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AGRIBUSINESS AND TRADE PROMOTION (ATP) QUARTERLY PROGRESS REPORT JANUARY – MARCH 2009



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AGRIBUSINESS AND TRADE PROMOTION (ATP) QUARTERLY PROGRESS REPORT JANUARY – MARCH 2009

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ACRONYMS

ACE	Audit Control & Expertise (Côte d'Ivoire)
AGRIS	Agricultural Research Information System
AIMS	Asset and Infrastructure Management Solutions
AMASSA	Association Malienne pour la Sécurité et la Souveraineté Alimentaires
ANOPACI	Association Nationale des Organisations Professionnelles Agricoles de Côte d'Ivoire
ANRO	Agriculture and Natural Resources Office
APFOG	Apex Farmers Organization of Ghana
APROSSA	Association pour la Promotion de la Sécurité et de la Souveraineté Alimentaires au Burkina
ATP	Agribusiness and Trade Promotion Project
CAADP	Comprehensive Africa Agriculture Development Programme
CICB	Comité Interprofessionnel des Céréales du Burkina Faso
CILSS	Le Comité Permanent Inter-états de Lutte contre la Sécheresse dans le Sahel
COFENABVI	Confédération des Fédérations Nationales des Filières Bétail Viande des Pays Membres de l'UEMOA
COP	Chief of Party
CORAF	Conseil Ouest et Centre Africain pour la Recherche et le Développement Agricole (also known by its acronym in English : WECARD)
CORPAO	Conférence Régionale sur les Perspectives Agricoles de l'Afrique de l'Ouest
COTR	Contracting Officer's Technical Representative
CTO	Cognizant Technical Officer
DCA	Development Credit Authority
DCOP	Deputy Chief of Party
DMDA	Dawanu Market Development Association
ECOWAP	Economic Community of West African States Agricultural Policy
ECOWAS	Economic Community of West African States
FANR	Food, Agriculture and Natural Resources Directorate of the Southern African Development Community
FAO	Food and Agriculture Organization (United Nations)

FAOSTAT	The statistical database of the United Nations Food and Agriculture Organization (FAO)
FARA	Forum for Agricultural Research in Africa
FEBEVIB	Fédération de la Filière Bétail/Viande du Burkina Faso
FEPAB/UPPAH	Fédérations Professionnel Agricoles du Burkina Faso / Union Provinciale des Professionnels du Houet
FEPPASI	Fédération Provinciale des Professionnels Agricoles de la Sissili, Burkina Faso
FIAB	Fédération des Industries Agroalimentaires du Burkina Faso
GDA	Global Development Alliance
GREFA	Group de Recherche et de Formation en Agricole et Arboriculture, Sikasso, Mali
HAACP	Hazard Analysis Critical Control Point
IEHA	Initiative to End Hunger in Africa
IFAD	International Fund for Agricultural Development
IFDC	International Center for Soil Fertility and Agricultural Development
IFPRI	International Food Policy Research Institute
ISO	International Standards Organization
LTTA	Long-term Technical Assistance
M&E	Monitoring and Evaluation
MARKETS	Maximizing Agricultural Revenue and Key Enterprises in Targeted Sites –Nigeria
MIS	Market Information System
MISTOWA	Market Information Systems for Traders Organizations in West Africa
MOU	Memorandum of Understanding
NANTS	National Association of Nigerian Traders
NEPAD	New Partnership for Africa’s Development
ODC	Office of Development Credit
ONAC	Office National du Commerce Extérieur (Burkina Faso)
OpM	Operations Manager
ORO/AOC	Observatoire Régional de la Filière Oignon
PASIDMA	Projet d’Appui au Système Décentralisé du Marché Agricole du Mali
PAU	Politique agricole de l’UEMOA
PIVA	Partner Institutional Viability Assessment
PMP	Performance Monitoring Plan

PPP	Public Private Partnership
RATES	Regional Agricultural Trade Expansion Support Program – East and Southern Africa
RCO	Regional Contracting Officer
RESIMAO	Réseau des Systèmes d’Information de Marché de l’Afrique de l’Ouest
ROESAO	Réseau des Opérateurs Économiques du Secteur de l’Agroalimentaire de l’Afrique de l’Ouest
ROPPA	Réseau des Organisations Paysannes des Producteurs Agricoles de l’Afrique de l’Ouest
SAGIC	Senegal Accelerated Growth and Increased Competitiveness project
SITRAC	Société Industrielle pour la Transformation et la Commercialisation des Céréales, Burkina Faso
SME	Small and medium enterprise
SPS	Sanitary and Phytosanitary Standards
STTA	Short-term Technical Assistance
TCN	Third-country National
TH	Trade Hub (short for West Africa Trade Hub)
TIPCEE	Trade and Investment Program for a Competitive Export Economy - Ghana
ToT	Training of Trainers
UEMOA	Union Économique et Monétaire Ouest Africaine (also known under its English acronym WAEMU)
UCOVISA	Union des Coopératives du Vivrier des Savanes
UGCPA-BM	Union des Groupements pour la Commercialisation des Produits Agricoles de la Boucle du Mouhoun
UPADI	Union des Producteurs Agricoles du Québec pour le Développement International
USAID	United States Agency for International Development
VCDP	Value Chain Development Plan
WA	West Africa
WACIP	West Africa Cotton Improvement Program
WADF	West Africa Agribusiness Development Facility
WATH	West Africa Trade Hub Project

I. INTRODUCTION

I.1 BACKGROUND ON ATP FY09 ACTIVITIES

This progress report for the ATP project covers the period from January to March 2009, the second quarter in the second year work plan of the project. The project was awarded in April 2008 to a consortium led by Abt Associates and including CARANA, ACIDI/VOCA and Ibex International. It was fielded in May-June 2008.

The project made substantial progress in the reporting quarter, as detailed later in the report. An overview of the project's objectives and outcomes completes this introductory section. The next section on the project's approach provides the basic context of the project to guide the reading of the report. The other sections are keyed to the activities of the four components, M&E, communications, and management of the project.

I.2 OVERVIEW OF PROJECT OBJECTIVES AND EXPECTED OUTCOMES

The Agribusiness and Trade Promotion (ATP) project's primary objective is to increase the value and volume of intra-regional agricultural trade in West Africa in order to contribute to achieving the six percent agricultural growth target set under the Comprehensive Africa Agriculture Development Program (CAADP) of the African Union's New Partnership for Africa's Development (AU-NEPAD), a framework for sustainable development drafted by African leaders. The Economic Community of West African States (ECOWAS) has developed its Agricultural Policy (ECOWAP) to implement the CAADP in its region.

With the ATP project, USAID/WA is focusing on selected activities where it can have a catalytic impact in supporting West Africans themselves to develop durable solutions to key constraints in intraregional agricultural trade. Helping them do so will not only drive substantial increases in intra-regional trade during the project, it will also make them sustainable after the project ends. The ATP program will implement integrated activities and programming to contribute to the following outcomes:

1. OUTCOME 1: Significant reduction of the incidence of physical and policy-related barriers to moving agricultural and related commodities regionally in West Africa.
2. OUTCOME 2: Enhanced linkages among agricultural producers and agro-input suppliers, agro-processors and distributors.
3. OUTCOME 3: More effective advocacy by regional private sector and other non-governmental actors for regional and national policies in support of a conducive environment for increased regional agricultural trade.
4. OUTCOME 4: Improved efficiency of trade transactions and regional market access, in particular through the improvement of regional market information systems.

2. PROJECT APPROACH

2.1 TARGETED VALUE CHAINS

ATP prioritizes its specific interventions in its outcome areas to a limited number of selected value chains as a basis for identifying technical gaps and opportunities that will assist the entire agricultural sector. Value chains were evaluated against the following seven factors: (1) The product's importance in intra-regional trade; (2) Urban demand for processed or value-added product; (3) The form (current degree of processing) of the traded product; (4) The potential for adding more value; (5) The number of small farmers and other participants involved; (6) The degree of perishability; and (7) Transportability of the product.

On this basis, the ATP team selected the following value chains with the highest potential for intra-regional trade and associated trade corridors:

- **Cereals (especially maize):** This value chain encompasses a number of closely related products with similar supply chains, financing issues, and (to a lesser extent) growing areas. Of these products we initially emphasize maize, which has a wide number of uses: human consumption (as a starchy staple in many different forms), animal feed, and maize used in beer brewing. Human consumption and animal feed are especially important uses for maize in West Africa; demand for maize as a key source of poultry feed, in particular, is growing rapidly in this increasingly urbanized region; maize is also used in farm fisheries. Millet and sorghum are also important coarse grains in West Africa; significant intra-regional trade in these products occurs in response to rainfall patterns. The project's interventions in maize storage, warehouse receipt programs, processing, and trade could eventually benefit other grain value chains.
- **Ruminant livestock:** This value chain includes cattle, sheep, and goats that are assembled on the hoof in the supplying countries and trucked largely to coastal markets. This will remain the predominant form of long-distance transport of ruminant livestock for years to come in West Africa. We also include red meat (from this same ruminant livestock) as a potential part of this value chain. Based on our analysis, we believe it is time to re-examine the viability of slaughtering livestock in supplying countries and transporting the meat—in an unbroken cold chain—to the largest coastal cities, which have concentrations of higher-income consumers willing to pay a premium for high-quality chilled beef, lamb, and goat meat.
- **Onions and shallots:** These two closely related value chains are produced in semi-arid, Sahelian zones with good access to water. As counter-seasonally grown vegetables, onions and shallots are important cash crops for smallholders whose main (rainy) season crops are cereals or cereals intercropped with legumes. Onions and shallots have similar end uses, as flavorful ingredients in the sauces that figure importantly in regional cuisine (which tends to be heavy on bland starchy staples, either rice or various forms of guel, *pâte* or to made from coarse grains—millets, sorghum, maize—or tubers). Both products face similar storage and transport issues; improved

drying and processing at the village level can extend the marketing season for both crops and can increase overall grower returns.

2.2 SELECTED TRADE/TRANSPORT CORRIDORS

Because of limited resources, the project has selected to work along the broad Central-West African corridors, through which Sahelian countries (Mali, Burkina Faso, Niger) trade with coastal countries (Côte d'Ivoire, Ghana, Togo and Benin) in the project's targeted value chains.

2.3 PARTNERSHIPS IN IMPLEMENTATION

ATP assists the regional inter-governmental organizations (ECOWAS, UEMOA, and CILSS) to work in synergy with WATH and other USAID projects in the region; and supports regional and national umbrella organizations of producers, processors and traders involved in the targeted value chains along the selected trade/transport corridors.

3. COMPONENT I: REDUCING BARRIERS THROUGH DIRECT SUPPORT TO ECOWAS AND UEMOA

3.1 ROAD TRANSPORT

ATP initiated work on the Niger-Ghana onion trade corridor during the period in review, soon after the recruitment of the Road Transport and Logistic Advisor in late December 2008. ATP worked closely with the Trade Hub (TH) to ensure complementarities and avoid duplication with TH's work on road governance undertaken in collaboration with UEMOA. ATP's and TH's corridor activities are quite distinct. Whereas the TH surveys the transport of containerized goods from dry ports to sea ports along main roads, ATP surveys the transport of agricultural products in bags (onions, maize) and livestock, starting from rural markets, where agricultural products are loaded, and following trunk roads that often skirt dry ports and main cities. In the onion survey, ATP initiated its survey in Galmi and Madaoua (in the onion production zone in Niger), followed onion trucks crossing into Burkina Faso and, instead of heading to Ouagadougou, veering south to go through Koupéla and Bitou before crossing into Ghana at Bawku.

At the same time, to ensure complementarity with TH's work, ATP adopted, with slight modification, the basic survey instrument developed by the TH to collect information on the number of road blocks, officials manning these stop points, delays, and the amount of bribes exacted there.

Survey results (based on data collected by 61 truck drivers trained by ATP) are being analyzed for joint publication with TH and UEMOA. Preliminary results, however, already suggest that the main market towns in the onion belt in Niger (Madaoua, Galmi, Arewa, and Sernaoua) are well served with large trucks on return trips to service Nigeria. In other words, there is no apparent shortage of trucks for onion export from Niger. The survey also indicates that Niger still collects taxes on onion export (CFA 300 per bag). The survey has identified 24 checkpoints in Niger (from Madaoua to Makalondi), 6 in Burkina Faso, 24 in Ghana (including 7 from Bawku to Bolgatanga, on account of recent insecurity in the Bawku area), and 10 in Togo. In Niger, the "going" rate for bribes exacted is CFA10, 000 per truck and per check point and agency (customs post, Gendarmerie stop, and police barrier). The rate increases for foreign registered trucks.

The survey conducted by ATP's Road Transport and Logistic Advisor (following, and at times riding in, trucks along the corridor) also points to the issue of truck axle overload. Under the ECOWAS regional road transport regime, all countries in the region have adopted measures to reduce truck overloading, which is blamed for countless road accidents and severe damage to road surfaces and useful road life. UEMOA has measures that apply to all members, but only Niger appears to

systematically apply them. Ghana has also adopted similar measures, but does not appear to systematically enforce them. Truckers moving through Niger, Burkina and Ghana are confused by the fact that not only is Niger the only country implementing axle overload measures, but also by the way in which the overload is determined and the fine levied. Whereas trucks with non-perishable goods (as followed by the TH) can afford to argue and wait for days to try to resolve the issue, onion traders cannot, and therefore must pay whatever is asked of them. Onion truckers overload trucks for a number of reasons: First, they don't know the total weight of the truck because there are no truck weighing stations at loading points as onions are traded by the bag and not weight. Second, charges (transport, export tax, and illegal charges, alike) are determined by the bag. Because of this, traders want to overstuff onion bags to reduce their number per truck and minimize these charges, but doing so results in overloading. ATP intends to follow-up on this issue in the next few quarters.

PRIORITY CORRIDORS IDENTIFIED BY ECOWAS AND UEMOA



3.2 TRADE AND AGRICULTURAL POLICY-RELATED BARRIERS: AGRICULTURAL AND TRADE POLICY PRIORITIES FOR ATP

ATP presented on March 20, 2009, its work program on agricultural trade policy to USAID, USAID-funded projects, the World Bank, FAO and FARA. Intra-regional agricultural trade in West Africa is framed not only by sectoral agricultural policies, but also as much by policies in other sectors within ECOWAS (customs, transport, private sector, etc.). As in the road transport activities, ATP is working closely with the TH to avoid duplication and build synergy. Building complementarities with TH starts first within CARANA, which both leads the TH and manages ATP's road and policy advisors, and then on the field.

ATP has identified with ECOWAS policy reforms of relevance to ATP in the agriculture, customs and trade, transport sectors, and private sector promotion. These regional policy initiatives include:

- ECOWAP, its plan of action and investment program which is currently under preparation, and transhumance;
- the ECOWAS trade liberalization scheme (ETLS) and common external tariff (CET) in the trade and customs sector;
- a common commercial policy and regional trade fairs; and,
- In transport transit arrangements, the ISRT--Inter-State Road Transit conventions, the joint border post initiative, and ECOWAS Brown Card scheme (third party vehicle insurance that makes an insurance policy obtained in any ECOWAS country valid in the other countries).

The ECOWAS 2009 work program reflects the renewed emphasis on implementation of the above and other principal policies of interest to ATP. During the quarter under review, ATP monitored the activities envisaged with regard to these ECOWAS programs. For example, as part of the formulation of the regional agricultural investment program, CILSS is leading preparation of a workshop in Bamako in late April to review the draft of the food security component of the program. Terms of reference are being prepared for the evaluation of the ETLS, and also the study of informal trade within the region. Concerning the review of the regional transit arrangements, discussions have begun towards the revision of the ISRT Convention adopted in 1982.

In collaboration with TH, and in order to set appropriate policy priorities that address key business constraints, ATP initiated preparations for a short-term trade policy barriers assessment. The study is an analysis of the gap between the provisions of regional policies and the realities confronting operators in those policy areas. It will establish the practical problems and the perspectives of the policy constraints faced by ATP traders and other operators. The study builds on the TH's methodology for parallel work by TH focusing on its priority products (cashews, shea products, apparel, etc.).

During the quarter under review, ATP initiated discussions with some members of the national transport and transit facilitation committee of Ghana (each ECOWAS country is required to establish and operate one under the guidance of a regional committee) in connection with joint efforts of Ghana and its land-locked neighbors Burkina Faso and Mali to improve the content and operation of the ISRT convention. The success of this tripartite initiative is being monitored as it could assist trade in ATP products and facilitate the above-mentioned general review of the transit mechanism at the regional level. For the same reason a similar initiative that seeks to improve upon the functioning of regional policies was identified and is being monitored: cross-border payment arrangement between Burkina Faso and Ghanaian commercial banks, which provides ATP traders a solution to problems of fund transfer between the two cedi/CFA franc currency zones.

Another practical approach to resolving policy-related constraints that was adopted during the period was the possibility of establishing a regional hotline arrangement or interconnected national pressure groups--to provide real-time assistance and relief for any operator whose rights under regional policies are being threatened or abused: a network of high-level contacts (among government officials, legal-aid lawyers, media, NGOs) that empowers a trader or transporter to

trigger off the system by lodging a complaint with a member of the Hotline Arrangement (just by phoning a dedicated number). The system is to provide an identifiable point for complaints, and in a matter of minutes, it ensures early intervention and appropriate redress (instead of the present feeling of helplessness, long delays, payment of unauthorized fees, seizure or destruction of merchandise). In the next quarter, ATP will pursue this idea further with the relevant stakeholders.

3.3 HELPING ECOWAS COORDINATE IMPLEMENTATION

ATP interactions with ECOWAS about the low level of regional policy implementation identified the lack of a systematic approach to facilitating and coordinating the implementation of the main regional policies. The discussions on the importance of an established regional system of managing the policy implementation process at the national level led to a renewed commitment within the ECOWAS Commission to create such a system, and an interest in the offer of ATP to assist in achieving such an objective.

During the review period, ATP embarked on the process of devising a regional system of coordinating policy implementation by formulating an outline of draft implementation strategies, guidelines and procedures. These draft operational instruments are to be discussed first with ECOWAS officials; the revised drafts would be presented for consideration and validation at a technical workshop to be organized in close collaboration with the ECOWAS Commission, and involving private sector operators and policy-makers. This phase of the process would terminate in the formal adoption of a general framework for coordination of policy implementation by the ECOWAS authorities.

3.4 SYSTEMS AND CAPACITY FOR MONITORING POLICY IMPLEMENTATION

As part of the adoption of a results-based system of programming and budgeting, ECOWAS has put priority attention on building its institutional capacity for operating an effective monitoring and evaluation system. In support of this, ATP has offered to help ECOWAS build a database to monitor implementation of its policy measures, particularly as they relate to ATP value chains and countries along its trade/transport corridors. ATP is building on its start during the previous quarter related to the development of a database on selected ECOWAS priority policy instruments, including basic texts and related information such as the archived ECOWAS Official Journal on CDs. During the period in review, however, ATP Policy Advisor's travel plans for follow up missions to ECOWAS were adversely affected by the non-availability of ECOWAS key staff because of conflicting calendars. ATP will work to avoid such problems in the future.

4. COMPONENT 2: BUILDING LINKS THROUGH SUPPORT FOR REGIONAL ASSOCIATIONS

4.1 STEPS IN ATP VALUE CHAIN WORK

The Agribusiness and Trade Promotion project has a well thought-through process in its value chain work to promote intra-regional trade and contribute to the improvement of productivity. These steps are as follows:

- Step 1: submit to validation by USAID and key partners (particularly ECOWAS and UEMOA) the project's choice of its three key value chains (maize, onion/shallot and ruminant livestock/meat), on which it is to concentrate its efforts on the ground.
- Step 2: undertake a thorough assessment of the value chains, through literature review and field studies in the countries concerned by its selected corridors.
- Step 3: submit to validation by key value chain stakeholders the value chain assessments, so that all can review the findings of the assessments and suggest, in a participatory way, the priority actions for the development of the value chain.
- Step 4: Prepare value chain development plans on the basis of the validation of the assessments, and identify action plans for implementation, in close collaboration with partners.
- Step 5: Implement the value chain development plans, with ongoing monitoring of implementation progress and periodic evaluation.

Steps 1 and 2 were completed in FY08, except for the livestock value chain assessment, which took place in September-October 2008. Step 3, validation of the value chain assessment, was the main activity for the October-December 2008 quarter.

4.2 ELABORATION OF VALUE CHAIN DEVELOPMENT PLANS

During the period in review, ATP's value chain leaders, working closely with other technical staff, elaborated Value Chain Development Plans (VCDPs) for livestock/meat, maize, and onion/shallot. ATP is designing the VCDPs on the basis of suggestions/recommendations formulated by stakeholders during the validation workshops and follow-up meetings, as well as comments and feedback received at the work plan presentation ATP gave to USAID/WA on January 20, 2009.

Each VCDP covers the 2009-2012 period, but includes an annual action plan that details the activities the ATP project will implement for the following year and the funding mechanism (direct technical assistance or grant) for each activity. It is a dynamic document that will be updated on a yearly basis, to take into account

new opportunities and propose solutions to new challenges faced by the value chain at the regional level.

In the course of designing the VCDP, ATP held several meetings to initiate partnerships for the implementation of the VCDPs, including but not limited to meetings with:

- Institut d'Economie Rurale (IER, Mali) and Institut National de l'Environnement et de la Recherche Agricole (INERA, Burkina Faso) on livestock fattening technology packages
- West African Seed Alliance (WASA), INERA, and the *Observatoire Régional de l'Oignon / Burkina Faso* (ORO/Burkina Faso), to set up trials in Burkina Faso on rainy season onion varieties
- *Programme d'Appui aux Filières Agro-Sylvo-Pastorales* (PAFASP, Burkina Faso / World Bank project) on fattening and meat export
- *Ministère des Ressources Animales* (MRA, Burkina Faso) during a workshop on meat export and upgrading of the Ouagadougou Abattoir
- University of Washington /Landcare for Food Security NGO to discuss possibilities of collaboration for training-of-trainers in seed production
- *Communauté de Pratiques sur l'Horticulture en Afrique Sub-Saharienne* (CopHorti / Hub Rural) on the creation of an e-forum of onion stakeholders in West Africa
- *Agriculteurs Français pour le Développement International* (AFDI) on production and storage activities with onion producers in Burkina Faso.

The draft VCDPs and their summaries have been shared with key stakeholders and partners in order to (i) get their feedback (expected by end April 2009) for fine-tuning the VCDP and (ii) identify opportunities for conducting some activities in partnership with them. These partners include CILSS, the *Programme d'Appui aux Filières Agro-Sylvo-Pastorales* (PAFASP Burkina Faso / World Bank), the *Association Malienne pour la Sécurité et la Souveraineté Alimentaires* (AMASSA), the *Association pour la Promotion de la Sécurité et de la Souveraineté Alimentaires* (APROSSA, Burkina Faso), the *Confédération des Fédérations Nationales de la Filière Bétail/Viande des pays membres de l'UEMOA* (COFENABVI), and the *Observatoire Régional de la Filière Oignon / Afrique Ouest et Centre* (ORO/AOC).

4.3 DEVELOPMENT AND IMPLEMENTATION OF A CAPACITY-BUILDING PLAN FOR REGIONAL ORGANIZATIONS

ATP project co-facilitated and co-financed (50% of total costs) an extraordinary general assembly meeting of the *Fédération Nationale des Organisations Interprofessionnelles de la Filière Bétail/Viande* (FOIBV, Burkina Faso) that took place in Ouagadougou on February 17-18, 2009. The objective was to rejuvenate this organization and ensure that livestock/meat stakeholders have a credible and representative voice in Burkina Faso. The meeting gathered over 120 stakeholders of the value chain (producers, butchers, abattoirs, traders, ministry representatives, etc.) and paved the way for a new organization called *Fédération de la Filière Bétail/Viande du Burkina Faso* (FEBEVIB). The organization elected an executive board and discussed elements of the future strategic plan of the federation. FEBEVIB

will represent livestock/meat value chain stakeholders in Burkina Faso and become an active member of COFENABVI. ATP is assisting FEBEVIB to elaborate a strategic plan and an action plan.

Taking advantage of the FEBEVIB launching (January - February 2009), the Chief Butcher of Burkina Faso (Koss Naaba) and the *Association Nationale des Bouchers du Burkina Faso* consulted ATP about the intention of the Burkinabé butchers to go on strike to protest illegal livestock slaughter, which competes with the Abattoir of Ouagadougou and impedes efforts of professional butchers to sell quality meat that respects sanitary norms--a prerequisite to increase the volume of meat exported in the region. The Association had decided to go on strike because previous discussions with the Government of Burkina Faso have not improved the situation. ATP advised them against a strike, which may turn consumers against them, and convinced them instead to mount an aggressive and well prepared advocacy program. The association requested ATP's support to elaborate an advocacy campaign and to build the capacities of butchers to develop business plans for meat export that could be submitted to a regional bank such as *Banque Régionale de Solidarité* (BRS).

At the regional level, ATP granted funds to COFENABVI to organize a regional organizational workshop in Abidjan, composed of two sessions:

- A three-day session on a Partner Institutional Viability Assessment (PIVA), 2-4 March 2009. The PIVA is a tool to analyze the performances of a partner organization and identify key improvement areas to reach sustainability. A total of 59 criteria are scored by the organization members themselves and lead to a scoring matrix that includes actual scores and target scores. ATP will update these scores yearly. The same exercise will be repeated yearly to measure performance improvements and take corrective actions if needed. In the case of COFENABVI, the initial scores highlighted that during the next 12 months efforts should mainly focus on three priority areas: (i) development of human resources within the organization; (ii) improvement of services offered to members; (iii) improvement of the organization's financial management.
- A two-day strategic planning session was held on 5th and 6th March, 2009 during which ATP facilitators assisted COFENABVI executives to draft a new multi-annual strategic plan to address key issues identified during the PIVA session and value chain development constraints.

A total of 29 executive members from 8 West African countries attended the workshop. The government of Côte d'Ivoire through its Minister in Charge of Animal Resources and its Minister in Charge of Regional Integration expressed their satisfaction to COFENABVI and ATP for their joint efforts to boost intra-regional trade of livestock, and confirmed its availability to reduce barriers to trade. After the workshop, ATP and COFENABVI discussed trade flow data collection within the region and agreed to develop together a data collection scheme built on existing COFENABVI data collectors posted in trans-boundary markets. ATP and COFENABVI agreed on a draft Memorandum of Understanding (MOU) covering all aspects of their partnership, which will be signed in the third quarter of FY 09.

For the onion value chain, ATP contributed technical assistance to facilitate the creation (January 6, 2009) of the *Observatoire Régional de l'Oignon / Burkina Faso* (ORO/Burkina Faso), as focal point of ORO/AOC in Burkina Faso. As such,

ORO/Burkina Faso intends to bring together stakeholders of all value chain functions and become the voice of the onion value chain in the country. The 48 participants (among which 11 were women) prepared a constitution and by-laws, and elected an executive board, with Mrs. Hélène Zoma Damiba as President. Since its creation, ORO/Burkina Faso has had many contacts with ATP to get advice and assistance in its first activities. Immediate key challenges for the organization are to increase its visibility among all onion value chain stakeholders, elaborate strategy, and start implementing an action plan.

During the quarter in review, ATP contacted several partners to contribute to a fertilizer PPP that would involve training-of-trainer programs on agro-inputs for maize and onion. These partners include IFDC and CroPLife Africa Middle East. In the next quarter, ATP will develop common action plans with these partners and sign a MoU with CroPLife.

4.4 BUILDING LINKAGES AND SUPPORTING TRANSACTIONS

ATP has identified and initiated recruitment of two market facilitators in Accra, and Abidjan to reinforce the bid and offer activities of the MIS, as well as the private public partnerships (PPP). ATP will be recruiting an expert in intra-regional trade to manage our facilitation efforts in Benin.

Since the maize assessment validation workshop (Accra, November 2008), ATP has assisted the *Société Industrielle pour la Transformation et la Commercialisation des Céréales* (SITRAC)- Burkina Faso, featured in ATP's series of Success Stories last quarter, to establish supply contracts with maize producers and traders organizations in the region. SITRAC is a key player in the regional maize value chain with orders of over 240,000 tons of maize flour, requiring 400,000 tons of maize to process for calendar year 2009. With support from ATP, SITRAC was able to secure a total of 72,750 tons of maize from Burkina Faso (37,000 tons), Côte d'Ivoire (27,500 tons), Benin (7,500 tons), and Ghana (750 tons – see text box). ATP is also helping SITRAC establish contacts in Mali. With average prices from \$233/t for Ghanaian maize to \$300/t for Ivoirian maize, ATP has facilitated a total of about \$8 million in intra-regional maize trade (excluding Burkina Faso). Thanks to these new business linkages with regional maize farmers and traders, SITRAC has been able to step-up its production, increase its market share, fill its orders—notably from government institutions (army, schools) and food aid agencies (World Food Program, Catholic Relief Services, other NGOs, etc.).

This has also helped SITRAC secure a second bank guarantee from ECOBANK in addition to that it already had with Coris Bank, a Burkinabe commercial bank. This bank guarantee will allow SITRAC's plant expansion, which is needed to increase the company's production capacity from 50 tons/hour to 150 tons/hour. The International Finance Corporation (IFC) approached SITRAC for a \$5 million equipment lease, which unfortunately exceeded SITRAC's ceiling of \$3 million through Coris Bank. SITRAC has requested assistance from ATP to identify another financial scheme to access the lease.

In the next few months, ATP will be also facilitating business linkages for two other maize processing companies based in Burkina Faso, which SITRAC introduced to the project. ATP believes that such lead processing firms are change drivers and able to boost intra-regional trade of maize.

ATP Workshop Helps University Graduate Find Value in Maize

When Elorm Goh graduated with a degree in sociology from the University of Ghana in 2006, no one expected her to look for a job in the agriculture industry, particularly as an international trader. After all, recent university graduates seldom see agriculture as a burgeoning industry

But Elorm's frequent trips to the Agbogbloshie Market in Accra, Ghana, piqued her interest in the industry and she soon became a member of the Ghana Agricultural Producers and Traders Organization (GAPTO) in hopes of starting her own business, though she was still unsure of what she wanted to do or how to begin,

Then, Elorm attended a Maize Value Chain Assessment Validation workshop in November 2008 as a representative of GAPTO. The workshop, organized by USAID's Agribusiness and Trade Promotion (ATP) project in Accra, brought together more than 50 value chain stakeholders from Benin, Burkina Faso, Côte d'Ivoire, Ghana, Mali and Niger to address the constraints and barriers to trade in the West Africa Region. Trade between African countries has traditionally been minimal because of the poor linkages between buyers and investors.

By connecting producers to buyers, the ATP workshop has enabled stakeholders, such as Elorm, to become active participants in the international maize trade. After the workshop, Elorm further developed her contacts by visiting Techiman and Ejura, the maize producing zones in Ghana, and Ouagadougou (Burkina Faso), one of Ghana's net importers of maize in West Africa. Maize, one of the key staple food crops in West Africa, plays a major role in food security. Its production as both a subsistence food and a cash crop has increased in recent years to meet the growing demands from industries as well as domestic consumers across the region.

Since the workshop, Elorm has been engaged in organizing farmers and marketing agents and has developed a good working relationship with extension officers around Techiman and Ejura. "Though I was new in the trade, it became easy for me because of the exposure I had at the ATP workshop," she said. "The facilitators were so well prepared that I benefited a lot." Elorm has already organized and supplied 750 metric tons of maize with a gross value of \$225,000 to a maize processing company in Burkina Faso.

Determined to establish herself as a key player in the maize industry, both locally and internationally, Elorm has secured a warehouse in Abissi, a town located in the maize producing zone in Ghana, and set up an office in Accra in anticipation of supplying at least 1,500 metric tons to international buyers by the end of 2009.

"When I tell my colleagues that I buy and sell maize, they become surprised because they think a graduate should not do that. But I think the industry has the potential to expand and create value for its players," she said.

During the FY09 second quarter, ATP identified organizations engaged in collective marketing of maize built on quality control; these organizations include the *Comité Interprofessionnel des Céréales du Burkina Faso* (CICB), *Union des Groupements pour la Commercialisation des Produits Agricoles de la Boucle du Mouhoun* (UGCPA-BM, Burkina Faso), *Union des Coopératives du Vivrier des Savanes* (UCOVISA, Côte d'Ivoire), *Union des coopératives Faso Jigi* (Segou, Mali) and cooperatives in Sikasso (Mali). These organizations can access cropping season credit with marketing credit tied around a highly developed quality control system in partnership with the World Food Program, the *Union des Producteurs Agricoles du Québec pour le Développement International* (UPADI) and Audit Control & Expertise

(ACE, Côte d'Ivoire¹). ATP will analyze this quality control scheme to see if it can be replicated to promote the development of a set of standards to facilitate regional trade as opposed to the varying regional and national grading systems that exist currently. ATP will also build capacities of regional maize stakeholders to meet this set of standards. The *Office National du Commerce Extérieur* (ONAC, Burkina Faso) is organizing, April 24-30, 2009, a trade promotion week for Burkina Faso products (including livestock and onion) in Côte d'Ivoire. Trade of livestock and onion from Burkina to Côte d'Ivoire slumped during Côte d'Ivoire's political unrest, but its potential remains high. ATP considers Abidjan and Bouake as key terminal markets for Sahelian products. ONAC requested technical and financial assistance from ATP to organize this event. In March ATP held meetings with ONAC and value chain stakeholders (FEBEVIB, COFENABVI, ORO / Burkina Faso) to prepare the event. ATP will make a presentation on intra-regional trade of livestock in West Africa during the forum and facilitate the exhibition of live animals and onion. ATP will partner with ONAC and the World Bank-funded project (PAFASP) to develop a follow-up scheme to track volumes and values of produces sold during the event, and business linkages built during the week.

¹ Audit Control & Expertise Cote d'Ivoire (ACE CI) is part of the group Audit Control & Expertise Global Limited (ACE - www.ace-group.net) doing warehouse certification and collateral management. ACE supports contract farming, trade flow facilitation and commodity pricing – ensuring value-optimization throughout the chain, including provision of finance for commodity producers and traders. On the 28th of March 2009, ACE CI established partnership with UCOVISA (Union des Coopératives du Vivier des Savanes) to enable UCOVISA to access production and marketing credit to ensure maize production around a highly developed quality control basis. UCOVISA is the principal supplier of maize to SITRAC from Cote d'Ivoire. UCOVISA is engaged in collective marketing of maize and has 9000 members, comprised of producer organizations in Korhogo, Boundiali, Ferké, Tengrela, Sinematiali, and Ouangolo. Support members re production, collection and marketing.

5. COMPONENT 3: BUILDING CAPACITY FOR PRIVATE-SECTOR ADVOCACY

ATP strategy for improving linkages is based on establishing close partnerships with regional private-sector organizations. The project team believes that these regional private-sector organizations offer the best prospects for building institutional sustainability in support of agribusiness and trade that will endure beyond the life of ATP.

During the FY09 second quarter, ATP developed advocacy programs for targeted partners: COFENABVI for livestock/meat, ORO/AOC for onion/shallot, and CICB for maize. The advocacy programs are part of the value chain development plans. They are closely linked to (i) organizational strengthening of the partner organizations, (ii) empowerment and capacity building of partner organizations in the elaboration of an advocacy strategy, and (iii) creation of pressure groups that will bring together diverse leaders and their organizations that have the potential for getting heard by decision makers and following-through with monitoring implementation of measures adopted. ATP will assist, rather than direct them in identifying and prioritizing key issues, elaborating an advocacy strategy, and implementing them, with support of national level pressure groups.

In the case of maize where no regional network exists yet, stakeholders attending the maize validation workshop (Accra, November 2008) have chosen CICB as the lead organization to work toward such a network. In February 2009 CICB submitted a proposal to ATP to organize a regional capacity building workshop on advocacy. ATP believes that this training constitutes a catalytic event that will bring together maize stakeholders of the region and engage them in a concrete collaboration around an activity of common interest. The TORs of the workshop, elaborated by CICB with ATP assistance, identify a regional advocacy strategy for the maize value chain as the main expected output. The workshop will take place in Ouagadougou in May 2009, and will be followed-up by an advocacy event during the 5th edition of the *Journées Agroalimentaires*, which the *Fédération des Industries Agroalimentaires du Burkina Faso* (FIAB) plans for November 2009.

6. COMPONENT 4: PROMOTING EFFICIENCY OF REGIONAL VALUE CHAINS

6.1 MARKET INFORMATION SYSTEM

6.1.1 PARTNERSHIP IN MIS

During the quarter in review, ATP finalized its MIS set up with the recruitment of a MIS specialist and finalizing of MOUs with partners, comprising the web-based MIS platform provider, Esoko Networks, and four national organizations engaged in MIS data collection in Burkina Faso (APROSSA Afrique Verte Burkina Faso), Côte d'Ivoire (ANOPACI), Ghana (Esoko, Ghana), and Mali (AMASSA Afrique Verte Mali).

AMASSA, APROSSA (both national NGOs), and ANOPACI (a national apex producer organization) are already engaged in data collection in their own right, but are being further strengthened in their capacities and regional outreach thanks to their partnership with ATP. They are focused on food security through the development of agricultural trade, primarily at the country-level, but now also at the regional level by taking advantage of ATP intra-regional MIS and market facilitation.

As noted in the previous report, BusyLab, originally identified in ATP MIS partnership, has restructured itself and, in the process, has given up the name "Tradenet.biz," owned by another entity. The new structure now includes a new international entity, Esoko Networks, headquartered in Mauritius and managing Esoko MIS platform (in lieu of Tradenet.biz). Esoko Networks has established a local affiliate in Ghana (Esoko Ghana) and expects to open in the near future similar branches in other countries. BusyLab, the mother company, remains a software developer, running the Esoko platform for, and supplying various services to the Esoko Networks group. In addition to this structure, BusyLab and the Esoko group are in the process of upgrading its platform and developing new services of much interest to ATP (e.g., providing information on intra regional trade through key market channels monitored by ATP).

ATP MIS partnership calls for the collection of price data (producer, wholesale, and retail-when appropriate) at 10 key market places in each countries, and covering ATP products (maize, onion, shallot, livestock, and meat). Because ATP cover additional markets and products for their own use, this partnership results in a critical mass of markets and products that enhances the appeal of the Esoko platform for ATP's and the national organizations' beneficiaries. The vision developed by ATP and shared with its partners is to strengthen their relationships over the life of the project so that they will see the benefit of continuing this partnership after the project unfolds.

ATP is also working to bring on board to this nascent partnership other organizations, and core public market information systems. CILSS initiated a meeting during the CORPAO event to discuss possible collaboration with FEWSNET and AGRIS, and CILSS' own interest in providing information of cross-border trade related to maize

and livestock, in particular. ATP is also working with the regional organizations (COFENABVI in livestock, and ORO in onion), and National Cattle Traders and Breeders Associations to provide both trade data and market prices to strengthen its MIS.

6.1.2 ATP MIS ACTIVITIES

During the period under review, ATP carried out the following activities:

- **Training of partners** in survey methodology to collect information on market prices, bids and offers, and profiling of traders engaged in bids and offers. ATP and Esoko need a common methodology to make data comparable across countries. ATP MIS specialist and Esoko traveled to Burkina, Côte d'Ivoire and Mali to conduct the training. This consisted in the characterization of markets, characterization of products, survey instruments, including the use of SMS and Internet to send prices to the Esoko platform. ATP also provided financial support for its partners in Burkina Faso, Côte d'Ivoire, and Mali to attend an Esoko conference (March 9-13) to share experience on MIS across countries (including ATP countries, Madagascar, Mozambique, Sudan and Afghanistan), provide feedback to Esoko on the performance of its platform and identify opportunities for further collaboration.
- **Facilitation of bids and offers** ATP MIS specialist represented ATP at the CILSS (CORPAO) meeting in Abuja to contribute to the generation of bids and offers for maize and livestock. At that meeting, there were 22 offers and 20 bids. ATP also participated (March 17) in the Fada, Burkina Faso, cereal exchange fair (bourse de cereals). At this event, bids totaled 322 tons, offers 2,573, and 166 MT transactions were made for a value of CFA15,565,000.

Products	Bids Quantity	Offers Quantity
Maize	4 100	13 030
Cattle	310000	597065
Goat	4 270	122 734
Sheep	10 000	491 802
Meat	3 600	324
Onion	520	15 000

Source : Trading and business workshop CORPAO, Abuja March 2009

- Meat, maize and onion in MT
- Cattle, sheep and goat per head

6.1.3 MIS DISSEMINATION

Busylab/Esoko is making information on price available to ATP's beneficiaries under the old Tradenet.biz platform, while waiting to complete the transition to its new platform. ATP and Esoko have been piloting the setup of "ATP West Africa" within the old platform; ATP West Africa will be finalized after the platform migration. In addition, Table 1 below presents partial (because the MIS training is not yet finalized)

market information collected (price data points, number of offers and users) during the period under review.

TABLE I. STATUS OF ACTIVITIES PER COUNTRY ON THE ESOKO PLATFORM FROM JANUARY THROUGH MARCH 2009

	Burkina Faso	Ghana	Cote D'ivoire	Mali
Market prices ¹	16 out of 42 (38.10%)	27 out of 63 (42.86%)	26 out of 96 (27.08%)	5 out of 39 (12.82%)
commodity price ²	40 out of 115 (34.78%)	70 out of 145 (48.28%)	66 out of 149 (44.30%)	13 out of 115 (11.30%)
news	2	4	8	2
library	0	2	1	2
prices	1.470	9.880	1.371	72
offers	56	1.450	28	24
users	59	3.034	53	25
groups	0	3	0	0

¹ Number of markets actively operating out of the total markets registered on the Esoko platform in the country

² Number of products enumerated out of the total products registered on the Esoko platform on the country.

6.2 MOBILIZATION OF ADDITIONAL FINANCE THROUGH ACCESS TO CREDIT AND THE DEVELOPMENT CREDIT AUTHORITY (DCA)

During the period under review, ATP worked with USAID's Office of Development Credit (ODC), which was visiting Ghana, to make a preliminary assessment of ECOBANK's interest in a DCA to serve ATP needs. ECOBANK expressed some interest, but also some reservations, which stem from the less than hoped-for results achieved under the on-going DCA with the TH. The COP provided notes on this meeting to two STTA retained by ATP to investigate further DCA's prospect for ATP, including either setting up one DCA or making use of an existing one by September 30.

Types of DCA
USAID partial credit guarantees (up to 50%) has four potential configurations or options:
<ul style="list-style-type: none">• A loan portfolio guarantee designed for financial institutions to cover a group of borrowers,• A specific loan guarantee, intended for the financing of a single project having a strong impact on the country's development,• A bond guarantee, protecting investors in paper issued by a company, and• A portable guarantee, intended for borrowers seeking finance from providers not yet identified.
Most of the DCA used in developing countries involve the first type, and in some cases, the second type,

The STTA will in fact, cover the larger perspective of access to finance, of which DCA is an instrument. To that effect, ATP also made available to the STTA providers meeting notes of the COP and the M&E specialist with ECOBANK and Ghana Commercial Bank about funds' transfer across countries and currencies. The STTA consultants comprise a senior financial specialist, with in-depth operational knowledge of DCA from his work and investigation in Senegal, and a young specialist who, following the experience gained by working with the senior consultant, will likely be hired by ATP to fill the position of Finance Mobilization Specialist in the next quarter.

The senior consultant (from the AYANI network) produced an initial review based upon discussions with an ODC officer in Senegal (who was reviewing DCA programs there) and a review of the literature. The draft review, to be finalized and incorporated into the final report in the third quarter, reports on the following:

- General description of the DCA (see text box) with a focus on the particular case of Senegal, where DCA is reportedly working reasonably well;
- Experiences with networks and partner banks (e.g. ECOBANK, CBAO);
- Lessons that can be drawn from this history; and
- The potential and future prospects for DCA guarantees to help ATP staff better understand such guarantees' basic operations (see text box).

6.3 MOBILIZATION OF ADDITIONAL FINANCE THROUGH WAREHOUSE RECEIPT

The maize value chain leader and two STTA consultants conducted 3 weeks of fieldwork for the warehouse receipt pilot study in Ghana in January 2009. Together with the COP, they briefed USAID on preliminary findings of the fieldwork. The initial conclusions of the study are that the economic and financial environment in Ghana is conducive to getting a warehouse receipt program up and running. Banks are trying to lend more to agriculture, insurance companies are expanding their business, and investment in grain storage is increasing. Now the government of Ghana is going ahead with a law to allow for a commodity exchange and warehouse receipts. ATP attended on March 19 a workshop where the government announced a feasibility study was underway and the results of the study would guide the Ghanaian Securities and Exchange Commission in writing the new commodity exchange and warehouse law. ATP is following up on the workshop by meeting with the organization doing the feasibility study and the Securities and Exchange Commission to ensure the scope and timing of a pilot warehouse receipt program is aligned with these initiatives of the government of Ghana.

6.4 MOBILIZATION OF ADDITIONAL FINANCE THROUGH LEVERAGE

In January 2009, ATP identified the new World Bank regional initiative for onions and potatoes as a leverage possibility for ATP partners of the onion value chain (i.e., mainly ORO/AOC). This regional initiative is still at a concept note stage and may take some time before it becomes a reality. However, its approach is interesting and would complement ATP's efforts towards strengthening onion value chain actors. The initiative will look for additional funds (e.g. through the All ACP program of the EU Commission) to top up existing bilateral World Bank value chain projects (PAFASP in Burkina Faso, PCDA in Mali, PRODEX in Niger) and regional projects such as ATP (through its partners), in order to increase intra-regional trade of Sahelian onions and potatoes⁴. On January 14, the ATP office in Ouagadougou hosted a meeting with UEMOA, bilateral World Bank and IFAD value chain projects, an onion processing private company, an onion producer organization and the World Bank to discuss and identify possible intervention priorities for this regional World Bank initiative. During the next few months, ATP will follow-up the development of the proposal with the World Bank.

On March 21, 2009, ATP initiated a consultancy to facilitate the development of public-private partnerships (PPPs) in the maize and onion value chains. Through field visits, the short-term consultant identified potential lead organizations and companies for maize and onion PPPs; in April he will define areas and responsibilities of each partner, and link them through MoU agreements. This activity will be discussed in detail in the FY09 third quarter progress report.

⁴ The Common Fund for Commodities would be another possibility

7. PROJECT COMMUNICATIONS ACTIVITIES

The efforts directed at introducing the project to stakeholders and the general public, which had begun in the Oct – Dec quarter, were continued and intensified, with emphasis on deepening already-established relationships, particularly with the media, and also creating new media relationships in order to establish the knowledge and visibility of ATP across the region. Other relationships which are potentially critical to project communications activities were also identified and established. Media coverage and publicity of project activities were pursued and improved to strengthen the relationship between the project and the media, and also present the project to the general public in a good light.

7.1 RELATIONSHIP BUILDING WITH STAKEHOLDERS

Relationship-building activities with key stakeholders were enhanced, particularly the media, in the various participating countries. New media relationships were established and strengthened in Ghana, Burkina Faso, and Côte d'Ivoire. Earlier relationships with the media were also strengthened. Through a Partnership Institutional Viability Assessment (PIVA) workshop organized in Abidjan, Côte d'Ivoire by the project, some other critical relationships were established with national federation members of a regional partner, la Confédération des Fédération Nationales de la Filière Bétail/Viande des Pays membres de l'UEMOA (COFENABVI). The relationship will pave way for ATP to use the platforms and events of these organizations to communicate its activities to other partners and stakeholders in the region.

An informal partnership was also established with one of Ghana's foremost business newspapers, *Business and Financial Times*. As a result of this relationship, the paper has agreed to work with the project by creating a new page for agricultural business related stories to support and communicate ATP project activities. The project has also deepened its relationship with a regional TV network (Africable) to ensure regional reach of ATP project activities. These channels will be useful, in addition to others, in supporting project activities.

7.2 PRODUCTION AND PUBLICITY

More knowledge and visibility of the ATP project were created through printing and provision of brochures (English and French) to participants at ATP programmes/events, as well as to the media to guide their reportage on ATP. Media orientation sessions were also held at every project activity to keep the media abreast of activities and other information on the project.

7.3 MEDIA ACTIVITIES/COVERAGE

All project activities received extensive media coverage and publication/airing during the period in question. Such activities were covered and reported in newspapers, on radio as well as on national TV stations by the media in the various

countries, and also carried across French West African countries by a regional TV network (Africable).

7.4 DOCUMENTATION

During the period in review, documentation of ATP project activities was continued and intensified to enable the project to secure sufficient materials for the development of documentaries on the project to showcase its activities. In line with this, all ATP project activities carried out in the quarter were documented. Still pictures and video shots were taken of project activities. Such materials, including video footages have been duly stored, on electronic storage devices. Project activities which were covered by the media and subsequently aired on TV and radio were also captured on CDs and DVDs⁵. PowerPoint presentations at workshops are among stored project materials. Newspaper stories on ATP activities in Burkina Faso and Côte d'Ivoire were also documented for the same purpose. ATP is also building scrapbooks (in Accra and Ouagadougou) of newspaper articles that reference ATP or that cover ATP events.

7.5 REGIONAL MEDIA COVERAGE

Conscious efforts were directed at facilitating regional coverage of project activities to create more knowledge and visibility for project ATP in the region, particularly in participating countries. As a result, good media relationships and contact persons were established in three countries including Ghana, Burkina Faso, and Côte d'Ivoire. The relationship with Africable, a regional TV network, has also been deepened. The regional TV network has again diffused information on ATP (PIVA workshop in Abidjan) across French speaking countries in the region. As part of collaborative arrangements between ATP and Africable, shots of the overview of ATP activities are being developed by Africable in collaboration with the ATP Communications Specialist to be aired across the region to intensify knowledge and visibility of ATP's in the region.

7.6 ATP WEBSITE

Preparations toward setting up a web site for the project have been made. The ATP web site, which is to provide information on ATP project activities, will be set up in the following quarter to be used to project and communicate ATP to stakeholders. Negotiations are on-going for collaboration to enable ATP to benefit from some platforms of ATP partners, including the use of partner web sites to communicate ATP's activities to give ATP a wider coverage and visibility.

⁵ ATP will request clearance from USAID/Legal and Public Affairs in Washington before publication of the materials.

8. PERFORMANCE INDICATOR REPORTING

8.1 INTRODUCTION

The Monitoring and Evaluation (M&E) specialist, recruited in November 2008, is responsible overall for all data collection and compilation. He coordinates monitoring activities at all levels of project implementation and across the four components.

During the period under review, January – March 2009, ATP identified a number of trade associations/partners to report import and export data for the project. In the maize value chain, the associations identified include (i) Techiman and Ejura maize traders association in Ghana, and (ii) the Comité Interprofessionnel du Céréales du Burkina (CIC-B) in Burkina Faso. For the ruminant livestock value chain, the associations identified include (i) the Ashaiman and Kumasi Livestock Traders and Breeders Associations, which will record imports of cattle into Ghana, and (ii) COFENABVI, our regional partner, which will record export data from Mali, Burkina Faso and Niger. In the onion value chain, ATP will work (i) with onion traders associations under GAPTO, which will coordinate data on onion imports into Ghana, and (ii) with ORO/AOC, our regional partner, which will record exports of onions from Burkina Faso and Niger to coastal countries.

These organizations, however, are not viewed as mere data collectors, but rather as partners with which ATP work to strengthen their capacities, provide market information services, and market facilitation to act on bids and offers, in order to deliver better services to their members and contribute to increase the volume and value of their trade. ATP asks its partners (who are well known in market places) to collect information on all trades at key market places, and not just trade conducted by members of the trader associations. That is, ATP collects trade data through market channels, rather than just trader associations. The complete trade data for the first year will serve as baseline to evaluate the trend in volume and value of intra-regional trade in ATP products.⁶

8.2 ONION VALUE CHAIN

ATP piloted its onion data collection methodology with GAPTO for the Accra market channel onion imported Accra and has just finalized its partnership to collect information for the Kumasi and Ashaiman market channels.

The onion associations that will be reporting trade data are located in three assembly markets, serving three market distribution channels, in Ghana (Accra, Kumasi and Techiman). ATP has piloted its methodology and finalized arrangements concerning the Accra market distribution channel. It has now worked out

⁶ ATP will report the change in value as the indicator for its primary objective, but will disaggregate the change in volume and value by product for analysis.

arrangements with the other market channels, but complete data are not available for these two market channels. Table 2 below presents data for onion imported into Accra from Niger and Burkina Faso.

TABLE 2. ONION IMPORT INTO ACCRA FROM NIGER AND BURKINA FASO IN FY09 FIRST AND SECOND QUARTERS

Market Channel	First Quarter FY 09		Second Quarter FY 09		% Change (+-)	
	Volume (MT)	Value (US\$)	Volume (MT)	Value (US\$)	Volume (MT)	Value (US\$)
Accra	2,213	1,457,244	8,295	2,371,406	+274.78%	+62.73%

Source: GAPTO

Onion trade in Ghana in the second quarter of FY09 recorded about 275% increase in volume over the first quarter imports and in value terms there is an increase of about 63% as can be seen in the table. The increase in volume was due to the good harvests realized during the season. As can be seen in the graph below, the first quarter imports of onions by GAPTO-Accra branch was 2,213 metric tons valued at about US\$1.46 million, whereas the second quarter recorded a volume of 8,295 metric tons valued at about US\$2.4 million. The increase in volume in the second quarter was due to the good harvests realized during the season, also leading to the decrease in FOB price per 120 kg bag from an average of Fcfa 26,000 in January to as low as Fcfa 6,000 in February and Fcfa 7,000 in March. It could also be that the UEMOA axle load measure applied only by Niger thus far, is compelling traders to bid down the price of onions in order to compensate for the higher transaction cost introduced by the measure. Traders indicate that now they must load no more than 250 bags of onions for export instead of 450-500 bags before implementation of the measure. Overall transaction cost (unit transport cost and fines) increase with the smaller size loads. ATP will investigate these issues in the next quarters.



FIGURE I. VOLUME OF ONION IMPORTS IN ACCRA IN FIRST AND SECOND QUARTERS FY09

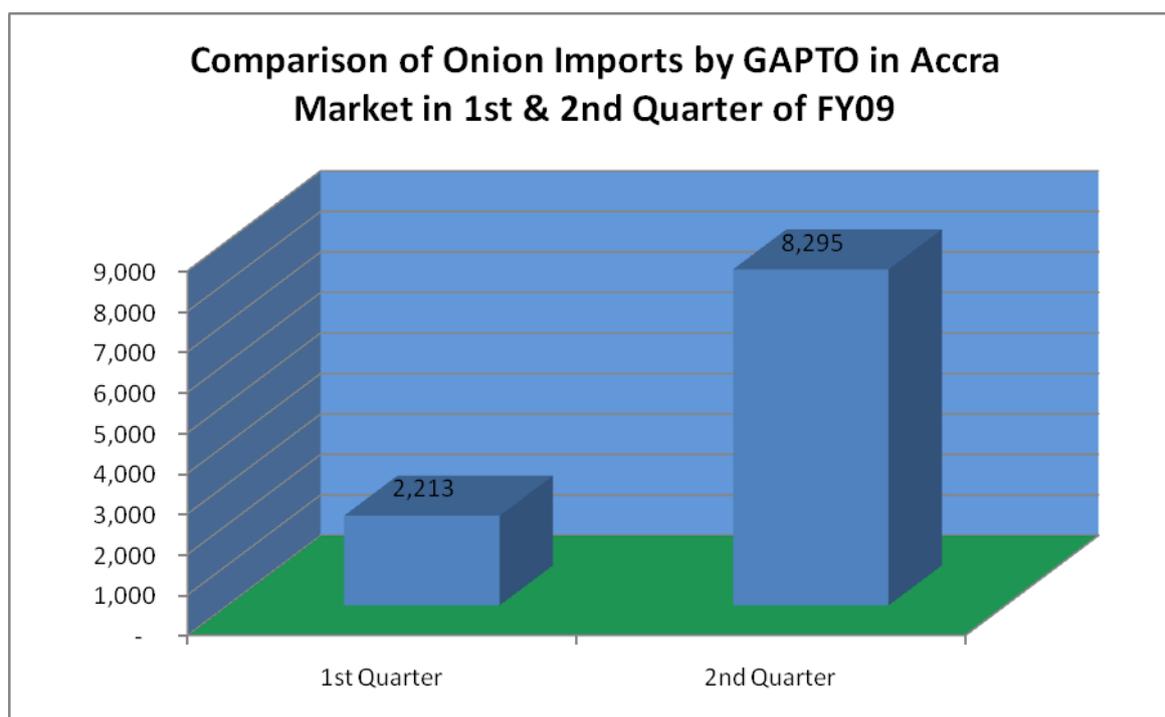


Table 3 below shows the volume and value of onions imported into Ghana from January to March 2009

TABLE 3. ONION IMPORT INTO ACCRA FROM NIGER AND BURKINA FASO IN FY09 FIRST AND SECOND QUARTERS

Month	Volume (Mt)	Value (US\$)	Value per Mt (US\$)
January	2,728	1,205,361	441.85
February	1,339	263,290	196.63
March	4,228	902,756	213.52
Total	8,295	2,371,406	285.88

Source: GAPTO

8.3 LIVESTOCK RUMINANT VALUE CHAIN

ATP has collected data for livestock trade import into Ghana's main distribution channels from the Ashaiman Cattle Breeders and Traders Association located in Tema near Accra and the Kumasi Cattle Breeders and Traders Association located in Kumasi. About 95% of livestock imported into Ghana go through these two market channels. Sheep and goat are imported during Tabaski and Christmas, and none was recorded during the January-March quarter.



Livestock data collection is complicated by the fact that traders and butchers often buy lots of animals using visual inspection and no weighing whatsoever. Whereas the enumeration of animals is straightforward, the categorization (by age or by size), and the average price and value of transaction are all subjective. ATP's partners, however, contend that they have acquired over the years the skills to estimate with a large degree of confidence the value of animals being traded. ATP piloted its data collection methodology and has worked with COFENABVI (set to sign a MOU with ATP), to collect comparable data, which will come online starting next quarter. Table 4 shows cattle import into Ghana during the period.

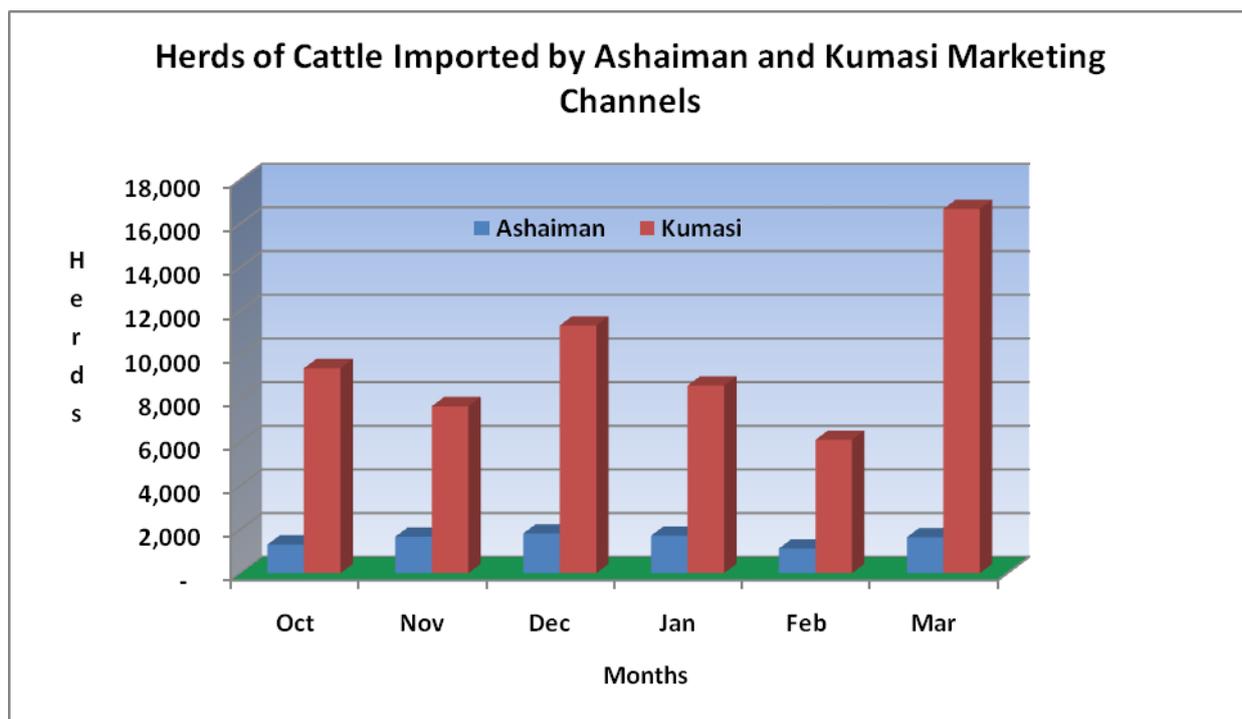
TABLE 4. CATTLE IMPORT INTO GHANA THROUGH THE KUMASI AND ACCRA MARKET DISTRIBUTION CHANNELS, OCTOBER 2008 – MARCH 2009

Month	Ashaiman		Kumasi	
	No of Herds	Value (US\$)	No of Herds	Value (US\$)
October	1,310	676,307	9,385	6,664,755
November	1,670	871,233	7,644	3,511,175
December	1,815	887,361	11,343	6,106,518
January	1,716	768,375	8,590	4,415,338
February	1,130	489,544	6,107	3,777,496
March	1,645	686,549	16,679	10,111,972
Totals	9,286	4,379,369	59,748	34,587,254

Source: Kumasi Livestock Traders and Breeders Association

Kumasi imported about four times as many cattle as Ashaiman between October 2008 and March 2009. One trader contends that this is due to more festive celebrations, thus more meat consumed during funerals in the Ashanti region (see Figure 2)

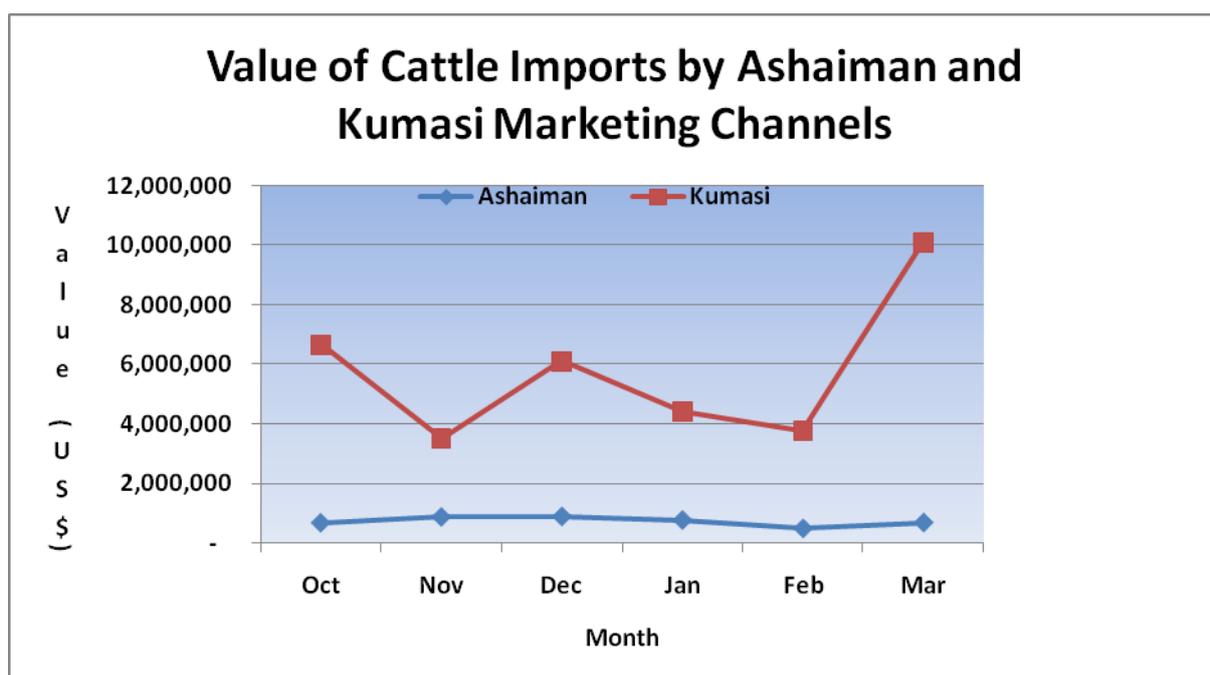
FIGURE 2. CATTLE HEADS IMPORTED INTO GHANA THROUGH KUMASI AND ACCRA MARKET DISTRIBUTION CHANNELS, OCTOBER 2009 – MARCH 2009



Source: Ashaiman and Kumasi Livestock Marketing Channels

The trend of imports by Ashaiman Cattle traders is almost the same as that of Kumasi *note: we are dealing only with trend in this statement* as most imports were done in December and March as can be seen in Fig.3. This is as a result of the Moslem and Christian festivals that fell within the same period of time in December as described above.

FIGURE 3. VALUE OF CATTLE IMPORT INTO GHANA THROUGH KUMASI AND ACCRA MARKET DISTRIBUTION CHANNELS, OCTOBER 2009 – MARCH 2009



Cattle import through the Kumasi channel increased from 28,372 animals in the first quarter to 31,376 in the second quarter, an increase of about 10.59%. The decline of the livestock imports from October to November was due to the Moslem fasting period. In December, following the end of Ramadan, imports rose sharply and reached 11,343 and began to decrease again and reached a low of 6,107 animals before rising to 16,679 in March 2009. These upswings in December and March were due mainly to the Moslem and Christian celebrations of the Eid al-Adha Festival and Christmas respectively. In March the imports rose again to a very high level as a result of the preparation for Easter celebration, during which a lot of animals would be slaughtered.

In the Ashaiman channel, however, imports decreased by 6.3% in number. It was thought to be normal during this period as farmers find it difficult to fatten the animals well before exporting them because of lack of good feed/forage during the dry season.

8.4 MAIZE VALUE CHAIN

Two main markets have been identified in Ghana for the export of good quality maize to Burkina Faso and Niger. The markets identified include Techiman and Ejura. These markets serve as the main assembly markets of maize in Ghana and in the main harvesting season, when tons of maize move



across the borders to the Sahel region. An initial meeting was held with the leadership of the two associations and there is every indication that data collection will commence by the beginning of May 2009. In the other ATP countries, CIC-B in Burkina Faso has also been identified to record the imports and exports of maize across the borders of Burkina Faso. A MoU is being prepared between CIC-B and ATP for data collection to also commence by beginning of May 2009.

8.5 DATA COLLECTION IN OTHER ATP COUNTRIES

As soon as data collection procedures are tested and judged to be reliable for Ghana, those of the other ATP countries will be instituted. Trade associations will be identified and trained on methods of data collection. Formats have also been designed for data collection on other indicators.

8.6 ATP DELIVERABLES

TABLE 5. ATP DELIVERABLES

Outcome	Task	Deliverables	Achievement/Comments
Outcome 1: Significant reduction of the incidence of physical and policy-related barriers to moving agricultural and related commodities regionally in West Africa	Task A 3.1.1: Collect and disseminate information on transport barriers, in coordination with UEMOA	<ul style="list-style-type: none"> • Semi annual reports on road harassment on at least one selected trunk route 	Anticipated by end of next quarter (Q3).
	Task A 3.1.2: Support a communications campaign to discourage road harassment	<ul style="list-style-type: none"> • Annual dissemination strategy for information on road harassment • Implementation of dissemination campaign with partners 	Strategy anticipated for Q3 of FY09.
	Task A 3.1.3: Identify key locations where investments in logistics infrastructure have the potential to greatly enhance intra-regional trade; facilitate private investment in these	<ul style="list-style-type: none"> • Annual list of target investments in market logistics infrastructure with a 'mini-strategy' for facilitating public/private investment for each target investment • One PPP in logistics 	Anticipated along an onion trade & transport corridor by end of Q3.

Outcome	Task	Deliverables	Achievement/Comments
	locations	infrastructure facilitated per full project year	
	Task A 3.1.4: Identify priority public investments to improve the efficiency of transport corridors critical to our value chains; support advocacy and provide know-how to our partners	<ul style="list-style-type: none"> • Annual list of the highest priority road infrastructure investments needed by transport corridor tracking progress against previous list • Dissemination and advocacy plan for promoting road infrastructure investments (Coordinated with Component 3) 	Anticipated along an onion trade & transport corridor by end of Q3.
	Task B 3.1.1: Define Agricultural and Trade Policy Priorities for ATP	<ul style="list-style-type: none"> • Analysis and vision statement for priority agricultural policy reform for each selected ATP value chain including updates of analyses done in preparation for ECOWAP with annual updates • 7 training workshops on key agricultural and trade policy issues 	Planning & preparation for a training workshop in Q3 of FY09
	Task B 3.1.2: Help ECOWAS Co-ordinate Implementation	<ul style="list-style-type: none"> • Annual implementation plan for agricultural policy change with milestones • Institutionalized process for gathering and incorporating industry feedback in policy change at ECOWAS • 	Anticipate by end of Q3. Significant work on this will be undertaken in Q2 through Q4.
	Task B 3.1.3: Develop systems and capacity for Monitoring Policy Implementation	<ul style="list-style-type: none"> • Status of implementation analysis for ECOWAS on key agric reforms as baseline for monitoring • M&E process ECOWAS can use to monitor policy implementation with member countries and other institutions 	Initiated in compilation on CD ROM Planned for Q3/Q4 of FY09
Outcome 2: Enhanced linkages among agricultural producers and agro-input suppliers, agro-processors and distributors	Task 3.2.1: Confirm Value Chain Selection with USAID and Partners	<ul style="list-style-type: none"> • Presentation of proposed value chains and process for validation with partners 	Completed
	Task 3.2.2: Assess Selected Value Chains with Regional Partners	<ul style="list-style-type: none"> • Assessments of key constraints for three selected value chains with proposed interventions (coordinated with VCDPs below) • Workshops to present and discuss assessments with 	Assessed at validation workshops for the three value chains in Accra and Ouagadougou during Q1.

Outcome	Task	Deliverables	Achievement/Comments
		regional member governments, ECOWAS and other partners	
	Task 3.2.3: Select Regional Private Sector Association Partners	<ul style="list-style-type: none"> • See task 3.2.4 below as deliverables apply to both 3.2.3 and 3.2.4 	Selected COFENABVI, ORBV and ORO.
	Task 3.2.4: Create a Value Chain development plan and build the capacity of regional associations	<ul style="list-style-type: none"> • VCDP for each selected value chain updated yearly with monitoring of progress • MOU and Capacity Building Plan for each selected private sector association partner aligned with the appropriate VCDP • Initial PIVA assessments for each private sector association partner; with annual updates to identify progress against Capacity Building Plans • Training of Trainer Manuals for association partners • Models and user guides for contractual and payment arrangements to protect producers and long-distance traders 	<p>Initial VCDPs to be completed in Q2.</p> <p>Planned for COFENABVI for Q2 after PIVA</p> <p>PIVA planned for COFENABVI</p>
	Task 3.2.5: Build linkages and support transactions through a network of Market Facilitators	<ul style="list-style-type: none"> • Monthly market information reports and target deals for each target consumption market • Periodic 'barriers to doing business' reports from buyers and distributors to feed into policy and advocacy efforts 	Facilitators will be hired, trained & reporting by Q3

9. PROJECT MANAGEMENT

9.1 STAFFING

The ATP project is approaching full staffing with a few unfilled positions: Financial Services (Mobilization) Advisor and 2 market facilitators in Cotonou and Kano. See Staffing Matrix below.

TABLE 6 STAFFING MATRIX

Position in Accra	Hire	Type of Hire	Start Date	Comments
COP	Ismael Ouedraogo	Intl.	5/5/08	
Finance & Admin. Driver	Patrick Addai Jeffrey Edue	LCN LCN	6/5/08 6/23/08	
Policy Advisor	Frank Ofei	LCN	Mid June 08	Half time working from Ghana
Operations Manager	Christel Tshikudi	Intl.	8/4/08	
Janitor/Office Assistant	Gabriel Dzikunu	LCN	9/15/08	Started with a professional service agreement
IT Specialist	Nana Akwasi Boaitey	LCN	10/20/08	Replaced Francis Anim
Communications & Outreach Specialist	Felix Deyegbe	LCN	10/1/08	
Admin. Assistant	Edith Mills-Tay	LCN	12/12/08	Replaced Philip Essuman
M&E Specialist	Chris Amedo	LCN	11/5/08	Began as a consultant
Transport Advisor	Kossi Dahoui	TCN	12/22/08	
MIS Specialist	Olivier Kabre	TCN	1/1/09	
Grants Manager	Bernardin Gatete	LCN	4/15/09	
Finance Mobilization Specialist	TBD	TBD	7/1/09	Started with finance access/mobilization assessment in April 2009
Position in Ouagadougou	Hire	Type of Hire	Start Date	Comments
DCOP	Raphael Vogelsperger	Intl. (TCN)	5/22/08	
Maize VC Coordinator	Rose Lum Wanzie	TCN	6/9/08	
Onion VC Coordinator	Alseny Soumah	TCN	6/16/08	
Janitor/Office Assistant	Seyba Zeba	LCN	07/01/08	
Admin./Office Manager	Lucienne Bambara	LCN	07/07/08	
Boukari Nebie	Driver	LCN	08/21/08	
Livestock VC Coordinator	Seydou Sidibe	TCN	9/1/08	

Institutional Capacity Building Specialist	Jules Sombié	LCN	10/15/08	Replaced Prosper Bissi bid as key personnel in proposal who opted out.
Office Assistant	Souleyman Belem	LCN	2/16/09	
Market Facilitators	Hire	Type of Hire	Start Date	Comments
Accra	Haruna Agesheka	Consultant	4/1/09	Contracted through professional agreement with GAPTO
Abidjan	Daouda Diomande	Consultant	5/1/09	
Cotonou	TBD	Consultant	TBD	
Kano	TBD	Consultant	TBD	

9.2 TRAVEL

Table 7 below lists travel made between January and March 2009 and their purpose.

	Date of Travel	Countries	Travelers	Purpose
1	5/1/09 - 17/1/09	Ghana	Rose Wanzie, Charlie Stathacos	Conduct a feasibility assessment for the design of a pilot warehouse receipt system in Ghana
2	18/1/09 - 25/1/09	Ghana	Raphael Vogelsperger, Seydou Sidibe, Jules Sombie, Alseny Soumah, Rose Wanzie	Prepare for and participate in the FY09 Workplan presentation to USAID
3	18/1/09 - 25/1/09	Ivory Coast	Olivier Kabre, Sarah Bartlet, Patrice Annequin	Conduct training on Esoko market information system to the Association Nationale des Organisations Professionnelles Agricole de Côte d'Ivoire (ANOPACI)
4	25/1/09 - 30/1/09	Burkina Faso	Nana Akwasi	Install a server at the ATP/Ouagadougou office and provide software training to the staff there
5	27/1/09 - 5/2/09	Niger	Seydou Sidibe	Attend regional livestock workshop organized by CEDEAO
6	2/2/09 - 7/2/09	Nigeria	Kossi Dahoui	Participate in the implementing partners meeting with the Government of Nigeria, various donors, and USAID/Nigeria concerning the Global Food Security Response program in Nigeria
7	16/2/09 - 20/2/09	Mali	Olivier Kabre, Laura Drewett, Patrice Annequin	Conduct training on Esoko market information system to the Association Malienne pour la Sécurité et la Souveraineté Alimentaires

8	21/2/09 - 28/2/09	Burkina Faso	Olivier Kabre, Laura Drewett, Patrice Annequin	Conduct training on Esoko market information system to the Association pour la Promotion de la Sécurité et de la Souveraine Sécurité et de la Souveraineté Alimentaire (APROSSA) in Burkina Faso
9	16/2/09 - 3/15/09	Burkina Faso and Niger	Kossi Dahoui	Start a detailed planning of transport activities for Niger and Burkina Faso and meet with counterparts (JEMOA, and Shipper's Councils)
10	22/2/09 - 26/2/09	Benin	Ismael Ouedraogo	Recruit market facilitator and identify traders organizations for capacity building and collection of trade data on onions, maize and livestock products
11	24/2/09 - 6/3/09	Ivory Coast	Seydou Sidibe, Jules Sombie, Iven Ose, Felix Deyegbe	Conduct a Partner Institutional Viability Assessment (PIVA) on livestock/meat organizations of COFENABVI (Confederation des Federations Nationales de la Filière Bétail/Viande)
12	9/3/09 - 15/3/09	Burkina Faso	Christel Tshikudi	Assist the technical team with finalizing Value Chain (VC) Development Plans, costing/pricing the planned VC activities, and elaborating grants VC program
13	15/3/09 - 20/3/09	Burkina Faso	Chris Amedo	Meet with COFENABVI, shippers' Councils, and CICA to plan trade data collection on livestock and maize. Work with the ATP team in Ouagadougou on identifying producer organizations for data collection and finalizing reports of indicators and deliverables
14	15/3/09 - 20/3/09	Nigeria	Olivier Kabre	Attend the CILSS Conference from March 16 -18 and afterwards and review with ECOWAS the current status of AGRIS
15	22/3/09 - 29/3/09	Burkina Faso	Ismael Ouedraogo	Conduct quarterly visit with ATP Ouagadougou office staff and strengthen partnerships with regional organizations and national organizations
16	21/3/09 - 28/3/09	Niger	Raphael Vogelsperger, Chris Amedo	Discuss data collection of onion exports with ORO and meet ICRISAT to discuss partnership with ATP
17	18/3/09 - 23/4/09	Ghana, Burkina Faso, Niger, Ivory Coast	Charlie Stathacos	Generate Public Private Partnerships (PPPs) for the Maize and Onion Value Chains

9.3 WORKPLAN, PROGRESS REPORT, AND OTHER CONTRACTUAL DOCUMENTS

ATP presented and defended its FY09 workplan to USAID on January 20, 2009. USAID participants were Michael Wyzan, Melissa Knight, Jeffrey Cochrane, Jorge Oliveira, Robert Kagbo, John Mullenax, Neil Price, Jonathan Chappell, Kevin McCown, and Matthew Burton.

FY09 workplan was revised based on feedback received by USAID officers and resubmitted for approval in March.

ATP submitted its third quarter progress report end of January which was approved by the COTR.

The project is awaiting the second task order modification that should include clauses addressing:

- environmental impacts and resulting environmental mitigation and monitoring actions for the ATP program activities;
- revised schedules for progress reports, annual workplans and PMP, period of performance, and RCO approval delegation of grants and LCN/TCN rate approvals to the COTR;
- increased sub-obligation.

ATP is also awaiting CO's retroactive rate approval of a few consultants and employees who were initially approved solely by former Acting COTR, Melissa Knight.

9.4 AGREEMENTS

ATP entered into agreements with the following organizations:

	Period of Performance	Organization	Amount	Purpose
1	19/1/09 – 31/3/12	ANOPACI	FCFA 48,857,500	Collect, process, and disseminate reliable, practical and continuous agricultural market information to allow producers to make good decisions and improve commercial negotiations in Ivory Coast
2	23/1/09 – 31/3/12	AMASSA	FCFA 48,441,575	Collect, process, and disseminate reliable, practical and continuous agricultural market information to allow producers to make good decisions and improve commercial negotiations in Mali
3	23/1/09 – 31/3/12	APROSSA	FCFA 48,406,530	Collect, process, and disseminate reliable, practical and continuous agricultural market information to allow producers to make good decisions and improve commercial negotiations in Burkina Faso

4	24/2/09 - 31/3/09	COFENABVI	FCFA 10,478,800	Organize an in-depth assessment of the organization and develop a pluri-annual strategic plan to become sustainable and provide adapted services to its members in order to develop the livestock and meat value chain in the region
5	25/3/09 - 31/3/12	GAPTO	GHC 96,000	Assist GAPTO and its affiliates provide reliable and verifiable collected data of cross-border trade on onion/shallot, livestock ruminants, and maize, imported to, or exported from Ghana
6	16/3/09 - 30/6/09	AYANI	USD 30,000	Assess financial market of agribusiness in Ghana, Burkina Faso, Niger, and Mali and develop a three-year plan for improving access of key regional value chain participants to finance

9.5 OTHER ADMINISTRATIVE ISSUES

ATP internal operations manual was drafted and will be finalized and validated before the end of May. This manual addresses issues such as office hours, leave, financial and administrative procedures, travel, reporting and internal communication procedures, procurement, and so forth.

Office security plans were drafted and sent for review to Abt Home Office.

New server and firewall were installed in Ouagadougou Office by Accra-based IT specialist at the end of January.

The ACDI/VOCA sub-account at ECOBANK in Ouagadougou is now in place and functional and serves to pay subcontracted employees' salaries and allowances.

8% salary increase was mandated by law for the private sector in Burkina (effective October 1, 2008), therefore, ATP applied it to its Burkinabe local staff.

VAT exemption in Ouagadougou was obtained and will be renewable yearly.

ATP has encountered many challenges to produce adequately formatted documents and reports for external dissemination considering the disparate computer literacy level of staff and the amount of time needed to reformat documents. Support was requested to Abt Home Office to train staff on document formatting.

10. PIPELINE ANALYSIS

CONTRACT BUDGET CATEGORY	BUDGET AMOUNT	ACCRUED EXPENDITURES TO 3/31/09	REMAINING BALANCE
DIRECT LABOR (including Fringe)	3,627,240	692,415	2,934,825
OTHER DIRECT COSTS	3,035,178	794,685	2,240,493
SUBCONTRACTS , CONSULTANTS, GOVERNMENT PROPERTY, GRANTS	7,509,641	947,942	6,561,699
INDIRECT COSTS	1,705,903	568,798	1,137,105
FIXED FEE	1,032,068	193,426	838,642
TOTAL	16,910,030	3,197,267	13,712,763
PIPELINE ANALYSIS			
FUNDED AMOUNT (OBLIGATION)			4,285,536
TOTAL BUDGET			16,910,030
LESS EXPENSES THROUGH 3/31/09 TO LAST QUARTER			3,197,267
OBLIGATION BALANCE ON 3/31/09			1,088,269
BUDGET BALANCE ON 3/31/09			13,712,763
MONTHLY AVERAGE BURN RATE			290,661
PIPELINE MONTH OBLIGATION AT CURRENT MONTHLY BURN RATE			4
PIPELINE MONTH BUDGET AT CURRENT MONTHLY BURN RATE			47
PROJECTED MONTHLY BURN RATE FOR NEXT QUARTER			350,000
PIPELINE MONTH OBLIGATION AT PROJECTED MONTHLY BURN RATE			3
PIPELINE MONTH BUDGET AT PROJECTED MONTHLY BURN RATE			39