

MARKET ANALYSIS SYSTEM

Information & Advisory Services





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CONTENTS

1	Introduction to the market	4
1.1	Relevance to the poor	5
1.2	Opportunities for pro-poor growth	5
2	Methodology	6
3	Market structure and performance	6
3.1	Overview of the market system	7
3.2	Core market performance	11
3.3	Supporting functions	14
3.4	Rules	17
3.5	Cross-cutting issues	19
4	Constraints analysis	22
4.1	Root causes	25
5	Market strategy	27
5.1	Market strategy statement	27
5.2	Opening portfolio of interventions	27

Figures:

Figure 1: Generic staple value chain
Figure 2: Information and services value chain
Figure 3: Generic information value chain
Figure 4: Specific radio value chain
Figure 5: Supporting functions
Figure 6: Rules

Tables:

Table 1: Survey of farmer's use of media	8
Table 2: Intervention logic table	25



INTRODUCTION TO THE MARKET

In Nigeria, over the years, smallholder farmers have demonstrated limited or no knowledge in many areas of farming, ranging from agronomical practices, use of tools and inputs on one hand to information on prices, weather forecasts and how to access to finance on the other. Smallholder farmers need various forms of information and advice to enable to address these gaps in knowledge.

They also need to be able to adapt their practices to changing climatic conditions and be responsive to new farming methods that increase yields and produce products of the quality demanded by customers and consumers. “No innovation ever gets accepted without effective communication from originators to the target adopters,”¹ which is why the role of information and advisory services is significant in enabling smallholder farmers to maximize their income.

In the past, Government extension services and Marketing Boards, provided some information and advisory services to farmers. However, because of various issues impacting the provision of extension services, which will be discussed extensively in other sections below, and the introduction of the Structural Adjustment Programme (SAP) in 1986, which saw the scrapping of Marketing Boards- and no institutions to replace or play their functions, millions of farmers have been left in a

precarious situation. Presently, for the smallholder farmer, market access is a challenge, and price uncertainties and volatility leaves them at the “mercy of merchants.”²

This suggests that opportunities to improve livelihoods and incomes of poor farmers should include deployment of an effective and efficient information and advisory service as a means of addressing a cross cutting issues common across all crop production value chains. This is the basis of BIF’s strategy, which makes full use of the linkages to the agriculture markets that BIF is also supporting (maize and cassava) and also to aquaculture to the extent where there is overlap.

Given that the bulk of grain production takes place in a belt across the north, Northern Nigeria appears a strong area to plan interventions in this market because poor smallholder farmers are concentrated in the North and agriculture is the dominant occupation of the poor in this area.

¹Emenyeonu, B.N., 1987. Communication and Adoption of Agricultural Innovations: Quantification and Notes Towards A Conceptual Model. Africa Media Review. 1 (2) pp. 105 -119

²Government to reintroduce commodity marketing boards: <http://www.punchng.com/business/business-economy/govt-to-reintroduce-commodity-marketing-boards/>

1.1 Relevance to the poor

In the “Information and Advisory Services” market, the poor smallholder farmers are largely consumers and primary beneficiaries of the service. They receive information as disseminated by service providers: government, extension agents or private organizations/associations.

Smallholder farmers are rarely providers of such information or involved in the content development process except in Person-to-Person (P2P) mode of dissemination.

Opportunities for strengthening this market for greater impact exist in Northern Nigeria where the national poverty incidence is highest: North Central - 59.5%; North East - 69% (although the poverty incidence could well have worsened given the spate of Boko Haram attacks in the North East over the last 2 years); and North West - 70%. This is in contrast to lower poverty levels in: South East - 58.7%; South South - 55.9%; and South West: 49.8%.³

Nigeria has about 14 million smallholder farmers who account for about 80% of domestic food production in the country.⁴ About 10.2 million of these farmers are in Northern Nigeria.⁵ The majority of smallholder farmers are in Kano, Katsina, Kaduna, Jigawa and Bauchi States, with an estimated population of 5.3 million farmers between them.⁶

Based on a 2012 agricultural survey⁷ the gender ratio of male to female farmers in Northern Nigeria is 9:1. Traditionally, there have always been fewer female farmers than male farmers in Northern Nigeria. The women in the north (with exception of states like Bauchi and Kaduna) are usually not involved in the main farming activities but in other value addition activities to the agricultural produce.

The majority of these farmers earn less than \$1.5 a day stemming from their low productivity and the fact that they are not earning as much as they should from the sale of their produce as a result of the low prices they realise for their product.⁸

Farmers have also been found to have limited literacy and continue to rely on old agronomical practices, such as rain-fed agriculture and traditional handling and storage practices which affect farm yield and/or results in post-harvest losses.

This gap between what smallholder farmers achieve and their potential is exacerbated by the increasingly technical, and constantly evolving, nature of farming, given the development of modern technology in seed varieties, tools and equipment, climate change, erratic weather patterns, and the influx of pests and diseases.

1.2. Opportunities for pro-poor growth

Given the aforementioned constraints smallholder farmers will be able to improve productivity and income by getting sufficient and timely information on best agronomical practices to adopt, crop specifications needed by industrial processors, weather forecasts, post-harvest loss prevention, post-harvest processing and crop storage opportunities, as well as alternative market outlets, and access to credit.

This information will enable the farmer to produce more efficiently with access to premium market for produce as well and to be better informed on the latest and best practices in agronomy and affordable sources and types of finance available.

Additionally, there better information can also address other issues that impact on many poor households such as health, education, culture and entertainment

³National Bureau of Statistics, 2010 Report, delivered on Monday 13th February, 2012.

⁴Oxfam, 2012. Policy Brief on Prioritising Public Investment for Sustainable Agriculture Development. Utako: Civil Society Legislative Advocacy Centre (CISLAC)

⁵National Bureau of Statistics Portal, 2014

⁶ibid

⁷Ango, A.K., Illo, A.I., Abdullahi, A.N., Makikasuwa, M.A. and Amina, A., 2012. Role of Farm- Radio Agricultural Programmes in Disseminating Agricultural Technology to Rural Farmers for Agricultural Development in Xaria, Kaduna State, Nigeria.

⁸ibid



Methodology

Based on the crop market selection process and early analysis done, it was found that certain supporting functions are just as important as the crops themselves and would require in-depth analysis and intervention. “Information and Advisory Services” was one of such recurring supporting functions.

Market Structure and Performance

The information and advisory services market is a crosscutting supporting function of the general crops market as depicted in Figure 1.

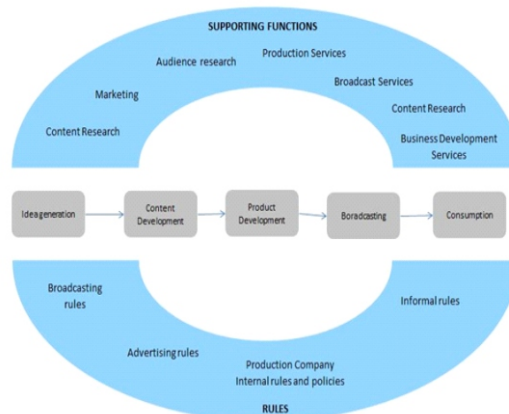


Figure 2: Information and services value chain

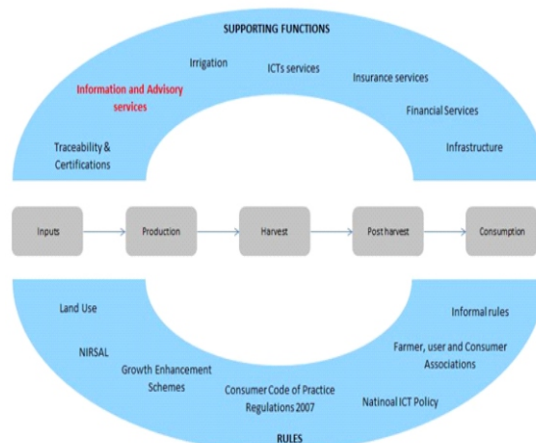


Figure 3 is a mapping of the information and advisory services market map based on radio as channel of dissemination. The various components of the value market map: core functions, supporting functions and rules. These are each discussed below.



OVERVIEW OF THE MARKET SYSTEM

The government has traditionally been the sole provider of information and advisory services to farmers. To this end, it established the National Agricultural Research and Extension Liaison Service (NAERLS), a national extension service establishment with a mandate for extension services and information dissemination, to transfer knowledge and ensure technology adoption by farmers.

However, due to the dwindling government focus on, and funding of, agriculture with the growing importance of the oil and gas sector, NAERLS is poorly funded⁹ and unable to efficiently cater for farmers know-how needs, especially provision of relevant and timely information. NAERLS currently has a total workforce of 400 employees¹⁰ to serve 14 million smallholder farmers, nationwide.

While NAERLS is the Federal Government's extension services body, the Agricultural Development Programmes (ADP) are the extension services body at the State level. The ADPs rely heavily on the Federal and external bodies, such as the World Bank, for funds.¹¹ To sustain their agricultural programmes, both NAERLS and the ADPs encourage private sector involvement in providing information and advisory services to farmers.

Over the years there have been an increasing number of private and non-governmental agencies that provide extension services to farmers such as those provided by the Smallholders Foundation, IITA, Sasakawa

Global, Value Seeds Limited, Youth Missionary Christian Association in Nigeria, Cocin Community Development Programme, Voluntary Services Organization, Nigeria, Premier Agricultural Development (PAD) and many other. In spite of the growing number of private/ non-governmental extension workers, still, the ratio of extension workers to farmers is about 1: 9000¹² and only 18% of farmers currently receive extension services.¹³

Apart from extension workers, information to smallholder farmers was passed through Marketing Boards, as mentioned earlier. These marketing boards were the institutions used by government to market and distribute agricultural produce, internally and externally.

They primarily informed farmers on the prices of produce, the various grades, and also assured them of buying their produce at a

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⁹Madu, U. A., Umar, M. H. and Khaliq, M., 2012. Farmers' Media Use Pattern in Adamawa State, Nigeria. International Journal of Academic Research in business and Social Sciences. 2 (1)

¹⁰NAERLS official website: <http://www.naerls.gov.ng/site2/index.php>

¹¹Akramov, K.T. 2009. Decentralization, agricultural services and determinants of inputs in Nigeria. International Food policy Research Institute (IFPRI)

¹²CORAF/WECARD, 2008. Analyses of the value-chain of priority staple crops for research and development interventions in West and Central Africa. Global Food Security Response Initiative.

¹³Nwuneli, N.O., 2013. Creativity: Unleashing the power within. LEAP Africa. Available at: <http://sme.firstbanknigeria.com/wp-content/uploads/2013/12/FirstBank-Creativity-and-Capacity-Presentation-Ndidi-Nwuneli.pdf>

particular price, regardless of external fluctuations, to ensure continued supply. But due to external pressure to liberalize the economy, Marketing Boards were scrapped to allow for private sector involvement. However, about 27 years later, the present Minister of Agriculture, Akinwumi Adesina, has spoken of the need to re-introduce the Marketing Boards, which he refers to as marketing corporations to be run by the private sector. The government has in July granted African Exchange (AFEX) Holdings concession to a number of federal government silos across the country and also launched the electronic warehouse receipt system (e-WRS).

This private sector led initiative is meant to replace the marketing board system. It is expected that the information and advisory services being provided by the board will now

be taken over by these private sector warehouse service providers.

Apart from extension agents and marketing boards, other channels through which information is disseminated to farmers are radio, television, mobile phone, newspaper, leaflet, parent, fellow young farmer, co-operative/ associations, commercial input dealer, internet, folk music, role play, town criers, and family, friends and neighbours. In each of these various mediums, there have been growing opportunities, for example, two Nigerian Newspapers, The Guardian and Daily Trust have dedicated pages to agriculture. Daily Trust in Particular, just started recently, testing with two pages, but have over the years, increased to about 8 pages.

Table 1: Survey of farmer's use of media

Media	Marketing	Pesticides	Herbicides	Fertilizer	Improved Seed Variety	Improved agric. practices	Processing	Storage
Radio	19.3	29.5	31.5	15.8	27.8	40.5	53.3	32.2
Television	0.5	1.1	1.1	-	-	0.5	2.6	3.2
Commercial agents	4.7	20.5	21.0	31.1	23.7	14.7	5.8	11.6
Newspapers	-	4.7	2.7	20.6	1.1	-	0.5	-
Agric. Bulletin	1.2	-	-	-	0.5	-	-	0.5
Fellow Farmers	1.6	1.1	1.1	-	0.2	3.2	6.2	2.1
Extension Agents	34.1	11.1	9.5	7.4	19.5	8.9	0.5	12.5
Family and relatives	30.2	2.1	5.7	7.9	4.7	2.1	-	4.7
Do not seek information	17.4	30.0	27.3	17.0	20.5	30.1	31.1	33.2

Source: Fieldwork of Farmers' Media Use Pattern¹⁴

¹⁴Madu, U. A., Umar, M. H. and Khalique, M., 2012. Farmers' Media Use Pattern in Adamawa State, Nigeria. International Journal of Academic Research in business and Social Sciences. 2 (1)

From Table 1, farmers' sources of information vary depending on the agricultural practice. However, the most popular media are Radio, Extension agents and family and relatives.

This is further corroborated by different surveys^{15 16 17 18} with the only change being co-farmers or "Fellow farmers" instead of "Family and relatives" as third most popular source of information. It is important to say that in most of the surveys found, very little made reference to ICT as a source of information to farmers.

We know from present practice that the above are not the only channels that can be used to reach poor smallholder farmers, and that teledensity has increased in Nigeria along with access to/ownership of mobile phones by the rural poor. But still, radio is the most dominant medium of reaching smallholder farmers with huge opportunities for pro-poor growth.

Since the 1960s, radio broadcasting has been used by the government to disseminate information to large number of farmers in very short time informing them of emergencies such as during large pest attacks (for example quail birds), or to drive a campaign for cotton production, or announce agricultural policy changes.

The major channel for government dissemination in the North was FRCN Kaduna, which also pioneered agric programmes. Today, apart from FRCN Kaduna there are a number of public and private radio stations that air programmes on agriculture.

These programmes are conceived internally by the radio stations or externally by other providers of information on agriculture like input suppliers and extension agents. NAERLS for example reaches out to farmers nationwide through partnership with Federal and State radio stations producing up to 15 different programmes for radio and television. Input suppliers like Zenith Energy Enzymes have their own weekly radio agricultural

programmes broadcast from Jos in Plateau State.

There are also foreign radio stations such as BBC Hausa Service and Deutsche Welle that have programmes on agriculture, and there are other non-governmental collaborations such as In Kidi ya Chanza ('when the drum beat changes you must change your dance steps'), a two-year project supported by Climate Change Adaptation in Africa (CCAA), Canada's International Development Research (IDRC) and DFID, disseminating information and advice to farmers through the radio to strengthen the capacity of smallholder farmers to adapt to climate change.

There are other means of effectively reaching farmers apart from radio, although these presently have little agriculture focused content. This includes the mobile phone. 64% of Nigerians have access to mobile phones (30% by primary ownership and 34% by secondary access).

Mobile phones been only recently been used as a tool to reach farmers. A major driver of this is the government's Growth Enhancement Scheme (GES) that allows farmers registered on the scheme receive fertilizers, agro-chemicals and hybrid seeds at subsidized rates



5.3m

The majority of smallholder farmers are in Kano, Katsina, Kaduna, Jigawa and Bauchi States, with an estimated population of 5.3 million farmers between them.

¹⁵Olaniyi, O. A. and Adevale, J.G. 2012. Information on maize production among rural youth: A solution for sustainable food security in Nigeria. Library Philosophy and Practice.

¹⁶Ango, A.K., Illo, A.I., Abdullahi, A.N., Maikasuwa, M.A. and A. Amina, 2013. Role of Farm-Radio Agricultural Programmes in Disseminating Agricultural Technology to Rural Farmers for Agricultural Developing in Zaria, Kaduna State, Nigeria. Asian Journal of Agricultural Extension, Economics and Sociology. 2 (1): 54 -68.

¹⁷Agwu, A.E., Ekwueme, J.N. and A. C. Anyanwu, 2008. Adoption of improved agricultural technologies disseminated via radio farmer programme by farmers in Enugu State, Nigeria. African Journal of Biotechnology. 7 (9): 1277 - 1286.

¹⁸Okwu, O.J. and Umoru, B.I., 2009. A study of women farmers' agricultural information needs and accessibility: A case study of Apa Local Government Area of Benue State, Nigeria. African Journal of Agricultural Research. 4 (12), pp. 1409 -1409.

via reference numbers sent to them on their mobile phones. There are a number of mobile phone based agricultural applications such as the mKRISHI sponsored by Tata Consultancy Services, Victoria DPI crop disease and Cultivapp.

These are not yet available or popular in Nigeria but there are opportunities for pro- packages on the mobile phone platform that can be used to facilitate discussions and solutions on the numerous challenges facing farmers in the country.

Another possible way of reaching the farmers is through television especially given the fact that radio and mobile do not provide the farmer with the means of seeing the practical demonstration of what he is being taught. It is worthy of note also that television is increasing becoming popular in Northern Nigeria

including among the smallholder farmers.

Television sets are now a common sight in the rooms and houses of these poor farmers due to a number of factors such the availability of cheap/affordable imported second hand (tokunbo) TVs and the Hausa culture of parents including a TV set and furniture among the gifts to their daughters getting married. A TV set is also seen as a status symbol or sign of arrival so it is acquired to demonstrate sign of wealth.

Television for agricultural information services is important for reaching the major policy makers such as top civil servants and top executives in industries using agric produce as inputs. TV is the major source of information for these policy makers and not radio. In order for us to affect policy and re-orientation of these policy makers there is need to have programmes using TV.



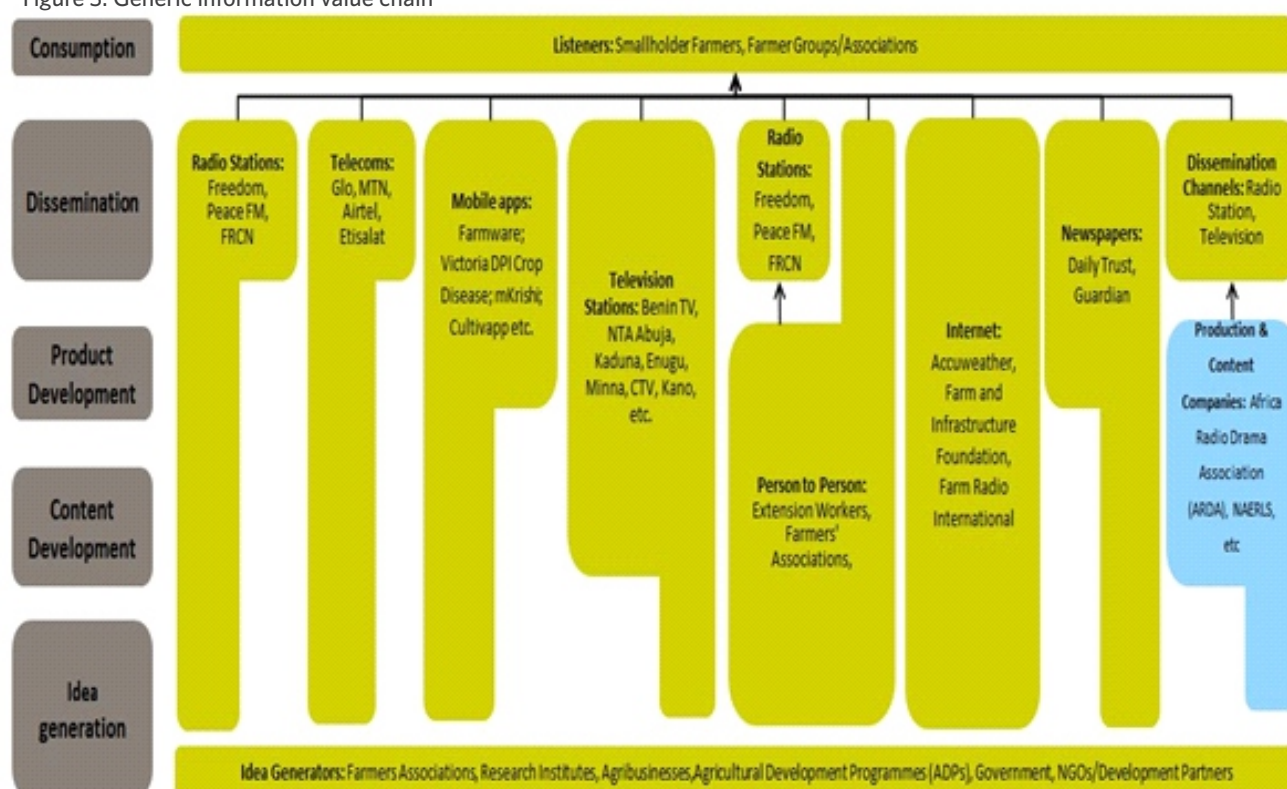
3.2 Core market performance

Figure 3 shows a generic value chain, showing the core function and various market players in the information and advisory services market.

based on this knowledge of the present and potential strength of radio over other channels. Depending on the media and channels used, quality and timely information can reach both male and female farmers at the same time in spite of the gender inequalities that exist.

The market performance consists of five core functions. These core functions are shown in the value chain map, along with the interactions between the actors in the market. It is important to note that information and advisory services on radio are mainly provided

Figure 3: Generic information value chain



Of the dissemination channels shown in Figure 3, radio has long been identified as the tool with the highest potential for effective (and supplementary) dissemination of information to farmers. A value chain for radio is shown in Figure 4.

Radio is arguably the cheapest and most accessible medium,¹⁹ to which 83% of rural dwellers have access (30% by primary ownership and 53% by secondary access). Further analysis of this market will be done



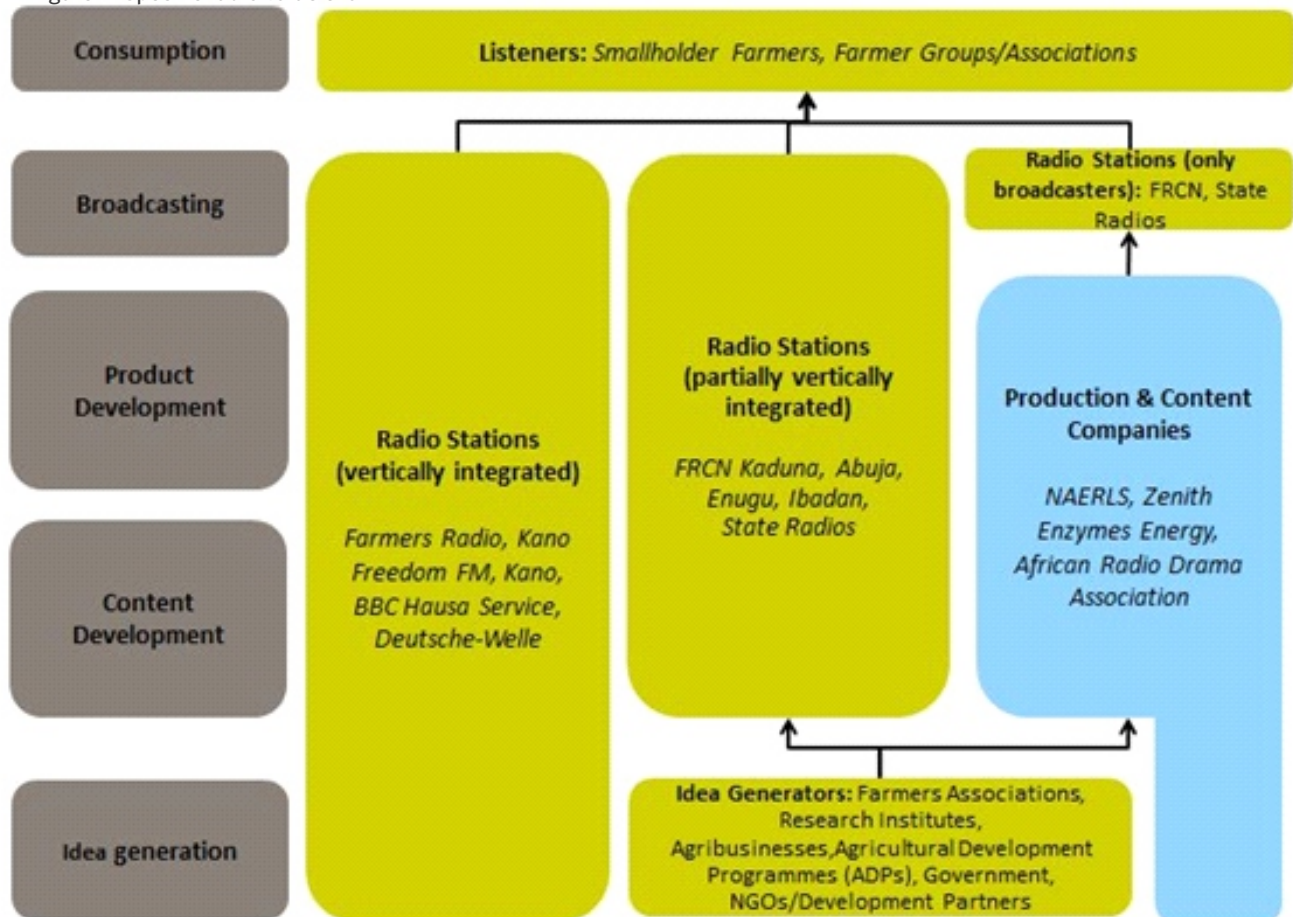
¹⁹Ridwan, A.A., Suleiman, H.B, and S.S. Fatonji, 2014. Radio as a tool of diffusing agricultural innovations in Lagos. Arabian Journal of Business and Management Review (OMAN Chapter). 3 (11): 149-164.

through public (Federal/ State), private local or foreign radio stations. Community radio stations are just emerging and not yet popular in Nigeria.

To avoid repetition these various actors are referred to as information service providers (ISPs).

from within the ISP or from an external body. Idea generation in the private sector is often driven as part of business development by the desire to promote an issue, service or product. For example, input suppliers like Zenith Energy Enzymes, Smallholders Foundation, Value Seeds, or a farmers' association like the All Farmers Association of Nigeria (AFAN) decide

Figure 4: Specific radio value chain



Idea generation: before information is disseminated, it is first generated during regular, planned brainstorming sessions or in an ad hoc manner in response to an event, for example a weather, pest or disease related event. It is during this process that the program topic, the themes of the content, target audience, geographical location for dissemination, and the duration of the programme are first defined.

The process of idea generation may either stem

on an issue of importance to its members and then embark on promotional campaigns through media and channels they believe farmers can access.

A typical example of external idea generation is NAERLS being instructed by the Ministry of Agriculture to design a campaign around, for example, the benefit of being a cotton farmer as a means to get farmers to start growing cotton. The idea could also be from findings of NAERLS' from any of the two annual surveys it conducts every year.

Farmers associations and co-operatives are instrumental, not just in getting information across to farmers but in giving both male and female a platform to voice their needs and demands to information service providers and even collectively advocate the need to participate in the content development and production processes.

There are many active farmer groups such as the Cassava Growers Association of Nigeria (CGAN), Maize Association of Nigeria, Women Farmers Advancement Network (WOFAN), and different farmers' co-operatives.

Content development: after the idea has been formed the production unit and research unit within a radio station, or a contracted content development expert such as African Radio Drama Association (ARDA)²⁰, develop content for the programme.

Content development involves liaising with agricultural subject-matter specialists and/or conducting secondary research using journals and publications or primary research. The subject matter specialists might be seed experts like Value Seeds personnel,

Agronomists from IITA or Institute of Agricultural Research (IAR), Extension Experts like Sasakawa Global, Fertilizer Experts like Zenith Energy Enzyme or Notore Chemicals, Policy makers from Ministry of Agriculture. Often the incentive of the subject matter specialists is to promote its own public profile, show-off research or policy capabilities, or position a product.

Product development: after liaising with subject matter specialists and conducting primary/secondary research, the production team decides on the format they consider best in disseminating the information to the farmers such as through presentations, interviews, drama or a combination of formats. In the case of drama (combining education and entertainment),

which farmers favour the most, either by themselves or via independent scriptwriters,

the production unit converts the technical content (from the subject matter specialists' inputs and research work) to simpler terms that farmers can relate to and comprehend. To further enhance understanding and increase reach, the content is translated into languages suitable for the audience.

NAERLS for example, translates from English to Hausa, Igbo, Yoruba, Fulfude, Kanuri and Pidgin English. Other producers who do not have the capacity to translate to as many languages usually focus on three major languages: Hausa, Igbo and Yoruba or just English and Pidgin. Smallholders Foundation designs its own programmes and translates to Pidgin English and Igbo, because of its target audience in Imo State, where it broadcasts.

ARDA is known to do its radio dramas in English, pidgin, Hausa or Igbo. As mentioned above the farmers seem to prefer information passed across in drama formats, but perhaps because of the cost involved in the drama process, ISPs seem to prefer presentations²¹.

The second part of product development involves studio and field recording. After the script has been approved by the editor within the production unit it is then recorded at an in-house or outside studio or outdoors, depending on the programme, such as Freedom FM and Farmers Radio, Kano.

The final part of product development is editing/ duplicating (also referred to as final packaging). This is often done by in-house radio station technicians or individuals with the editing software skillset employed by a contracted production company to put the programme together for presentation. Duplicating as the name implies is simply duplicating of the programme on digital media (cd, mp3 etc.) after it has been finally edited.

Broadcasting: radio broadcasting is either of a live or pre-recorded package. Stations such as the Manoma Radio (Farmers Radio) Kano, Smallholders Foundation and Freedom FM are vertically integrated and broadcast their own programmes. To expand their reach, stations

²⁰ ARDA is a development communication NGO that provides Technical Assistance and Consultancy services to development agencies. It addresses thematic issues through dramas and partners with about 20 radio stations in disseminating the information.

²¹ Ango, A.K., Illo, A.I., Abdullahi, A.N., Makikasuwa, M.A. and Amina, A., 2012. Role of Farm- Radio Agricultural Programmes in Disseminating Agricultural Technology to Rural Farmers for Agricultural Development in Xaria, Kaduna State, Nigeria.

have partnerships with each other such that when a programme is broadcast on a station there is a mutual understanding with another radio station to broadcast the same programme as well.

Producers who do not have a license to broadcast their programmes buy airtime from a radio station with license to broadcast. This may involve a live broadcast or pre-recorded package. NAERLS for example has a radio production unit but does not have a license to broadcast. It therefore produces its programmes and distributes for broadcast to all Federal and some State radio stations such as FRCN Kaduna, FRCN Abuja, FRCN Ibadan, FRCN Enugu, Kaduna State Radio, Niger State Radio, Minna, Oyo State Radio, Ibadan, Osun State Radio, Oshogbo.

Organic Fertilizer Company, Zenith Energy Enzymes broadcasts live on Peace FM, every Monday 5:00- 5:30 pm. Different radio stations have their different airtime rates. Costs are in the range of N405,000 per quarter (as in the case of Peace FM) to as high as N1,476,000 per quarter on Wazobia FM – It also varies by whether the package is for stand-alone or syndicated broadcast.

A format that is commonly used is the “reality show format” where there are no well written/strict scripts to be followed but basic guidelines on topics to be discussed with panelists/discussants/ experts. Listeners are allowed to contribute via phone calls and/or SMS. The Zenith Energy Enzymes programme broadcasted on Peace FM, Plateau State and Smallholders Foundation broadcasted on 98.0FM, in 3 Local Governments in Imo State, take this format.

There are certain organizations, which are experts at training for broadcasting services such as Federal Radio Corporation of Nigeria Training School, Lagos.

Consumption: this is the point when the information broadcasted reaches the intended beneficiary, smallholder farmers.

“
**Sometimes farmers form
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”

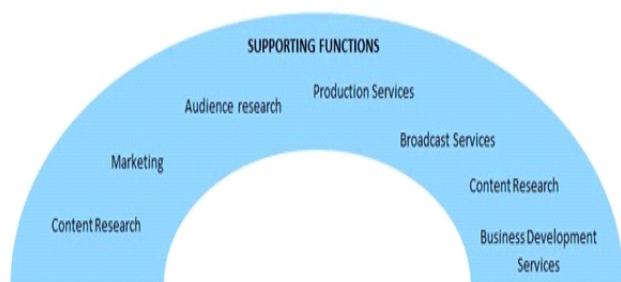
Many smallholder farmers own radios or have access to one. Sometimes farmers form “listener groups” where they gather in the house of a farmer who owns a radio and listen in group. Because of the daily routine of the farmer and with according to the crops grown, there are given times of the day when farmers can be reached, either early in the morning (7-10am) and/or later afternoon/early evening (5-7pm).

The mornings are the most favoured times. However, this is primetime when professionals (individuals working in a structured environment with resumption and closing times) are most accessible in transit to work, or in the evening on their way back from work. Radio Stations often profit from the high demand as those time slots are priced high and sold to those who can pay for it. Farmers Radio, which is a dedicated Farmers station, starts its programmes on agriculture at 10:30 and closes at 4:00pm, when it is able to serve at all.

3.3 Supporting functions

There are supporting functions along the core functions of the value chain which affect the information and advisory services market. Figure 5 shows a diagram of the supporting functions and brief discussions on each one of them.

Figure 5: Supporting functions



Content research: this refers to the substance or material dealt with in a programme packaged for broadcast. One of the difficulties of operating a schedule of agricultural extension programmes on radio is accessing agricultural research material to support the range of topics requested by farmers.²²

ISPs need to be trained on how to access good quality research. Usually, radio stations operating in Northern Nigeria (private and public) just have regular producers and assistants who have no background knowledge of research or what to look out for.

Freedom FM, for example only created a research unit after receiving research capacity training from SAVI, a DFID programme on public accountability. Sometimes ISPs have to pay third parties to carry out research for them and don't do it often or well enough because of the cost involved in doing so.

As mentioned above, farmers need information that involves sourcing and collation of weather, price, storage and crop processing data. This will require fostering of partnerships with institutions and organizations rendering the service such as Nigerian Meteorological Agency (NiMET) or market associations such as Dawanu International Market.

Often the incentive of the partner subject matter specialist is to promote its own public profile, show-off research or policy capabilities, or position a product.

Marketing: marketing functions consists of activities to help ISPs secure sustainable

sources of finance for dissemination of their information packages. So marketing is important in getting sponsorship or advertisements to ensure sustainability of the programmes and thereby help in building more listenership.

Agricultural information service providers such as Freedom FM, Farmers Radio, Zenith Energy Enzymes, NAERLS and IITA seem to lack the expertise required in marketing their agricultural programmes. Public sector ISPs seem to depend heavily on government subvention, grants and donor support, which have proved to be less reliable.

They rarely engage the services of experts to promote agricultural programmes because of the general perception that agriculture support is a social service. Private Radio Stations, such as Freedom FM, as mentioned earlier, shelved agricultural programming as they were unable to measure their impact and design a value proposition to attract sponsors and advertisers.

Recently, public radio stations have become more autonomous and are beginning to search for alternative sources of funding outside government and are being trained on marketing strategies. FRCN Kaduna was successfully trained by ENABLE, a DFID advocacy programme, on how to market (general) programmes and make them more commercially viable. Freedom FM, at the time was also trained on marketing strategies by ENABLE.

Other non-radio stations agricultural information service providers need marketing services, as without marketing to get sponsors or advertisers to promote the production of an agricultural programme and increase its awareness amongst smallholder farmers, the programme often gets cancelled or suffers from irregularity.

As a result, smallholder farmers currently have a limited number of agricultural programmes to learn from, and these programmes are quite

²²Chapman et. al. (2003), Rural Radio in Agricultural Extension: The Example of Vernacular Radio Programmes on Soil & Water Conservation in Ghana, ODI Agricultural Research & Extension Network, Network Paper 127, January 2003

insufficient in addressing their various critical needs or enabling them to maximize their income earning potential.

Audience research: there are research practices that help radio broadcasters, advertisers and other ISPs determine numbers and demography of listeners inclusive of who listens to what, where, when, why and how. This is research to help ISPs ensure that information packages are developed to meet the needs, wants and values of their target audience effectively and efficiently.

Targeted audience research can help determine programme content, broadcast schedules, and the preferences of listeners regarding the mix of information and education in the package.²³ Information from audience research is important in establishing a sound business case with potential programme sponsors and/or advertisers who have an incentive to reach the target audience that an ISP serves.

From discussions with ISPs very few claimed to carry out any sort of impact survey. One claimed to conduct its audience survey on agricultural programmes (targeted at semi-literate farmers) on Facebook. Smallholders Foundation claimed to issue out very simple questionnaires to farmers in 3,300 listener groups in the three local governments it broadcasts in to measure the impact of information shared on a topic recently addressed by the station.

There are professional bodies capable of conducting radio audience measurement research such as Market Research Consultancy Limited. ISPs do not use these professional bodies because they are unaware of the service they provide, and those who are aware believe the cost of engaging these private entities to be high and/or have a weak appreciation of the benefits derivable from employing the service.

It would appear ISPs trying to reach farmers do not currently understand the vital role of this function and having neglected it they have



3,300

Smallholders Foundation claimed to issue out very simple questionnaires to farmers in 3,300 listener groups in the three local governments it broadcasts in to measure the impact of information shared on a topic recently addressed by the station.

failed to establish a sound business model that would attract the right partnerships necessary to sustain this market.

Production services: the production function includes a number activities ranging from choice of ambience (music and other sounds) to orchestration of the actual delivery of the content (inclusive of choice of participants, arrangements for callers and so on) for a specific show. Content development and programme production that are targeting a specialized audience require appropriate training and capacity building.

The BIF field work revealed that producers of agricultural programmes seem unable to serve the agriculture segment as some of them, like the Farmers Radio, Kano, do not think to have specialized programmes on different crops to meet the needs of different farmers. For example, there is no particular time when maize farmers, cassava farmers, sorghum, rice or millet farmers can tune in to listen to a programme on the crop they grow.

Instead, information was found to be top-down, based on what the producer (or its sponsor) decided was important for the farmers to know. There was low involvement of farmers, especially female farmers in the content development or production process.

As a result, the production or its broadcasting times are not deliberately synchronized with the farming calendar or, as mentioned above, with the daily routines of the farmers. In NAERLS for example, information supposedly for farmers was elitist and focused more on the

²³Chapman et. al. (2003), Rural Radio in Agricultural Extension: The Example of Vernacular Radio Programmes on Soil & Water Conservation in Ghana, ODI Agricultural Research & Extension Network, Network Paper 127, January 2003

institution than on the farmers.

It was somewhat misplaced with extension workers doing the job of a radio on-air personality. Older farmers interviewed said the programmes were repetitive and boring. The production competences of programme ISPs can be built on as there are certain organizations, which are experts at training for production (and broadcast) services such as African Radio Drama Association (ARDA), Community Development Centre in Zaria and Federal Radio Corporation of Nigeria Training School, Lagos.

Broadcast services: broadcast services describe the set of technical activities required to transmit wirelessly via radio waves to a broad audience. In Nigeria, radio stations need to obtain a license from the National Broadcasting Commission (NBC) to render this service legally. Radio stations often sell their airtime to organizations or institutions looking to disseminate information to the public. This is mostly how they are sustained. In agriculture, broadcasting services are provided by the radio stations, and agricultural programme producers, such as NAERLS,

ADPs, Farmers Associations, input suppliers, research institutes (IITA, IAR) pay the stations to broadcast. As mentioned above, these fees differ from station to station, usually based on popularity and reach. They all have broadcasting primetimes during which rates are highest.

Agricultural content producers are usually only able to afford primetimes when there is a lot of revenue from sponsorship, advertisement or if it is seen as a viable method of marketing, as in the case of Zenith Energy Enzymes. Other than that, content producers are limited by their budget and pay for air-time they can afford.

For example, as government funding in the agricultural sector has been declining over the years, NAERLS finds broadcasting during primetimes exorbitant and is unable to synchronize its agricultural programmes with daily routines of farmers. The cost of the broadcasting airtime also limits the number of agricultural programmes that can be aired. However, there is a dedicated Farmers Radio

where broadcasting is vertically integrated.

The entire process of production and dissemination takes place within the radio station- broadcasting times can be targeted to synchronize with farmers' daily routines, without competition for primetime. But as mentioned above, Farmers Radio broadcasts its programmes on agriculture at 10:30 and closes at 4:00pm, when it is able to serve at all (as they claim to have a problem with electricity and struggle to afford diesel).

Business development services: this describes the wide array of non-financial services (marketing, financial/strategic planning, access to finance, links to input suppliers) critical to the growth of businesses.²⁴

The government has traditionally provided information and advisory services to farmers; this has further buttressed the general perception that agricultural programmes are part of government's social services.²⁵ Public information service providers depend heavily on government subvention, grants and donor support such as the Ford Foundation and Bill and Melinda Gates Foundation, Sasakawa.

Freedom FM, a private information Service provider does not have a clear sustainable business model for agricultural programmes, and has currently stopped it. The need for business development services is not just for information service providers alone but also for input suppliers, such as Value Seeds Limited and Zenith Energy Enzymes- seed and fertilizer companies.

These companies seemed to lack a viable business model and appeared only involved in agriculture because of the revenues received from selling to government and/or subsidy payments received through the Government's GES Scheme, which is expected to come to a close in 2015. ISPs require business development services to shape their approach towards the information and advisory services market.

3.4 Rules

Figure 6 shows the rules (formal and informal), which affect the way the information and advisory services market operates:

²⁴The SEEP Network, <http://www.seepnetwork.org/glossary-pages-20358.php>

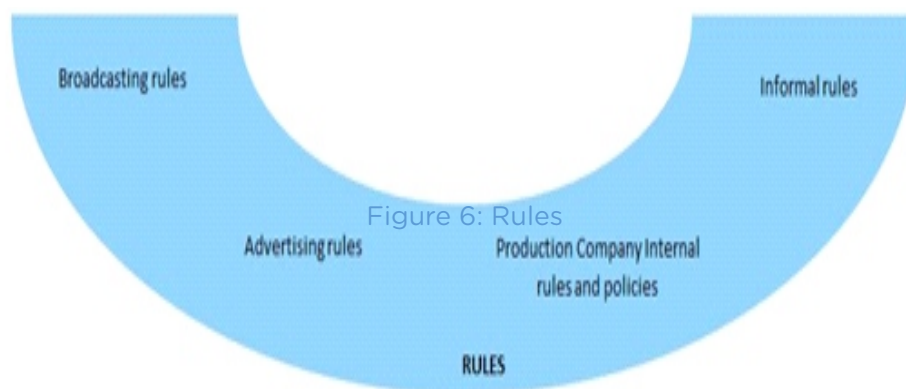


Figure 6: Rules

Broadcasting rules: broadcasting rules are instituted by The National Broadcasting Commission (NBC). The NBC is the body commissioned to monitor the broadcast industry. It has the authority to issue, suspend or revoke a station's broadcasting license.

The NBC is a government establishment and therefore is subject to being politicized or used by the government to stifle, what it may consider, dissenting or anti-government voices. One of the major rules is that religious organizations or political parties are not to be granted broadcast license however, a number of private radio stations are owned or controlled by politicians. There have been cases of Public and Private Radio stations being reprimanded by the NBC.

Advertising rules: the Advertising Practitioners Council of Nigeria (APCON) is the authority that "controls and regulates the practice of advertising in Nigeria, in all its aspects and ramifications"²⁵. Essentially, all advertisements and sales promotions are to be vetted or approved by APCON before publication/screening (broadcast). It

is a "sanctionable offence" to air or publish advertisements, which have not been approved by APCON's Advertising Standards Panel (ASP). Only registered APCON members may apply to APCON directly for approvals, all others have to go through a registered APCON practitioner.

Internal rules and policies: public information service providers have their internal rules and policies that may affect their ability to partner with private organizations. For examples, it is considered unethical for NAERLS to promote any product, seed or fertilizer, by any private company.

If a company has any seed variety or fertilizer it wants to advertise it has to first ensure the product is certified by one of the government's agricultural institutes, which then forwards the product to NAERLS to advertise. Farmers Radio Kano, however claimed to be semi-autonomous and not averse to advertisements or sponsorships from private organizations.

Informal rules: Person to Person (P2P) plays an important role in information dissemination. In farming communities there are festivals held, sometimes, bi-annually where farmers share their experiences and learn from each other.

In every community there is a Sarkin Noma (the leader of farmers). The smallholder farmers believe whatever the Sarkin Noma tells them, over and above what is said on the radio or what an extension worker offers them.

Listenership and the possible impact of the message disseminated are tied to the on-air personality: Farmers tend to lose interest in programmes when there is a change in on-air-personality anchoring a programme they listen to.

²⁵Final report of The Agricultural Extension Transformation Agenda

²⁶APCON, official homepage: http://www.apcon.gov.ng/?page_id=20

Cross-Cutting Issues

Gender equality and social inclusion

There are opportunities for women in the information and advisory services market even though the information and advisory services market is male dominated especially in the North. Regardless, in most of the radio stations in the north, even though proportionately fewer women serve as broadcasters, script writers, editors, producers and even directors.

For example, the director of the FM Radio Kano is a woman. However in spite of the opportunities for women there are only 26 of them and 160 men in Radio Kano. This is likely to be the similar position in other ISP establishments as well.

As for the women farmers, their access to agricultural sources consists of: husbands, being the major source of information; women; mass media (radio).²⁷ It is important to mention that women have been found to have inadequate access to extension workers, especially as agricultural extension workers are mostly staffed by men who are inclined to serve other men.²⁸

In terms of content and social inclusion, there is little involvement of farmers, male or female in content development process. During the visit to NAERLS, it was found that of the programmes they had planned in a day, only 10-15 minutes was dedicated to women. It is however important to mention that there are a few programmes specifically for the women folk such as Ann's Choice and In Kidi ya Chanza.

The airing of programmes is not synchronized with the daily lives of the women in respect to their domestic tasks, chores and family obligations. Only one ISP claimed to have carried out a survey to adjudge the best times to schedule agricultural programmes for

farmers especially women.

Farming programmes do tend to be relevant to a broad swathe of the community including men and women. In many communities, however, there is a clear division of labour, with well-defined roles for men and women in terms of the crops they grow and the activities they are responsible for. In rice production in Ghana, for instance, women are predominantly involved in the harvesting, winnowing, manual de-stoning, parboiling and marketing.

Men are predominantly responsible for the land preparation, sowing, water management and weeding, and the household may join together for certain tasks such as threshing and transport. Radio extension programmes, therefore, need to be prepared and broadcast in a way that makes them accessible to the target audience. This will require consultation with the community to identify not only the different subject priorities of men and women but also the timing of the broadcasts including any meetings of listeners' groups or follow-up training, to fit in with work and household schedules.²⁹

3.5.2 Political economy

The government up until 1994 had sole ownership of radio and television broadcasting in Nigeria. However, in line with the deregulation policies ushered in by the Structural Adjustment Policies (SAP) in the 1980s, the government deregulated media broadcasting in Nigeria resulting to a proliferation of private ownership of radio stations.³⁰

Since 1994, there has been media diversity and enhanced dissemination of information to citizenry. Today there are 5 Federal Radio Stations 40 State Radio Stations, some of which are semi-autonomously run. There are also over 25 private owned radio stations and 26 Campus radio stations. Amongst the

²⁷ Okwu, O.J. and Umore, B.I., 2009. A study of women farmers' agricultural information needs and accessibility: A case study of Apa Local Government Area of Benue State, Nigeria. *African Journal of Agricultural Research*. 4 (12), pp. 1409 -1409.

²⁸ Ibid

²⁹ Chapman et. al. (2003), *Rural Radio in Agricultural Extension: The Example of Vernacular Radio Programmes on Soil & Water Conservation in Ghana*, ODI Agricultural Research & Extension Network, Network Paper 127, January 2003

³⁰ National Broadcasting Commission official homepage: <http://www.nbc.gov.ng/>

stations, there is a lot of collaboration and syndicated broadcasting. These stations build their audiences and dedicated following by taking up sectorial issues like politics, health, education, entertainment and sports. Radio has been used as a platform to source for and influence public opinion, support or criticize government which usually heightens during election periods.

As a result, there is a struggle for purchase of radio slots. Radio stations or programme producers perceived to be too anti-government are cautioned by the National Broadcast Commission and sometimes sanctioned. It is important to note however that owners of radio stations seem to try not to influence the radio station managerial team and allow it to be run as a business.

3.5.3. Use of radio in agricultural information and advisory services

arming practices have remained inefficient since support to extension services declined from the federal government and the function was devolved to State Agriculture Development Projects (ADPs).

The River Basin Development Authorities (RBDAs) as well as the Federal Ministry of Agriculture and Rural Development have provided extension services over the years. The ministries of Water Resources (housing the RBDAs) and Agriculture and Rural Development have been merged and de-merged over the years and squabbled variously over who should be providing this service.

Eventually it was devolved to the ADPs and there has since been a loss of vision and coordination for the function as well as dwindling budgetary provisions.

Due to the sheer numbers and geographical spread of farmers and the inability of public extension workers to effectively reach them, radio, television and local structures, such as

village heads and town criers were used in disseminating information to the farmers. As illustrated above, the government had run information and advisory services for farmers as a social good for such a long time and when the opportunity for private sector involvement presented itself, the business case for private provision of agricultural information and advisory services seem to remain unclear.

This was exacerbated by the shift in focus over several decades by government, the dominant player in agricultural information service provision, away from agriculture as the main country's source of foreign exchange to oil and gas. The change in focus led to a significant reduction in government funding of agriculture sector³¹ which has resulted in gross deterioration in the sector over the years.

Currently there is a wide perception by the Nigerian youths of farming to be a poor man's business. Instead of farming, there is a preference for white collar jobs or quick money and fame. It is around these other interests that radio stations have built their market.

Presently, radio programmers build their listenership around music/ entertainment, politics, education, health, family and social programmes etc., which all attend to the needs of the youths. There are very limited programmes on agriculture.

For example, popular radio stations like Cool FM and Wazobia FM which have a huge following nationwide have never had a regular programme on agriculture. The limited availability of programmes on agriculture is made worse as traditional service providers, NAERLS, Agricultural Development Projects, and other Public Agricultural Agencies are "virtually off the air now because of the exorbitant charges by the broadcasting houses for airtime".³²

Meanwhile in the Agricultural Extension

³¹Emenyeonu, B.N., 1987. Communication and Adoption of Agricultural Innovations: Quantification and Notes Towards A Conceptual Model. Africa Media Review. 1 (2) pp. 105 -119

³²Final report of The Agricultural Extension Transformation Agenda

Transformation Agenda, the argument of the government is that the services provided by these agencies (NAERLS, ADPs) must be seen as a social good and must therefore be granted subsidy for airtime by both public and private media houses as part of their corporate social responsibility in support of the Agricultural Transformation by these broadcasting organizations.³³

Today, few private stations are known to have taken up agriculture but the problem seems to be in their inability to come up with a clear business model that makes the provision of information and advisory services to farmers sustainable. There are agricultural programmes

aired occasionally. The programmes that are aired are government sponsored or donor sponsored.

A few are sponsored by input supply organizations looking to promote sales of their products. The presence of a recently launched, dedicated Farmers radio, Manoma Radio, Kano, in 2012, hints at the interest in some quarters to test the potential and opportunity in the information and advisory services for small holder farmers, if at least, a sustainable business model could be evolved.



³³Ibid



CONSTRAINTS ANALYSIS

The constraints and underlying causes are specific to the smallholder farmers that BIF will be targeting in the information and advisory services market system in Nigeria. These issues have been identified through our discussion on the market structure and performance in section 4. The three key constraints can be summarized as:

- Limited agricultural programming available for smallholder farmers;
- Smallholder farmers do not find the information that is available on agriculture useful; and
- Smallholder farmers have limited access to information.

Constraint 1: Limited agricultural programming available for smallholder farmers.

There are very few agricultural programmes available for smallholder farmers which means information needed by smallholder farmers is generally not available. Ultimately this results in farmers being unable to maximize their income.

Our discussions with NAERLS, the government's dominant information service provider on agriculture, showed that the limited availability of agricultural programmes can be attributed to declining government

agricultural programmes and poor government funding. They also complained of their inability to create and air more programmes because radio airtime is exorbitant. Our study also discovered that private sector involvement in information and extension services provision is low because the agricultural information services is seen as a social service which has traditionally been solely provided by the government.

On their part the private sector attribute lack of sponsorship and advertising revenue to their limited interest in provision of agriculture programming. On the other hand sponsors such as IITA, Kano branch stated they only worked with radio stations them on a needs basis because they felt they were not getting value for money from radio coverage and that radio stations were only out to extort them.

Another reason for low sponsorship or advertisement is the internal policies of some government owned radio stations which do not allow outright advertisement of private agricultural inputs except through an arduous process of certification by a government accredited research institute.

Sponsors and advertisers prioritize programmes have a perception that they won't

get value for money from agricultural programmes and because of lack of mechanism to track impact of such agricultural programmes even if sponsored.

Our investigations have shown that sponsors and advertisers prioritize other sectors than agriculture because, currently, agricultural programme listenership is perceived to be lower than other programming, such as politics, entertainment, sports, health, education etc.

For example, “Story Story” or “Gatanan Gatanan Ku” (in Hausa) by BBC Media Action has been on for years and grown a very huge listenership within and outside Nigeria. It has received various sponsorships from various organisations and institutions to produce programmes on a variety of social issues but has never received sponsorship to produce a programme on agriculture.

Industry observers we spoke to attribute this to the fact that the content delivery format in agricultural programmes is not generally attractive to target smallholder farmer as content and programme developers do not know how to serve the agriculture segment.

Constraint 2: Smallholder farmers do not find the information that is available on agriculture useful .

Smallholder farmers do not find information on agriculture useful as it generally does not meet their need. Again, ultimately this results in farmers being unable to maximize their income. Smallholder farmers do not find information useful because available information is often outdated, inaccurate and repetitive especially to older farmers as very few changes are made to content over the years.

The reason for the few changes to content is that agricultural content providers have poor

understanding of the gaps in farmers’ knowledge, which should ideally inform the content of the programmes to be aired.

Freedom FM complained that a constraint it had in providing information to smallholder farmers is the lack of template to follow to establish what should consist information to the farmers and how it should be done.

Other reasons given for the weak content are a lack of incentives to carry out research and improve content, which arises from sponsors/ advertisers preference for other social programme like sport, as well as limited research and content development capacity of information service providers, both in-house and external.

Smallholder farmers find information outdated and unreliable due to the ISPs lack of an effective mechanism to pool relevant and real time information (e.g. weather and price). The process of gathering information on market prices and weather is irregular and arduous such that by the time the information is eventually collated and disseminated, it is outdated and often inaccurate.

During the field work it was found that smallholder farmers were told by an ISP that the rains would be early and short; the farmers then planted early, others who did not listen to the information or ignored it planted at the regular time, first week in July. It turned out the weather forecast was wrong, the rains came at the normal time and were long.

Those farmers who listened had a bad harvest. Smallholder farmers said regardless of the information on price announced on the radio, they do not trust it but still used their traditional methods, going from market to market with one or two bags, testing how the market is before committing the other bags.

Executives of the Dawanu International Market claimed that prices of grains were not regularly announced on the radio and that even when the prices were announced they were incorrect.

Agricultural Information dissemination is often deemed not useful because of the low involvement of farmers (male and female) in content development process, making such information top-down and largely based on what information service provider wants to promote.

Smallholder farmers also find information not useful when broadcast schedules are not synchronized with the farming calendar. For example, Farmers Radio Kano, from our discussion agreed that they do not have and had not thought of having specialized programmes on certain crops aired for farmers which synchronized with the farming calendar. This, again, stems from the inability of content and programme developers to serve the agriculture segment.

Constraint 3: Smallholder farmers have limited access to information

Smallholder farmers have limited access to information on agriculture and when information is available, it generally does not meet the need of their needs. As a result, smallholder farmers are unable to maximize their income.

The limited accessibility to information is caused by non-synchronization of broadcast timings for agricultural programmes with daily routines of the male and female farmers. The non-synchronization is due to high competition for primetime on general radio with the best time to reach farmers (morning) also being the best time to reach the non-agricultural working class.

Another reason for this is the limited number of radio stations dedicated to addressing the real

needs of the farmers. For example, NAERLS, the dominant federal actor in providing information to farmers, does not have license to broadcast but relies on Federal and State radio stations in broadcasting its programmes; Farmers Radio, Kano, the only station nationwide dedicated to agriculture, operates between 10am and 4 pm, which are not popular times to reach farmers.

Our interactions with farmers and ISPs have indicated that information is not accessible to the farmers when it is not delivered in the right format. This is in line with research on the role of agricultural radio programmes that Farmers prefer drama and interactive programmes that allow them to give feedback and share their experiences but content developers and producers seem to prefer the presentation format.³⁴ This situation reiterates the inability of content and programme developers to serve agriculture segment.

Smallholder farmers also have limited access to information on agriculture due to the fact that other channels apart from radio by which they can be accessed by farmers such as mobile telephony are not being efficiently or effectively used. This can be traced to lack of innovation and of adoption in developing technology for development space.

The Nigerian government as dominant agricultural information provider has always used radio and television, even though information disseminated through the television is not accessible to smallholder farmers because of the cost in acquiring a television and the poor power supply. There is also lack of innovation in developing technology for development space is because of the inability to commercialize mobile applications, including mobile applications for agriculture.

³⁴ Ango, A.K., Illo, A.I., Abdullahi, A.N., Makikasuwa, M.A. and Amina, A., 2012. Role of Farm- Radio Agricultural Programmes in Disseminating Agricultural Technology to Rural Farmers for Agricultural Development in Xaria, Kaduna State, Nigeria.

Root causes

We have analysed these constraints in order to identify the root causes of each constraint and to then design interventions that can remove these root causes and thereby address the constraint. Our analysis of the root causes, and proposed interventions, are presented in Table 3.

Table 2: Intervention logic table

Constraints	Underlying causes	Related Supporting & Enabling Functions	Root causes	Intervention
Limited agricultural programmes available for smallholder farmers which limits information availability to them	Government agriculture programming has been declining over the years	Broadcasting and Production services; Content research services; Business Development Services	Government funding of agricultural programmes is inadequate	Intervention 1: Work with agricultural information repository to inclusively improve content curation for smallholder farmers; develop sustainable methods for keeping content updated and useful; develop sustainable methods for pushing content to farmers/making it available to them on demand <i>e.g. work with NAERLS, aggregators at Dawanau Market, a radio station, telecom operators (for SMS short code) etc. to develop a model which will be self-sustaining after initial investment.</i>
	There has been low involvement of Private Sector in provision of agriculture programming	Advertising and Marketing Services; Business Development Services; Audience research services; Broadcasting and Production services; Content research services	Lack of sponsorship and advertising revenue Agricultural Information Service provision is generally seen as a social service Sponsors/ Advertisers and ISPs lack mechanism to track impact Content and Programme developers do not know how to serve agriculture segment	Intervention 2: Work with input suppliers to use goal congruence with other stakeholders such as radio stations, farmers associations and State ADPs to devise sustainable models for financing outreach to farmers for their mutual benefit – <i>e.g. increased sales for input supplier; expanded membership and dues for farmers association; increased relevance, visibility and outreach for ADPs; increased long term revenues for radio station. Possibly build on links between Zenith Energy Enzymes, Peace FM in Jos and the farmers associations the company deals with</i> Intervention 3: Work with private radio station to devise inclusive content with farmers, and the measurement/impact tracking mechanisms needed to support value propositions to potential sponsors. Assumption being that content + audience = revenues. Possibly build on lessons learned by Freedom Radio in Kano and their unproductive foray into agriculture content provision.
Smallholder farmers do not find available information on agriculture useful	Available information is outdated, inaccurate, repetitive and not synchronized with the farming calendar	Content research services; Audience research services; Broadcasting and Production services	Agriculture content providers have poor understanding of the gaps in farmers' knowledge Low involvement of farmers in content development process, including women Content and Programme developers do not know how to serve agriculture segment Lack of effective mechanism to pool information on weather and price Not all channels available to most rural farmers are being used	Intervention 1: Work with agriculture information repository to inclusively improve content curation for smallholder farmers; develop sustainable methods for keeping content updated and useful; develop sustainable methods for pushing content to farmers/making it available to them on demand Intervention 3: Work with private radio station to devise inclusive content with farmers, and the measurement/impact tracking mechanisms needed to support value propositions to potential sponsors. Assumption being that content + audience = revenues. Possibly build on lessons learned by Freedom Radio in Kano and their unproductive foray into agriculture content provision.

Smallholder farmers have limited access to information	Broadcast timings for agricultural programmes are not synchronized with daily routines of male and female farmers	Broadcasting and Production services; Audience research services	Content and Programme developers do not know how to serve agriculture segment Not all channels available to most rural farmers are being used, in particular, mobile phones.	Intervention 1: Work with agriculture information repository to inclusively improve content curation for smallholder farmers; develop sustainable methods for keeping content updated and useful; develop sustainable methods for pushing content to farmers/making it available to them on demand Intervention 3: Work with private radio station to devise inclusive content with farmers, and the measurement/impact tracking mechanisms needed to support value propositions to potential sponsors. Assumption being that content + audience = revenues. Possibly build on lessons learned by Freedom Radio in Kano and their unproductive foray into agriculture content provision.
	Information is not delivered in the right format		Content and Programme developers do not know how to serve agriculture segment	Intervention 1: Work with agriculture information repository to inclusively improve content curation for smallholder farmers; develop sustainable methods for keeping content updated and useful; develop sustainable methods for pushing content to farmers/making it available to them on demand





MARKET STRATEGY

5.1 Market strategy statement

The overall vision of the market is *enhancing smallholder farmers' income through higher productivity such that the smallholder farmers benefit from the increasing availability and access to agricultural information and advisory services that will enable them to make informed decisions and maximize their income.*

To actualize this vision, three systemic changes are needed:

- Increase in agricultural programming;
- Making content of programme more relevant to the smallholder farmers; and
- Increased access of smallholder farmers to relevant and timely information.

As discussed above, radio was identified as one of the most effective mediums capable of reaching smallholder farmers given their numbers and geographical spread.

In this regard, BIF will seek to partner with existing agricultural information service providers: Public and Private Radio Stations, including Farmers Radio, Kano, Freedom FM and Farmers Radio Owerri owned by Smallholders Foundation, . Others include Content producers such as NAERLS, Input Suppliers such as Zenith Energy Enzymes and Value Seeds Limited etc..

The aim is to achieve their individual but complimentary objectives of working sustainably, sourcing funds, marketing products, increasing and impacting targeted

listeners (smallholder farmers). BIF will also explore the opportunity of integrating a mobile based platform into the radio project to increase and enhance information access to smallholder farmers.

5.2. Opening portfolio of interventions

Intervention 1: to support the development of content research and a sustainable agriculture information repository with relevant stakeholders

Market under-performance: In maximizing their income farmers face three major information related constraints: Firstly, there are few agricultural information programmes for smallholder farmers resulting in limited content and variety of information available to them.

Secondly, smallholder farmers do not find available information on agriculture useful as the information is often outdated and not meeting their needs.

Thirdly, smallholder farmers have limited access to information.

The under-performance discussed above is a factor of a number of root causes which include: declining and inadequate Government agriculture programming due to low funding; poor understanding of the gaps in farmers' knowledge by agriculture ISPs; and low involvement of farmers in content development process, including women. Other causes include content and programme developers not

knowing how to serve agriculture segment; and lack of effective mechanism to pool information on weather and price as well as the fact that limited information channels (especially mobile) are available to most rural farmers.

Vision of change: The vision of change is increased smallholder farmers' income and knowledge arising from inclusive, sustainable and increased number of agricultural programmes as well as the content therein to be provided especially by the private sector.

Intervention overview: The system change will involve working with government extension and research establishment (NAERLS) to adopt inclusive, demand-driven research in content and programme development to involve sponsors and advertisers apart from government for broadcasting through partner radio stations.

This will also entail developing partnerships with agencies, organizations and bodies capable of providing agricultural information and telecom operators to develop a sustainable agricultural repository from which smallholder farmers can easily access information via their radio and mobile phones. This is based on the logic:

Improved content + Audience = Revenue

It will also involve developing sustainable methods for keeping content updated and useful and developing sustainable methods for pushing content to farmers or making it available to them on demand.

Potential activities include:

- Facilitate the development of an agriculture information repository or platform to inclusively improve content curation for smallholder farmers;
- Identify and facilitate content creation as well as capacity building for a

network of agriculture information curators; and

- Provide TA support to the network to develop proactive and feasible production and marketing strategies to reach and increase uptake of relevant information by smallholder farmers.

Potential results will include:

- Existence of a sustainable, inclusive, timely and relevant agriculture information repository;
- Visible and vibrant network of information curators;
- Development and implementation of proactive production and marketing business models and plan by providers;
- Widespread access and use of available agriculture information by smallholder farmers leading to increased listenership; and
- Increased alternative source of funding (other than government) and sustainability for the ISPs due to the adoption of an inclusive, demand-driven research in content and programme development.

Intervention 2: To support input suppliers as private sector agriculture ISPs in developing linkages and a value proposition for sponsorship of radio outreach to smallholder farmers.

Market under-performance: The proposed intervention will address the constraint of limited agricultural programmes available for smallholder farmers which in turn limits the information available to them.

There are few agricultural programmes available for smallholder farmers due to low involvement of private sector in providing agricultural programming due to the perception that agricultural programming is a social service and also because of lack of sponsorship and advertising revenue.

As a result there are not enough programmes to serve the needs of smallholder farmers, and

they are therefore unable to make informed decisions that enable them maximize their income earning potentials.

Vision for change: The vision of change is to increase smallholder farmers' knowledge and income due to sustainable and increased number of agricultural programmes being provided by the private sector ISPs such as the input suppliers

Intervention overview: Work with input suppliers to use goal congruence with other stakeholders such as radio stations, farmers associations and State ADPs to devise sustainable models for financing outreach to farmers for their mutual benefit.

For example: increased sales for input supplier; expanded membership and dues for farmers association; increased relevance, visibility and outreach for ADPs; and increased long term revenues for radio station. This will involve fostering sustainable partnerships among information service providers and various stakeholders, private and public, in the agricultural sector in order to increase the capacity of the input supplier to serve listeners beyond the marketing of its product and ensure sustainability of agricultural programming.

Currently there are some existing models in the market such as Value Seeds Ltd model and Zenith Energy Enzymes model doing what we have mentioned above. The Zenith Enzyme already has its own radio show for the purpose of marketing its product to farmers and opening it up to farmers associations, State ADPs, radio stations who already have an incentive to work with farmers.

The company supplies organic fertiliser to farmers in northern Nigeria. The company has developed a business model using Peace FM radio Jos programme between 4:30pm and 5:00pm Mondays to offer its products along

with embedded information /extension services especially on the use and application of organic fertilizer as well as access to premium market for its farmer customers.

The company has in its payroll some agriculture extension workers who also double as its agents in each of the 17 local government councils in the state. It organizes monthly meetings and technical sessions for its agents and farmers to deepen their knowledge and also for feedback.

The intervention will possibly build on links between Zenith Energy Enzymes, Peace FM in Jos and the farmers associations the company deals with.

Potential activities include:

- Provide TA support to develop a business case for input suppliers to attract sponsorship and advertisement for the radio outreach for smallholder farmers;
- Facilitate and nurture linkages and partnership between input provider, ADPs, farmers Associations and radio stations; and
- Build the capacity of the input supplier to serve listeners beyond the marketing of its products and ensure sustainability of agricultural programming.

Potential results will include:

- Increased partnership and sponsorship of radio outreach for smallholder farmers by ADPs, Farmers associations and radio stations due to their increasing perception of value for money; and
- Widespread access and use of available and relevant agriculture information by smallholder farmers leading to increased listenership.

Intervention 3: To support private sector radio and television as private sector agriculture ISPs in developing linkages and value proposition for sponsorship of radio outreach to smallholder farmers.

Market under-performance: The proposed intervention will address all three constraints: limited agricultural programming available for smallholder farmers, the poor quality of available information to smallholder farmers, and limited access to information by smallholder farmers.

There are limited agricultural programmes available for smallholder farmers due to low involvement of private sector in providing agricultural programming due to the perception that agricultural programming is a social service and also because of lack of sponsorship and advertising revenue.

Private radio and TV stations, advertisers and sponsors prioritize other sectors, apart from agriculture, as agricultural information service provision is generally seen as a social service. This outlook is further exacerbated by the inability of the ISP, advertiser and sponsors to properly gauge listenership and track impact.

The broadcasting timings for agricultural programmes are not synchronized with the daily routines of smallholder farmers, their farming calendar, and not delivered in the right format. This is because agriculture content providers have a poor understanding of the gaps in the farmers' knowledge- as there is low involvement of farmers in content development process and low incentive to invest much in agriculture programming, again, based on low agriculture sponsorship and advert placements.

As a result there are not enough programmes to serve the needs of smallholder farmers, and they are therefore unable to make informed decisions that enable them maximize their income earning potentials.
Vision for change: the vision of change is to increase smallholder farmers' knowledge and

income due to sustainable and increased number of agricultural programmes being provided by private radio and TV stations.

Intervention overview: Work with private radio stations to devise inclusive content with farmers, and the measurement/impact tracking mechanisms needed to support value propositions to potential sponsors under the assumption that good content + audience= revenue.

This will involve fostering sustainable partnerships among information service providers and various stakeholders, private and public, in the agricultural sector in order to increase the capacity of the radio and TV stations to serve smallholder farmer listeners especially building on lessons learned from the ISPs unproductive previous attempts and foray into agriculture content provision. Example of these unproductive attempts include those of Freedom Radio in Kano.

Currently there is an existing model that appears to be working well. This is the Farmers radio in Owerri managed by Smallholders foundation. Small-holders Foundation owns a radio station called Farm Radio, 98.0FM, which broadcasts for 10hours daily in 3 Local Governments in Imo State.

The radio runs programmes on micro-credit, good agronomical practices, market prices (sourced from 38 different markets), and weather forecast from partnership with NiMET. Farm radio is vertically integrated; the content of the programmes, the formats used include drama, presentation and reality magazines, and dissemination are all done by the station.

Broadcasting is done in Igbo and pidgin English. Sometimes, smallholder farmers are trained to be radio presenters, as a means of building trust amongst other farmers and increasing listenership. Apart from agricultural information via radio, Smallholders Foundation

provides extension services to farmers. This includes setting up to “Green clubs” in secondary schools to get the youths involved in agriculture. It has also given loans to 373 women organized in co-operatives.

According to the foundation’s Managing Director, it has about 250,000 listeners and 3,300 listener groups. Smallholder farmers are able to give feedback through solar powered interactive radio mobiles called AIR Devices, which are provided by Smallholder Foundation to listener groups and connected to the radio presenter’s computer.

The presenter downloads the voice messages from the farmers and addresses them on air. Audience research and impact assessment are conducted through the listener groups with simple questionnaires given to smallholder farmers.

Smallholders Foundation plans on expanding to North West Nigeria. It has partnership with Notore and plans another with Olam; however, till date majority of its funding is from donor support. The radio station has won many awards including Rolex Award, The YARA prize for Green Revolution, UNESCO, UNDP etc. Potential activities include:

- Provide TA support to develop the business case for radio and TV stations to attract sponsorship and advertisement for the radio outreach for smallholder farmers;
- Facilitate and nurture linkages and partnership between radio stations TV stations, input and service providers, ADPs, farmers Associations and channels such as radio stations;
- Build the capacity of the radio and TV stations to serve listeners beyond the marketing of its product and ensure sustainability of agricultural programming; and
- Capacity building on the conduct of

audience listenership measurement/impact tracking by the staff of the radio and TV station.

Potential results will include:

- Increased partnership and sponsorship of radio and TV outreach/programmes for smallholder farmers;
- Widespread access and use of available and relevant agriculture information by smallholder farmers leading to increased listenership; and
- Institutionalization and frequent conduct of audience listenership measurement/ impact tracking by radio and TV stations.



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