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**ALBANIAN AGRICULTURE  
COMPETITIVENESS**

# **ALBANIAN AGRICULTURE COMPETITIVENESS PROJECT**

**Contract No. EDH-I-00-05-00004-00**

**DAI**

## **QUARTERLY REPORT**

**January – March 2008**

This report was prepared by DAI for review by USAID.

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## **EXECUTIVE SUMMARY**

AAC's momentum and pace accelerated significantly during the third quarter resulting in considerable progress towards achievement of its first year targets.

Component one, Strengthen Producer Capacity for Competitive Commercial Farming, achieved substantial results with most targets met or exceeded. Component two, Strengthen Capacity for Market Development, also saw a quickening of its activities, especially through program coordination with EDEM. Component three, Increase Access to and Use of Timely and Reliable Market Information, saw steady progress towards meeting first year targets.

The impressive gains achieved in Components 1 and 2 are due, in large part, to the development and implementation of strategic and pragmatic plans of action for each of the four high value products. Each product plan was designed with input from all of the AAC Staff and based on value chain assessments, roundtables, and in-dept interviews with value chain actors to ensure their buy-in.

AAC continues to explore effective ways of working to develop profitable farm business models for the four products through the outreach programs in the three field offices. Lushnje and the Northwest areas with large coastal areas and favorable growing conditions offer the greatest options for working with the entire value chain for the four products. Korce, located in a mountainous region with a different set of growing conditions, has fewer options for working with all of the value chain products on a competitive basis. It has identified selective actions within each chain (production, post production, marketing) that will result in added value for the client.

## **COORDINATION EFFORTS**

Engagement with value chain actors and their public and private support network is viewed as crucial to expanding AAC's enterprise development model. To this end, AAC staff continue to meet regularly with the main commercial actors in the agricultural value chain, Albanian government officials, donor organizations, and donor-supported contractors. Indicative of the important role AAC is playing in the sector, AAC is seeing a shift in who is requesting meetings. Increasingly it is AAC partners who are asking to meet and discuss involvement in project activities.

Some of the organizations AAC has met with this quarter include: SNV, Spanish Aid, FAO, EBRD, World Bank and U.S. Peace Corps, who have expressed interest in volunteers providing support to AAC clients. Meetings with Albanian Government included staff from the Ministry of Agriculture, Food and Consumer Protection at the national, regional and commune levels. These meetings were related mainly to Components #1 and #3. A meeting with the Agriculture University of Tirana examined support options for Component #3.

## **OPERATIONS**

During this period, AAC underwent another change in project management. Paul Sommers served as Interim COP in addition to his duties as production specialist. A new candidate for the AAC Chief of Party was submitted to USAID by DAI in early January, however the candidate had accepted other employment when approval was received. Ed Reinauer was put forth as a candidate in early March, received approval in mid-March and began his assignment on 31 March.

An outreach specialist for the Saranda area was also approved and Mr. Konstandin Koco joined the AAC Team mid- March.

The staffing pattern for the third quarter of the AAC Project follows<sup>1</sup>:

### **PROJECT MANAGEMENT**

Paul Sommers Chief of Party (interim)

#### **Component #1**

#### **STRENGTHEN PRODUCER CAPACITY FOR COMPETITIVE COMMERCIAL FARMING**

Paul Sommers- Tirana

Ilir Pilku- Tirana Grants Manager

Ilir Mehmeti-Northern Region (based in Tirana)

Lushnje Office

Piro Rapushi

Josef Liko

Luto Goga

Konistine Koco (Sarenda)

Korce Office

Lefter Turtulli-

Mehmet Pupa

Pellumb Tuxhari

#### **Component #2**

#### **STRENGTHEN CAPACITY FOR MARKET DEVELOPMENT**

Chief of Party (Vacant) Tirana

Paul Sommers Tirana

Piro Rapushi- Lushnje Office

Lefter Turtulli- Korçe Office

Ilir Mehmeti- Norther Region

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<sup>1</sup> While the area identified is the principle area of responsibility for the staff person, because the total number of AAC staff is small and the programmatic areas interface and support each other, there will be continuous crossover by staff among the functional areas.

Component #3

INCREASE ACCESS TO AND USE OF TIMELY AND RELIABLE MARKET INFORMATION

Bled Hodobashi-Tirana

Monika Thimo-Korce

Majilinda Qorri-Lushjne

Administration

Merita Janushi

## **SUCCESS STORY**

### **New Buyers Enable Apple Producers to Increase Income**

It was a pleasant surprise for Ferdinand Aliu to find that someone was interested in buying his lower grade apples. Like other apple producers from Korça, in southeast Albania, he had difficulty identifying sales opportunities for the part of his produce that did not meet market requirements for table use.

He received a phone call from USAID's Agricultural Competitiveness Program whose aims are to enhance the agribusiness potential of Albanian farmers and enable them to become commercially successful. Two processors – SIDNEJ from Berat and KAMPION from Shkodër – had contacted the Program staff stating that they needed supplies of lower quality apples which they use for producing jam and marmalade.

After Ferdinand, the Program contacted other apple producers from the Korça region who had stocks of lower grade apples. They were also glad to find a new opportunity to sell the lower quality product. Eventually, both processors brought their trucks and bought 130 tons of apples from the region's farmers.

Apples of this kind are normally thrown away and considered waste. This was the first time these farmers were able to make some money from this product by selling to processors. With an average selling price of 10 lek/kg, the farmers scored an added income of 1,500,000 Lek in total value.

This new sales channel has the potential to continue in the future. Every year a certain amount of produce is damaged due to weather, poor harvesting or because it falls to the ground prematurely. Now these farmers have the opportunity to turn those apples into money value instead of disposing them as waste.

There is already a new demand from the same processors to procure 150 tons of apples and 50 tons of cherries for 2008. A growing number of processors with whom the Agricultural Competitiveness Program works have shown interest in buying apples and cherries from Korça farmers.

The Agricultural Competitiveness Program is working with farmers like Ferdinand Aliu to improve their productivity, finding new markets and buyers and increase the use of market information.

## **IMPLEMENTATION**

### **COMPONENT I**

#### **STRENGTHEN PRODUCER CAPACITY FOR COMPETITIVE COMMERCIAL FARMING.**

Substantial growth occurred in this component when compared to the previous quarter. Task #1 Consolidation of Production, saw the number of groups identified by the three field offices reaching over 15 compared to the first year target of 10. The groups ranged from growers who informally banded together to consolidate production to groups who are officially registered and have worked together for several years. Most of the producer groups are joined around specific crops, especially short term seasonal crops like watermelon and greenhouse produce. Tree fruit based producer groups are not as well formed but progress in being made in Korce with apple growers, especially around the “Made in Korce” branding theme.

Described in the subsections below, all these activities will directly lead to increased incomes for farmers.

#### **Task 1 – Consolidating Production**

Producer associations are viewed as a key strategy for achieving the aim of the project. AAC recognizing the fledging efforts of several producers groups to provide meaningful services to their members plans to build on their efforts to date with the purpose of encouraging them to become for-profit cooperatives.

##### **Lushnje Region**

Contract with commercial growers groups continued as part of the teams regular outreach program. The main sub-sectors where there is growing interest are greenhouse vegetables and early season watermelon.

##### **North Region**

Contacts are now firmly established and watermelon and greenhouse vegetables have been identified as the main competitive products in the North region (Shkoder, Lezha, Durres/Tirana). Several field visits to growers were organized to identify producer groups and their needs in the following areas:

- Shkoder - Vukatana (27), Kosmac (15), Ana e Malit (12), Dajc and Koplík (1);
- Lezha - Torovice (6), Krajen (1), Kallmet (1), Zejmen (1), Fushe-Kuqe(10), Gurrez (1) and Gramez (1) and;
- Durres - Fushe-Kruje (1).

Preliminary data about their commercial profile were collected.

## KORCA Region

The steps towards forming growers working groups continued during the third quarter. Regional Korca Roundtable (January 30<sup>th</sup>, 2008) was held with apple producers, producer groups, buyers, input supply dealers, representatives of MoAFCP (Ministry of Agriculture, Food and Consumers Protection), other projects and financial institutions. The total number of participants was 77. The need for establishing producer groups was the main focus of the Round Table. This is very important as individual farmers have small and scattered orchards, thus, the product quantity presents a serious challenge when trying to enter the wholesale domestic and export markets.



### *Korça Round Table Discussions*

The task continued of transforming associations or growers groups from their current state towards a solid for-profit cooperative.

#### *Olives:*

The use of the soil test analysis kit was demonstrated with the table growers group in Bilsh Berati, and all protocols to analyze the soil of Mr. Fitim Zaimi were applied. Fertilizer recommendations were given based on the results. The group also benefited from a one day seminar on advanced techniques in table olive production.

#### *Watermelon:*

The Lushnje team in cooperation with EDEM organized an initial meeting of watermelon growers in the Berati area with a consolidator from Korce. The meeting was so successful that AAC was requested by the growers group to assist in the formal registration of their group.

#### *Greenhouse growers:*

Interest from buyers located in Kosovo has led to growers groups asking for assistance in developing a consolidation and marketing strategy.

## **Task 2 – Improving Production Practices**

### **Develop commodity specific technical training packages**

AAC's approach to addressing this critical issue is to identify growers specific needs in terms of improving their production system, marketing opportunities and options for financing.

Training packages containing specific technical information designed to improve productivity through increasing yields, decreasing costs, and /or improving quality have been designed and implemented for each of the subsector products.

These were delivered through workshops attended by selected commercial growers. In some cases high level expertise was used to address a technical issue while in other cases AAC outreach staff provided the needed information. A series of field demonstrations were designed to accompany the workshop topics in order to demonstrate to the growers how the new technology works under field conditions.

For the third quarter, a total of 15 workshops were delivered to over 350 growers and twenty field demonstrations were established on client farms. In addition to productivity issues the workshops also dealt with marketing and financing. Value chain actors were invited to discuss with the growers group's practical ways in which linkages could be improved. These meetings have lead to a growing understanding by growers that opportunities for stronger ties in the value chain are possible and that AAC can serve as a catalyst for utilizing these opportunities. Several training sessions on different issues were organized with growers during the last quarter.

### **North Region**

The first version of the technical package and training plan for North region clients was drafted for watermelons and greenhouse vegetables. In the case of table olives and olive oil information on the following was provided:

- best practices for olive cultivation,
- assistance in the identification of pests and disease,
- the specification for quality olives, and
- the post-harvest skills and understanding necessary to obtain maximum prices

Initial steps to prepare the documents and information for recruiting an olive production lecturer, as well as organize and deliver the spring agronomic services training program in olives (tillage, pruning, organic and mineral fertilization, irrigation, drip irrigation systems) were taken.

## Korce Region

- Five Training Sessions were held during February on “Winter Pruning” with participation of 60 farmers. Apple growers learned the advantages of implementing the proper pruning and its impact on apple yield and quality but also on production periodicity (lack of continuous production) in the years to come. During the sessions growers received the latest information on pruning methods which was helpful as they often are exposed to different ways/suggestions related to pruning.



*Winter Pruning Sessions*

- Six Training Sessions on “Orchard Fertilizing” with participation of 47 farmers were held. Soil analyses were completed for AAC clients in Korçe area. The use of rapid soil test kits was introduced to growers and explanations on the application of the test results related to main elements N, P<sub>2</sub>O<sub>5</sub>, K<sub>2</sub>O and the PH were provided.
- Several data types were taken into consideration, e.g. element status in soil; amount of manure provided, expected apple yield for each tree, etc. and a leaflet was produced and distributed to growers to assist them in calculating the correct formulation of fertilizers to be applied in their orchards. Expertise and experience from Korca Agriculture University and Regional Agriculture Department was utilized in the presentations.

In all the sessions the AAC team emphasized to growers that excessive use of fertilizers negatively impacts on both:

- ✓ Product and soil damage
- ✓ Production cost increase

The acceptance of growers to use soil test kits as part of their management system was evident after presentation of the sessions.



*Orchard Fertilizing Sessions*

### Lushnje Region

The three main training topics developed and presented during this quarter were:

- “Practices for the cultivation of watermelon” prepared by Prof. Doc. Sokrat Jani – Technology Transfer Center Lushnje.
- “Crystal fertilizing in greenhouse” prepared by Prof. Doc. Astrit Balliu – Agriculture University of Tirana.
- “Protection from nematode and other soil pests, biological and chemical treatment, deadlines doses and manner of application” prepared by Prof. Doc. Vangjel Jovani – Agriculture University of Tirana.

Several training sessions were held during the last quarter in different areas covered by Lushnja office to provide technical training for the following specific commodities:

#### Greenhouse Vegetables:

AAC clients of Lushnje, Fier and Berat were trained on two of the more essential topics related to production e.g. “Nematode management” and “Use of crystal fertilizers in the greenhouses”.

#### Nematode management training

- |                              |                  |                  |
|------------------------------|------------------|------------------|
| • Gorican village, Berat     | January 29, 2008 | 27 participants. |
| • Kemishtaj village, Lushnje | February 2, 2008 | 15 participants. |
| • Velmish village Fier       | February 9, 2008 | 16 participants  |
| • Hysgjokaj village Lushnje  | March 1, 2008    | 50 participants  |

#### Use of crystal fertilizers in greenhouse

- |                         |                   |                  |
|-------------------------|-------------------|------------------|
| • Gorican village Berat | February 12, 2008 | 25 participants. |
|-------------------------|-------------------|------------------|

- Goricaj village Lushnje February 19, 2008 15 participants.
- Velmish village Fier March 8, 2008 12 participants.
- Hysgjokaj village Lushnje March 15, 2008 30 participants.

The local media was invited in the “Nematode Management” training held in Hysgjokaj village, Lushnje. The AAC activity was broadcast on one of the main news programs on the following day, in a special edition. The Head of the Agriculture Sector in Lushnja, Mr. Isuf Çela, was interviewed at this event where he expressed his appreciation for the cooperation with the AAC project..

#### Watermelon:

Water melon growers of Samatice in Berat , Xare in Saranda and Divjaka in Lushnja received training on:

#### Applying new technologies to watermelon production

- Divjake January 22, 2008 31 participants.
- Samatice village Berat January 26, 2008 26 participants.
- Xare village Sarande January 25, 2008 15 participants.



*Watermelon field day*

#### **Demonstrate new technologies**

Field offices presented the priority technologies that were identified by the growers through the monthly workshop series. These advanced technologies will also be put into AAC client fields as demonstrations. They are designed to improve productivity by either reducing costs and/or increasing output - both important to increasing the value of the grower’s product.

#### North Region

The following activities were conducted during the last quarter:

- Monitor 3 tomato comparative trials in Vukatana (7 varieties, first crop)
- Discuss the nematode control plan of “old cropped” greenhouses
- Use of perimeter crop trap to minimize pest and disease sprays in open field watermelon in Gurrez and Torovica

- Use of bumble bees in tomato and cucumber production in plastic greenhouses of Vukatana and Kosmac

#### Korce Region

Plans and procurement budget completed for 7 field trials for commercial growers (1 lead grower per demonstration):

- Pruning fruit trees
- IPM – Integrated Pest Management
- Fruit thinning
- Seedling selection
- Harvesting for optimal quality
- Post-harvest storage options (including mobile storage units),
- Discussion on Market Demands between “Oshafi” trade company and Korca growers.

#### Lushnje Region

Based on the workshop findings with grower groups and on the suggestions of Agriculture University of Tirana professors and TTC specialists for the application of new technologies, the AAC Lushnje staff designed a scheme for establishing field demonstrations with selected clients. A detailed plan was produced to follow up on trials, organization of demonstration days and cost-benefit analysis which will be introduced to farmers.

The following field demonstrations were proposed:

- Watermelon.
  - ✓ Used of grafted seedlings
  - ✓ Double drip line fertigation.
  - ✓ Plastic Tunnels
  - ✓ Integrated Pest Management
  - ✓ Fruit thinning
  - ✓ Honey bees for pollination
  - ✓ Harvesting for maximum value



*Water melon cultivation in Saranda area*

- Tomato in green houses .
  - ✓ Solarization/nematode management
  - ✓ Integrated Pest Management
  - ✓ Renewable energy efficient greenhouse.
  - ✓ Bumble Bees
  
- Cucumber in greenhouses
  - ✓ Solarization/nematode management
  - ✓ Integrated Pest Management
  - ✓ Renewable energy efficient greenhouses
  
- Pepper in greenhouses
  - ✓ Solarization/nematode management
  - ✓ Integrated Pest Management
  - ✓ Renewable energy efficient greenhouses.
  - ✓ Low cost options for storage in communes

During the last quarter the AAC Lushnje team established 3 watermelon field demonstrations in 3 different locations (total: 9 trials) and 2 greenhouse tomato trials in 3 different locations (total: 6 trials).

### **Encourage consolidators and input suppliers to invest in private sector extension**

The growth in private outreach staff reflects the importance companies are placing on development of their value chains. While initial efforts are noteworthy much remains to be done. AAC sees the buyers group as a key intervention point for outreach activities.

#### North Region

- Collaborated with two local vegetable nurseries for virus free saplings and assistance to growers of new varieties.
- Promoted the adoption of new vegetable varieties.
- Watermelon consolidator invested in field demonstration of new technology

#### Korce Region

- New tree varieties. Joined with nursery seedling producers on advising clients on tree selection for their orchards relative to the client's needs\

#### Lushnje Region

Several discussions were held by the Lushnje Regional Office during the last quarter with input suppliers on issues related to vegetable production, including the promotion of investment in this sector. The following ideas are some which grew out of the discussions:

- Solar water heating units. In order to find more economical ways to heat greenhouses the AAC staff organized a meeting with Mr. Nezir Çullhaj, a businessman who has entered into a joint venture with an Italian company. The discussion focused on the use of solar energy to heat the green houses and there were signs of some interest in investing in this direction. A follow-up meeting will be held the second week of April for a more definitive discussion will take place with participation by the AAC project team.
- New watermelon seedlings. In cooperation with input suppliers “Bruka Seedlings” and “Agroblend” a demonstration trial will be set up next quarter to compare the advantages of hybrid water melon with the seedless watermelon in Saranda. To date “Bruka Seedlings” Co. has offered three seed varieties of hybrids for the field trials and is preparing to offer three other hybrid grafted seedlings. AAC staff is exploring with both companies opportunities to extend these fields trial in two other areas, Berat and Divjaka.
- Finance. A meeting with SNV in Fier was held to exchange ideas on how SNV can best be involved in financing agricultural activities.

### **Build the capacity of existing public and private sector extension staff to provide technical services to farmers**

#### North Region

Seven (7) meetings were held with Crop Department, Extension and Science Directorates in the Ministry of Agriculture Food and Consumer Protection as well as with Regional Directorates of Agriculture Food and Consumer Protection in Shkoder and Lezha regions to introduce the AAC project to potential partners and coordinate AAC activities with them.

Twenty (20) vegetable and melon growers were visited to link the producers with technical assistance offered through AAC on the following:

- improve quality and improve yields through post-harvest management,
- improve production practices,
- form producer groups for marketing,
- reduce cost of inputs and transaction costs in accessing services.

Three meetings were held with private sector extension services, wholesale and retail agro-input suppliers, and vegetable greenhouse nurseries in Shkoder, and Tirana.

#### Korce Region

AAC donated a rapid soil test kit to Korce University, Agriculture Faculty for demonstration of advanced production technology to students.

Korça Regional Office staff participated in three training sessions put on by “Bayer” Input Supply Company to promote better linkage between farmers and input dealers, and to evaluate the impact of inputs in orchard production.

The staff also organized a discussion among several processors and seedling producers which focused on the promotion high value cherry varieties. The final objective was to supply the processing industry with appropriate high quality raw materials.

The Korça Regional Office staff was invited to participate at the MADA (Mountaneous Area Development Agency) launching ceremony where their focus and strategy in agriculture was introduced and possible ways of cooperation were explored.

#### Lushnje Region

The Lushnje Regional Office maintains continuous contact with the private extension unit of the area to support their initiative to establish the *Divjaka Chamber of Agronomists* and create a legal and functional private service. The initial group has drafted a MOU in which they request AAC cooperation and support for the legalization process.

### **Collaboration with MoAFCP Technology Transfer Centers**

#### North Region

One meeting was organized with the Technology Transfer Center in Shkoder and discussions held to coordinate activity plans of both parties.

#### Korce Region

The AAC Korça Regional Office cooperated with the Ministry of Agriculture, Food and Consumer Protection and Korçe Technology Transfer Center to develop a training program on pruning and fertilizing of fruit trees.

## Lushnje Region

AAC has organized follow-up meetings with the following agencies:

- Technology Transfer Center in Lushnje,
- Regional Agricultural Directorates of Food and Consumer Protection of Fier, Berat, Lushnje and Sarande,
- Agriculture University of Tirana.

The focus of the meetings was the AAC plan of activities for the next quarter and exploration of opportunities for collaboration.

**Provide cost-share grants to lead farmers to demonstrate new technologies and methodologies that address specific constraints in the production of one of the AAC commodities.**

## TIRANA OFFICE

Grant selection criteria, grant application guidelines, grant application template and grant management procedures were developed with assistance from DAI-HO technical staff.

The grants manager worked with Bethesda-based TAMIS specialist to include Grant Manual procedures and guidelines in TAMIS thereby preparing the AAC to initiate its grant program and is in the process of identifying the best ideas from regional offices for consideration. Training sessions were held with the AAC Regional Office staff on grant procedures.

The following are some of the ideas being explored for proposed grant applications:

- cold storage for tree fruits in Korça area,
- new watermelon planting technology – use of saplings in North region,
- table olive plantation drip irrigation and pest management in Bilsh-Berat,
- establishment of a “mother nursery”, rootstock improvement of super high density of fruit trees orchard
- solar heated flat panel for greenhouse use

### **Task 3 – Strengthening Farmers’ Access to Finance**

A key indicator of real value chain growth and sustainability is the degree of commercial support provided to the main actors by the financial services sector. AAC has designed its program to engage this vital sector through the life of the project. Results are already evident by the strong participation of leading rural lenders in the AAC roundtable series and eagerness to meet with AAC staff based in Tirana and the field offices. Concrete achievements have already occurred with lenders providing finance to AAC farm enterprise clients as a result of project activities.

## **Assist PSHM and other microfinance firms**

### **TIRANA OFFICE**

During the past quarter, the Grant Manager organized series of meetings with other development projects and financial institutions. The purpose of these meetings was to inform other implementers on AAC goals and objectives, learn more about their project activities and find ways for cooperation and coordination to the benefit of project clients. Loans provided from financial institutions were monitored in collaboration with the Regional Office staff.

The AAC Regional Offices continued to coordinate and facilitate the participation of representatives of various financial institutions at the AAC training sessions held in Korca, Berat, and Divjaka. The main goal is to establish relations between them and AAC clients and share information. The Grant Manager is continuously working with PSHM loan officers to assist them and provide more expertise on agriculture activities of small and medium scale vegetable and fruit farms.

Activities of the grants manager during this quarter were also focused on the establishment of direct contacts with numerous organizations to develop and orient their representatives toward the support of AAC clients. The following is more detailed information on the meetings held with the financial institutions:

- PSHM - Mr.Robert Hart / Director, Mr.Denis Derralla / Operation Director, Mr.Artan Male / Corporate Resp. Director, Mr.Edmond Duro / Korca's Manager, Mr.Pirro Ceta / Korça Agriculture Officer, Mr.Zalo Hoxha / Lushnja's Manager, Ms.Dudie Guri / Lushnja's Agriculture Loan Officer, Mr.Skender Gjoni / Fushekruja Loan Officer, Mr.Fisnik Decaj / Shkodra's Manager. The discussion was focused on: the AAC activity in country and its objectives, farmer access to financial sources and financial training modules. The grants manager was provided with detailed information on PSHM training courses oriented towards business financials, specific training modules produced for fruit trees and vegetables e.g. apple, peach, cucumber and watermelon. Agreements were reached in ways of cooperation between AAC and PSHM. AAC was invited to send groups of farmers to participate in PSHM training workshops whose expenses will be covered by PSHM.
- USAID Mission, Tirana - Ms.Alma Kospiri / SME and Trade Development Specialist. Discussions were held on DCA funds with the aim of providing AAC partners with accurate information on the Development Credit Authority fund.
- RAIFFEISEN Bank - Mr.Artan Kadria / Vice-President, Ms. Ensuela Hysnelaj / SME Director, Ms. Holta Kasemi / Quality and Processing Manager. The objective of the meeting was to increase and improve farmers' access to financial sources. The Bank expressed interest in involving its specialists on agriculture related issues. AAC will invite bank specialists and loan officers to participate in the AAC training sessions

and workshops, share information and assist them to strengthen their skills and capacities in the agriculture sector. The Bank plans to establish an Agriculture Microfinancing Division in the future.

- MADA (Mountainous Area Development Agency) - Mr.Shkelzen Marku / Executive Director, Mr.Fatmir Voci / Specialist. Introduction of MADA grants strategy for the rural areas was made and methods of collaboration were discussed.
- Peace Corps - Diana Djaloshi / Manager, Mr. Jerome Parker / Korca's Peace Corps Volunteer. Information was collected on the skills of the current Peace Corp Volunteers and discussions held on how best to utilize them as an additional resource and involve them in AAC plans and activities.
- JEHONA Credit Union - Ms. Elvana Sharkaj / Executive Director. The discussions focused on farmers' access to credit sources as JEHONA manages a large number of credit unions throughout Albania, including the rural areas.
- BESA Foundation - Mr.Bajram Muça / Executive Director. The objective of the meeting was on methods to increase farmers' access to credit.

## REGIONAL OFFICE KORÇE

Regular meetings were held with PSHM during the third quarter. The joint activities were a strong point for showing a good cooperation which was reflected in both farmers and PSHM work.

Joint training sessions were organized with growers and PSHM representatives to establish contacts between the growers and the financial institutions. For this purpose three training sessions were held in different areas of the region. Thirty-Nine farmers participated in these training sessions including AAC primary and secondary clients along with input suppliers (mostly seedling producers).

### **Loan Facilitation**

The following loans were provided in collaboration with AAC Korca Regional Office:

### **PSHM Loans**

Twelve (12) loans for investment in new orchards, working capital and storehouses, totaling 5,100.000 Lek (US\$ 63,750) were given to growers during the last quarter.

**Table 1. Loans provided to clients with AAC assistance**

<b>Nr.</b>	<b>DATE</b>	<b>NAME</b>	<b>AMOUNT</b>	<b>INSTITUTION</b>	<b>LOCATION</b>	<b>PURPOSE</b>
1	October	Llambi Rapi	1,200,000	PSHM	Zvirine	Apple storehouse
2	January	Vasil Qeleshi	550,000	PSHM	Zvirine	New orchard
3	January	Robert Qeleshi	500,000	PSHM	Zvirine	Storehouse / New orchard
4	January	Mitat Pajo	400,000	PSHM	Poceste	Tractor / pump
5	February	Sherif Psari	400,000	PSHM	Zvirine	Seedlings
6	February	Andrea Beqiraj	400,000	PSHM	Polene	Land for new orchard
7	February	Artan Feratllari	250,000	PSHM	Kreshpanj	Tractor
8	February	Bardhyl Feratllari	550,000	PSHM	Kreshpanj	New orchard
9	February	Illir Bacelli	300,000	PSHM	Dvoran	New orchard / pump
10	February	Alban Kodra	250,000	PSHM	Dvoran	New orchard
11	March	Dhimiter Shkembi	200,000	PSHM	Dvoran	Pentari
12	March	Raqi Taci	100,000	PSHM	Zvirine	New orchard



*PSHM Loan Officer, AAC Korçe staff and apple growers*

In order to expand the farmer's access to finance, AAC cooperation was extended to other financial institutions. For example, several meetings were organized with Pro Credit Bank - Korca branch. They concluded early on that cooperation with AAC project could be very useful, and as a first step they participated in the introductory workshop. The result was a joint training session organized with growers and Pro Credit bank representatives in which 14 individuals participated - two input suppliers and twelve growers.

Another meeting was organized with "Korçarja" Credit Union. The coordinator of the Credit Union, Ms.Diana Ceta introduced their program, focusing on activities with farmers. This credit union has two branches, one in Bulgarec and one in Plasa villages, which have been successful in providing loans to farmers. A second meeting is scheduled with the responsible persons of these branches for future cooperation.

## REGIONAL OFFICE LUSHNJE

AAC in Lushnja has invited the main financial institutions to the training sessions organized with farmers on technical production issues. PSHM and Credit Union have used this opportunity to introduce their services to these potential clients. Although the interest rates are considered high by growers, they remain interested in receiving loans from these institutions as they are seen as available sources to support farm investment activities.

On-going monthly meetings are held with financial institutions operating in the region: PSHM Lushnje (Mr. Zalo Hoxha director, Dudie Guri Loan Officer) and Credit Union Berat ( Mrs. Rahime Goga loan officer) and Pro Credit Bank ( Mr. Artur Hajdari Senior Loan Officer). The impact of the meetings and training sessions is reflected in the delivery of eight new loans to clients supported by AAC with a total amount of 4,000,000 lek (US\$ 50,000).

Follow up meetings on clients progress related to loan payment show that currently all the clients are paying on time and there is no evidence of delays in installment payments. The Lushnja Regional Office staff established regular contacts with PSHM loan officers and Credit Unions to collect on regular basis the detailed data for AAC loan clients.

**Table 1. Loans provided to clients with AAC assistance**

<b>Nr.</b>	<b>Date</b>	<b>Name</b>	<b>Amount</b>	<b>Institititon</b>	<b>Location</b>	<b>Purpose</b>
1	14/11/2007	Tomorr Hyka	500,000	Credit Union	Kutalli	New Investment / Greenhouse
2	17/12/2007	Pellumb Tabaku	500,000	Credit Union	Velmish	New Investment / Greenhouse
3	17/12/2007	Azis Daulle	500,000	Credit Union	Poshnje	New Investment / Greenhouse
4	21/01/2008	Rrapush Fisheku	500,000	Credit Union	Poshnje	New Investment / Greenhouse
5	21/01/2008	Razie Golemi	500,000	Credit Union	Poshnje	New Investment / Greenhouse
6	21/01/2008	Orland Golemi	500,000	Credit Union	Poshnje	New Investment / Greenhouse
7	22/01/2008	Bastrit Xhelili	500,000	Credit Union	Gorican	New Investment / Greenhouse
8	21/01/2008	Serjan Kashari	500,000	Credit Union	Gorican	New Investment / Greenhouse

- **Build the capacity of AAC partners for basic financial planning**

### TIRANA OFFICE

The grants manager has been developing AAC cost-benefit models for each commodity and a training session was held with the Regional Outreach Specialists to explain and discuss the models with them. AAC's cost analysis models will be used to provide an effective tool for targeted farmers and farmer associations and will serve as a guide for their business operations and future investments.

Training sessions were presented to the Korca and Lushnja Outreach Specialists on “Cash flow Calculation”. A “farm record book” was drafted and will be discussed soon in order to secure base line information.

Lushnje region

Production costs were calculated for each commodity and each area. Respectively:

- 2 costs for watermelon in Lushnja
- 1 cost for watermelon in Saranda
- 2 costs for tomato in the greenhouse
- 1 cost for dry tomato in Lushnja
- 2 costs for cucumber in Berat greenhouse

This is an on-going process where the cost-benefit analysis will be included in the next step.

## **COMPONENT 2**

### ***STRENGTHEN CAPACITY FOR MARKET DEVELOPMENT***

Component 2 of the AAC program focuses on strengthening market capability by linking producers to buyers, facilitating access to new markets, and increasing the supply of high-quality product. AAC’s strategy for achieving results was to maximize the knowledge resource base accumulated by the EDEM Project. Staff from both projects have developed a joint program of work during this quarter for the commodities which overlap in the fruits and vegetables, melons, and olive oil sectors .

The addition of LTTA Michael Brown by the EDEM Project in February has created a working environment of cooperation that will speed up project activities.

Each of tasks are described below

#### ***Task 1 – Linking Producers to Buyers***

- **Quick-start activities working with suppliers of existing EDEM partners**

Korce Region

Korca Regional Roundtable helped in establishing relations among producers and consolidators/processors (list provided by EDEM Project)

A February meeting was held with the representatives of GTZ project in Korca since part of the GTZ activities for this year will be in the agricultural sector. GTZ’s main focus will be the marketing of agricultural products. For this purpose, in collaboration with the Korce Chamber of Commerce and Industry they have created a regional brand for the commodities of the Korça region. This brand was presented in a workshop organized by Korca Chamber of Commerce and Industry, GTZ, and SNV. Participants were from the

area of agriculture, agro processing, etc. AAC Korça Regional Office was invited to participate in this event at which both staff and AAC primary clients were present.

Discussion was held during the event on use of the "Product of Korca" brand. The first step in this direction will be the use of the brand by consolidators after buying the product (apples) from small apple growers. GTZ and SNV are planning to have another meeting to define the right criteria for continuing this work which began 5 years ago. This is a good opportunity for regional well-known products like: apple, cherry, onions, beans, vegetables, potato, grape, meat products, honey, dairy products, wine, herbs and spices, pickles, barley, and other cereals. AAC will work with selected products within the four AAC sub-sectors.

Separate meetings with Korca fruit processors were organized during last quarter to gauge their interest in collaborating with apple growers. The idea is to work with growers and processors to change their attitudes towards each other and convince them to consider each other as strategic partners.

More meetings with EDEM representatives are taking place for strengthening links among growers and buyers (consolidators and processors). Both AAC and EDEM projects are making common efforts to support clients with services for product marketing and developing marketing strategies.

#### Lushnje region

The Lushnje Regional Office, in cooperation with EDEM, has facilitated eight meetings between “consolidators and farmers” and “consolidators and processors” with the final goal to motivate the farmers to produce for the processing industry and to assist farmers find new markets. Most of the meetings have ended with concrete contracts between vegetable growers and processors as follows:

- Processors and red pepper growers – Two in Lushnje and one in Berat
- Processor and cucumber (cornishon) grower - One in Fier and two in Berat
- SEJEGA Processing Co. and tomato grower – Two in Lushnja

### **Task 3 – Increasing the Supply of High-Quality Product**

#### North Region

AAC staff has consulted printed materials and organized several visits to the North region to understand better the calendar of melon production in both project areas of Torovica and Adriatic. A technology package for extension the growing season has been prepared. The two sites are planting grafted seedlings in order to improve quality and bring their product to market earlier.

#### Lushnje Region

Growers of both watermelon and greenhouse vegetables are interested to learn ways in which they can improve the quality of their final product. To this end, workshops and demonstration plots have been designed to improve productivity and post harvest handling. For water melon, early season provides the greatest value added opportunity. The field demonstrations listed in Component #1 are designed to bring the final product to market as early as possible.

For greenhouse growers, extending the season on both ends will add value to their final product therefore the workshops and field demonstrations are designed to achieve this result.

### Korce Region

In Korce post harvest activities for high quality apples offer opportunities for adding value. The outreach staff have been in discussion with owners of existing cold storage facilities to explore options for using these facilities for the up coming 2008 season. Apple growers have also been in discussions with AAC staff on options for renting mobile storage units for the few months after harvest when the value of the fruit rises significantly.

## **COMPONENT 3**

### **INCREASE ACCESS TO AND USE OF TIMELY AND RELIABLE MARKET INFORMATION**

Market information has the potential to revolutionize the Albanian agriculture sector by addressing one of the key causes of the fragmented and inefficient state of the Albanian marketing system: the lack of prompt, accurate information to make informed market decisions. Competitive value chains depend on the timely flow of information from the market upstream to the producer and from the producer along the value chain to the end buyer.

Steady progress has been achieved. The MIS specialist worked with AAC field staff to identify opportunities for establishing a viable market information system. Extensive meetings were also held in Tirana with organizations that have the potential to collect, analyze and disseminate information.

AAC is also a very active member of the MIS/RCI network. AAC's MIS specialist will be attending the first meeting of RCI/MIS projects next month in Macedonia. AAC had planned for this component to be farther along that it is now. However a MIS STTA to conceptualize this component was approved by USAID and will arrive in April and it is expected that with this assistance, the implementation of a MIS system will be back on track.

### **INTRODUCTION**

Part of the AAC work in enhancing the competitiveness of Albania's agriculture is the design, building and management of a functional and sustainable Market Information System (MIS). The AAC general approach includes interventions throughout the value chains of targeted products which will be reflected in the MIS design. For value chains to become competitive there needs to be a timely flow of information from the market upstream to the producer and from the producer along the chain to the end buyer.

Eventually the information provided by the MIS will include not only prices but also market intelligence such as product features, market standards requirements, size, color, variety, grading and certifications. In addition, the system will provide market analysis of current and future trends and opportunities, export briefs, and business contacts.

The highlights of work done under Component 3 in the last quarter include:

- A desktop research was carried out on previous MIS in Albania and in pertinent countries, problem areas and causes of failure were identified, and a summary of lessons learned was compiled.
- A brief analysis was prepared of the constraints and deficiencies of the agricultural marketing system in Albania and how the MIS can/should address them

- A preliminary analysis on user groups' information needs
- An institutional analysis of potential MIS partners and/or hosts
- Field visits and interviews with lead farmers and processors in Lushnja and Korça
- Meetings and discussions with several public and private institutions with potential to get involved in the MIS structure.

## **PRELIMINARY DESKTOP RESEARCH**

The purpose of the desktop research was to identify other MIS efforts, review their experiences, and draw lessons learned in order to avoid same pitfalls or repeat best experiences.

Some of the findings from the desktop research include the following:

- There are a few cases when the MIS has a cost-recovery mechanism in the form of subscriptions but as yet there is no fully profitable or sustainable system in the countries surveyed.
- According to a FAO survey and a review of MIS in several countries, there seems to be a relatively high rate of failure caused by low human resource retention, lack of accountability and quality control, shortage of funding, low priority on the part of governmental host institutions, and the inability of bureaucratic structures to understand and serve market needs.
- The scope of MIS must carefully be determined in accordance with the resources available as some systems have tried to cover too much too soon and have failed.
- Training should be an important component of the MIS as most previous experience shows there is a direct link between insufficient training and system failure. Training includes two elements: 1. Market information use (farmers, wholesalers, processors, input suppliers); and 2. Market information service (data collectors, analyzers and disseminators)
- Much inefficiency in the current agricultural marketing system in Albania is partly due to the lack of a useful and demand-driven market information system. This will be considered in the design and as far as possible the constraints will be addressed by the system.

### **Identify the information needs of target groups**

Three main types of sub-activities have been carried out under Activity 3.1:

1. In-office discussions and brainstorming on MIS target user groups
2. Meetings and interviews with intermediary organizations and institutions
3. Direct interfacing with priority user groups

1. During discussions and brainstorming sessions with AAC management the following were identified as *potential* MIS user groups:

- Input Suppliers
- Farmers/Producers
- Wholesalers/Consolidators
- Processors
- Retailers
- Financial Services

From this list of potential user groups, three *priority* target groups will be the focus for Year 1: *farmers/producers*, *wholesalers/consolidators*, and *processors*. Once the system is under way and information is being provided to and used by these groups, the next step will be to include *input suppliers*, *retailers* and *financial institutions* in the system.

2. Through several meetings with institutions such as MoAFCP, Regional Agricultural Directorates, ACIT, KASH, ABMC, AFADA, and BKFSH, information needs of farmers, input suppliers and wholesalers were discussed. The result was a better understanding of the information needs these groups have from the perspective of institutions that serve in the agricultural enabling environment. In addition some of the findings listed below under point 3 were confirmed during these meetings.
3. Direct interfacing with farmers, wholesalers and processors was the most important sub-activity in identifying user needs. During one roundtable in Korça, two workshops in Lushnja, and four visits/interviews in Korça, several important needs were identified that are being considered in the design of the MIS.

### **Korça Roundtable.**

Although the scope of this roundtable was broad, the marketing/trading workgroup discussed also market information needs. Three types of market chain actors were present: *trader*, *farmer/consolidator*, and *wholesale center manager*. The apple farmers - who also consolidate produce from other farmers - receive little or no information on market demands, changes and opportunities. The wholesale center manager receives wholesale prices from the Ministry, while the trader receives information through business contacts, mainly by phone.

### **Lushnja Workshops.**

The main themes of these workshops were technology and production issues, but the market information needs were also discussed. Vegetable farmers differ in the amount and quality of information they receive. Those farmers who own cars, cell phones and contacts with traders reported they do receive information on request (to their contacts). However, they do not receive regular and comprehensive information from any source. On the other hand, the poorer farmers get no information at all.

## **Visits/Interviews.**

Four visits to individual and farmer groups in Korça were conducted during this quarter to discover what type of information is needed by farmers, how frequently and in what form. Farmers place more value on price information but they agreed that at later stages information on quantities demanded would also be useful. They lack information on apple varieties - what market demands which variety at which price - is lacking and this would be useful for those farmers who are planning on expanding their orchards. The preferred methods for dissemination are cell phone SMS / voice messages and printed forms. An estimated 90% of farmers have cell phones and most villages have a central café where farmers meet regularly.

## **Korce Region**

Several meetings were organized and efforts were made by the Korça Regional Office staff related to the creation of a Market Information System. One of the meetings was organized with the director of wholesale market in Korca. The AAC staff made a short introduction on AAC project activities focusing more on the Component 3 activities directly linked with the establishment of the MIS.

The director of the wholesale market showed interest and explained that the wholesale market is developing on daily basis a price list for all the products which is used only within the wholesale market place.

Several field visits and interviews were organized with the AAC primary clients to identify their needs for market information. Conclusions were the following:

- lack of information on market prices
- lack of market information system (markets, amounts required, time etc.)

They suggested that AAC has to consider the lack of internet access for farmers and develop a system and/or find a way to send the information directly to farmers' hand.

## **Lushnje Region**

A meeting was held with representatives of the Regional Agricultural Directorate in Lushnja to identify market information needs and how to improve the market information system. Results from the meeting show that the system is working, though with lots of lacking facilities such as:

- internet connection not regularly in place, thus not all the time available for information exchanging
- information only from Lushnja market and a daily price list developed and shown in the Prefecture.

- limited access to MIS for farmers, only the list of prices in an A4 format shown on a small notice board inside Lushnja wholesale market.

### **Establish a system to collect wholesale market prices**

#### **TIRANA OFFICE**

- Three meetings were held with the MoAFCP and the Regional Agricultural Directorates in Lushnja and Korça. The current collection system being used by the MoAFCP was examined and ways of improving and expanding it were identified.
- Two meetings with wholesale center management in Lushnja and Korça and one visit in Fier wholesale market center AutoGrill were conducted. Their current collection and dissemination practices were discussed.
- The Sow for the MIS STTA was finalized and approved. This will enable AAC to move ahead with the design and training aspects of the MIS.

#### **Korce region**

Twice a month, Korça Regional Office staff collects information for the wholesale market prices per each commodity AAC is working with. Information is collected at the wholesale market in Korça. A list with wholesales market prices for domestic and import products is produced after; price information on main agricultural inputs is included in the list.

TAMIS training was developed during February. The AAC ME specialist in cooperation with Korça Regional Office staff worked together on completing the client profile data. The list with AAC primary clients is produced.

## **MONITORING & EVALUATION**

In this quarter the AAC Program was able to collect some data regarding several performance indicators. As of April 2008 it's still too early to measure the Program Area-Level Indicators due to the seasonality of production, sales and income records. Most of the indicators measured so far belong to the Agricultural Enabling Environment Element and the Agricultural Productivity Element.

In general, AAC has either exceeded some indicators or is very close to meeting them. As the performance monitoring table shows below, for 5 indicators the target has been exceeded. Since there is another quarter ahead, special focus will be given to the rest of the indicators.

### **REGIONAL OFFICE LUSHNJE**

Base line survey was discussed in details with all staff members and the initial figures for the primary clients are filled in the forms. Base line survey for the primary clients of the three commodities is almost finished. Problems encountered during the process are mainly linked with lack of accurate figures on cost calculations and lack of record keeping by farmers. AAC staff had developed detailed individual interviews with primary clients trying to get the most accurate and realistic figures.

## Performance Monitoring Table

Indicator	Unit of Measure	2007 Baseline	2008	
			Target	Actual
<b>PROGRAM ELEMENT-LEVEL INDICATORS</b>				
<b>2. Agricultural Enabling Environment Element Indicators</b>				
2.1. Number of public and private institutions undertaking capacity/competency strengthening	# of institutions	0	2	10
2.2. Number of individuals who have received short-term agricultural enabling environment training	# of individuals	0	20	66
2.4. Number of producers/processors who have received credit	# of producers	0	20	31
<b>3. Agricultural Productivity Element Indicators</b>				
3.1.* Number of additional hectares under improved technologies or management practices	# of hectares	0	138*	172
3.2. Number of producer organizations, trade and business associations assisted	# of organizations/ associations	0	15	13
3.3. Number of individuals who have received short-term agricultural productivity training	# of individuals	0	250	298
3.4. Number of agriculture-related firms benefiting directly from AAC assistance	# of firms	0	10	8
3.5. Number of new markets identified (geographic areas, new products and new buyers)	# of new markets	0	15	6
3.6. Number of transactions completed (contracts signed and/or repeat sales)*	# of transactions	0	30	8
3.7. Number of farmers/firms who applying new environmentally sound technologies that enhance productivity, production, quality**	# of farmers/firms	0	200	96

\*Please refer to the Table of Indicators. For the other indicators data is lacking at the moment due to: 1. production and sales seasons; 2. no activity so far in those areas.

## **OTHER ACTIVITIES**

### **KORÇA ROUND TABLE**

Regional Korca Roundtable (January 30<sup>th</sup>, 2008) was held for apple producers, producer groups, buyers, input supply dealers, representatives of MoAFCP (Ministry of Agriculture, Food, and Consumers Protection), other projects and financial institutions. Total participants: 77. In this activity was discussed the need of establishing the producer groups as our individual farmers have small and scattered orchards, so, the product volume/quantity is a serious challenge when considering the wholesale markets domestically and for export.

### **AAC STAFF RETREAT**

An AAC staff retreat was held on March 17-18, 2008. AAC staff from Tirana, Lushnja and Korçe Offices participated, Michael Brown and Sabah Sena from EDEM project were present too. Goals of the meeting were the following:



*AAC Staff Meeting – March 17 & 18, 2008*

## **Taking Stock**

The first goal of the workshop was to take stock of the program to date – what is going well and what needs to go better; and how the program is progressing as per the indicators.

Part I of taking stock was to present themes from one-on-one interviews conducted with eight of the fourteen AAC staff. After the themes were presented, participants were put into small groups to discuss the themes, agree on those that especially ring true, and identify points they think are missing.

Part II of taking stock was to review the indicators and discuss as a team. In general, the team concluded that it is doing okay with the production indicators, as well as indicators that relate to key actors at the production end of the value chain, but that much more attention should be given to the market development indicators.

## **Effective Teamwork**

The second goal of the workshop was to develop “effective teamwork” ground rules, review and clarify roles and relationships across the program, and clarify team expectations for the new COP.

## **Workplan Development**

The third goal of the workshop was to summarize the efforts of the regional and Tirana teams in developing the quarterly workplan, and to especially engage in some “collective thinking” about Component 2 activities.

## **Indicators and Year 2**

These final two goals – to look ahead to Year 2 (indicators, products, market development, MIS) and to brief USAID on 4<sup>th</sup> Quarter work plan activities – were combined, because the discussion on Component 2 was an important and took longer to address.

USAID delivered two clear messages to the team:

- AAC should be a market-driven program. Much more emphasis needs to be given to Component 2. Priority should also be given to getting Component 3, MIS, operational. It will be a critical component of the program.
- AAC in Korce should be doing more than apples. Do the needed market intelligence and come forward with some additional candidate products. Provide the analysis with each candidate that makes the case why it should be a priority for AAC and how it will contribute to meeting AAC indicators.

- Mr. Ilir Mehmeti was elected as a member of EDEM/AOA official jury to collect from processors olive oil samples for 2008 National Competition of High Quality Olive (January 2008).
- AAC Production specialist and North Outreach Specialist in cooperation with AOA, MoAFCP, and other experts prepared a paper on “Albania Olive Growing and Olive Industry”, that was presented in the 4th International Olive Oil Congress, held in Split Croatia, on February 22-25, 2008.

## **CONSULTANT SERVICES and TRAINING**

Two STTA’s provided assistance to the AAC project during the quarter:

### ***Ms. Bronwyn Irwin – Home Office Technical***

- Work to finalize the AAC First Year Work plan;
- Finalize the AAC one-year operational budget;
- Developing and implementing the marketing strategy including meeting with local potential buyers;
- Working with the Korca and North outreach teams to develop structured work plans based on the needs of the client farmers.

### ***Ms. Steve Joyce – TRG subcontractor***

- Support in developing the Work Plan;
- Teamwork ground rules

## **ADMINISTRATIVE**

- Completed AAC staff - Mr. Kostandin Koço was hired in the position of Agriculture Outreach Specialist, on March 12, 2008 to work in Saranda area.
- IT consultant hired – Service contract signed.
- Continuous work with Internal Communication System TAMIS (local offices and Home Office communication)
- Produced and submitted financial reports to USAID
- Produced and submitted weekly calendar plans
- Produced and submitted quarterly reports to USAID