports to achieve their required volumes. These end buyers have an interest in expanding local procurement in order to reduce costs and mitigate the risks of fluctuating currencies, grain prices and policies that may impact grain imports (e.g., the Nigerian government has taken moves to significantly reduce rice imports). Expanding local procurement, however, requires greater reliability and higher volumes of production. This could be achieved in part by increasing yields through the widespread use of quality seeds by small, medium and large farmers alike.

Financial service providers – Although banks and other investors have long considered agriculture a risky sector, growing consumer markets and the high growth potential of African agriculture is causing many financial service providers to agriculture in a new light and view it as a potential growth sector. Regional banks such as Ecobank have shown an interest in exploring means to develop credit solutions to help farmers finance inputs. In parts of Africa, insurance companies (as well as the Syngenta Foundation) have shown an interest in exploring crop insurance that could be sold with seeds. Impact investors, such as Injaro Agriculture Capital Holdings, are making investments in growing seed companies across the region. These financial partners have an interest in participating in ASIWA activities to better understand the seed sector and help develop workable solutions that expand their financial services while managing risk.

Other input suppliers – West African and international fertilizer and crop protection producers and distributors could show an interest in participating in ASIWA activities and working groups. Increasingly, input suppliers are coordinating to offer full technical packages that include seeds, fertilizers and crop production products at once. Including these other input suppliers would link ASIWA to wider efforts to increase farmer productivity through the use of modern technologies and practices.

Bringing together both the traditional seed stakeholders and the non-traditional stakeholders will help build a larger market or demand ‘pull’ needed for the Alliance to offer real value to attract interest, buy-in, and active participation. For example, involvement on the part of larger maize traders in Kano, Nigeria, poultry feed millers and breweries can help create an organized demand pull for more production (i.e., higher yields), harvests using certain varieties of grain (e.g., white sorghum, specific varieties of rice) which could motivate more farmers (small or commercial) and their representatives (farmer associations) to increase their own use of quality seeds. This in turn could create a critical mass of seed users demanding quality (and certifiable) seeds, thus creating a disincentive for seed companies and traders to supply poor quality or counterfeit seeds, and incentivizing investments in new equipment and practices on the part of the seed industry. At the same time, government bodies may be more likely to respond to a critical mass of stakeholders advocating improvements in seed quality and availability, as opposed to a smaller group of stakeholders within the more narrow seed industry.

In its attempt to develop a platform able to attract such a spectrum of stakeholders, CORAF/WECARD-WASP must first identify the range of relevant regional and national stakeholders, and understand their respective motivations and potential roles within ASIWA. Table 2 below presents a stakeholder map with these perspectives for potential types of ASIWA stakeholders.

Table 2: ASIWA Stakeholder Map

Stakeholder Type	Motivations/Interests	Possible Interest in ASIWA
<i>Research and scientific institutes</i>	<ul style="list-style-type: none"> • Enhancing profile and credibility as national research institutes. • Building internal capacity to develop and produce breeder and foundation seeds. • Serving agriculture through developing new, higher yielding seeds. 	<ul style="list-style-type: none"> • Sharing knowledge, experience and research outcomes with stakeholders. • Engaging in seed quality and certification initiatives. • Accessing capacity building support, knowledge and technology transfer. • Enhancing interface with seed companies, seed users and output end buyers to better understand and respond to market demand. • Expanding role of private seed enterprises in foundation seed production.
<i>Local seed companies and NSTAs</i>	<ul style="list-style-type: none"> • Market growth through increased production and sales of quality improved seeds. • Increasing ability to grow markets through regional seed exports, production and sale of new seed varieties. • Accessing finance and technical assistance needed to invest and grow. • Removing of unscrupulous companies to build confidence in local seed markets. 	<ul style="list-style-type: none"> • Working with stakeholders to improve credibility of seed sector and build farmers' confidence in seed supply. • Working with stakeholders to increase farmer demand for and ability (via credit and technical solutions) to purchase improved seeds. • Leveraging market facilitation and industry development activities to gain access to BDS and access to finance and technical support needed to grow (including for production of foundation seeds).
<i>International seed companies</i>	<ul style="list-style-type: none"> • Market growth through increased sales of improved quality seeds in West Africa. • Increasing ability to easily register and export foundation and multiplied seeds throughout West Africa. • Collaborating with local stakeholders in developing and distributing well-adapted varieties to serve regional markets. 	<ul style="list-style-type: none"> • Leveraging ASIWA's convening platform to advocate adoption/implementation of regional harmonized seed policies. • Using convening platform to build relationships with local stakeholders. • Working with stakeholders to increase farmer demand for and ability (via credit and technical solutions) to purchase improved hybrids/OPVs.
<i>Agro dealers</i>	<ul style="list-style-type: none"> • Expanding sales of inputs to farmers • Reducing reputational and financial risk posed by selling poor quality or counterfeit seeds. 	<ul style="list-style-type: none"> • Collaborating to improve credibility of seed sector and build farmers' confidence in seed supply. • Working with stakeholders to increase farmer demand for/ability to purchase improved seeds.
<i>National agricultural public sector agencies</i>	<ul style="list-style-type: none"> • Ensuring farmers and agriculture sectors have access to productive seeds needed to support food security and farmers' livelihoods. • Ensuring commercial seed products are effective, reliable, and safe. 	<ul style="list-style-type: none"> • Sharing knowledge, experience and research outcomes with stakeholders. • Leveraging donor and private resources to improve production, availability and supply of quality seeds.

<i>Development partners, intergovernmental orgs, and international orgs</i>	<ul style="list-style-type: none"> • Supporting national and regional food security and farmer livelihoods through higher farmer productivity achieved through the increased availability and utilization of improved seeds. • Maximizing possible impact through effective use of development resources. 	<ul style="list-style-type: none"> • Sharing knowledge, experience and research outcomes with stakeholders • Using ASIWA platform to coordinate seed development efforts • Leveraging private sector engagement to develop high impact seed development solutions
<i>Seed users</i>	<ul style="list-style-type: none"> • Increased production and incomes per hectare through higher productivity/yields. • Minimizing production and market risk, including risk of purchasing poor quality/fake seeds. • Gaining access to broader range of seed varieties and competitive seed markets. 	<ul style="list-style-type: none"> • Leveraging ASIWA platform to advocate for initiatives and policies that assure availability of quality seeds and protection/recourse for poor quality or fake seeds. • Working with stakeholders to develop credit solutions to enable purchasing of higher quality seeds and improve access to extension services.
<i>Output end buyers</i>	<ul style="list-style-type: none"> • Increasing market share and profitability through increased production. • Securing reliable and consistent sources of raw inputs, preferably through contract purchasing. • Reducing currency and policy risk through expanding local grain procurement. 	<ul style="list-style-type: none"> • Leveraging ASIWA platform to press public and private seed stakeholders to take necessary steps needed to enhance yield/production levels. • Working with stakeholders to develop credit, market and technical solutions for input supply and extension services that strengthen supply chains.
<i>Financial service providers</i>	<ul style="list-style-type: none"> • Increasing market share by expanding into new sectors and customers while managing risk. • Higher rates of return on capital through investments in high potential/high growth sectors such as agriculture. 	<ul style="list-style-type: none"> • Collaborating to develop credit solutions for seed enterprises (for working capital and investments) and seed users (for inputs purchasing). • Working with governments and development partners to develop credit enhancement/guarantee programs to support financing in agriculture and seed sector.
<i>Other input suppliers</i>	<ul style="list-style-type: none"> • Expanding market share through new sales channels, financing solutions, and developing input packages offering seeds, fertilizers and crop protection products. • Increasing demand for high quality inputs. 	<ul style="list-style-type: none"> • Working with stakeholders to build farmers' confidence in quality input supply. • Working with stakeholders to develop credit solutions to enable purchasing of higher quality seeds and improve access to extension services.

The Importance of Champions within ASIWA

In considering possible stakeholders relevant to ASIWA's overall vision, it is also important to identify specific private sector oriented organizations, businesses and even individuals that are positioned to play a critical role in availing ASIWA the credibility, relevance, and operational capacity needed to attract a critical mass of seed stakeholders. It is important that in launching ASIWA, CORAF/WECARD-WASP identify and target 'champions' or 'leaders' at both the regional and national levels that perceive sufficient value in the organization to commit their time, financial and technical resources to its success. If the ASIWA value proposition is not strong enough to attract the interest and commitment of champions, then it may be necessary to modify ASIWA's service offering to make it more attractive to industry champions.

A **regional champion** would involve a regional actor in the seed or agriculture market that is already active or present in a majority of West African markets. The African Seed Trade Association (AFSTA) is particularly well suited to be an interface within both the regional and national platforms, given its relationship with National Seed Trade Associations (NSTAs). Due to its role as an association and alliance within Africa, AFSTA's involvement could also leverage significant lessons learned and knowledge sharing from seed development activities elsewhere on the continent. Also, given that AFSTA is said to be moving its regional headquarters to Senegal, it will be close to the Dakar-based CORAF/WECARD-WASP office.

Other possible regional champions involve international seed companies with an interest or growing presence in West Africa, such as Syngenta, Pioneer/Dupont, Monsanto and others, grain traders with a regional presence in target markets such as Olam, Export Trading Group, and Novel, large processors (e.g. breweries), or regional farmers associations.

National champions should have a vested interest in the development of the seed sector within their respective market, as well as the positioning and credibility within a market to motivate and act as a mediator and problem solver among various stakeholders within the broader seed and agriculture sectors. Dynamic NSTAs could play this role, as could leading private seed companies or agro dealers. The scoping exercise also included interviews with a number of farmer associations key to potentially play a role as champions within ASIWA, given their representation of smallholder and commercial farmers and the mutual interest of farmer associations and WASP as well as other partners to involve farmer associations and capable farmers in foundation seed production. Other national champions could include large national grain buyers (such as breweries, feed companies, millers and processors and even organizations like the WFP). Public or private science/research institutes or select public agencies (e.g. a strong national seed committee) could also play a leadership role. However, such partners should be selected carefully, keeping in mind desired private sector orientation.

To address concerns stemming from WASA, it is important to distinguish among members of a new alliance to ensure that the Alliance is ultimately viewed as representative of the seed sector and seed users, as opposed to representative of development partners (e.g. CORAF/WECARD Consortium members, USAID, AGRA, other donors) and government in the seed sector (e.g., ECOWAS, participating governments). While it is clear that development and government partners will play a critical role in providing early financial, institutional capacity building, and operational and technical support (including that of CORAF/WASP staff and resources) to launch ASIWA, activities and institutional orientation must remain focused on the private sector, with a robust initiative to build a membership base of private stakeholders who are direct participants in the seed sector or otherwise have a business interest in seed sector growth (e.g., seed users, end buyers, financial partners).

6. BUDGET FACTORS FOR CONSIDERATION

This section discusses a number of key budget components likely to be incorporated the final ASIWA operating budget, although a comprehensive proposed budget for launching and operating ASIWA over a 2- to 4-year period will be developed at the conclusion of the next proposed phase (see next steps below) with further clarity on available resources.

Staffing

Although the staffing of the organization and the means with which staff salaries are financed may evolve over time (with initial donor funding eventually evolving into membership dues), an initial proposed staffing structure is presented below. In the early stages of ASIWA's development, staff from WASP, WAAPP or other initiatives could fill a number of the staff roles discussed below.

Regional Alliance Staff

Two to three professionals could carry out ASIWA's regional coordination and management as part of the technical secretariat:

- **ASIWA Manager**– Commercially- and results-oriented professional responsible for building and maintaining relationships among a cross-section of regional seed players, who (a) is a thought leader within the Alliance and West African seed sector, (b) contributes to the design and implementation of ASIWA Working Group Initiatives, and (c) serves as ASIWA's key liaison with Government and Donor partners;
- **WASIX Coordinator**– Professional with extensive experience developing and implementing communications strategies who is responsible for (a) promoting and maintaining a network of stakeholders sharing experience and knowledge, (b) supporting development of an ASIWA Community of Practice, and (c) coordinating ASIWA-led analyses; and
- **ASIWA Coordinator** –Mid-level professional able to (a) support ASIWA stakeholder engagement and communications, (b) contribute to ASIWA communications and (c) coordinate ASIWA events.

ASIWA National Affiliate Staff

At the national level, a technical secretariat made up of one or more individuals—depending on available budget, stakeholder buy-in and linkages with other developments projects—could carry out ASIWA activities:

- **ASIWA Country Representatives (one per country)**– Commercially-oriented professional with agriculture experience and strong relationships and credibility amongst national seed stakeholders, responsible for brokering and facilitating engagement between stakeholders (initially, current WASP/WAAP country staff could fill these positions to leverage Seed Specialists synergies and resources in the short-term); and
- **Agribusiness Specialists or Technical Advisors (based on available funding)**– Commercially-oriented specialists with experience within the seed sector and the 4 staple value chains within ASIWA focus, responsible for contributing to brokering, market facilitation, industry development solutions, and technical assistance where appropriate (these staff would be hired based on available funds and working group activities within a country and could be drawn from existing WASP/WAAPP staff).

Note: At first, SSG Advisors recommends that ASIWA avoid hiring national-level staff so as to remain lean and efficient in its early stages. Instead, the ASIWA technical secretariat can host National ASIWA Forums to capture country-specific feedback from seed industry stakeholders.

Working Group/Initiative-Based Staff

Based on the availability of funds and specific requirements of initiatives and activities coming out of the ASIWA Working Groups, initiative-based program directors/coordinators/technical staff could be hired to support implementation. To the extent possible, stakeholders could in part cover staffing needs for a specific initiative or working group, either through financial contributions or seconding staff. In some cases working groups could incorporate existing WASP staff to keep costs down and leverage synergies and current activities.

Other Operational Costs

Depending on available budget, selected working groups and other planned activities, ASIWA's non-labor costs would be allocated to support working group initiatives and analytical activities (most likely organized through WASIX).

- **Working Group Initiative** budgets would be developed on a case-by-case basis and would involve significant voluntary/no-cost participation/cost-share by participating stakeholders, with ASIWA funds used to coordinate activities, provide discrete technical assistance and analyses (see below), and organize events.
- **Analytical Activity** budgets would fund seed market studies (definition, volume, value, competitive environment, financing needs and solutions, trade constraints), policy analyses (national or regional), lessons learned and best practices papers. WASIX would coordinate and manage the analyses, although Working Groups could commission a research assignment needed to inform their initiatives.
- **Conferences and Events** budgets would be allocated for events targeting the broader ASIWA membership and partner bases, or specific working groups (e.g., meetings bringing together partners to discuss regional seed quality issues). It would be important that these events were action- and result-oriented, and focused on topic- or issue-driven knowledge exchange and problem solving. WASIX would coordinate these activities with support from relevant steering committee and working group members.

Phased Approach

SSG Advisors proposes that CORAF/WECARD-WASP considers taking a phased approach to building ASIWA to avoid taking on too many activities and responsibilities before it has the capabilities to deliver on promises and effectively demonstrate early value to the private sector. ASIWA could initially focus on establishing the regional platform and steering committee and launching WASIX, using existing WASP staff if possible. ASIWA could phase in the national ASIWA affiliates, starting with countries with a selected number of strong champions and favorable market dynamics, and then expand as the initial alliances gain traction.

7.ASIWA NEXT STEPS AND ACTION PLAN

Experience indicates that it takes time for alliances like ASIWA to gain build the capabilities, credibility, and institutional momentum needed to become sustainable organizations. With less than four (4) years remaining under WASP, it is critical that CORAF/WECARD/WASP management and technical teams act swiftly and strategically to build ASIWA's fundamental underpinnings, particularly in terms of:

- Demonstrating the potential to deliver real value to stakeholders, whether through convening, knowledge-sharing, and collaborative learning or developing joint solutions and initiatives that move regional seed development forward. In this context, WASP/CORAF/WECARD and other interested development partners must dedicate both staff and financial resources to assure the Alliance's successful launch and roll-out.
- Achieving early buy-in, engagement, and participation from a wide cross section of private, public, and development stakeholders with an interest in the long-term development of West Africa's seed industry. In this context, WASP/CORAF/WECARD must place an emphasis on identifying and engaging private sector champions that have the capacity, credibility, and motivation needed to help move the alliance forward.

The following action plan presents a proposed roadmap for achieving these principles while establishing ASIWA, with a focus on tasks to be carried out between May 2014 and November 2014. The action plan focuses on specific steps WASP Management and Consortium Members can take to efficiently and practically mobilize the Alliance while building a robust membership and partner base.

Although ASIWA is ultimately intended to be an independent entity with its own staff, governance structures, and oversight from a steering committee made up of members, the Alliance will rely heavily on WASP staff and human resources in its early stages. In this regard, the action plan proposes that over next 6 to 12 months the ASIWA Technical Secretariat be led by existing or future WASP employees and that the Interim Steering/Orientation Committee involve representatives from WASP Consortium members, namely, CORAF/WECAR, ECOWAS/CEDAEO, UEMOA, CILSS, Le Hub Rurale, ROPPA and AFSTA. As a sufficient membership base is developed, a new Steering/Orientation Committee will be selected from among ASIWA members. Furthermore, as ASIWA secures funding for its own operations, ASIWA employees could take positions within the Technical Secretariat.

The proposed action plan is divided into four distinct activities: Mobilization, Partner Engagement, WASIX Launch and Alliance Formation. Multiple tasks shall be carried out simultaneously. *A proposed time line for Action Plan is presented in Annex A.*

Mobilization (April – June 2014)

To ensure that ASIWA is able to carry forward momentum from the Validation Workshop in Cotonou, SSG Advisors recommends delegating temporary technical and strategic roles to WASP staff and consortium members.

- **Establish initial ASIWA technical secretariat.** The initial technical secretariat will be composed of WASP technical staff, who will assist in the implementation of ASIWA next steps until full-time staff are identified.
- **Designate ASIWA Steering/Orientation Committee to assist with early partner outreach and provide initial strategic oversight.** The ASIWA Steering/Orientation Committee may be composed of no more than six personnel from WASP, USAID, Hub Rural, ECOWAS, UEMOA, AFSTA, or other ASIWA consortium partners. The support committee will provide the ASIWA technical team with strategic oversight and assist with regional and national partner engagement.
- **Develop initial ASIWA Marketing Materials**–Finalize and publish presentations, brochures and materials that can be presented during the partner engagement activities
- **Recruit a full-time ASIWA Coordinator and a full-time WASIX Coordinator.** WASP technical staff have a large number of existing commitments and responsibilities, so they will not be able to provide daily implementation support to ASIWA on an ongoing basis. To reduce the

burden on WASP staff and allow for greater ASIWA independence, WASP will recruit an ASIWA Coordinator to manage ASIWA's day-to-day implementation and a WASIX Coordinator to oversee the design, development, and launch of the West Africa Seed Information Exchange (WASIX).

- **Develop funding proposal for USAID.**⁵WASP has sufficient funds to support initial ASIWA activities, but not to fully fund ASIWA during its first several years. The CORAF/ASIWA technical team and/or WASP shall orchestrate a funding proposal to secure additional financial support for ASIWA during its early stages.

Partner Engagement (June – October 2014)

Public and private stakeholder buy-in to ASIWA is critical to the success of the alliance. The ASIWA team will engage with potential ASIWA members at a variety of levels, with the goal of building grassroots support for ASIWA.

- **National Partner Engagement.** The ASIWA technical team, led by the ASIWA Coordinator and supported by WASP country-level seed specialists, will map out possible ASIWA champions and members at the national and regional levels. The ASIWA technical team shall organize workshops in target countries to outline the ASIWA approach, identify potential national-level champions, and collect seed stakeholder feedback on national-level challenges and interests for which ASIWA could be a key resource.
- **Multinational Partner Engagement.** While multinational companies (not exclusively seed) could be engaged at the national level through their local subsidiaries, it will also be essential to engage these multinational firms at the strategic, regional level under a separate outreach effort. Multinational partners will be evaluated as potential regional champions for the alliance. It is possible that multinational grain buyers or large processors would be interested in assuming a champion-type leadership role in order to help secure a more reliable supply from West Africa. Similar to the national-level seed companies, the ASIWA team should collect feedback from the multinational companies and solicit their feedback in terms of their challenges, interests, and motivations pertaining to the West African seed industry.
- **Report on Outcomes of Partner Engagement.** As a product of the national and multinational partner engagement efforts, the ASIWA technical team will produce a report that:
 - Lists interested national and regional partners that could become involved in ASIWA as champions, possible steering committee/orientation members and/or initial members;
 - Lists seed industry challenges that are consistent across the region;
 - Lists seed industry challenges that are unique to specific member countries; and
 - Recommends adjustments to the ASIWA approach based on stakeholder feedback at the national and regional levels.
 - Recommend a list of possible steering committee members to be nominated during the launch event.

Throughout the first 6 months of ASIWA implementation, partner engagement must be an ongoing task, conducted not only in a structured format by the ASIWA coordinator, but also by the senior personnel on the ASIWA Steering/Orientation Committee who can leverage their deep networks within the West African agribusiness community to help ASIWA attract the interest of direct and indirect seed industry stakeholders.

⁵ This action plan assumes that the WASP is able to obligate a sufficient amount of funding – prior to receiving additional USAID funds – to cover initial expenses associated with ASIWA-related staffing, communications, and travel as well as other ASIWA costs

WASIX Virtual Platform (May – August 2014)

The West Africa Seed Information Exchange, or WASIX, will be a core service offering of ASIWA. WASIX will be a platform for sharing seed industry knowledge across borders, across the public-private divide, and throughout the seed value chain. It will facilitate technology transfer, information sharing, collaborative learning, and active dialogue through virtual communication tools, traditional media, and/or in-person forums focused on seed industry learning and best practices in seed development.

The WASIX virtual platform will be a low-cost, high impact tool that ASIWA can use to demonstrate its value in the near term. A *Community of Practice* can allow seed industry dialogue to begin immediately, even before the first ASIWA event is scheduled to take place. With the WASIX platform in place, partners can access a concrete example of the value that ASIWA can bring to the West African Seed Industry.

WASIX's development will follow a four-step process:

- **ASIWA Communications Strategy.** As the communications-centered component of ASIWA, WASIX must follow high-level guidance to ensure that its content and structure are consistent with the rest of ASIWA's communications initiatives. This content and structure should be outlined in a platform-wide communications strategy.
- **WASIX Needs Assessment.** The precise vision for the WASIX virtual platform will determine the requirements that ASIWA has for an IT subcontractor. ASIWA should conduct a needs assessment to describe the precise functionality that the WASIX platform should have. This needs assessment should include feedback from sample stakeholders that can provide input on a variety of proposed web-based resources.
- **WASIX Platform Development.** The WASIX Needs Assessment will establish a firm vision for the WASIX virtual platform. Based on that vision, ASIWA will procure the services of a web design/development firm whose experience is well aligned with the proposed platform. ASIWA will thoroughly test the platform before it goes live.
- **WASIX Platform Launch and Publicity.** The launch of the WASIX virtual platform must be accompanied by a targeted publicity effort promoting WASIX among seed stakeholders. In particular, WASIX will be actively promoted to the NSTAs, National Seed Committees, and AFSTA, whose members will be encouraged to participate in the new community of practice.

Alliance Formation and Launch Event (May 2014 – January 2015)

The inaugural ASIWA regional event will be hosted by November 2014. There are several alliance formation items that must be completed before then and several other activities that must take place immediately following the launch event in order to set an operational plan in motion for 2015.

- **Develop ASIWA Charter.** ASIWA will develop a proposed constitution and charter, a process that will involve:
 - Review and evaluate charters of existing Alliances in Africa (with a focus on models from West Africa) to understand best practices and approaches relative to ASIWA's objectives and prospective membership
 - Draft an initial ASIWA Charter and share with the interim ASIWA Steering/Orientation Committee

- Based on feedback from ASIWA Steering/Orientation Committee finalize draft Charter document for presentation at Launch Event
- **Launch Event.** The launch event itself will be open invitation. The ASIWA team will recruit support from sponsors or champions to help defray the cost of the event. At the event, the stakeholders will discuss the draft charter, attend topical *working group* meetings based on issues identified during partner engagement, and participate in networking and information-sharing workshops.
- **Selection of Steering/Orientation Committee.** During the launch event, stakeholders will also select the first Steering Committee.
- **Development of Operational Plan.** Based on stakeholder feedback that emerges during the event, the ASIWA Technical Secretariat will immediately prepare a 2015 work plan, a draft sustainability plan, and an institutional development plan for ASIWA (including training program(s) for staff and stakeholders). These outputs will be presented to the ASIWA steering committee for approval along with the draft charter at the outset of 2015.

ANNEX A: PROPOSED TIMELINE FOR ASIWA ESTABLISHMENT AND LAUNCH

Mobilization	April	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Jan.
Establish Initial ASIWA Technical Secretariat										
Designate ASIWA Support Committee										
Recruit ASIWA Staff										
Develop USAID Funding Proposal										
Partner Engagement										
National Partner Engagement										
Multinational Partner Engagement										
Partner Engagement Report										
WASIX Virtual Platform										
ASIWA Communications Strategy										
WASIX Platform Needs Assessment										
WASIX Platform Development										
WASIX Platform Launch and Publicity										
Alliance Formation and Launch Event										
Develop Draft Charter										
Feedback, revisions and approval of ASIWA Charter										
Launch Event										
Selection on Steering/Orientation Committee										
Development of Operational Plan										
First Steering Committee Meeting										

ANNEX B. LIST OF STAKEHOLDERS INTERVIEWS

Country	Org Type	Name	Organization	Position	City	Email
Nigeria	GON	Prof Lateef B Taiwo	Institute of Agricultural Research and Training (IAR&T)	Deputy Director	Ibadan	lbtaiwo@yahoo.com
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	RI	Dr H N Kura	Institute of Agricultural Research and Training (IAR&T)	Seed Coordinator	Zaria	nasirukura@yahoo.com
	GON	Olatokun Anthony	Nat Agric Seed Council-GMA&RD	Coordinating Director	Abuja	dg@seedcouncilngr.org
	GON	Dr Martin Fregene	FMARD-Fed Min of Agriculture & Rural Development	STA	Abuja	mfregene@danforthcenter.org
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	GON	Wale Fashade	FMARD-Fed Min of Agriculture & Rural Development	PEOHMA	Abuja	walefashade@gmail.com
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INGO	Issoufou Kapran	AGRA - Alliance for a Green Revolution in Africa			ikapran@agra.org	

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