

Scaling Seed and Technologies Partnership:

A brief on the EGS Study

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Outline

- EGS: Background
- Purpose & synthesis of the Global Study
- Current Situation of EGS in Ghana
- TOR of the EGS Study in Ghana
- Next Steps

EGS : Background

- During 1970s and 1980s, seed system support in developing countries was focused on strengthening public sector institutions (ie,. NARIs, Extension Services and state-owned seed corporations). This approach achieved limited success in Africa.
- SAPs in the 1980s and 1990s resulted in general withdrawal of state seed system support, creating space specially for the private sector but also for civil society seed organizations, while maintaining linkages with NARIs.
- The 1990s also saw the emergence of large-scale direct seed purchase and distribution, particularly in Africa in response to natural disasters and crisis.
- Over the decade, there has been emerging trend to lower yield gaps through efficient and accessible input markets and market-driven technology adoption in agriculture.
- A call by Stakeholders of the SSA Agricultural Development agenda to address bottlenecks in the Seed System for a better agricultural performance.

Why EGS Study

- BMFG & USAID, both having major investments in the seed sector development, In 2013 agreed to a strategic focus on one essential entry point into the seed system:
Supply of EGS

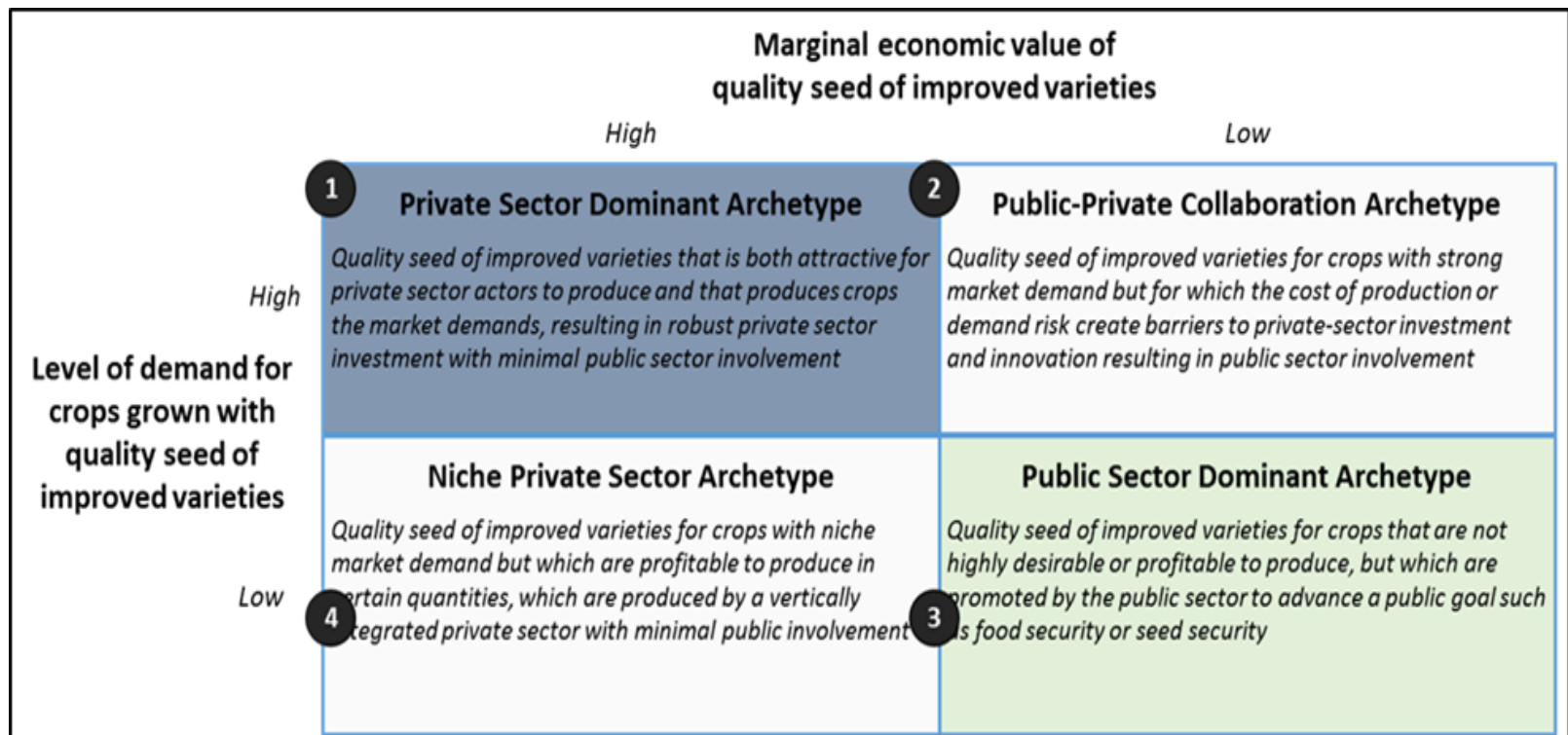
Why Focus on EGS Study



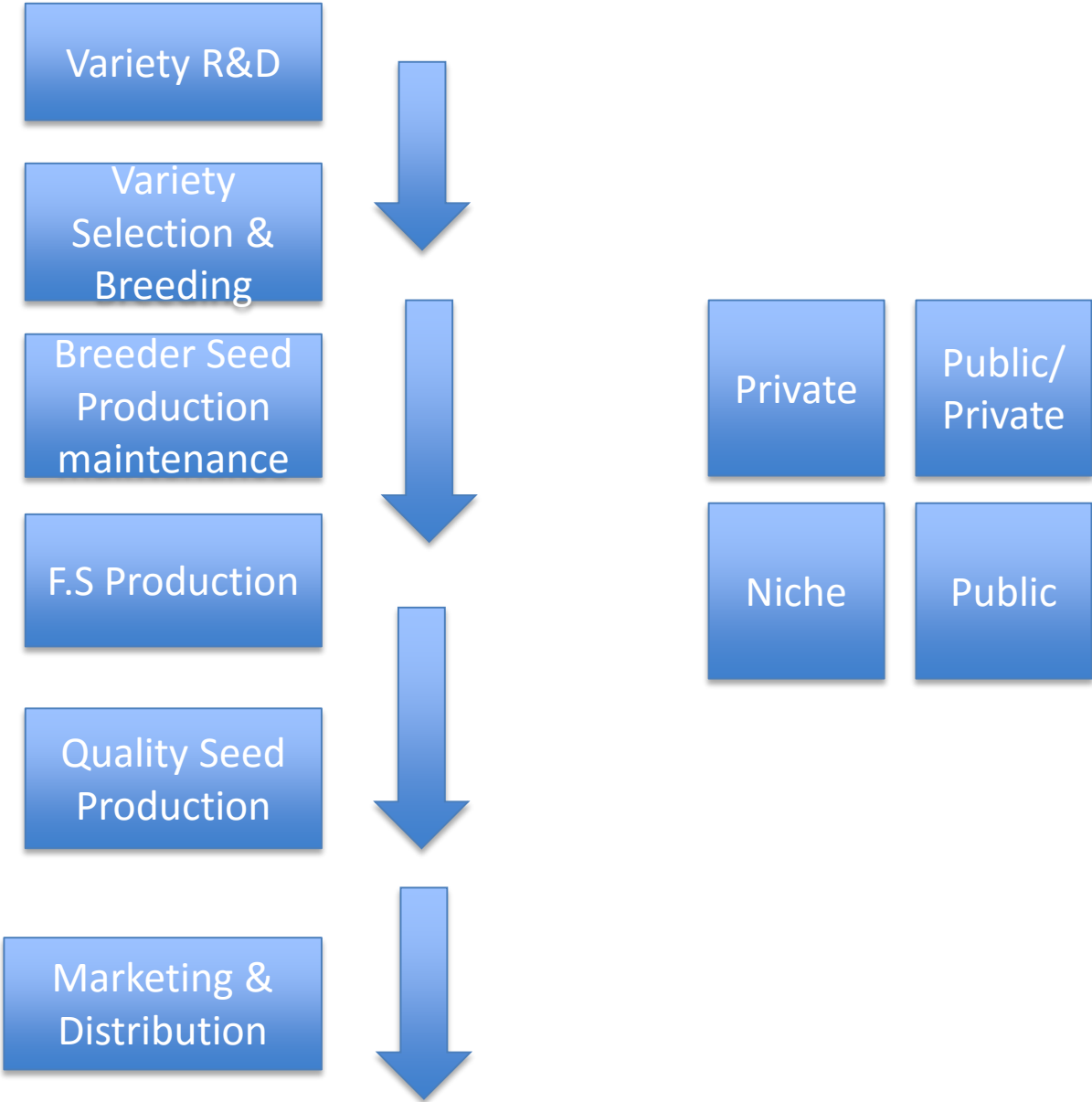
Synthesis of the Global Study

- **Hence the engagement of Monitor Deloitte (MD) to carry out a Global Study**
- MD Applied a Common Economic Framework for this study.
- The Framework was adapted to highlight the Economic Characteristics of Seed.
- Economic characteristics of seed have implications for the ideal state value-chain

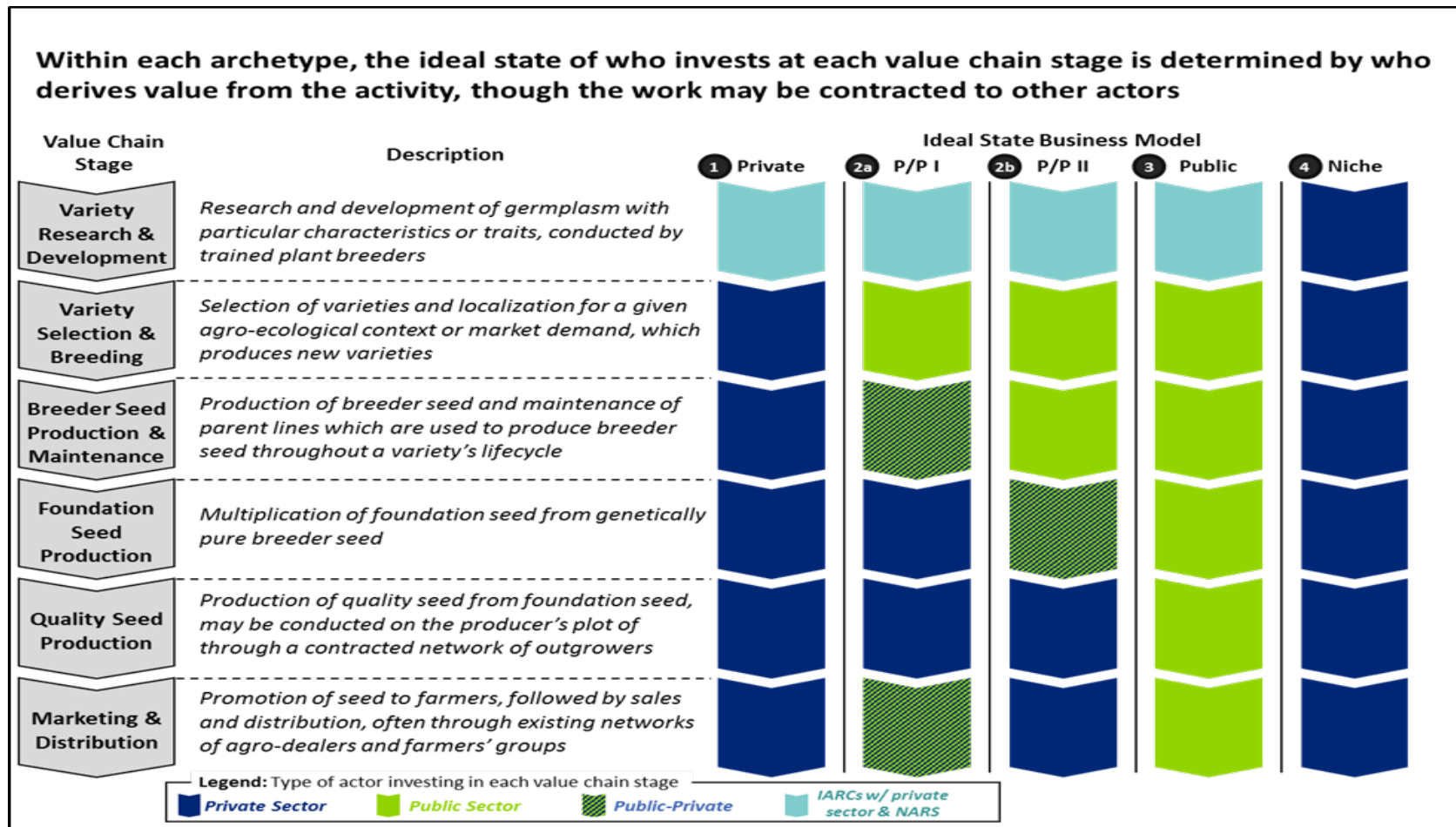
Economic Framework use in the Global Study



EGS Value Chain/Ideal state business model



Key takeaway from the Global Study



Ghana's Seed Sector

- Ghana's Sector has undergone some significant changes in the past few years:
- National Seed Council established
- National Seed Law (Plants and Fertilizer Act, 2010) passed
- Catalogue of crop varieties released and registered in Ghana

Current Challenges

- Maintenance of germplasm, and production of quality inbred lines intended for the production of maize hybrids.
- Long lag between variety release and commercialization.
- The new Seed Law opens the door for an increased role for the private sector in seed production and allow other entities to produce and market foundation seed. But existing capacity is weak.

Ongoing National EGS Study: Scope of Work

The consultancy will include but not be limited to the following tasks:

- Identify and analyze dominant seed systems of relevant crop groups and food crops (groundnuts, maize, rice, sorghum, soybean, and yam)
- Describe and analyze the current structure and organization of EGS supply
- Calculate potential EGS demand, and assess the cost of production for EGS supply.
- Match national EGS demand with revenue/cost.
- Identify the Optimal Market Archetype for EGS Supply.
- Assess Private-Public Partnership Mechanisms.
- Analyze key challenges, and formulate recommendations and conclusions

Deliverables

The consultancy will be expected to deliver, the following outputs:

- Inception Report
- Field Study
- Hold National Dialogue
- Final Draft EGS Study Report
- Recommendations/Guideline for developing country level action plan.

Time Frame

Period	Activity
February 2016	<ul style="list-style-type: none">• Desk review of work done by Monitor-Deloitte in the earlier EGS Study and work done by the Centre for Development Innovation (CDI) of Wageningen University and Research Centre, in the Netherlands, in the Integrated Seed Sector Development Program.• Prepare and submit inception report by February 28, 2016
March 2016-May 2016	<ul style="list-style-type: none">• Field study• Preparation of Study Report• Facilitate National Dialogue
June 2016	<ul style="list-style-type: none">• Submission of Final EGS study report on Ghana• Report of the National Dialogue.• Recommendation/guideline for developing a country-level action plan for EGS.

THANK YOU