

ПРОЕКТ ЗА ЕКСПАНЗИЈА
НА МАЛИ БИЗНИСИ



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SMALL BUSINESS
EXPANSION PROJECT

PROJEKTI PËR ZGJERIMIN
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USAID MACEDONIA SMALL BUSINESS EXPANSION PROJECT

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EXECUTIVE SUMMARY

STRATEGIC OVERVIEW

USAID's Small Business Expansion Project (SBEP) catalyzes MSME growth as a source of job creation and improved incomes in Macedonia. SBEP identifies opportunities and facilitates MSME linkages to promising market opportunities, financing, and technology. In parallel, the Project fosters critical public-private dialogue and partnerships at the regional and local levels as means of supporting MSMEs and regional economic growth. Through these efforts, SBEP is developing a replicable model for sustainable regional economic development, starting in the Project target regions of Polog and Pelagonija and eventually adding a third region.

In its initial phase SBEP has proactively engaged with firms, municipal governments, and existing programs at the regional and local levels to identify opportunities and test approaches. The Project quickly recognized that the most promising opportunities for MSME growth lie in the food and agriculture industry, which comprises some 16% of GDP and employs over 20% of the national population.¹ SBEP recognizes massive growth opportunity in this sector, and this quarter Project efforts have been focused on developing this opportunity. The *Grow More Corn* campaign and similar initiatives in various value chains, which are detailed in the following sections, present a model of wide-ranging transformational impact based on the introduction of new technologies and enhanced market linkages. Rural tourism, light manufacturing, textiles and apparel, and construction are among the other opportunity areas SBEP has identified and where the Project has initiated market-led interventions.

The key issue to address in all of these sectors is poorly integrated supply chains, a reflection of weak or non-existent linkages among MSME suppliers, aggregators, and end-buyers. These linkages were well-established in the former Yugoslavia, but the void left behind in Macedonia has led to informality, massive inefficiencies, and declining competitiveness across sectors. A related issue is the extremely limited public-private dialogue and coordination among stakeholders to structure and implement strategic funding proposals and programs. SBEP comes at the problem from both ends, by fostering dialogue among disparate stakeholders, and by working directly with lead firms and MSMEs to identify needs, facilitate market linkages, implement proof-of-concept initiatives, and take these initiatives to scale.

SBEP prioritizes two mutually-reinforcing categories of local economic development initiatives:

- **Supply Chain (SC)** integration and strengthening to benefit MSMEs and link them to markets, finance, technology, and support services
- **Public-Private Dialogue (PPD)** leading to strategic priorities, funding proposals, partnerships, and implementable economic programs

Access to finance and **workforce development** initiatives are cross-cutting components which SBEP utilizes to operationalize its SC and PPD initiatives. Project activities are implemented through local **Business Service Organizations (BSOs)** – here SBEP includes public-sector partners such as the Regional Development Centers (RDCs), National Agricultural Extension Agency (NEA), and the Public Enterprise for Forests *Makedonski Shumi*, as well as private firms and consultants with specific technical expertise and a proven track record of providing solutions for MSMEs (e.g. Preda Plus, MKonsalting, PointPro, and ALRD). By executing Project initiatives through local firms and public-sector bodies, SBEP validates their expertise, enhances and adds to their experience, and thus builds up their capacity and strengthens their credibility. This adds to a stronger local knowledge

¹ Macedonia State Statistical Office, 2007

base in areas like supply chain enhancement and access to finance, which will continue to the expansion of the local economy.

ONGOING SBEP ACTIVITIES (as of March 2013)		
Component	Initiative	Expected Outcomes
Supply Chain	<ul style="list-style-type: none"> • Grow More Corn Campaign • Industrial Tomatoes • Wheat Production • Wild-Gathered Products • Light Manufacturing • Energy Efficiency & Waste Management • Artisans 	<p><i>MSME growth, leveraged investment, market linkages/import substitution through:</i></p> <ul style="list-style-type: none"> • Introduction of new technology and training/monitoring on modern protocols • Increased volume and quality of yields • Catalytic effects along in multiple value chains • Establishing new collection centers • Collector training and certification • Matchmaking for import substitution • Replicable model developed for innovation and cost reduction • Matchmaking for import substitution
Public-Private Dialogue	<ul style="list-style-type: none"> • LEADER/LAG • Workforce Development in Construction • Women in Business • Diaspora Investment • Access to Finance Workshop • Accounting Workshop 	<p><i>Regional and local development strategies established, enhanced, and deployed through:</i></p> <ul style="list-style-type: none"> • Stakeholders educated and motivated for participation in framework • Development financing accessed • Worker training and certification • Market-driven curriculum development • Business leaders and aspiring businesswomen brought together for support and action • Diaspora informed about investment possibilities • Improved policy environment for encouraging Diaspora investment • Businesses and orgs. trained on financing opportunities • Accountants educated on latest developments and requirements in the area

SUPPLY CHAIN COMPONENT

In the SBEP operational framework, new initiatives originate through an “all of the above approach” including public-private dialogue, Project outreach initiatives, and partner BSOs. Opportunities are screening for the following conditions in order to be considered for Project support (facilitative, financial, or otherwise):

- market potential through lead buyers or anchor firms
- transformational impact on supply chain (value sharing)
- scalable – replicable – synergistic
- local ownership and leveraging of public and private investment
- geographic coverage
- consider gender, youth, and environmental impact

Opportunities meeting these conditions are vetted through an iterative process involving relevant stakeholders. The critical element of this process is economic viability; if an initiative shows potential to create value at multiple levels, this is the ultimate indicator of success and brings about the public and private buy-in necessary for sustainable success. “Value” in this sense is not limited to financial value, but refers to progress on all outcomes that the Project seeks to develop, especially those resulting from MSME growth.

This approach allows the MSMEs involved to harness the investment and know-how of larger firms in developing local supply chains to meet market requirements. This enhances the economic viability of small farmers as microenterprises, for instance, who gain access to new technologies and technical assistance, as well as the security of purchasing agreements with buyers. As these microenterprises grow and demonstrate their capacities to meet the pricing, volume, and quality needs of buyers, they become viable alternatives to importing inputs at the lead firm level.

The following activities from the first quarter of 2013 highlight the Project’s approach toward creating shared value through targeted supply chain initiatives.

GROW MORE CORN CAMPAIGN

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • 40 farmers selected for drip irrigation pilot • 40 additional farmers selected for improved seeds and modern protocols • RFP for drip irrigation package released; Magan-Mak awarded contract 	<ul style="list-style-type: none"> • Increased yields up to 17 T/ha with at least 400 partner farmers in coming years • Catalytic effects in multiple value chains (dairy, egg, food processing) presenting opportunity for MSME growth, job creation, and income enhancement

Veze Sharri, Macedonia’s largest egg producer, was among the many firms to which SBEP reached out in its initial phase. Little did either party know that the product of early meetings would yield a transformational opportunity: corn. Veze Sharri, like many Macedonian firms in the food sector, imports most of its inputs from abroad. For an egg company, this means huge quantities of mostly Serbian corn. The logical question for SBEP was whether local production could be increased to fill the supply gap (Macedonia produces around 150,000 tons per year, and imports another 50,000t). Encouraged by a commitment from Veze Sharri to buy any surplus corn that SBEP could help generate, the Project hit upon its first major supply chain opportunity.

Recent droughts have hurt agricultural production the world over, but even irrespective of any crisis Macedonian corn production is extremely low. Average production on some 29,000 hectares in 2012 was just 4.3t/ha: less than half the global average. Outdated practices, poor input quality, and a lack of technical know-how at the farmer level all contribute to the poor performance of this struggling industry. Farmers are unable to compete with cheaper and higher-quality imports, and in 2013 many find themselves at a critical “make or break” juncture. They must either find a way to kick-start their small businesses, or in the near future will have to give up on farming entirely.



Figure 1: Drip irrigation concentrates water and fertilizers at the root of the plant, resulting in significant cost savings and improved yields

In 2012 SBEP implemented drip irrigation on small pilot plots to demonstrate the benefits of this simple yet revolutionary technology, which include cost savings for farmers as well as significant water conservation and increased fertilizer efficiency – all leading to substantial improvements in the volume and quality of yields. With the *Grow More Corn* initiative the Project is taking its proof-of-concept to scale in the target regions. This quarter SBEP organized and signed MOUs

with 40 pilot farmers from the two regions to receive drip irrigation for small corn plots (one hectare or smaller). An additional group of 30 farmers has been identified in Polog to receive technical assistance on seed varieties and agricultural protocols for growing corn or silage. The Project anticipates improved yields of up to 17t/ha, which will have a major impact on the local corn industry.

“If this [initiative] proves successful, next year I’d like to invest in a drip irrigation system for 20 more hectares”, said Slavco Petkovski, a corn farmer from Bitola with some 15 years of experience.

It would be difficult to overstate the catalytic effect of a potential 100-200% increase in corn production among SBEP’s partner farmers. As an input for the dairy, egg, poultry, beef, and food processing sectors, the corn value chain presents massive potential for MSME growth in Macedonia. Domestic and international dairies such as Dukat, BiMilk, EkoSharr, and Alpi, among others, have taken a particular interest in the initiative, as most of the pilot farmers also form part of these firms’ milk supply

chains. Both farmers themselves and food companies are recognizing that increased corn production will lead to increased profit margins and enable them to upgrade their systems/technology, form new market linkages, and expand their small businesses. The same applies for small businesses on the “upstream” side, where input suppliers like MaganMak are recognizing growth potential. In addition to private businesses, the universe of stakeholders includes key public sector players such as local mayors and water utilities (the Bitola and Prilep water supply companies, for example); the success of this initiative will depend on various forms of leveraged investment and cost-sharing among stakeholders. Expanded credit lines from dairies for their supplier farmers, reduced water rates to incentivize good practices like drip irrigation, and in-kind contributions like public or private land made available for pilots are all possibilities identified in the early stages of this initiative.

As most farmers grow not only corn but some combination of corn, wheat, barley, alfalfa, and even sunflower, this new technology may very well be applied for these other crops, similarly unlocking growth potential. For a small farmer, the effect can be transformational, marking a major shift from subsistence-level farming to strategically managing a farm as a viable and growing micro or small business. SBEP plans to work with at least 400 farmers over the next three years, a number which could grow exponentially as more and more farmers recognize the benefits of drip and modern protocols. SBEP projects that the resulting increase in domestic production could eventually fill the current supply gap, and beyond.



Figure 2: SBEP partner farmer Slavco Petkovski in his corn field

Grow More Corn also encompasses the Project's cross-cutting themes of increased access to finance, workforce development, and BSO capacity-building. Along the value chain, as firms grow and have needs for working capital and upgrades, businesses – including small farmers – will seek new financing from strategic partners and commercial banks, as well as through EU development financing vehicles for larger-scale projects (SBEP's wheat initiative provides such an example). Here, SBEP partner BSOs can provide assistance. Furthermore, SBEP's close coordination with local mayors, water companies, and other institutions directly feeds into the Project's local economic development initiatives, namely the LEADER/LAG process. In this way the *Grow More Corn* campaign showcases the mutually-reinforcing processes at work across SBEP's supply chain and PPD spheres.

The introduction of new technology also presents an excellent workforce development opportunity, and SBEP has partnered with the VET school in Tetovo to implement the same irrigation scheme on one hectare of its land, as a vocational training tool. The school, much like the individual farmers, keeps dairy cows and sells milk to local dairies. Students will gain hands-on experience with a new technology as well as valuable exposure to the greater supply chain model – a fairly novel concept in Macedonia.

This quarter SBEP also established a partnership with the National Extension Agency, which has offices in both target regions and will conduct trainings and field-level monitoring (including environmental monitoring) as part of the campaign. SBEP views NEA as a critical business support organization (BSO), as its technicians advise and support the farmers who will be growing their small businesses. SBEP plans to support the NEA's outreach activities as part of *Grow More Corn*.



Figure 3: SBEP is introducing drip irrigation for corn for the first time in Macedonia

The flowchart below demonstrates examples of the wide-ranging potential impact of the *Grow More Corn* initiative.

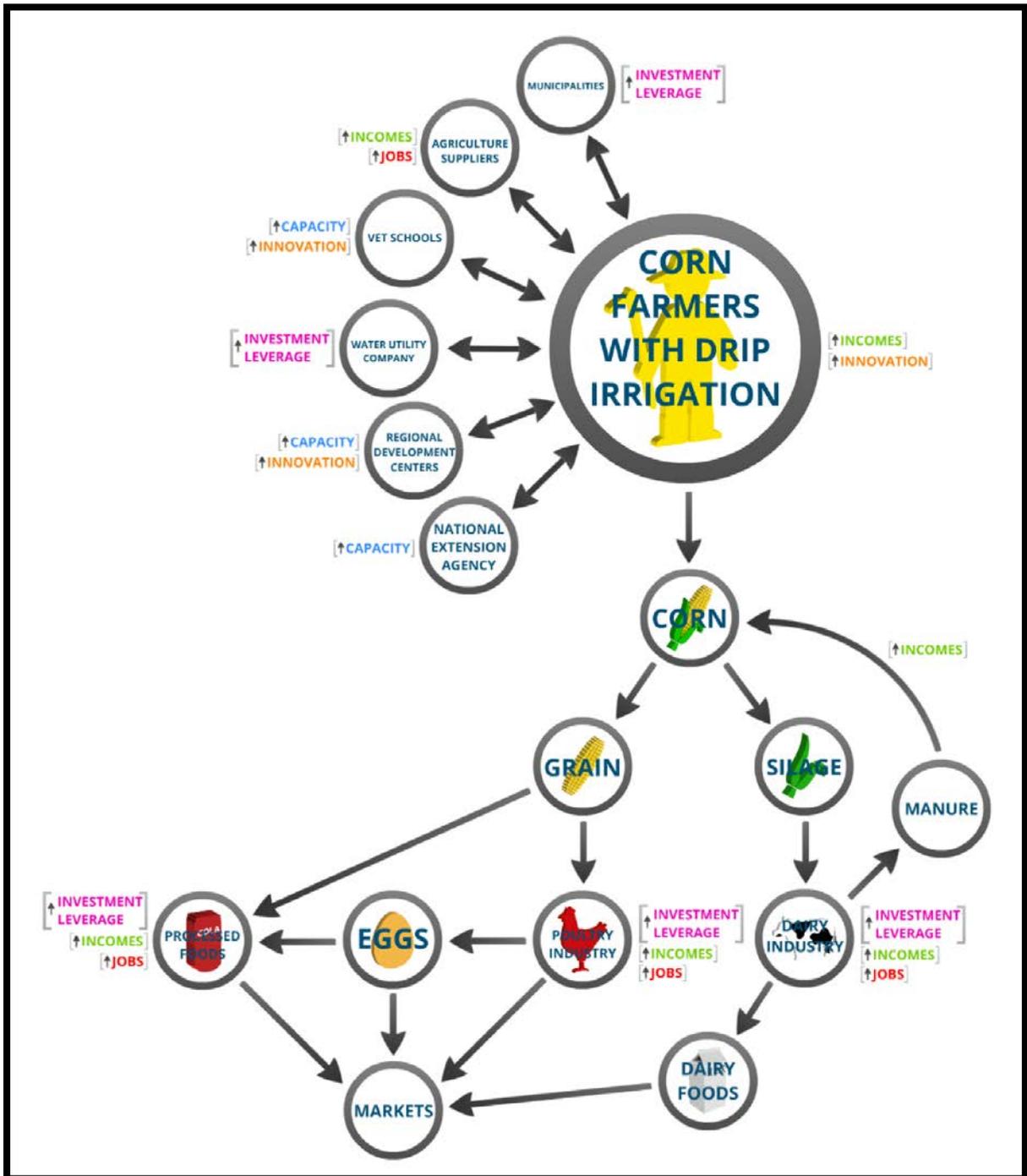


Figure 4:



Figure 5: SBEP staff collecting plot data with farmers in Pelagonija

Drip irrigation equipment for this initiative will be supplied by the local firm MaganMak, a certified distributor for the Israeli firm Netafim, who is a global leader in this technology. This quarter SBEP released a public Request for Quotations for this procurement; MaganMak was the only firm that responded. Its proposal was evaluated by a committee made up of SBEP staff members, and the award was made based on very high scoring on pre-established technical and pricing criteria. Chief among these criteria was the provision of technical support for farmers, which MaganMak will provide at no cost through its own staff and with the assistance of Netafim's Director of

Research and Training, who plans to make several visits this year to meet with farmers and lead trainings.

In the winter months of 2013 SBEP deployed staff to measure and collect GPS data on all the parcels included, and additional parameters, such as water availability were checked. This is a prerequisite for the MaganMak experts to be able to design the appropriate system for each plot. It is also the first step in enabling SBEP to track its impact at the farm level.

Initial presentations by MaganMak to introduce the drip irrigation systems and recommended protocols are scheduled for the first weeks of April in Dzepchishte and Bitola, and the irrigation systems will be installed after the first corn seedlings have sprouted in late April. Kickoff events for the campaign will be held in May in both regions, with participation by the US Ambassador in Pelagonija and the DCM in Polog.

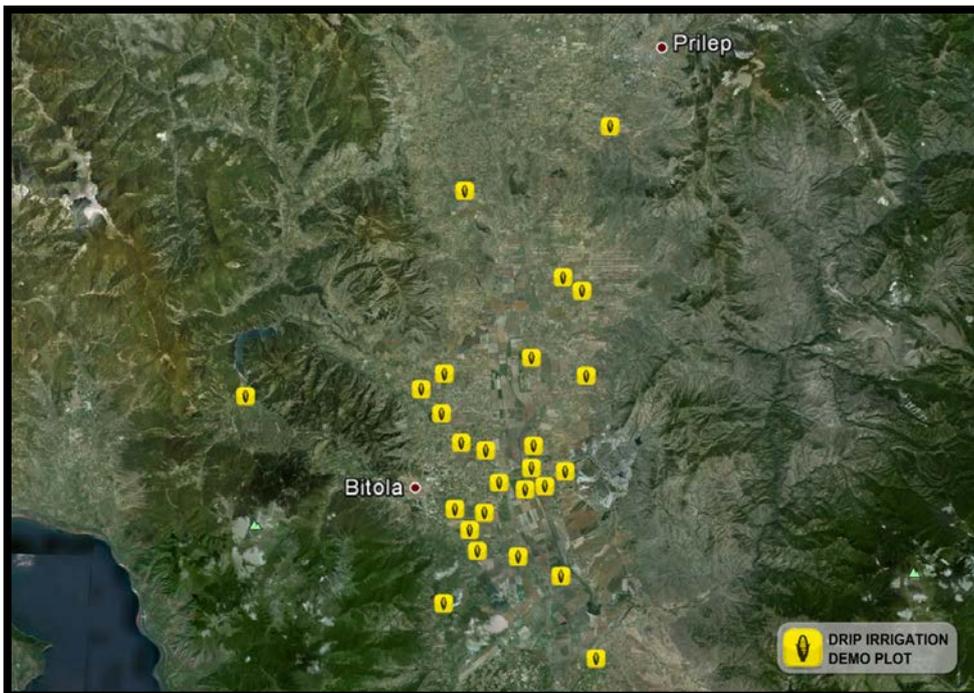


Figure 6: SBEP corn demo plots with drip irrigation in Pelagonija

SBEP OUTREACH THROUGH MOJA ZEMJA MAGAZINE

As a supplement to the agricultural pilot activities that SBEP is undertaking in Polog and in Pelagonija, the Project is achieving wider outreach and promotion through educational articles published in *Moja Zemja*, the monthly magazine of the Federation of Farmers of Macedonia (FFRM). Two articles have been published to date, in the February and March issues, the first about increasing corn yields with drip irrigation, and the second about increasing the production of industrial tomatoes using the same technology. An upcoming article will be written in collaboration with MaganMak technicians analyzing the important factors that go into the business decision to switch from open-field or sprinkler irrigation to drip, and the cost savings and increased margins associated with this upgrade.

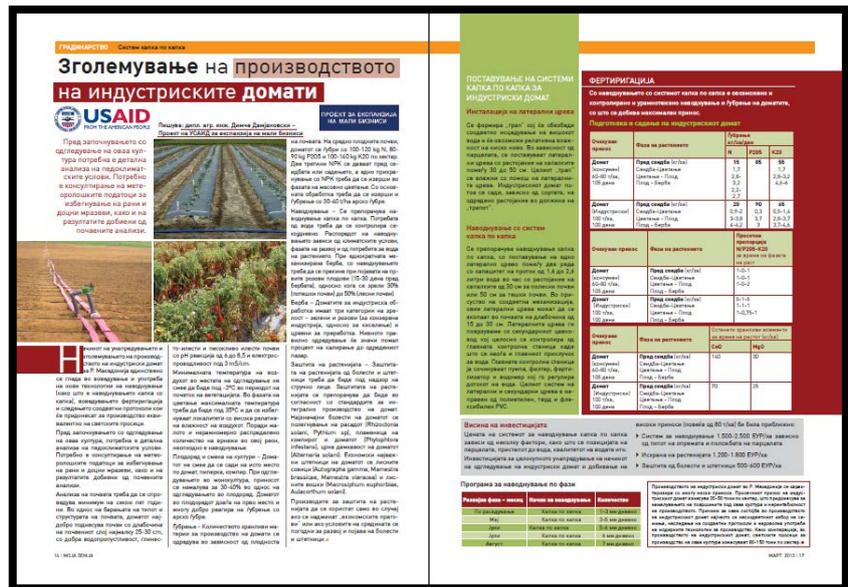


Figure 7: SBEP's first article on increasing tomato yields in the March 2013 issue of Moja Zemja

This collaboration with the monthly magazine forms part of the SBEP effort to educate farmers nationwide on competitiveness and improved technical and business practices. It feeds directly into SBEP's agricultural supply chain and vocational training goals.

INDUSTRIAL TOMATOES INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> Three farmers in Konzervna supply chain selected for drip irrigation pilot 	<ul style="list-style-type: none"> Increased yields up to 120 T/ha Catalytic effects in food processing value chain, presenting opportunities for MSME growth, job creation, and income enhancement

In parallel with the *Grow More Corn* campaign SBEP is organizing a smaller-scale pilot initiative for increasing the yield of industrial tomatoes from the current average of 20 tons per hectare to up to 120 tons per hectare. Again, the small production of industrial tomatoes is due to inefficient farming practices, and the low quantities do not satisfy the needs of the local processing industry, which resorts to imports.



“We need to decide if we want to work with modern production methods like most developed countries do or keep antiquated methods that are maybe 50 years old. If we choose the latter, woe is us!” said Borce Vrdzovski, an industrial tomato farmer whose operation has set local records for tomato yields.

For this initiative, SBEP has selected three pilot farmers in the Novaci area of Pelagonija who will grow industrial tomatoes on one hectare of their land, using drip irrigation and expert recommended protocols. Furthermore, they will use high quality seedling material prepared by experts in cooperation with Konzervna (Kompanija Zivko Radevski), the local producer of tomato paste in Bitola. Konzervna will act as the anchor firm purchasing the increased supply of tomatoes, and as a guaranteed buyer will ensure increased and stable incomes for the farmers. The demo plots on which industrial tomatoes will be grown with new technology will also serve as showcases, from which other farmers can learn about the benefits of these practices and eventually consider adopting them. In this way, SBEP expects the initiative to grow exponentially as a result of the pilot

phase. As with the corn initiative, representatives of the National Extension Agency will be working in coordination with SBEP staff and sector experts to identify farmers, educate them on good agricultural practices, and conduct monitoring throughout the growing season.

WHEAT PRODUCTION INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> Partnership established with Zito Altan 	<ul style="list-style-type: none"> Increased yields and quality of wheat crop with up to 40 farmers Training on protocols for at least 100 farmers Catalytic effects in food processing value chain, presenting opportunities for MSME growth, job creation, and income enhancement

SBEP has also initiated a market-driven program to restore broken linkages in the wheat supply chain in Macedonia. As with corn and tomatoes (and indeed most crops), domestic wheat production is low in volume and quality due to inappropriate inputs and cultivation practices; SBEP has identified a particular weakness in inadequate post-harvest storage facilities, which significantly reduces the value of local wheat. The Project has partnered with lead firm Zito Altan, a Skopje-based mill with plans to expand its supply chain in Pelagonija and considering opening a wheat collection center there. Through MKonsalting, a local BSO specializing in the wheat sector, SBEP will establish linkages between farmers and Zito Altan (and other mills), while also increasing yields by introducing new seed varieties and modern growing protocols. MKonsalting will identify some 100 wheat farmers to participate in the pilot phase, and will organize a conference on wheat in May, where sector experts will provide training about new seeds and modern protocols. By the fall sowing season, SBEP plans to have facilitated purchasing agreements between Zito Altan and up to 40 farmers. Farmers will benefit from a guaranteed buyer and both increased yields and prices for their crop, and Zito Altan will set an example for other mills looking to grow by demonstrating the

value-added of proper post-harvest handling and storage. The wheat initiative encourages small farmers to think strategically about their small businesses, and provides a scalable model which SBEP and its partner BSOs can transfer to other regions and value chains.

WILD-GATHERED PRODUCTS INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • Collection Centers established in municipalities • First round of collectors' trainings 	<ul style="list-style-type: none"> • Up to 600 new seasonal jobs with stable incomes

SBEP is also deploying its supply chain enhancement approach to the wild-gathered products sector. The Project is working with the municipalities of Bogovinje and Mavrovo & Rostushe, the Mavrovo National Park, and BSO partner Probio to open collection centers for wild herbs and mushrooms in Polog. The result will be an organized supply chain for these non-timber forest products, and will stimulate the local population to engage in this type of income-generating activity. It is expected that by opening the two collection centers in the villages of Pirok and Janche, over 300 households in each community will benefit from higher and more secure incomes, as well as reliable season jobs.

As of this quarter the center in the village of Pirok has been fully refurbished and equipped with the necessary scales and documentation, while the establishment of the Janche center awaits a working permit from local authorities. Both centers are expected to begin work next quarter in time for the new collecting season. In the meantime, the first in a series of trainings for collectors took place in Bogovinje on March 30, attended by some 15 participants who received certificates co-sponsored by the Public Enterprise for Forests *Makedonski Shumi*. The Public Enterprise, as the body responsible for managing Macedonia's forests, has recently developed and issued regulations concerning the sustainable and organic collection of wild herbs and mushrooms, prescribing the rules of collection and also requiring that collectors be trained and certified. The SBEP-supported trainings are doing precisely that, providing education on best practices and offering collectors the opportunity to obtain the required certification. SBEP partner BSO Probio, a registered certifying body, conducts the trainings and will be working closely with SBEP staff to facilitate purchasing agreements between

the new collection centers and buyers of the new supply of wild-gathered products. There is also the possibility of establishing more collection centers in the Mavrovo National Park.

Trainings will continue in the next quarter, and as the collecting season opens, SBEP expects increasing numbers of collectors to go through the program and receive certification; already, the first group of trainees plans to recruit up to an additional 120 potential collectors.



Figure 8: The Certificate awarded to trained Wild Herb and Mushroom collectors



Figure 9: Wild herbs expert Ivan Stojanov of Probio with wild herbs and mushrooms collectors trained in Bogovinje

LIGHT MANUFACTURING INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • Consultants hired under success-fee model to connect local LM suppliers to anchor firm supply chains 	<ul style="list-style-type: none"> • MSME growth as a result of matchmaking activities • Scalable model applicable in various contexts

Another line of activities within SBEP's efforts to reconnect supply chains is in light manufacturing. As in other sectors, the connections between local MSMEs and larger firms have been broken or are difficult to establish. Low quality, high prices, or inability to deliver sufficient quantities on time are among the obstacles for establishing these critical business relationships. Therefore the larger companies, whether Macedonian or foreign, resort to importing supplies. SBEP outreach has shown that many firms are willing to substitute imports with local supply, but do not have the time or resources to identify potential contractors. In that context, SBEP has hired supply chain experts to



Figure 10: Packaging materials in Comfy Angel that may be sourced locally

identify opportunities for LM sector import substitution. The starting point is with two major companies: Pilep-based Comfy Angel, a Macedonian-British joint venture producing beddings for export, and Johnson Controls, a large American multinational producing electronics for the automotive industry, with local operations based in Skopje. Local sourcing by these companies would mean significant growth opportunities for local subcontractors.

The pilot phase will run for three months, during which the consultants (Mr. Dejan Janevski and Mr. Goce

Peshev) will identify MSMEs that may be able to fit into the anchor firms' supply chains, and also interview other stakeholders in order to understand the challenges that light manufacturing companies face and to tailor services to meet market demands. This matchmaking program – which incorporates the success-fee model pioneered under USAID's Competitiveness Project through 2012 – is widely replicable and can be deployed in various contexts within SBEP programs.

VITAMINKA/ARTISANS INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • Vitaminka pilot initiated 	<ul style="list-style-type: none"> • MSME growth for local artisans

SBEP's supply chain efforts with Pelagonija-based confectionary leader Vitaminka has led the Project to focus in the short-term on a pilot initiative to facilitate sourcing corporate merchandise from local artisans. In January, meetings with artisans were held in Bitola and Prilep, drawing over 50 participants, many of whom provided samples of their work. Starting small, two women artisans – a seamstress and a designer – signed on to develop an apron, a cooking glove and a kitchen towel to offer as corporate giveaways for Vitaminka. Local BSO partner Preda Plus is coordinating the SBEP-Vitaminka partnership, and will be reporting on progress in the next quarter.

ENERGY EFFICIENCY/WASTE MANAGEMENT

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • BSO PointPro hired to analyze upgrading options for two small businesses with growth potential 	<ul style="list-style-type: none"> • MSME growth • Promoting scalable models of green tech/energy efficiency and waste management

In February, SBEP contracted Skopje-based BSO PointPro Consulting to complete comparative analyses of technical upgrading options for two progressive small businesses under financial strain due to inefficiencies in energy consumption and waste generation. This initiative will potentially unlock growth potential for these firms, and also serves as a model for firms looking to upgrade in these areas, increase efficiency, reduce costs and waste, and become more environmentally-friendly. It will also provide an example of how forward-thinking firms can identify a need, analyze potential solutions, and access financing to implement the needed upgrades.

Agroprodukt maintains a large glass greenhouse in the Polog village of Vrapchishte, currently using LPG (liquefied petroleum gas) for heating, which makes the business highly inefficient. PointPro developed three alternative models for efficient heat supply and presented them to the owner and manager of the greenhouse on February 1 in Tetovo. The second firm, Prilep-based Milko HF, is one of Pelagonija's largest cow farms; it produces large quantities of manure and currently dumps it in a field nearby. The company's owner recognizes the environmental risk – he will likely face fines at some point – as well as the value lost by simply dumping this natural fertilizer. PointPro proposed two alternative solutions and presented them to the owner in Prilep on February 22. The solutions involved both disposal of the manure in an environmentally friendly way, as well as options for making use of it and thus creating an additional revenue stream.



Figure 11 PointPro consultants with Agroprodukt owner discussing heating options for the glass greenhouse

In the next quarter both businesses will consider the alternatives presented and may choose to implement one of the solutions. PointPro will be able to provide further assistance in developing projects to access funding for implementing the chosen option. SBEP will continue to report on progress under this initiative, which cuts across many Project priority areas.

CHALLENGES: SUPPLY CHAIN COMPONENT

As a result of its field work and the increased awareness of local and international companies operating in both Polog and Pelagonija, SBEP staff identified a matching opportunity between the *European Trees Company*, a Dutch-owned tree farm, located on more than 400 hectares in the municipality of Jegunovce in Polog, and *Bagach*, a plastic injection-molding company in Prilep. The tree farm purchases large quantities of plastic pots for tree seedlings (more than 80,000 pots valued at over \$130,000 per year), currently importing them from Poland. At the same time, SBEP found that *Bagach* had the potential to produce such pots, if given the parameters. After proposing the match, SBEP organized a visit for representatives of *Bagach* to the tree farm and a meeting between the two companies. *Bagach* presented an offer, but the deal was not made because the companies could not reach an understanding on pricing.

This is a clear illustration of the types of challenges that local MSMEs constantly encounter, and demonstrates the value of SBEP's casting a wide net in exploring opportunities. Not all pilots will result in deals, and SBEP and its partners (BSOs and others) learn lessons with each challenge.

PUBLIC-PRIVATE DIALOGUE COMPONENT

SBEP facilitates public-private dialogue as an iterative process that responds to demonstrated opportunities for economic growth. The sustainability of this process is ensured because organizations and firms recognize and respond to the economic incentives associated with contributing to this dialogue.

In the Polog region, SBEP is convening up to 400 stakeholders to catalyze regional development through the RDC, the Chamber of Commerce of Northwest Macedonia, GIZ, and other groups. Initial programs include initiatives targeted at:

- accessing development financing opportunities
- attracting Diaspora investment
- supporting women entrepreneurs
- enhancing workforce development, and
- advancing cross-border cooperation efforts with Kosovo

In the Pelagonija region, SBEP is supporting the LEADER/LAG approach to organizing and financing regional development initiatives through the RDC, LEDs, and civil society actors. SBEP coordinates with up to 300 stakeholders, a number which could reach 1,500 in the Project's second year. Initial programs include initiatives targeted at:

- accessing development financing opportunities
- catalyzing rural tourism
- improving rural infrastructure
- enhancing agricultural development, and
- advancing cross-border cooperation with Greece

SBEP PPD initiatives are inherently tied to its Supply Chain activities in that proven strategies and models within the SC component are designed to directly inform discussions and programs under the PPD component. In a general sense, the focus on local supply chain enhancement and import substitution as a strategy for local development is already being recognized by public officials as a viable and innovative alternative.

LEADER/LAG INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • Two training cycles: <i>“Establishing partnerships and forming LAGs”</i> • February 12, 2013 Resen • February 28, 2013 Prilep • March 4, 2013 Bitola <i>“Networking with local stakeholders”</i> • March 26, 2013 Prilep • March 27, 2013 Resen • April 1, 2013 Bitola 	<ul style="list-style-type: none"> • LAGs established in Bitola, Prilep, and Resen • Increased capacity to access EU development funding and implement local development projects in target subregions • At least 100,000 citizens (30,000 under each LAG) covered

SBEP's "flagship" Public-Private activity to date has been its active promotion of the LEADER/LAG strategy to train local stakeholders on accessing financing for projects through EU development funding opportunities. Through this process the Project plans to establish three new subregional LAGs covering at least 100,000 Pelagonija citizens altogether. With the support of SBEP's strategic partner in the region, the Pelagonija Regional Development Center, the cycle of trainings entitled *Introducing and Implementing the EU LEADER Approach in Pelagonija* has continued from the previous quarter, preparing local actors in Bitola, Prilep and Resen to be able to access EU development

funds. This quarter two cycles of trainings took place, the first focusing on good governance practices within a LAG and on mobilizing communities, and the second highlighting the necessity of networking and engaging local stakeholders. A third cycle of trainings will take place in April. The workshops drew over 50 participants.



Figure 12: Group work during the Prilep LEADER/LAG training

The goal of these workshops is to train potential Local Action Group (LAG) members – from both the public and private sectors – on how to establish and run a LAG, but also to allow participants to network and discuss plans for future cooperation. The initiative is a first step to forming full-fledged

LAGs, which will be critical in forming and executing local development strategies. Many of the Project’s supply chain initiatives involve stakeholders also present in this target group; market-driven strategies proven viable in supply chain pilots will influence the way that public officials, for example, think about local development. Local mayors are already showing signs of this major shift in thinking.

WORKFORCE DEVELOPMENT INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • Stakeholder coordination and brainstorming • First training workshop presented by Renova for construction industry students 	<ul style="list-style-type: none"> • Training and certification for construction industry students (projection of up to 1,000 certified over life of project) • Developing curricula that meet the needs of the market • Physical upgrades to Tetovo VET school

Tetovo is the center of Macedonia’s construction industry, and is home to leading firms such as Renova and Pofix. These firms directly employ over 400 workers, plus the many additional workers employed within their 250+ local MSME subcontractors. Yet, as SBEP’s initial outreach confirmed, a major and constant concern for these firms is finding quality workers. Thus, in the context of the region’s high youth unemployment, SBEP and a coalition of partners have developed a workforce development initiative to help match the needs of the construction industry with the local workforce. SBEP has brought together representatives from the Renova Foundation, the Workers’ University in Tetovo, the VET School in Tetovo, the Polog Regional Development Center, the North-West Chamber, the municipality of Tetovo, and USAID’s YES



Figure 13: Coordination meeting on the Workforce Development initiative in Tetovo

SBEP and a coalition of partners have developed a workforce development initiative to help match the needs of the construction industry with the local workforce. SBEP has brought together representatives from the Renova Foundation, the Workers’ University in Tetovo, the VET School in Tetovo, the Polog Regional Development Center, the North-West Chamber, the municipality of Tetovo, and USAID’s YES

project to pool resources and coordinate efforts to ensure maximum impact in this critical area.

This quarter SBEP facilitated a partnership between the Workers' University in Tetovo and Renova, which offered training and certification to a number of the firm's subcontractors on plastering. The plan is to continue and expand this activity in the future, offering certification courses for current workers as well as those out of work, thereby improving their competitiveness in the job market.

“The number of problems in the construction sector in Macedonia is huge, but the worst is people working without a diploma. That is why we are preparing to become more competitive in the market with the help of the certificates that are given by the USAID Small Business Expansion Project in collaboration with the RENOVA Foundation”, said Harun Ahmeti, the owner of a small construction company and a subcontractor of RENOVA.

Going forward, the initiative will encompass various activities focused on the youth of Polog: to raise awareness among students about the job opportunities for young people in the construction industry, and provide means to acquire the necessary skills and certifications either through formal or informal vocational education; to encourage the development of curricula that matches the needs of the sector; and to stimulate construction companies in the region to allocate funds for certification of their workers. A study tour to a vocational school in Skenderaj, Kosovo is planned for the beginning of April, with the purpose of demonstrating to SBEP partners the many advantages of a modern vocational school. This visit will serve as an initial brainstorm on how to replicate certain elements in the VET school in Tetovo (for example by refurbishing and equipping a laboratory for construction works, with the support of the construction companies).

Upcoming events: SBEP PPD Component

- Study tour to Skenderaj, Kosovo VET School on April 2, 2013
- Ongoing LEADER/LAG workshops (Pelagonija)
- Women in Business conference planned for May 2013
- Diaspora Investment workshop planned for June 2013

WOMEN IN BUSINESS INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • ALRD contracted to map out opportunity areas for women's entrepreneurship in Polog 	<ul style="list-style-type: none"> • Women-owned businesses identified • Significant cases of women engaged in agriculture with potential of growth identified • Potential members of Women Cluster (support organization) identified • At least 5 cases of small-scale pilot intervention opportunities identified

SBEP actively seeks to identify opportunities and build capacities for women's entrepreneurship; thus, in coordination with its Polog regional partners, the Project has initiated a program that focuses on "Women in Business." It adds to the discussions and activities that have preceded it, namely the GIZ proposal to establish a Women Entrepreneurs Cluster and the idea of having such a cluster within the North-West Chamber. As a starting point, however, SBEP considered it necessary

to map out the scope and size of existing and potential businesses owned or managed by women in the region, determine the extent and nature of the market demand and supply of their products/services, as well as analyze existing support programs. Primarily, the focus is on the agribusiness and services sectors, but other sectors will be considered as activities develop. SBEP's market approach forms the base for this initiative; market opportunities will be the driving force behind the initiative, and linkages developed to ensure sustainability.

For those purposes, SBEP has contracted the Association for Local and Rural Development (ALRD). This non-governmental organization based in Kamenjane, municipality of Bogovinje, is uniquely positioned to conduct such a diagnostic, as its target groups include rural communities, youth, and women. ALRD has started research in the field and is identifying cases where small-scale pilot interventions can help support women's entrepreneurship initiatives.

As part of the initiative, a coordination meeting was held on March 27 in Tetovo with the regional partners: GIZ, the Economic Chamber of North-West Macedonia, the Polog Regional Development Center, and ALRD. The group discussed ideas for maintaining a sustainable support network for women in business and what steps should be taken in that direction. The partners agreed that the women themselves must decide what type of association they need, and it would be best to provide them with an opportunity to meet and brainstorm. As a result, SBEP and its partners will organize a conference for both women who are successful business leaders and can serve as role models, as well as others engaged in formal or informal economic activities, and who are in need of support to expand their operations. The tentative date for the conference was set for May 17, and all the partners should suggest ideas about potential topics, and also participants. The Woodrow Wilson College, a private school in Brvenica, has agreed to host the event.

DIASPORA INVESTMENT INITIATIVE

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> Stakeholder engagement, initial planning for June workshop 	<ul style="list-style-type: none"> Increased investment from Macedonian Diaspora in Europe resulting from: <ul style="list-style-type: none"> <i>Workshops targeted at Diaspora actors to educate on opportunities, and</i> <i>Reformed policies to incentivize Diaspora investment</i>

In partnership with the Economic Chamber of North-West Macedonia, SBEP has identified major investment potential in the significant Macedonian Diaspora community, whose members operate businesses throughout Europe. Current inflows from this group are mostly limited to remittances; investment is low because of lack of information, as well as a business/legal environment that offers few incentives for Diaspora investment. SBEP is formulating plans to engage this group and also to advocate for more investment-friendly policies.

Stakeholders currently in discussions with SBEP include the Macedonian Chambers of Commerce, the Agency for Foreign Investments, and Macedonia 2025; SBEP will act as a facilitator for this mix of state and non-state actors to eventually develop policy proposals for more Diaspora-focused incentives. To address the information gap, SBEP plans to organize a June conference targeted at Diaspora actors who generally return home for the summer. The Project will concretize this plan in the coming quarter.

ACCESS TO FINANCE WORKSHOP

Activities this quarter	Expected Outcomes
<ul style="list-style-type: none"> • Bitola workshop replicates success of last year's initial event in Polog 	<ul style="list-style-type: none"> • 220 participants gain insight into funding opportunities and take advantage of great networking opportunity

A workshop on financing opportunities for businesses was organized on February 6, 2013 in Bitola.

SBEP and its partners in Pelagonija –the Regional Development Center, Preda Plus and the Business Start-Up Center – joined forces in putting together this event, which was modeled on a similar workshop held in Polog in November 2012. The purpose of these conferences is to bridge the information gap between entrepreneurs and the funding sources that could help them expand their businesses.



Figure 14: The Bitola access to finance conference engaged over 200 participants

Like the first event, the Bitola workshop attracted a large number of participants interested in learning more about the different funding mechanisms for businesses available in the country. Some 220 businessmen, farmers, and municipal and NGO representatives, as well as private consultants, attended the one-day event. During morning sessions a number of mechanisms were presented, including IPA/IPARD, Cross-Border Cooperation, CIP, financing instruments through the Dutch government, SBS/BAS, as well as the Macedonian Bank for Development Promotion; during the second half, Q&A breakout sessions were held, focusing on each of the mechanisms separately. The participants voiced a number of questions, and shared their experiences in accessing, or failing to access, funding either from national or bilateral/multilateral funds. The event also served as a networking opportunity, the results of which are being captured through the regional partners. The best ideas emerging from these discussions may be considered for SBEP support.

SME ACCOUNTING WORKSHOP

On January 24th SBEP and its Pelagonija regional partner Preda Plus organized a workshop for accountants. The workshop, held in Prilep, was put on as a result of recent legal changes affecting annual financial reporting for SMEs. More than 100 accountants from Prilep, Bitola, Resen, Demir Hisar and other towns in Pelagonija attended the one-day event, representing over 450 SMEs. This type of refresher course is important for the SMEs as the accountants are their principle source of

information on the changing regulation. Well informed accountants may save their businesses thousands of dollars in fines that would otherwise be incurred for inadvertent violations of new accounting regulations.

CHALLENGES: PPD COMPONENT

There are challenges that the activities under the PPD Component also face. One example is the case of Vitamill's IPARD application. This startup company from Tetovo applied for IPARD funding in November, with SBEP support via partner BSO MKonsalting. The application referred to finalizing the investment and starting operations at the mill, with potential for creating a dozen jobs.

However, the application was not successful, because the documentation provided by the municipality was incompatible with the requirements of the IPARD awarding authorities. In other words, the municipal systems were insufficiently developed to accommodate the requested information, thus creating confusion and delaying the procedures. In the coming phase, MKonsalting will assist Vitamill to complete the paperwork, including revising the necessary documents.

Although frustrating, this challenge validates the widespread agreement that IPARD applications can be particularly difficult, and highlights a case in which a partner BSO and its client both benefit from the learning process.

“I think [conferences like this one] are of great help, especially to small and micro businesses, which are the largest category in Macedonia. They need to be additionally informed, as they don't regularly follow the websites of institutions that offer information on such topics. I really liked that this conference was outside of Skopje as this is a good opportunity for businesses from Bitola to not only become better informed, but also to network, which is really important.”

Viktorija Sazdova,
Trajkovski Partneri Konsalting

OTHER PROJECT UPDATES

PROJECT ADMINISTRATION

In March SBEP submitted its Local Compensation Plan to the Project COR at the request of the Regional Contracting Office. With approval for this document, SBEP will be able to hire contract employees and consultants with credentials approval from the COR, streamlining the process for bringing on additional staff as needed. SBEP is currently awaiting response on this issue.

MONITORING AND EVALUATION

This quarter SBEP finalized the Project’s PMP with input from the USAID COR and Mission Environmental Officer, agreeing on sixteen indicators plus sub-categories. As initiatives begin to create results in the next quarter and beyond, SBEP will report on progress vis-à-vis the established indicators, as well as data on other relevant metrics such as increased crop yields and the like. Next quarter SBEP will develop a standardized M&E planning tool to be tailored for each activity area, including data collection measures, relevant stakeholders, and reporting methods. Baseline data collection has already begun with the Pelagonija corn farmers, for example, as displayed below. SBEP has created an online relational database to serve as a knowledge management tool enabling Project staff to track data on strategic partners, target demographics, and key indicators. SBEP will begin to use this tool in earnest in the next quarter.

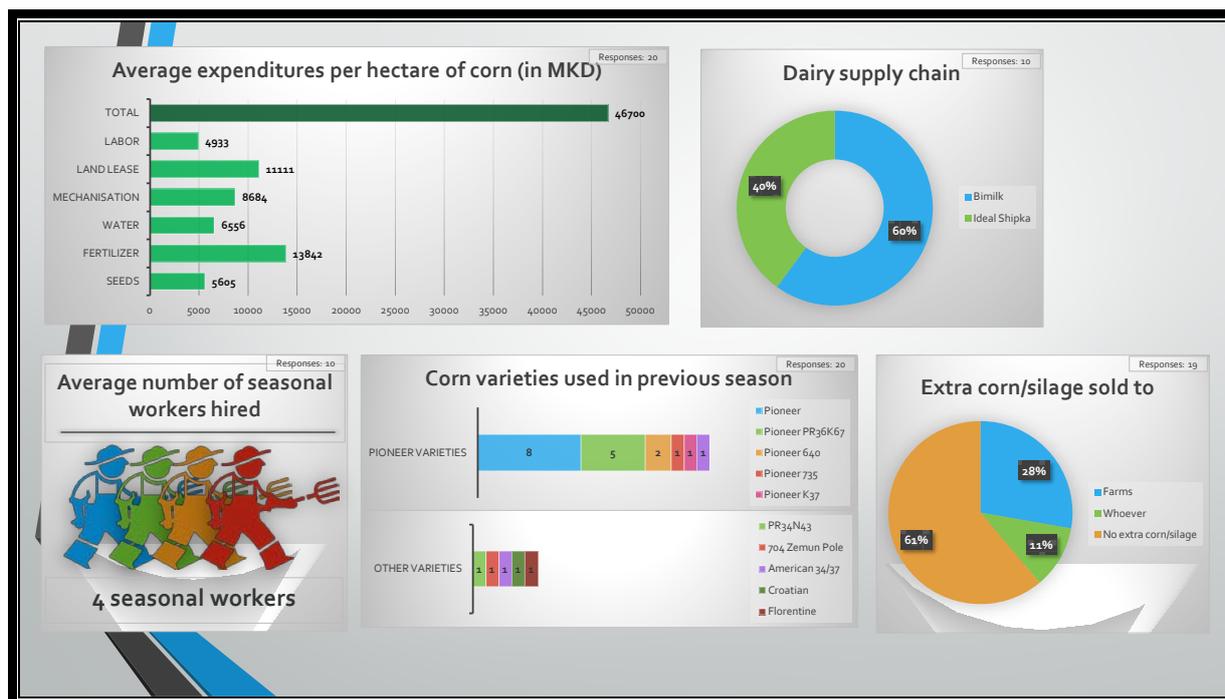


Figure 15: Baseline data on SBEP's Pelagonija corn farmer partners

ENVIRONMENTAL COMPLIANCE

SBEP submitted a Programmatic Environmental Assessment (PEA) in the first quarter of FY2013, and at the end of the last quarter received comments and questions from the Washington-based Bureau Environmental Officer (BEO). SBEP will meet with the COR and Mission Environmental Officer (MEO) in the next quarter, and will then respond to the BEO questions.

As agreed in initial meetings, SBEP continues to submit Environmental Review Checklists (ERC) with each Concurrence Memo it submits to the COR for activity approvals. When appropriate, SBEP prepares Environmental Mitigation and Monitoring Plans (EMMP) for specific activities, which are encompassed in the Project's M&E plan. To date, SBEP has completed ERCs and EMMPs – and gained approved at the mission level – for Concurrence Memos 5 and 7, the Wild-Gathered Products and Grow More Corn initiatives, respectively. Subcontractor PointPro also completed a full ERCs and EMMPs as part of its assignment on the Energy Efficiency and Waste Management initiative, which will be utilized in the event that the firms do opt to implement the proposed upgrades (whether with SBEP support or independently).

ANNEX I: SBEP CALENDARS OF ACTIVITIES FOR CURRENT REPORTING PERIOD

◀ Dec 2012		~ January 2013 ~					Feb 2013 ▶
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
		1	2	3 Meeting with RDC Shefic Meeting with ESA Meeting with Renova	4 Arijan Toska - Women's initiative in Polog Ministry of IT	5	
6	7	8	9 Meeting with SBEP Database Developer - Database Presentation	10 Visit to the Worker's University with Renova	11 Meeting with the manager of JP Makedonski shumi Meeting with Pelagonija wild herb collector and Ivan - Capari	12	
13	14 Staff Meeting	15 Meeting with Fatmir to discuss Kakurinov's offer for FP7 ToT and the Polog supply chain Meeting with fin. consultant Marija Vaskova regarding wheat supply chain Meeting with Ivan (MaganMak)	16 Meeting with Agropal recycling company in Brvenica Meeting with RIOT Company (virgin sunflower oil producer) in Brvenica Visit to textile company Di-Simone	17 Meeting with prof Kakurinov - KEY Meeting with manager of the Rural Tourism Cluster in Gostivar	18	19	
20	21 Leader workshop Bitola MoU signing at Konzervna Meetings with Tearce and Jegunovce Mayors for corn production Coffee with IDEAS	22 Meetings with Corn farmers and visiting dairy plants in Polog region- Dimce Training of workers - Renova and Worker's University initiative Mtg with director of VET School in Tetovo Meeting with Marija Vaskova and sunflower virgin oil producer in Brvenica	23 Meetings with Corn farmers and visiting dairy plants in Polog region- Dimce Visiting a wild herb collection center in Veles Checking out a collection center in Veles	24 Meetings with Corn farmers and visiting dairy plants in Polog region- Dimce Training of workers - Renova and Worker's University initiative meeting with Kiril to talk EE and Corn Training session on USAID Disability policies and procedures Accountant training - Prilep	25 Meetings with Corn farmers and visiting dairy plants in Polog region- Dimce Training of workers - Renova and Worker's University initiative Artisans - Bitola and Resen Meeting with Emilia - RDC Pelagonija	26	
27	28 Staff meeting Mtg with dairy farmer Kiril Prilep Mtg with new female corn and tomato pilot farmer Bitola Mtg with Strezevo irrigation system representative	29 RDC Coordination Meeting Artisans - Prilep and Krusevo National Strategy for Organic Production - MAFWE, Skoje Presentation Findings and Recommendations of a Study - GIZ RED signing MoU with Preda+, Konzervna and tomato pilot farmers	30 MoU signing with Bogovinje Wild herb collection center Kick off meeting with North West Camber and Sanela - Woodrow Wilson School	31 Meeting with farmers in Polog region - RDC Office, v. Dzepcishtle Meeting with pilot drip irrigation farmers in Polog region - Vezeshari, v. Trebosh	Notes:		

~ February 2013 ~						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 Meeting with Agroproduct and Point Pro - v. Gradec Meeting with Agropal recycling company and Point Pro - v. Brvenica	2
3	4 Field visit to drip irrigation farmers - Tetovo VET School Meeting with Sanela to discuss concept paper for mapping of women initiatives in North-West	5 Field visit to drip irrigation farmers - Jegunovce and Zhelino Meeting in Comfy Angel (textile company) in Prilep Certification of the second group of construction workers in Tetovo	6 Financing opportunities conference in Bitola Field visit to drip irrigation farmers in Tearce Certification of the second group of construction workers in Tetovo	7 Meeting with Ilija Kondinski from the Public Water Management Enterprise "Strezhevo" Certification of the second group of construction workers in Tetovo	8 Meeting with AgroProduct YES work plan presentation	9
10	11 Database and application presentation Staff Meeting	12 Measuring the plots for the corn pilots and doing interviews with the farmers in Pelagonija National park Mavrovo LEADER Workshop in Resen	13	14 Meeting with Renova Foundation - Tetovo Retreat with RDC Pelagonija	15	16 Identifying locations for collection centers - National park Mavrovo
17	18 Meeting with recycling company Agropal - v. Brvenica	19 Meeting with sunflower company Riot and Tuto (possible cooperation) Wheat project - meeting with Zito Altan Meeting with Ivan - Flores (discussing brochures and labels)	20 Meeting with Crimson Capital Mtg with Dejan Janevski - BIMilk Meeting with SEEU Business center	21 Diaspora planning meeting Meeting with candidate for cultivation of herbs Meeting with LED Office Tetovo Meeting with Macedonian forests	22 Ambassador Meeting with Chiefs of Party at the US Embassy Pointpro presentation in Prilep	23
24	25 Staff Meeting	26	27 Meeting with recycling company Agropal - v. Brvenica Meeting with sunflower oil producer Riot - v. Brvenica Meeting with Renova Foundation	28	Notes:	

◀ Feb 2013	~ March 2013 ~						Apr 2013 ▶
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
					1	2	
3	4 Meeting with EU Plants a& Bagac Prilep - v. Preljubishte	5 Meeting with Workers University - Tetovo Meeting with VET School Meeting with Konekt Discuss light manufacturing sourcing concept Mtg - Marija from YES project	6 Trip to Pelagonija Meeting with BiMilk Meeting with PE Strezevo Meeting with Sin AG Meeting with Cice Trade Meeting with Miri Plast	7 Trip to Pelagonija Meeting with NEA Meeting with Mayor of Novaci Meeting with Ag Company Simpex	8 Meeting with mayor of Jegunovce RCI - Holiday Inn USAID March 8th event Meeting with B&S Energy Gostivar	9	
10	11 SBEP Staff Meeting Strezevo project	12 Meeting with B&S Energy and Pointpro Meeting with Pointpro & AgroProduct Meeting with PE Makedonski Sumi Mebi Prima - Collection center, Scale delivery - Pirok, Bogovinje	13 Polog Women Initiative update	14 Mebi Prima - Collection center, Scale delivery Meeting - dairy plant - Fejzi Meeting - dairy plant Laktoza (Nuro company) Meeting - dairy Dukati	15 Trip to Bitola - meeting at Amnita collection center Meeting with Metal ART Mtg with Renova Fondation Mtg with dairy Alpi - Dzepciste	16	
17	18 Meeting with corn farmers in Novaci	19 Meetings with corn farmers in Bitola Meeting with drip farmer - Trebosh	20 Meeting with Sanela	21 Meeting with FACE Representative in Tetovo Cooordination meeting regarding the details in organizing the Regional Agribusiness Forum Meeting with Agropal recycling company - Brvenica	22 Meeting diary plant Munevere Meeting with Veze Sharri	23	
24	25 SBEP Staff Meeting MoU signing with corn farmers in Bitola	26 Measuring fields for corn Meetings with corn farmers in Bitola Meeting with Vele Ivanovski, Logovardi collection center candidate Meeting with Mayor of Novaci Visit to cow farm, Kiril Nebrezanec MoU signing with corn farmers in Novaci Leader Event - Prilep group	27 Meetings with corn farmers in Measuring fields for corn - Pelagonija Trip to Tetovo	28 Meetings with corn farmers in Bitola Measuring fields for corn - Pelagonija FFRM kick off AGROSTART - Hotel Continental	29 Coordination meeting on corn	30 Training for the first group of Wildherb Collectors - Bogovinje	
31	Notes:						