

Semiannual Report  
July, 2002 - January, 2003

ASSISTANCE TO ALBANIAN AGRICULTURAL TRADE ASSOCIATIONS

**AAATA**

Cooperative Agreement no. PER-A-00-99-00001-00

by

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Submitted to

UNITED STATES AGENCY FOR INTERNATIONAL DEVELOPMENT  
Washington, D.C.

February, 2003

# **Assistance to Albanian Agricultural Trade Associations**

**Semi-Annual Report, July 2002 – January 2003**

## **I. Executive Summary**

This semi-annual report is presented in the same format as the previous report (January 15- July 15, 2002), continuing to reflect the Project's emphasis during this time frame on implementing Project strategies through legally registered Albanian NGOs, associations, or foundations.

The major Project areas: association development, technical assistance to agribusinesses, advocacy, policy conceptualization, credit union support, and public/private partnerships are reported on individually.

A highlight of this reporting period has been the construction of three new high-tech Israeli greenhouses in the areas of Hysgjokaj, Saranda, and Lushnja (Divjaka). Together with the existing two greenhouses (Lushnja and Durres), this brings the total area of high-tech greenhouses to 2 ha.

The project has established a horticulture team to provide technical assistance and support not only to the existing high-tech greenhouses, but also to the new potential greenhouses that will be built in the future. The team currently operates within the ABMC structure, and is composed of eight people, who are concerned with preparing and facilitating the construction process of new high-tech greenhouses, and offering a full range of technical assistance. This includes (1) daily agronomic management of the greenhouses, (2) pests and disease control and prevention, (3) fertigation (plant nutrition and irrigation), and (4) on-line daily climate control and management.

Team members providing agronomic assistance pay visits to the clients two to three times per week, dealing directly with client problems and offering viable solutions. Once a week team members gather together to discuss the problems that have arisen during the week. In addition to Albanian specialists, foreign specialists (predominately Israeli) visit the greenhouses to track their progress.

Connected to the Project's development of greenhouse technology is the establishment of Technology Transfer Centers (TTCs), which are private sector-based sites that provide demonstration activities according to the technology to be introduced. The Project, in closed cooperation with AGRIDEV, has developed a center for the introduction, implementation, and extension of high technology in protected vegetable cultivation. The complex (7,000 m<sup>2</sup>) was constructed in the Lushnja area (Krutja), at the same location where the first high-tech greenhouse was built in Autumn 2000. The structure allows for walking tunnels and an open-field plot for demonstration of different techniques and technologies, agricultural practices and variety performance test of open field vegetables.

Much has been accomplished during this reporting period, fueled by the continuing dedication of the Project's staff and their commitment to providing a high level of quality services for our clients.

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# Assistance to Albanian Agricultural Trade Associations

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## II. List of Acronyms

### List of Acronyms and Explanation

#### 1. AAATA Components:

AAATA	Assistance to Albanian Agricultural Trade Associations, the USAID Cooperative Agreement with IFDC
ABMC	Association and Business Management Center
ACG	Agribusiness Consulting Group
CUU	Credit Union Unit

#### 2. AAATA Sub-Contractors and Direct Collaborators

AGRIDEV	Agricultural Development Company, Israel
AKA	Alliance of Kosovar Agribusinesses
CASP	Collaborative Agribusiness Support Program
DSCAMF	Development of Savings—Credit Associations Movement Foundation (Albanian NGO specializing in credit union formation and support)
KBS	Kosovo Business Support, USAID
LOL	Land O'Lakes

#### 3. Agricultural Trade Associations

AFADA	Albanian Fertilizer and Ag-input Dealer Association
AFPA	Albanian Fishery Professional Association
Alb-Flor	Medicinal Herbs Association
AMPA	Albanian Meat Processors Association
ANSPA	Potato Seed Association
AOA	Alimentary Oil Association
APFA	Albanian Poultry Farmers Association
ASHTA	Albanian Spices and Herbs Traders Associations
AVALB	Albanian Agricultural Mechanization Association
BKFSH	Albanian National Farmers Union
DENA	Dairy Processing Association
HABA	Horticultural Albanian Businessmen's Association
KASH	Federation of Agricultural Trade Associations
KEA	Agribusiness Expert Council
LEEA	Dairy Production Association
UPM	Wheat Millers Association

#### **4. Government of Albania**

FRI	Food Research Institute
GOA	Government of Albania
LRI	Livestock Research Institute
MOAF	Ministry of Agriculture and Food
MOEC	Ministry of Economic Cooperation
MOF	Ministry of Finance
PCOA	Parliamentary Committee on Agriculture
VRI	Veterinary Research Institute

#### **5. Donor Collaborators**

ASP	Agribusiness Service Program
FAO	Food and Agriculture Organization (UN)
GTZ	German Aid
PSOPA	Promotion of Self-help Organization in Private Agriculture
TSU	Technical Support Unit (IBRD Agribusiness Project)
CIM	Centrum für Internationale Migration und Entwicklung (Frankfurt)
2KR	Second Kennedy Round Project

#### **6. Other:**

AAEF	Albanian American Enterprise Fund
ABA	American Bank of Albania
AKA	Alliance of Kosovar Agribusinesses
ATA	Albanian Telegraphic Agency
AUT	Agricultural University of Tirana
BOT	Bank of Tirana
FIAA	Foreign Investors Association of Albania
PSES	Private Sector Extension Services
PSHM	Albanian Partner in Micro-Credit
TTC	Technology Transfer Center
UIIA	Union of Investors and Industrials of Albania

# **Assistance to Albanian Agricultural Trade Associations**

*Semi-Annual Report, July 2002 – January 2003*

## **III. Program Components**

### **A. Agribusiness Institutional Strengthening**

#### **A1. Federation of Agriculture Trade Associations (KASH)**

##### **General Status**

Several major accomplishments were realized during the second half of 2002. These included:

- Participated in the preparation of six Free Trade Agreements with neighboring countries.
- Prepared position papers and lobbied for seven fiscal laws.
- Participated in three international trade fairs.
- Conducted its National Conference.
- Prepared position papers for agribusiness development issues in each KASH region.
- Organized the visit of Albanian Parliamentary Committee members in Kosovo.

These activities enhanced KASH's reputation at both national and international levels, and it improved significantly its performance at the regional level. KASH Regional Councils are now well known and have started lobbying with local authorities. Communication with regional offices has been vastly improved.

During this period KASH was invited to participate in several donor activities and meetings including a meeting with the Vice President of the World Bank.

KASH's presence in the media has also been enhanced. Several TV reporters visited the KASH office to cover KASH's position on different agricultural policy issues. KASH leaders were invited to participate in live TV debates. Most well known newspapers reported KASH's positions on important policy issues.

## Summary of Objectives

1. **Encourage effective advocacy to the government.**
2. **Encourage effective advocacy to donor community.**
3. **Encourage healthy environment for agribusiness.**

## Activities in Support of Objectives

1. **Encourage effective advocacy to the government.**
  - a. On July 3, 2002 a KASH national board meeting was organized to prepare KASH's positions on Free Trade Agreements and fiscal policy reform. Collaborating with GTZ, two questionnaires were prepared and a survey was conducted to support KASH in formulating a position paper on Free Trade Agreements. This position paper was sent to the Ministry of Agriculture and Food (MOAF) and the Ministry of Economic Cooperation (MOEC).
  - b. KASH organized special meetings with the MOAF and the MOEC to present its interest regarding six Free Trade Agreements Albania prepared with neighboring countries: Macedonia, Croatia, Bosnia-Herzegovina, Serbia, and Montenegro, Bulgaria, and Romania. In four instances, KASH representatives were members of the official negotiating delegations.
  - c. KASH organized a media campaign to convince the government not to allow importation of wheat flour from Serbia and Montenegro without customs duties. Several articles appeared in major Albanian newspapers, and KASH representatives were invited to participate in live TV debates. Letters were sent to the Minister of Agriculture and Food and the Minister of Economy. As a result, the Free Trade Agreement with Serbia and Montenegro has been reopened for discussion.
  - d. On November 1, 2002, the KASH National Conference was held. It was organized in collaboration with the Agricultural University of Tirana (AUT). Approximately 200 association board members and invitees participated in the event. Changes were made in KASH bylaws to accept the regional chairmen as members of the National Board. The Conference also adapted resolutions regarding KASH organizational restructuring and agricultural and fiscal policy reform. Important policy issues included in the resolution were approved by a broader national conference organized by the AUT thereby increasing the spectrum of support. Both resolutions were sent to the GOA. The Media coverage of the Conference was arranged, insuring the participation of national public and private TV stations, various newspapers, and the Albanian Telegraphic Agency (ATA). A copy of KASH National Conference Resolution and Agenda are provided in Appendix C and D.
  - e. KASH participated in the meeting of Business Advisory Council to present KASH's position on fiscal policy reform. Specific positions reflecting KASH members' interests were on current draft laws were presented, namely: On excises in the Republic of Albania. On national tax system.

- On taxes on profit.
- On tax procedures in the Republic of Albania.
- On approval of levels of customs duties.
- On local taxes on small businesses.
- On taxes of immovable properties.

These positions were presented to the MOAF, Parliamentary Committee for Agriculture (PCDA), and Food and Parliamentary Committee for Economy. As a result some positive changes especially in the laws “On excises in the Republic of Albania” and “On approval of levels of customs duties” were achieved.

- f. Agribusiness associations, in collaboration with KASH, continued their efforts to solve their specific problems. The most active one during the second half of 2002 was the Albania Meat Processors’ Association (AMPA). Licenses on meat import and reference prices were the main issues discussed. While the former is still being discussed, a reasonable agreement with Custom Duties General Directorate was reached on the matter of reference prices.

## **2. Encourage effective advocacy to donor community**

- a. On July 18, 2002 the KASH Executive Director had a meeting with World Bank Vice President Mr. Johannes F. Linn. KASH concerns on agricultural policy reform and the need to emphasize the role of private sector organizations were discussed during this meeting.
- b. KASH had several meetings with representatives of GTZ, the European Union, Swedish Development Agency, etc., to present its positions on agricultural development and seek collaboration on joint activities in the future.

## **3. Encourage healthy environment for agribusiness**

- a. During second half of 2002 KASH continued to strengthen its partnership with other business associations such as the Foreign Investors Association of Albania (FIAA), the Union of Investors and Industrials of Albania (UIIA), AMCHAM, Chamber of Commerce, etc. During discussions of Fiscal Policy Reform 2003 KASH collaborated with the Beer Producer’s Association and Wine and Vineyards Association. During the first KASH Board Meeting of 2003, the Beer Producer’s Association joined KASH, increasing KASH association members to 18.
- b. KASH and the Alliance of Kosovar Agribusinesses (AKA) organized a visit of Albanian Parliamentary Committee on Agriculture (PCOA) to Pristine during the November 20-23, 2002 period. Several meetings with the Kosovar counterpart committee and other Kosovar and UNMIK authorities were held. Removing trade barriers between Kosovo and Albania and improving the Durrës-Morina road were some of the main issues discussed.
- c. On December 17, 2002 a MOU between KASH and the Agricultural Development Company, Israel (AGRIDEV) was signed. The purpose of this agreement was to set forth the parameters of future cooperation between the two parties. KASH will inform and update AGRIDEV on developments in the private agribusiness sector in Albania and

AGRIDEV will inform and keep KASH updated on all new modern technologies related to agriculture.

- d. KASH participated in three International Trade Fairs: Poznan, Poland (September 10-13, 2002), Tirana (October 9-14, 2002), and Berlin (January 17-26, 2003). Approximately 50 entrepreneurs presented their products in these trade fairs. They helped to improve the image of Albanian agriculture and attracted the attention of thousands of visitors and several potential investors. More than 50 Schengener visas were provided to Albanian entrepreneurs.
- e. KASH supported the organization of B2B meetings in Tirana (July 15/December 16), Skopje (September 12), and Belgrade (October 7). These meetings are being organized by the Kosovo Business Support project with funding from the USAID Office in Pristine.

## **KASH Regions**

### **1. Councils**

Regional council members received training in leadership and advocacy issues, with emphasis on strengthening KASH at local levels and presenting local policy issues to local government. Formal position papers were presented for each region and sent to local authorities. Changes were made in the KASH by-laws to clearly define the role of regional councils and empower these councils with the KASH organizational structure. Likewise, the KASH Board adopted changes in the by-laws resulting in the restructuring of voting rights and membership levels of the organization. Decisions now require a two-thirds majority of votes to pass.

### **2. Coordinators**

Two trainings activities were organized with regional coordinators focusing on office management, computer skills, and position papers preparation.

### **3. Office and Facilities**

During second half of 2002 computer and printers were provided to regional offices and regional coordinators were encouraged to use e-mail via local Internet cafes. As a result of the training and equipment provided, communication between regional offices and central office has greatly improved.

### **4. Regional Meetings**

Two rounds of regional meetings were organized in all regions; one in September and the other in December. At the September regional meetings training was conducted on how to prepare a position at the regional level. Free Trade Agreements with Bulgaria and Romania and fiscal policy reform were also discussed.

During the December meetings position papers were approved in each region and results of lobbying for fiscal policy reform were presented; 635 members participated in the two sets of regional meetings.

### **Achievements Contributing to Meeting Result Indicators**

1. Three meetings of KASH National Board and two sets of regional meetings were conducted.
2. KASH associations impacted significant policy improvements for Free Trade Agreements with Croatia, Bulgaria, Romania, Serbia and Montenegro, and Bosnia-Herzegovina.
3. KASH continued to strengthen its partnership with agribusiness associations and the AKA in Kosovo and is working to establish contacts with other business associations in neighboring countries.
4. The second KASH National Conference was held on November 1, 2002.

### **Contribution Calculation for July 2002- January 2003**

July 3, 2002, KASH meeting	\$ 1,700
August 12, 2002, meeting of regional chairmen and coordinators	\$ 1,000
September 9-13, 2002, participation in the Poznan Trade Fair	\$ 2,000
October 9-14, 2002 Sponsorship for Tirana Trade Fair	\$ 1,700
September and December 2002, KASH regional meetings	\$ 47,750
October 14, 2002 KASH board meeting	\$ 1,700
November 1, 2002 KASH National Conference	\$ 15,325
Parliamentary committee visit to Kosovo	\$ 3,600
December 6 2002 KASH board meeting	\$ 2,000
<b>Total</b>	<b>\$ 76,775</b>

## **A2. Albanian National Farmers Union (BKFSH)**

### **General Status**

During the period of this report, BKFSH continued its outreach to farmers, providing them with important marketing and legislative information as well as orientating growers to new competitive technologies and assisting them in identifying reasonable financing and developmental technical assistance. BKFSH also strives to assist farmers in developing their skills in order for them to increase crop yields, realize larger profits, and generally improve the quality of life for their families. Another important goal of BKFSH is the education of farmers on environmental protection issues.

BKFSH is unique because of its ability to directly reach farmers with multiple technical and nontechnical messages. Future collaboration with AFADA would allow its members to be better informed about inputs and competitive crops. During the last 6 months BKFSH has been developing a process of message transfer based on meetings established at a fixed place and date. These meetings are based on agendas that are meant to gather or disseminate ideas.

An important objective of BKFSH is the education and training of future farmers. BKFSH is in the process of establishing linkages with Junior Achievement and U.S.-based “4-H Clubs” to establish in Albania these models of young farmer education. Collaboration with regional agricultural high schools is an important component of this approach.

Likewise, the involvement of women in private business initiatives is an important objective that can partially be addressed through specific training courses geared towards women in agriculture.

### **Summary of Objectives**

- 1. Improve Association Financial Well Being.**
- 2. Boost Membership, Leadership, and Strength.**
- 3. Solidify the Organizational Base of the Association.**
- 4. Develop Association Capacity to Provide Services to Members.**
- 5. Encourage Effective Advocacy.**
- 6. Promote Awareness and Build Group Image.**

## Activities in Support of Objectives

### 1. **Improve Association Financial Well Being**

- a. New efforts were made to increase the percentage of dues-paying members. Results were an increase in dues of 60,000 lek (\$428) during the reporting period.
- b. BKFSH made a deposit to the ABMC in the amount of \$2000 to be credited towards their membership capital in the ABMC based on IFDC/BKFSH contract to BKFSH to survey farmers' local activities so as to build a regular system of meetings. The survey was completed..
- c. BKFSH identified new partners to generate non-dues revenues.

### 2. **Boost Membership, Leadership, and Strength**

- a. Participated in the KASH regional meetings held during September.  
Topic: "BKFSH - Its Role and Objectives within KASH"

Regions	BKFSH Participants
Shkodra	9
Tirana	12
Fier	25
Saranda	17
Korca	7
<b>Total</b>	<b>70</b>

- b. Participated in the KASH regional meetings held in December.  
Topic: "BKFSH Regional Structures"

Regions	BKFSH Participants
Shkodra	10
Tirana	15
Fier	22
Saranda	20
Korca	5
<b>Total</b>	<b>72</b>

- c. **BKFSH Board Meetings**  
Organized the BKFSH Board Meeting on July 24, 2002  
Topics: Information on BKFSH branches in districts; choose delegates for the BKFSH General Meeting; establish a commission to review By-Laws.  
**Participation                    11 members**

- d. Conducted the BKFSH General Meeting on September 25, 2002  
Topics: Report on association activities for the past 2 years; approve new by-laws; elections of BKFSH officials.

**Participation            80 members**

The new BKFSH President was elected during the first meeting of the new BKFSH Board Meeting. Media coverage of the Conference was arranged, insuring the participation of national public and private TV stations, various newspapers, and the ATA.

- e. BKFSH Board Meeting on October 15, 2002.  
Topics: Getting to know the newly elected BoD; determining the deadline for questioners' collection; collecting dues; reviewing the association budget.

**Participation:            11 members**

- f. BKFSH Public Hearing with the PCOA on November 13, 2002.  
Topic: Agricultural Land Registration

**Participation:            100 members and invitees**

- g. BKFSH Study Tour—Greece (November 25-28, 2002)  
Purpose: To exchange experiences with homologue organizations.

### **3. Solidify the Organizational Base of the Association**

- a. During the second half of 2002, BKFSH structures were reorganized in the regions of Gramsh, Permet, Tepelene, Delvine and Skrapar. Over 100 people participated in the meetings organized for this purpose. BKFSH management explained the role and necessity of the association in order to protect the interests of small producers.
- b. Conducted site visits to 100 farm families and discussed with almost 600 farmers their concerns and needs. As a result, BKFSH structures were created in regions of Delvine, Gjirokaster, Tepelene, Permet, and Skrapar.
- c. Three Board Meetings were conducted in July, September, and October 2002 (34 members participated).
- d. Participated in the KASH regional meetings held in September and December 2002 (142 members participated).
- e. BKFSH organized a public hearing session with PCOA on November 13, 2002, with the participation of 100 members and invitees. Media coverage of the Conference was arranged, ensuring the participation of national public and private TV stations, various newspapers, and the ATA.

### **4. Develop Association Capacity to Provide Services to Members**

- a. BKFSH collaborated with regional offices of KASH, ABMC, ACG, KEA, and DBU in Regions, GTZ, SIDA Project, Rural Credit, and the Rural Development Agencies in order to facilitate services for members through these organizations.

**5. Encourage Effective Advocacies**

During the second half of 2002, KASH continued its consolidation as a specialized institution of advocacy and BKFSH collaborated in lobbying efforts related to GOA bilateral relations and free trade agreements with Macedonia and Croatia.

**6. Promote Awareness and Build Group Image**

- a. In cooperation with the media component, prepared and broadcasted TV emissions in five regions (Shkoder, Tirana, Fier, Korce, and Saranda) presenting BKFSH’s local and national activities.
- b. Prepared BKFSH poster and brochures. The poster was presented during regional meetings and will be used to publicize BKFSH regional meetings.
- c. Prepared articles on BKFSH activities, organic agriculture, and technology transfer for the *Agrobiznesi* Newsletter and the *Tribuna e Ekspertit* magazine.

**Achievements Contributing to Meeting Results Indicators**

- a. New BKFSH Structures were created in five regions: Delvine, Gjirokaster, Tepelene, Permet, and Skrapar.
- b. Contact points were created as a result of BKFSH staff efforts to create structures in the districts of Puke, Mirdite, Mat and Skrapar.
- c. BKFSH suggestions at the Public Hearing on Agricultural Land Reform were taken in consideration and highly appreciated by the PCOA.
- d. Suggestions regarding the Agricultural Land Tax and Agricultural Fiscal Policies given to the MOAF from BKFSH were taken into consideration in the law reformulation.

**Contribution Calculation for July 2002—January 2003**

<b>What</b>	<b>Contribution (\$)</b>
Board Meetings	170
BKFSH General Meeting	400
Public Hearing	1,000
<b>Total</b>	<b>1, 570</b>

### **A3. Associations Business Management Center (ABMC)**

#### **General Status**

During the latter half of 2002, the ABMC made good progress in helping associations adopt procedures and practices to ensure their financial sustainability and institutional growth after project closedown. In this context, ABMC has been working in two directions: providing planning and administrative services to associations; and offering more specialized services to associations' individual members. Project units demonstrated the benefits of ABMC membership by working with ABMC and its owner associations to provide valuable services to their members, including technical support, market information, business training, and trade missions.

In addition, ABMC is focusing on its own growth, independence, and financial sustainability for the post-project period. During the last months, it has made changes to its organizational structure and to the roles and responsibilities of the staff. These changes will allow ABMC to take a stronger and more active role in developing trade associations and in increasing its client base.

The 2002 Annual Work Plan for this period emphasized the need to:

- Increase ABMC' s revenue generation in order to achieve financial sustainability.
- Develop strategies for ABMC membership drives, including a media campaign.
- Organize skills trainings for ABMC staff to improve institutional capacity.
- Increase the number of client contracts and fee payments for ABMC services.
- Reinforce the ABMC sustainability objectives at the general meetings of three trade associations.
- Assist KASH to increase its membership and to organize national and regional meetings where ABMC achievements are presented.

The needs outlined above were incorporated into six strategic objectives for the ABMC 2003 Annual Work Plan. The report focused on each objective and details the challenges ABMC has faced, and the successes it has had, in achieving them.

ABMC has increased income fees, which generated additional revenues of \$11,284 during the period, bringing its bank account balance to \$93,657.

During the second half of 2002, the Albanian National Seed Potatoes Association (ANSPA) became a member of ABMC by paying the capitalization fee of \$6,000. Likewise, BKFSH has paid 70% of the capitalizing fee (\$4,236).

ABMC has identified three other associations as potential members: the Agribusiness Expert Council (KEA), the Albanian Spice and Herbs Trade Association (ASHTA), and the Union of Flour Producers (UPM). Discussions have begun to encourage these entities to join the center.

## Summary of Objectives

1. **Strengthen ABMC and individual associations capacities to provide services to members.**
2. **Solidify the organizational base of individual association, boost membership, and develop leadership of these associations.**
3. **Improve financial well being by increasing membership, services offered, and identifying sources of funds from grants and donors.**
4. **Promote ABMC as service provider and strategic partner to financial institutions and donors.**
5. **Enhance the image and awareness of ABMC and member associations.**
6. **Support KASH in developing stronger regional councils.**

## Activities in Support of Objectives

1. **Strengthen ABMC and individual association capacities to provide services to members.**
  - a. Internal Training
    - During the last quarter, the ABMC Executive Director has worked closely with a local management consultant to (a) analyze the center workflow, (b) define and clarify the roles and responsibilities of the staff, (c) establish new administrative policies and procedures, and (d) prepare an 8-month strategic plan that emphasizes association development, increased visibility, and an expansion of the ABMC client base. A more efficient office administration and a clearer strategic vision will allow ABMC staff to focus on providing qualitative services in a more personalized and professional way.
    - In November 2002, two members of the ABMC staff participated in a Deloitte & Touche-sponsored training workshop on “Trends in Human Resource Management,” which provided information on human resource interaction with business strategies, human resource trends in the region, and human resource challenges to businesses during the start up phase.
    - ABMC supported the professional skills training for KASH Regional Coordinators in September 2002. The training focused on: prioritizing office work, administration of daily duties, building relationships with members and other organizations of agricultural sector, and management reporting.

With regard to strengthening the capacities of member associations, cited are the following activities, facilitated by ABMC, to increase market access for member associations as well as to encourage the transfer of peer knowledge:

b. ABMC has provided concrete support services, such as:

- **Logistics for trade missions**

- In collaboration with Agribusiness Associations of Iowa nine members of various ABMC associations participated in a trade mission on agro-inputs to Iowa (U.S.A.) (August 2002).
- Three AMPA members participated in the '63<sup>rd</sup> American Convention of Meat Processors' in Reno, Nevada (U.S.A.) (July 2002).
- Four AMPA members participated in the International Exposition for Food Processors in Chicago, Illinois (U.S.A.) (November 2002).
- Seven AFADA members visited the Food and Processing Fair in Podgorica, Montenegro (December 2002).
- Sixty-four ABMC association members participated in the first 'Business to Business' (B2B) activity held in Tirana, Albania (July 2002). Eighteen members participated in the second B2B meeting held in Skopje, Macedonia (September 2002); sixteen AFADA members participated in the third B2B series held in Belgrade, Serbia (October 2002) and fifty-six association members took part in the fourth B2B activity held in Tirana in December 2002.
- Media coverage of the B2B activity in Tirana was arranged, insuring the participation of national public and private TV stations, various newspapers, and the Albanian Telegraphic Agency.
- ABMC is partnering with the Kosovo Business Support/USAID (KBS) Project, to organize B2B activities for 2003.

- **Technical Assistance**

- ABMC provided technical services to association members with the support of the Project's Agribusiness Consulting Group (ACG). Thirty member businesses requested technical assistance (TA) services, specifically: business plan preparation, credit facilitation, joint venture development, and grant proposal preparation. (Additional information is provided in the ACG section of this report).
- ABMC, in collaboration with the ACG, is in the process of identifying regional agricultural experts to provide TA to associations members in their particular location. Use of regional experts allows the ABMC to provide its clients with high quality services at a lower cost to the client. Price sensitivity is a key issue with Albanian agribusiness owners and the ABMC must strike a balance in being able to provide quality services at very competitive rates.

Income from technical services rendered by the ABMC during July-December 2002 amounted to \$5,284.

**2. Solidify the organizational base of individual association, boost membership, and develop leadership of these associations.**

a. Activities: Associations' Meeting Management

- During the past 6 months, ABMC has prepared, facilitated, and chaired the board meetings for AFADA, BKFSH, ACU and AVALB and the general meetings for AFADA, BKFSH and AMPA. Board meeting discussions encompassed general issues and problems that affect the association members and their businesses, ways to empower the association boards to be more proactive in ensuring the success and sustainability of the association itself and of ABMC, and efforts to reorganize the associations' network communication.

ABMC staff members introduced the center and its services to members in both the regional and general meetings. In the general meetings, they also facilitated the election process for association Presidents and boards, and collected membership dues. The total number of participants in these meetings was 286 members.

Media coverage was arranged for the general meetings of AFADA, BKFSH and AMPA, insuring the participation of national public and private TV stations, various newspapers, and the Albanian Telegraphic Agency.

- With the initiative of Chief of Party of AAATA/IFDC, has been created an ex-officio Emeritus Committee with all the former executive directors of trade associations. The mission of this committee is to strengthen associations and impact the development of respective agriculture sectors. This committee is part of ABMC as its unofficial voice to association members. A ceremony to announce the creation of this committee and to award honorific diplomas to its members was organized by ABMC in October 2002. Media coverage for the ceremony included the participation of three TV stations and ATA.
- ABMC has prepared, and is in the process of distributing, membership cards to all association members that paid their dues for the year 2002. Each card contains the member's photo, the name of the association, the amount of dues paid, and validation period as well as the ABMC/KASH stamp.
- AFADA regional meetings were organized in Shkodra, Tirana, Elbasan, Fier, Korce, and Berat with total participation of 110 members.
- The ABMC organized the logistics for KASH regional meetings in September and December 2002, including sending invitations to local government representatives and donor projects in the regions, distributing key materials and newsletters, and providing translation support. There were 635 participants at these meetings.
- Prepared and published the *Agrobiznesi* newsletter on quarterly basis until September; thereafter on a monthly basis. The newsletter has been a good tool to provide and disseminate information to association members on different activities in the sector and on agriculture development.

**3. Improve ABMC and individual associations financial well being by increasing membership services and identifying sources of funds from grants and donors.**

ABMC has increased income fees, generating additional revenues of \$11,284 during the period, bringing its bank account balance to \$ 93,657.

In addition, ABMC began work on a new database that will provide association boards and ABMC Client Relations Specialist with computer generated reports noting *Members in Good Standing* and *Delinquent Dues*. These reports, along with other management reports, will enable both the ABMC and associations boards to pursue membership dues aggressively and retain members, resulting in higher dues collection rates.

a. Proposal Development

ABMC worked closely with clients to prepare and submit five project proposals/grant applications to the ASP/World Bank grant program on the following issues:

- New technology in collecting, harvesting, and protecting the olive fruit and efficient methods to market its products (AOA members).
- Marketing development of agri-inputs and early vegetable production for export (HABA members).
- New technology for selective fishing in Belsh lakes (AFPA members).
- Improving the technology of cleaning spices and medical herbs (ASHTA members).
- Construct a collection, packaging, and standardization point for greenhouse production (HABA members).

All five proposals have successfully passed the initial phase of the application process, and with high scores. ABMC is a service provider for the ASP/World Bank grant program, and for every winning proposal it earns 25% of the total grant awarded, 10% for technology transfer and 15% for project management. ABMC is actively seeking, from owner associations and their members, as well as from new clients, project proposals that are oriented towards marketing development, technology transfer, and industry development.

b. Grant Implementation

The Association of Onion Production “Mirasi” (AOP) Project

ABMC worked closely with the onion association in the preparation and submission of their winning project proposal to the ASP/World Bank grant program. The implementation of the AOP project began in August 2002. Three grant payments, totaling \$8,260 has been deposited in the association bank account. The funds will be used to complete the construction of the onion storage. During this period, ABMC has provided technical assistance to the client to ensure the necessary micro climatic environment for the storage of onions. ABMC staff members have prepared reports on the progress of the project implementation and have prepared technical information that will go into the association’s promotional brochure. ABMC has prepared memorandums of understanding (MOU) and business contracts that the association will negotiate and sign with vegetable wholesale dealers. ABMC is preparing the association’s promotional

brochure, which will promote the activities and achievements of the association and will explain how the association has used grant funds to build the storage. ABMC has also facilitated communication between the ASP/World Bank grant program and the AOP. The final phase of project implementation, to be conducted in April, will include field seminars to promote the marketing center of onion production and for the technology transfer to other members of this association. The project implementation will be completed in August 2003.

c. Association Budget Status

Statement of association account balances (over capitalization) as of December 31 2002:

HABA	\$3,531
AVALB	\$6,556
AOA	\$ 930
AMPA	\$3,144
APFA	\$ 382
AFPA	\$ 862
<u>AFADA</u>	<u>\$7,487</u>
<b>Total</b>	<b>\$22,892</b>

ABMC account balance as of December 31 2002: \$93,657 (including \$58,236 in capitalization funds).

**4. Promote ABMC as service provider and strategic partner to financial institutions and donors.**

a. Identify strategic partners to generate non-dues revenues.

As detailed above, ABMC is a service provider for ASP/World Bank grant program.

In addition, AFC/GTZ-Fier has asked ABMC to provide technical assistance to their agro-processor clients in Berat, Fier, and Kavaje. ABMC experts are working with them to increase their production quality and to reduce the costs of raw materials, by using new technologies and new recipes for cherry, plum, apricot, and peach jams. During this period laboratory tests have been concluded for various fruits in an effort to enhance jam quality. ABMC income for its role as service provider will be \$2,612.

b. Promotional activities for ABMC

ABMC staff presented its services and success stories in all regional and general association meetings. ABMC introduced its collaborative work with other organizations and explained how these relationships could benefit association members. To reinforce the message that ABMC is very knowledgeable about what is happening in the sector and that it has strategic links to other organizations, ABMC invited several groups active in the agricultural sector to present their work during association meetings, including Chemonics, PSHM, SNV-Fier, GTZ, FIAA, Alpha Bank, AAEF, and the American Chamber of Commerce.

ABMC has participated in SEED-sponsored joint meetings and round tables with various agriculture associations and businesses operating in Albania, to discuss the current

challenges in agriculture. Its participants introduced the center, emphasizing not only its experience as a service provider but also as an association management center.

**5. Enhance the image and awareness of ABMC and member associations**

- a. ABMC has developed a promotional brochure, poster, and pamphlet on technical assistance. The brochure includes a general overview of ABMC, its services for associations and individual members, its relationship with KASH, and its collaboration with other institutions. The technical assistance pamphlet concentrates on promoting ABMC technical services and how to obtain them. The website [www.abmc.org.al](http://www.abmc.org.al) is under construction.
- b. In December 2002, ABMC prepared an informal market research survey and distributed it to association members attending regional meetings. The purpose of the survey was to determine what people know about ABMC and its work, as well as to measure their satisfaction for the services and support provided to them by their associations. The results from this survey will be useful in structuring association development efforts. The results will also allow ABMC to offer new services or those services most in demand, and to market them more effectively.
- c. AMBC participated and presented itself in the workshops organized in Athens and Thessalonica, Greece in November 2002. There were discussed issues on agribusiness association development under EU regulations.
- d. ABMC liaised with KBS/USAID FOR organizing a B2B activity for the Balkans, giving our associations the opportunity to present themselves and their businesses, as well as to meet homologue businesses in the Balkans.
- e. Ninety-three members of AFADA and ACU have requested e-mail accounts. ABMC has opened accounts and assisted them in this endeavor. Internet access to all association members was provided, to enable them to find international market prices, equipment sources, new technology, and training materials.

**6. Support KASH in developing stronger regional councils.**

- a. In September 2002, ABMC organized professional skills training for KASH Regional Coordinators in Shkodra, Korca, Fier, and Saranda. The training focused on: (a) prioritizing office work, (b) administration of daily duties, (c) building relationships with members and other organizations active in the agricultural sector, and d) management reporting.

ABMC has distributed the following to each Coordinator:

- Computer and printer.
- Current membership database, listed by association and by region.
- Membership dues receipts.
- Membership cards.
- Promotional materials about ABMC.

- b. ABMC is preparing for phase three training of coordinators that will include computer and e-mail use, task assignments, roles and responsibilities towards ABMC and its clients, and operating policies and procedures.
- c. ABMC also handled the logistics and organization for KASH Annual Conference in November 2002, including sending invitations to local government representatives and donor projects, distribution of materials and newsletters, and the provision of translation support.

### **Achievements Contributing to Meeting Result Indicators**

- a. Four association board meetings were organized during September–December.
- b. Three general membership meetings were conducted during September–December.
- c. Services provided to ABMC members consisted of: individual TA (local and international), site visits, trade missions, grant proposal preparation for donor support, communications, marketing advice, introduction and facilitation with foreign companies, financial service support, training and technical publications, training in specific topics for common groups, business diversification, export promotion, networking, office administration support, English translation, agribusiness newsletter, new technology and machinery demonstrations, and sector assessments.
- d. Three trade missions to the United States were organized by ABMC during July–November.
- e. Several members of ABMC associations participated in two trade missions, in B2B meetings in Skopje and Belgrade in July, and to one trade fair in Podgorica, Montenegro, in September.
- f. AFC/GTZ contracted ABMC as a service provider. The first phase is finished.
- g. ABMC deposit account balance was \$93,657 on December 31, 2002.
- h. Emeritus Committee with former executive directors of trade associations was created.

### **Contribution Calculation for July 2002 – January 2003**

<b>What</b>	<b>Contribution</b>
Four Association Board Meetings (ABMC members)	\$ 2,990
Three Association Annual Meetings (ABMC members)	\$ 12,260
AFADA Regional Meetings	\$ 11,000
Site Visits	\$ 6,800
Trade Missions	\$ 85,150
ABMC Budget	\$ 93,657
Total Budget of Seven Associations	\$ 22,892
<b>TOTAL</b>	<b>\$ 234,659</b>

## **A4. Agribusiness Expert Council (KEA)**

### **General Status**

The Agribusiness Expert Council (KEA) was legalized in March 2002 as a non-governmental and nonprofit foundation, consisting of 16 well-known agribusiness experts. The purpose of KEA is to serve as a “Think Tank,” to contribute in policymaking, and the building and consolidation of competitive businesses.

The establishment of the foundation was an important action in the development of Albanian agriculture since it is the first attempt to make available to all agribusinesses a high level of expertise through the use of the country’s intellectual resources.

KEA’s publication of the first two issues of *Tribuna e Ekspertit*,” its quarterly magazine; two books; and two major policy papers helped in spreading and strengthening the foundation’s reputation.

Through KASH, the Foundation has contributed to the preparation of agriculture development strategies based on research and studies conducted by KEA. The Foundation has also sought to assist donors in developing and implementing appropriate projects in agriculture and rural development.

### **Summary of Objectives**

- 1. Present KEA and increase its image.**
- 2. Increase the capabilities and expertise level of KEA as a “Think Tank” in policymaking, research studies and analyses in areas it covers.**
- 3. Evaluate the economic level in general and for different businesses.**
- 4. Inform actors through media and other communication means.**

### **Activities Performed in Support of Objectives**

- 1. Present KEA and increase its image.**

Focus: Present the Foundation to GOA officials, agribusiness entrepreneurs, homologue organizations and international donors.

- a. Public presentation of KEA Foundation took place at Tirana International Hotel, on September 12, 2002. Many well-known agricultural experts, GOA officials, and international donor representatives attended the event. Media coverage of the activity included national public and private TV stations, various newspapers, and ATA.
- b. KEA continued to present itself to agribusiness entrepreneurs, GOA officials, homologue organizations, and donors. Several meetings and discussions were conducted aimed at increasing public awareness about KEA and seeking cooperation between the intellectual scientific experts and agribusiness owners. Seventeen agribusiness owners in six districts were contacted as well as four homologue organizations and three donors.

**2. Increase the capabilities and expertise level of KEA as ‘Think Tank’ in policymaking, research studies and analyses in areas it covers.**

Focus: Conduct member training in foundation functions, preparing policy papers and grant proposals for the Foundation and collaborate with homologues organizations and donors.

- a. An IFDC international consultant conducted a series of seminars on preparing policy papers and grant proposal writing in August 2002. KEA Foundation staff and council members participated in the training. During September 18-22, 2002, KEA Executive Director conducted three seminars in Kosovo, sponsored by IFDC Kosovo. Specialists from the Ministry of Agriculture and Rural Development of Kosovo, the University of Pristine, and local agribusiness owners participated in the training. The seminars focused on:
  - Reforms in agriculture and agribusiness during the transition period in Albania and the impact of governmental policies.
  - Information and statistics service in the market economy.
  - KEA Foundation—it’s mission, goals, and the services it offers.

**3. Evaluate the economic level in general and for different businesses.**

Focus: Perform economic analysis and studies to identify potential successful businesses, stimulate investments and evaluate agricultural products competitiveness

- a. On September 6, 2002, KEA organized a seminar with specialists of MOAF, on Policy Analysis Matrix (PAM) method and its application. This method is used for measuring competitiveness and evaluating the comparative advantages of agricultural products.
- b. On September 24, 2002, KEA in collaboration with MOAF, organized a national seminar in Vlora on the olive oil industry. The material presented in this seminar was based on a study of 126 olive oil-processing lines. Olive oil processors, farmers, and specialists from MOAF participated in this activity. AAATA’s marketing consultant and ACG specialists covered specific topics during the seminar.
- c. On September 27, 2002, KEA experts and consultants discussed the creation of an information and management center for the export of fresh agricultural and processed products.

- d. On October 22, 2002, KEA organized a seminar with BKFSH members on applying the PAM method for agricultural products in greenhouses and open fields.
- e. On October 24, 2002, KEA conducted a meeting with agribusiness people in Shkodra to discuss agricultural policies and get a perspective of agricultural development in the area. Evaluation of the possibilities for cultivation and export of herbs and spices in this zone was part of the discussions.
- f. KEA participated in the National Conference of KASH on November 1, 2002, and presented papers on:
  - Analysis of Albanian Agriculture.
  - Policy Matrix Analysis-Measuring Competitiveness and Competitive Advantages.
  - Olive Oil Industry in Albania: An Analysis of Marketing, Competitiveness and Technology.
  - Fisheries in Albania: Strengths, Weaknesses, Opportunities and Threats.
  - Development of the Greenhouse Sector in Albania. Opportunities for Future Development.

**4. Inform actors through media and other communication means.**

Focus: Prepare and deliver required information related to the presentation of the Foundation and the various studies and analysis conducted by it.

- a. Prepared and published two issues of *Tribuna e Ekspertit*, KEA's periodical quarterly magazine consisting of information on agricultural policies and important agricultural problems in Albania and worldwide.
- b. Supported the publication of two books, *Manuali i Nematologjise Bujqesore* and *Kullimi i Tokes, Aspekt Agronomike*.
- c. Prepared and delivered two policy papers: (1). SWOT Analyses of Albanian Agriculture; (2). Medical Herbs and Spices: A Great Opportunity for Export.

**Achievements Contributing to Meeting Result Indicators**

- a. Public presentation of the KEA Foundation on September 12, 2002.
- b. Preparation and publication of two issues of "Tribuna e Ekspertit," the Foundation's quarterly magazine; support for the publication of two agricultural books.
- c. Organization of three meetings of KEA's Board of Directors.

### Contribution Calculation for July 2002- January 2003

<b>What</b>	<b>Contribution</b>
KEA Board of Directors Meetings	\$ 4,000
Round table discussions	\$ 3,500
“Tribuna e Ekspertit” Magazine	\$ 3,800
National Seminar on Olive Oil Industry	\$ 4,250
Two seminars on competitive analysis	\$ 2,000
<b>Total</b>	<b>\$ 17,550</b>

## **B. Agribusiness Development**

### **Agribusiness Consulting Group (ACG)**

#### **General Status**

ACG is a group of technical experts within the project who provide TA to association member clients. During the last 6 months the ACG continued its work to fulfill its mission: to assist private agribusiness enterprises to expand their production and increase their profitability, to foster agribusiness development and to establish the basis for industry clusters and commodity value chains. It continued to assist progressive entrepreneurs to succeed as examples for attracting investment funds from domestic and overseas sources.

ACG works in tandem with the ABMC. It provides TA to clients by following a process that consists of: preparation of an MOU between the ABMC/client; TA client needs identified and set forth in a contract; TA provided to client with services monitored by ABMC; payment of appropriate fees to ABMC based on service provided and as stipulated in contract; client evaluation of TA services provided.

ACG has set five strategic objectives to be realized during this year:

- 1. Improve entrepreneur skills business planning.**
- 2. Increase access to market information.**
- 3. Upgrade technical abilities.**
- 4. Promote diversification into new products.**
- 5. Provide direct technical assistance.**

ACG functioning is based on teamwork and teams. There are four teams working at ACG that cooperate and support each other in fulfilling common goals. A short description of each of the AGC teams follows:

- a. The Green Team** is composed of specialists covering each of 5 main industries (sectors and sub-sectors) that are:
  - Horticulture: Fruit and Vegetable Processing, Greenhouse, Field Production and Potato
  - Olive Oil: Standard, Extra-Virgin, and niche products (Kosher olive oil)
  - Herbs, Spices, and Medicinal Plants
  - Poultry: Eggs, Broilers, and Turkey
  - Fishery (Aquaculture)
- b. The Blue Team** is a small pilot commercially oriented effort that experiments with the dynamics of privatizing consulting to agribusiness. One of its functions is to identify as

many services as possible for which agribusiness will pay, experiment with contractual approaches and payment processes, etc.

- c. **The Red Team** focuses primarily on development TA where new ideas and technologies are introduced into Albania.
- d. **The Stripe Team** is based in Fier and is focused on agricultural production activities based in Southwestern Albania. A Centrum für Internationale Migration und Entwicklung CIM (German institution) agronomist manages the team and it provides continuous assistance to the newly created producer association 'Darsia' in Hysgjokaj, Lushnje.

Collaboration with ABMC has helped ACG to provide business services, establish trust and generate income. In general, the ACG accomplished the following during this reporting period:

- Introduced new techniques on vegetables production, tested high quality vegetable seeds, and introduced modern equipment for packaging and food processing;
- Engaged and trained local experts, specialists and business people enabling them to offer technical consultancy to clients regionally;
- Promoted regional trade cooperation based on comparative advantage and uniform policies and regulation;
- Encouraged and supported clients with ideas for new investments,
- Established linkages with donor programs that assist the agribusiness sector;
- Coordinated efforts of associations' members to consolidate procurements and facilities to reduce costs.

### **Activities and Achievements by Industry**

**Green Team** activities performed in support of objectives and achievements realized as result of activities are analyzed by sectors and sub-sectors.

#### **Horticulture**

The primary goal was to promote and improve the production and profitability of the association members and clients assisted in the three existing sub-sectors and the newly targeted area of, fruit culture:

1. TA was provided to four levels of greenhouse production:
  - High tech (Israeli greenhouse)
  - Mid tech (glass greenhouses)
  - Traditional plastic greenhouses
  - Low tech plastic greenhouses and tunnels
2. Open field crops.
3. Potato.
4. Fruitculture (tree production).

### Activities in Support of Objectives

- a. Three new Israeli high-tech greenhouses were constructed during the period between mid- August and mid-October—in Divjaka 0.52 ha, in Vrion, Saranda 0.32 ha, and 0.2 ha in Hysgjokaj Lushnje. With the construction of these greenhouses, the surface of Israeli high-tech greenhouses in Albania reached 2 ha.

Based on the previous experience with the construction of the first two greenhouses, the project has setup a horticulture team to organize, coordinate and assist in the construction of the three new greenhouses. The mission of this team is to continue to offer technical assistance and support to the existing 5 high-tech greenhouses, and assist new potential clients interested to construct high tech greenhouses. The team operates within the ACG structure. It is composed of eight people and its activities consisted mainly in preparing and facilitating the construction process of the greenhouse, daily agronomic management of the greenhouses, pests and disease control and prevention, fertigation, etc.

The plant protection specialist (member of horticulture team) pays weekly visits to the five high-tech greenhouses, identifying plant and soil problems, and offering on the spot solutions. Horticulture agronomists also paid site visits according to the specific problems these producers encountered. Greenhouse producers agreed to pay for the services to be provided for the first cycle (October 2002-June 2003). In total, horticulture team members made 110 field visits to high-tech greenhouse producers.

- b. In collaboration with red team specialist, a horticulture expert from AGRIDEV paid two visits during last six months. He provided instructions to the horticulture team on specific technical issues and coordinated the supply of bumblebees and hormones for fruit settings from Israel.
- c. To create local capability in assisting high tech greenhouse construction, three construction specialists are part of the horticulture team. They gained technical skills in cooperating with Israeli specialists during the construction period of the three new high-tech greenhouses. In January they attended a 3-week course in Israel on “Intensive and Sustainable Vegetable Production Systems.” This local construction team will be able to take over the construction of the high-tech greenhouses, resulting in lower construction costs for the client.
- d. Good results were achieved regarding plant protection, production yield and quality in both of the high-tech greenhouses constructed in 2000. Tomato harvesting began in November yielding approximately 6 tonnes/dynym and selling at prices 30%-35% higher than current market prices.
- e. In spite of initial difficulties, the three new high tech greenhouses are achieving satisfactory results, largely due to the continuous technical assistance and special attention given to these producers. The high-tech greenhouse in Hysgjokaj has started cucumber harvesting, the greenhouse in Divjaka began tomato harvesting in late December, and the Saranda client will start harvesting in early February.

- f. In September 2002, the construction of the high tech Technology Transfer Center (TTC) in Krutja, Lushnje was completed. Some experiments of growing late autumn crops without heating were done. An open field day was organized in November 2002.
- g. Two mobile courses with two modules each were organized in July and October. AGRIDEV experts moderated the courses and passed their experience and expertise to Albanian farmers and local specialists. The marketing and horticulture specialists of the project collaborated with AGRIDEV experts on the topics to be presented to Albanian farmers. The first course modules were on production and marketing principles and the second course modules were on post-harvesting techniques and marketing plans. According to farmers' specific needs, the courses were held in the regions of Lushnja, Saranda, Shkodra, and Korça. These mobile courses were very helpful to farmers regarding advanced know how and technologies, post-harvest techniques, and marketing skills. There were 180 participants in both courses.
- h. In collaboration with AZROM Company, horticulture specialists prepared the manual on "*Management of the Systems in High Tech Greenhouses.*" The manual provides instructions to farmers on using greenhouse equipment and facilities to create very good climatic conditions for plant growing and protection.
- i. Through AGRIDEV, Israeli seed companies have been contacted and agreed to offer new seed varieties. At present, a total greenhouse area of 500 m<sup>2</sup> has been planted with new tomato and cucumber seeds (as a second crop production) in Hysgjokaj, Lushnje. The TTC will be used to experiment with these new trial seeds (tomato, sweet pepper, cucumber, and melon).
- j. Articles on new cultivation methods on high-tech and mid-tech greenhouses and new methods of plant protection were published in the *Agrobiznesi* newsletter.
- k. Initial product diversification in the low-tech greenhouses achieved very good yields. Pepper yielded 15 tonnes/dynym and melon yielded 80-90 tonnes/dynym.
- l. The statutes of the Hysgjokaj producer association "Darsia" will serve as model for other farmer groups in Albania. This group has more than 10% of greenhouse surface in Albania and the project has assisted them continuously via CIM consultants and other project staff to enhance their business concepts and skills. 'Darsia' is a new type of cooperative based Albanian and on German law and functioning as an agriculture company with capital shares.
- m. The project began a study of organic agriculture. This study focuses on the possible production and use of organic fertilizers such as compost, humus and manure in greenhouse production. Some greenhouses in Hysgjokaj have been chosen as trials for the production and use of these organic fertilizers. Results are expected in the next few months, with current indications that organic agriculture products have high export potential.

During the past 6 months, the horticulture team with support of expatriate experts has been able to realize the following achievements in the horticulture sector:

- 60% of HABA members planted “long shelf life” tomato hybrids, and more than 50% planted high-yield tomato and cucumber hybrids for the autumn crop production.
- The second crop of tomato and cucumber production increased by 4% and 3%, respectively, compared with 2001 yields.
- 27 low-tech greenhouse growers diversified their production by planting pepper, eggplant, and melon.

The ACG green team started to assist the fruitculture sector in Albania. Two members of the green team are collaborating with the University of Korca on a study for apple tree production in the regions of Korça and Kolonja.

## **2. Open field crops**

Due to the seasonality of open field crops, there are no activities to be reported in this sub-sector. However, horticulture specialists have been working on providing quality seeds to growers and arranging contracts between growers and wholesalers for the next season.

## **3. Potato—Green and Stripe Teams**

The Potato Seed Association (ANSPA) is working in this sub-sector to improve potato production throughout Albania and introduce high-quality potato seeds. The CIM specialist has assisted in this effort and follows the development of this sub-sector.

### **Activities in Support of Objectives**

- a. The Project sponsored the publication of the book, *Patatja*, on new technologies for potato production. The book has been well received. The majority of copies have been sold to ANSPA-members, farmers, agriculture students, MOAF, and others. Because of high demand, the book will be reprinted. Additionally, a follow-on volume with additional information on potato reproduction will be published in the next 3 months.
- b. Trainings and field days were organized during last 6 months with ANSPA members in the regions of Korce, Devoll, Pogradec, Librazhd, Diber, Kukes, Gramsh, Lushnje, Fier, Permet, and Shkoder. The trainings were on new technologies for potato growing, seed quality control, potato conservation, and product marketing. The marketing consultant prepared the materials, handouts, and presentation focusing primarily on marketing centers. 470 ANSPA members participated in the trainings.
- c. A seminar was organized for ANSPA members in Pogradec (July) on potato seed quality and new varieties. The seminar was also attended by representatives of “Europlant,” a German potato seed company. During the seminar, potato growers and traders had the chance to discuss directly with the German specialist the seeds they receive from this company.

- d. Members of ANSPA in Librazhd and Korca, signed contracts for their production of potatoes, with the chips factory in Librazhd. This factory began operation in December 2002 and they have contracted for 200 tonnes of potatoes with local producers.
- e. Typical areas for production of potato seeds in Albania have been chosen and planted in Shishtavec (Kukes), Streblove (Librazhd), Sojnik,(Gramsh), Vithkuq, Voskopoje (Korce), and Velipoje (Shkoder). First results taken from the trials in Shishtavec and Sojnik indicate good quality seeds are being produced.
- f. ANSPA continued its collaboration with different national and international projects, such as AGRINAS, TRIANGLE, DORCAS, MADA, GTZ, and SNV to exchange experience and technical assistance.
- g. ANSPA continued to collaborate with different Albanian governmental institutions such as the State Entity of Seeds and Seedlings for the registration of new varieties of seeds.
- h. ANSPA MC Company exported three trucks of fresh potatoes to Kosovo in October. This company continues to collect potato production from the farmers based on contractual agreements.

### **Poultry**

During these 6 months, the poultry industry has continued to grow. A new poultry farm for eggs has been built in Vlore with a capacity of 50,000 chickens and production of 40,000 eggs per day.

### **Activities in Support of Objectives**

- a. “Floryhen” Company finished its experiments for processing manure. They used three different methods of processing and first results of processed manure have been good. A quantity of 50 tons has been sold to farmers. The poultry specialist followed the experiment in cooperation with Soil Institute and will continue to provide assistance in improving the quality of manure by lowering the humidity level.
- b. Continued to provide assistance to turkey growers in Hysgjokaj and Fushe-Kruja for improving turkey production by using new feeding recipes in Hysgjokaj, Lushnje and Fushe-Kruja. TA also consisted of collecting information on market prices and contracting potential traders.
- c. Two meetings of major egg producers, feed grain importers, and Albanian Poultry Farmers Association (APFA) members were organized to discuss the development of the poultry industry in Albania and multilateral cooperation to avoid unfair competition.
- d. An article on the method for processing manure was prepared for the *Agrobiznes* newsletter.
- e. A media campaign was started to increase egg consumption and consumer awareness about the nutritional values of eggs. Five TV programs have been broadcasted on the national public station (TVSH) and on two private stations.
- f. The marketing perspective for the poultry industry was completed. A professional team, consisting of the Project’s marketing consultant, a poultry technical consultant, and poultry experts, prepared it. Twenty egg and broiler producers were contacted for the

report. Results of the perspective, have been prepared in a brochure to be distributed to APFA members and other interested parties in the sector.

- g. Floryhen Company exported 5 million eggs and animal feed to Kosovo.
- h. Five members of APFA participated in Pack Expo International Trade Fair in Chicago in November, 2002.

### **Olive Oil**

Work in this sector focused on assisting olive oil processors to collaborate with producers in establishing their own label and trademark. An additional important objective was to improve on the results achieved last year in the quality of olive oil.

### **Activities in Support of Objectives**

- a. Three new Alimentary Oil Association (AOA) members were assisted during September–December 2002 in installing new olive oil processing lines won from the 2KR project. The new lines were installed in Kurjan (Fier), Lanabregas (Tirana), and Oblike (Shkoder).
- b. Prepared for publication a book entitled *Improvement of Olive Oil Quality—A Challenge for Albanian Export*. It includes the materials that were held in the workshop organized in Dhermi, Vlore, in May 2001. The book will serve as a manual for processors to assess olive oil quality.
- c. AOA members are registered with the GTN in October 2002 with the assistance of AmCham.
- d. Prepared and distributed olive oil international price list/bulletin for Albanian processors (bi-monthly).
- e. Conducted an in-country analysis of olive oil produced in the last season from Vlora processors. Thirty samples from 10 processors were analyzed for olive oil acidity. The results were good. Four processors produced extra virgin olive oil for the second consecutive year.
- f. Demonstration of shaker unit for olive oil collection for the farmers/suppliers of Bestrova and Panaja (Vlore) in December 2002.
- g. As a result of the assistance provided to ANI Company in Qeparo-Vlora, ANI bottled and labeled 20 tonnes of olive oil with its own trademark and sold it to the local market.
- h. Articles on mechanization of olive trees harvesting, HACCP and EU standards in olive oil-processing industry were published in the *Agribiznes* newsletter.
- i. The working group on Albania membership in International Olive Oil Council (IOOC) continued to promote the adoption of IOOC regulations to the Albanian olive oil industry.
- j. The first Albanian law of olive oil production and marketing was approved in September, 2002. It took into consideration concerns of AOA members.

- k. Olive oil specialist participated on a study tour organized by AAATA/IFDC project on application of HACCP system and EU standards in assuring food safety regarding fats, oils and related products, sponsored by the TEI of Thessalonica, Greece in December 2002.
- l. Fourteen olive growers have been assisted for establishing new plots using certified olive seedlings and registered varieties during the planting season in December 2002.

### **Fishery**

The Fishery sector continues to have good results in developing the production of fingerling and restocking fresh water areas. During the last 6 months the fish farm in Gurras, Pogradec started to produce trout fingerlings with the OVAPRIM method. Two new fish farms have started. Restocking fresh water areas for fingerlings in the regions of Belsh and Hysgjokaj have been accomplished.

### **Activities in Support of Objectives**

- a. Two new fish farms have been created; one for trout (July 2002) in Malesia e Madhe. The second is for fresh water fish (October 2002) in Lezha. This farm fish received various kinds of fresh water fingerlings from Hydra Company, an Albania Fishery Professional Association (AFPA) member.
- b. A group of Hysgjokaj fish farmers were assisted in buying fingerlings at low prices from producing companies in Albania. This group has been advised to increase restocking areas with all kinds of fresh water fingerlings. As a result, in November 2002, 100% of the whole water area has been restocked.
- c. Training on marketing was organized for Hysgjokaj and Belsh fish farmers groups in November, in cooperation with the Chemonics SME Project. Twenty-five farmers were trained on general marketing principles.
- d. The project's fishery specialist found fingerlings at favorable prices and assisted a group of fresh water fish farmers from Belsh.
- e. The second phase of the in country training on "Fingerling Production with New Methods" in cooperation with World Learning was accomplished in August. During this phase, four of the participants from the first phase used the new method of OVAPRIM in their fish farms. As a result, these farms realized a higher overall response of injected females and obtained eggs, at a lower cost of treatment per kilogram
- f. Fish price publication from EUROFISH, was prepared in cooperation with marketing component and distributed to AFPA members. It provides detailed price information on the major fish and shellfish species traded on the European market.
- g. Training on "Technology of Fish Cultivation in Reservoirs" was organized for the group of fish farmers of Belsh in December. Handouts on the methodology of fish cultivation were distributed to the 15 participants. The same training was also conducted in Durres and Kavaja.

- h. Training was conducted in September, in Saranda and Vlore for fisherman who produce fish in cages. The training consisted of cage construction, design as well as species selection, stocking rates, and feeding caged fish. Twenty-two AFPA members participated in these trainings.
- i. A contract was signed in November, between EUROFISH, a fish processing company, and fishing firms in Lezha to supply fish to EUROFISH.
- j. Prepared an article on OVAPRIM technology for the August issue of “Agribusiness” newsletter.

### **Herbs and Spices**

The Herbs and Spice (H&S) Component of the IFDC/AAATA Project with support from Furth & Associates continues to assist the Albanian private herbs and spice sector to:

- Establish, implement, and strengthen the Albanian Spice and Herbal Trade Association (ASHTA).
- Increase the quality of the Albanian herbs and spices.
- Encourage herb and spice cultivation in Albania.
- Improve market orientations.
- Liaise with governmental and international institutions conducting similar work.

The Herbs and Spice Component is helping the H&S sector revitalize through its assistance, thus demonstrating that the sector can progress now despite the severe constraints with which it is faced.

### **Activities in Support of Objectives**

- a. Two meetings of the Board of Directors of ASHTA were held (August, December). During these meetings, ASHTA membership fees, election of the financial controller of the association, ASHTA membership in KASH, design of the membership card and opening of the bank account of ASHTA were discussed.
- b. Site visits were conducted to establish and maintain connections already begun with important dealers in the Herbs and Spice Sector. In some site visits representatives from Institutions like the American Bank of Albania participated in order to have a better idea on the H&S business development and needs in south Albania, as they are already exposed to the H&S development dynamics in the north. Also, numerous meetings were continually held with H&S dealers in the office. Assistance was continually provided to competent dealers who were seeking financial help.
- c. Several meetings were conducted with various governmental, private and International institutions such as the Cooperation Office of the Swiss Embassy, E-CAT Tirana, Regional Development Agencies (RDA), “Barnaba” Foundation of Albania, Association of Forests and Pastures Users of Kukes, Agricultural University of Tirana, FRI.

- d. The cultivation trials already designed and established by the H&S component early this year in Shkodra (Sage and Thyme), Tirana (Winter Savory, Rosemary, and Oregano), and Saranda (Oregano) went on very well under the rigorous supervision and guidance of the component. Samples from first and second harvesting were taken from each location and sent to the United States for laboratory analysis. The data obtained are being processed and will serve as basis for the botanic, economic and agronomic recommendations to farmers, collectors, dealers, and processors. The positive results received in the existing cultivation trials encouraged their expansion, which is being conducted under a separate contract from the U.S. Forest Service. Expansion of cultivation trials started in October and will be carefully monitored, particularly in this critical period of the year. New contracts with landowners were prepared and signed. Preparation is under way for collecting the necessary data and economic information to form reasonable conclusions about the economic viability of cultivating specific herbs and spices in Albania.
- e. The Albanian translation of the American Spice and Trade Association (ASTA) Clean Spice Guidebook was published. It was distributed largely during the November seminars. It addresses all levels of the Albanian botanical industry, from the growers and collectors/dealers all the way to the processors and exporters. Albanian H&S dealers, processors, and exporters as well as other commercial, research, and educational structures indicated the book will serve as a tool that would help increase the quality and quality control of the Albanian herbs and spices. The guidebook has been previously used as the basis for training overseas sources, Albanian ones included, as to the requirements of the U.S. market in today's world.
- f. Several meetings were conducted with Albaflor and the project media component regarding the design and production of educational and technical materials such as the Sage poster and the *Gentiana lutea* Leaflet. These materials were very successfully produced by the media component and distributed at no cost during the November seminars. Work with Albaflor also focused on the preparation of a book on the current status of the Albanian Aromatic and Medicinal Flora. The book is already prepared and edited. Publication is expected during the first half of 2003 with financial assistance of KEA. These materials serve as a valuable source of educational information, as well as part of the project's efforts to stress environmental protection issues and higher quality.
- g. During late October and early November, four training programs were conducted in four regions of Albania: Korça, for the first time (October 30), Saranda (November 1), Shkodra (November 5), and Tirana (November 6). The seminars discussed issues related to the quality improvement of the Albanian herbs and spices. Topics were extracted from the ASTA "Clean Spices" guidebook combined with the experiences of other countries in this sector. The topics discussed in the seminars were extremely well received by the participants, as they indicated the flow of the Albanian products in Europe. Over 110 people participated, including H&S dealers, processors, and growers; as well as representatives from the USAID, Chemonics Project, ACIT Project, MOAF, MOF, pedagogues and students of the Agricultural University of Tirana, pedagogues from the "Luigj Gurakuqi" University of Shkodra Department of Economics and Botany, students of the "Fan Noli" University of Korça, Agricultural Departments of Districts, Albaflor, Forestry Research Institute, and Faculty of Natural Sciences. The seminars generated

interesting discussions and debating among the participants regarding quality issues, market information needs, and availability. Media coverage for the ASHTA seminar was arranged by project staff, and five national, public TV stations, three newspapers, and the ATA provided coverage of the event. Some seminars were also videotaped for internal uses. Thus, a long-term process of educating the various parties as to the requirements for shipping better product into the world markets has started.

- h. The seminars also served as meetings of the general Assembly where ASHTA membership fees were introduced to the participants, and the latter were invited to become ASHTA members.
- i. Articles introducing the objectives of the component's work and its activities in support of objectives were published at the *Tribuna e Ekspertit* magazine and *Agrobiznesi* newsletter.
- j. A presentation on the H&S Component was done during the regional meetings of the KASH/ABMC in September to introduce the component in the five targeted regions of assistance of the project (Korça, Shkodra, Tirana, Fieri, and Saranda).

### **Special Opportunities – The Red Team**

Here the work is focused on identifying opportunities for entrepreneurs that want to expand the businesses or diversify into new ones.

#### **1. Agro Processing**

- a. Found 10 offers (from the United States, Israel, Italy, and Germany) for equipment for fish meal line, milk processing line, yogurt packaging line, refrigerator room, and packaging line for vegetables.
- b. Negotiated for a cooperation agreement between the Horticultural Albanian Businessmen's Association (HABA) members and the Food Processing Association in Bulgaria for exporting vegetables from greenhouses.
- c. Continued the cooperation with the Food Research Institute (FRI) to develop new recipes of cherry, plum, apricot, and strawberry jam for "En&Zy," "Shpiragu," "Alba," and "Redi." Companies using these recipes will produce higher quality jam at lower production cost.
- d. Red team members studied the option of using the gravity-drip irrigation for farmers that don't have electric sources. Based on this study, an Israeli firm that produces and exports this type of system worldwide has been contacted. Three units of gravity-drip irrigation have been ordered—one for the TTC and two for clients. They will serve as examples to show the system's benefits and convince farmers to invest in this useful and practical system.

## 2. Joint-Ventures

- a. Negotiated with “YAKINTON,” an Israeli company, and “VIVIERS DE FRANCE,” a French company, for a joint venture with “Blue Eye” and “Vrion” companies to grow and export trout. Also, worked on fulfilling the documentation for getting permission from the Council of Waters of Albania (Ministry of Tourism), for using the water of “Bistrica” river for growing trout.

The quantities exported during the period July 2002-15 of January 2003 were:

Company Name	Item	Quantity	Country
EN&ZY	Processed fruits and vegetables	100 tonnes	Kosovo
ALGREC	Frozen vegetables	150 tonnes	Germany, France, and Belgium
FLORYHEN	Eggs	5,000,000 eggs	Kosovo
MC-ANSPA	Fresh Potato	60 tonnes	Kosovo

## Finance

The main focus has been to support business on identifying their finance needs and to facilitate the securing of credit. Ten business plans were prepared for individual clients. Ten bank loans were disbursed during this period by the American Bank of Albania (ABA) and TB totaling \$1,200,000. Four trade credits were realized through 2KR Project for processing and bottling of olive oil.

No.	Company Code	Amount of Credit Requested (USD)	Status
1	OPO-57	40,000	Approved and Disbursed
2	HA-PR-2	150,000	Approved and Disbursed
3	HA-PR-36	120,000	Approved and Disbursed
4	HA-PR-03	200,000	Approved and Disbursed
5	DA-PR-01	100,000	Approved and Disbursed
6	DA-PR-81	130,000	Approved and Disbursed
7	PO-EG-05	200,000	Approved and Disbursed
8	OPO-20	70,000	Approved and Disbursed
9	FF-44	50,000	Approved and Disbursed
10	PO-EG -65	140,000	Approved and Disbursed
	<b>Total</b>	<b>1,200,000</b>	

## Achievements Contributing to Meeting Result Indicators

- a. Three new high tech greenhouses totaling 1.04 ha (10.4 dynym) were built and started production.
- b. ACG provided 41 priority clients with business services and 60 other potential cluster clients from association members.
- c. During the past 6 months ACG specialists and experts conducted 210 site visits providing technical assistance, and facilitated \$ 2,975,000 in clients self-investments.
- d. A marketing perspective for poultry sector was done.

- e. Four olive oil processors produced for the second year extra virgin olive oil. One of them introduced its own packaging, labeling and trademark to the domestic market, for the first time.
- f. The fresh water area in Hysgjokaj and Belsh was 100% restocked with fish.
- g. ACG team assisted 27 horticulture clients diversify into new products.
- h. Cultivation trials of specific herbs went very well and as a result the areas planted will increase.
- i. Two mobile courses, consisting of 14 trainings and 10 field days were organized in cooperation with AGRIDEV, ABMC, and the marketing component.

### **Contribution Calculations for July 2002 – January 2003**

<b>What</b>	<b>Contributions</b>
Site visit to clients (210 x \$100)	\$ 21,000
New self investments	\$ 2,975,000
Disbursed Loans	\$ 1,200,000
Trade Credit	\$ 910,000
Business Plans (10)	\$ 1,000
Two Israeli mobile courses	\$ 1,440
AFPA trainings	\$ 310
ANSPA trainings and field days	\$ 2,400
Seminar on “Quality Improvement, Marketing, and Micro and Macro-Analytical Testing” with ASHTA members	\$ 7,872
Two meetings of Board of Directors of ASHTA	\$ 1,600
Meetings with Institutions Representatives	\$ 1,000
<b>Total</b>	<b>\$ 5,121,622</b>

**Self Investment Made by AAATA Clients From  
JULY 2002 – JANUARY 2003**

**A. Dairy Processing**

Company Name	Owner's Name	Location	Investment Value	Purpose
KOZARA	Qemal Kozara	Lushnja	\$ 150,000	New breeding stock.
DELTATON	Edmond Gjata	Gorre Lushnje	\$ 150,000	Cows, new barns for complex and tractors.
<b>SubTotal</b>			<b>\$ 300,000</b>	

**B. Meat Processing**

Company Name	Owner's Name	Location	Investment Value	Purpose
MEAT MASTER	Çesk Kimça	Shkoder	\$ 70,000	Plant reconstruction
EHW	Luan Leka	Tirana	\$ 80,000	New outlets
HAKO	Adnand Hako	Tirana	\$ 300,000	New plant
BARDHI	Robert Bardhi	Tirana	\$ 40,000	Plant reconstruction and extension
KMY	Grigor Lengo	Tirana	\$ 60,000	New equipment
FRIGO-FOODS	Sokol Meqemeja	Tirana	\$ 200,000	New refrigerator
EURO-MEAT	Arben Pojani	Tirana	\$ 150,000	New cold storage
<b>SubTotal</b>			<b>\$ 900,000</b>	

**C. Horticulture**

Company Name	Owner's Name	Location	Investment Value	Purpose
ALFA ROMEO	Fatmir Kallbaqi	Durres	\$ 20,000	New equipment for the business diversification
ISAK	Ismail Sinani	Sarande	\$ 120,000	New High-Tech Greenhouse
LICO	Ali Lico	Divjake	\$ 180,000	New High-Tech Greenhouse
TABAKU	Abdyl Tabaku	Hysgjokaj	\$ 80,000	New High-Tech Greenhouse
<b>SubTotal</b>			<b>\$ 400,000</b>	

**D. Poultry**

Company Name	Owner's Name	Location	Investment Value	Purpose
DRIZA	Hiqmet Driza	Fier	\$ 250,000	Land purchasing, new silos, and some feed mill equipment.
EN & ZY	Enver Ferizaj	Kavaje	\$ 50,000	Repairing the poultry building and buying some new equipment for the farm.
PULARIA E RE	Beniamin Bedini	Vlore	\$ 500,000	Building New Poultry
PULARIA TEPELENE	Qemal Hoxha	Tepelene	\$ 400,000	Building New Broiler
<b>SubTotal</b>			<b>\$ 1,200,000</b>	

**E. Olive Oil**

Company Name	Owner's name	Location	Investment Value	Purpose
TORO	Ylvi Toro	Fier	\$ 50,000	New processing line
HAJDARI	Bedri Hajdari	Tirane	\$ 30,000	New processing line
OBLIKE	Musa Brahimi	Shkoder	\$ 20,000	New processing line
SABIN	Lulezim Kapllani	Vlore	\$ 10,000	New packaging
IVAP	Valentina Postoli	Tirane	\$ 5,000	New building
<b>Sub Total</b>			<b>\$ 115,000</b>	

**F. Fishery**

Company Name	Owner's name	Location	Self Investment	Purpose
HYSA	Gjergj Hysa	Malesi Madhe	\$ 30,000	Building Trout Fish Farm
LESAJ	Anton Lesaj	Lezhe	\$ 20,000	Building Fish Farm
HIDRA	Arjan Palluqi	Tirane	\$ 10,000	Buying new technology in production of fingerlings
<b>Sub total</b>			<b>\$ 60,000</b>	

**Total Investments: \$ 2,975,000**

## Trade Credit for the Period July, 2002 – January 2003

### A. Olive Oil

Company Name	Owner's name	Location	Trade Value	Purpose
TORO	Ylvi Toro	Fier	\$ 200,000	New processing line
HAJDARI	Bedri Hajdari	Tirane	\$ 130,000	New processing line
OBLIKE	Musa Brahimi	Shkoder	\$ 130,000	New processing line
SABIN	Lulezim Kapllani	Vlore	\$ 60,000	New packaging
IVAP	Valentina Postoli	Tirane	\$ 40,000	New building
<b><i>Sub Total</i></b>			<b>\$ 560,000</b>	

### B. Poultry

Company Name	Owner's Name	Location	Trade Value	Purpose
DRIZA	Hiqmet Driza	Fier	\$ 350,000	Chicken feed and baby chicks from Greece
<b>SubTotal</b>			<b>\$ 350,000</b>	

**Total Trade Credit = \$ 910,000**

## **The Blue Team**

### **Private Consulting Initiative**

During the second half of 2002, the Blue Team continued to assist Albania's private agribusiness enterprises to expand their production and profitability. Eight clients/businesses have been continuously assisted in improving their business skills in terms of financial management, product diversification, market research, and procurement techniques.

Following the MOUs signed during the first half of 2002, service contracts and consulting expertise have been given as requested for each entrepreneur. After assistance is completed, payments for services are invoiced to ABMC account.

Types of expertise provided during this period from the Blue Team to agribusiness clients were as follows:

- Management consulting (mainly marketing and finance) to four clients.
- Export/import agent for five clients.
- Business plan preparation for two clients.
- Manufacture agent for two clients.
- Document preparation (including grant proposals, advocacy issues, business descriptions, credit requests etc) to four clients.
- Referral services for six clients.

The Blue Team conducted individual counseling for eight-targeted clients in improving their business performance and assisted them in the preparation of credit proposals for submission to identified financial institutions. During 2002 the eight-targeted clients obtained \$1 million in short and medium term credit from the American Bank of Albania and about \$300,000 credit in kind from their respective suppliers. Export negotiations have been successfully achieved for fresh tomatoes and processed vegetables with a total value of \$500,000.

Some other business improvements and result indicators are as follow:

- a. A single owner in Lushnja that operates a fruit and vegetable processing plant, was convinced to sell parts of his business to a local trade partnership that has a good reputation and a consolidated network in marketing farmers outputs. As a result, the newly created shareholder company increased three times the production of processed fruit and vegetables totaling 600 tonnes for 2002.
- b. Two dairy businesses in Lushnja were assisted for improving/increasing milk production and breeding stock. Through contacts and negotiations with foreign suppliers and support via medium term credit of \$300,000, they were able to procure 300 heifers from Germany and Austria.
- c. A fresh vegetable greenhouse producer in Durrës was assisted in processing part of his prime season tomatoes. With some small equipment purchased from Italy he produced some sample quantities of tomatoes juice, tomato sauce for pasta, and tomato jam. These

products were sold through his outlets and generated revenues three times his 2001 income.

- d. A newly created agriculture input trade company (resulting from a merger of eight dealers) was assisted in drafting their partnership agreement, by-laws and operational procedures. Also, procurement expertise and foreign relations correspondence with overseas suppliers was provided to them during the second half of 2002. As a result, to date they have imported about 12,500 tonnes of fertilizers, and a database of some potential suppliers has become operational.

The Internet was used continuously to find world market prices for various agricultural commodities, equipment and inputs. Two other clients received training on Internet usage and have recently established their own Internet access.

### **Pool Resources**

The media and marketing components operate as pool resource for the activities performed by ACG teams. They continued to assist the ACG teams to perform their activities so that strategic objectives can be realized. The two components also offered assistance to individual clients based on their needs. Meanwhile, they collaborated with other components of the AAATA project to accomplish specific tasks.

### **Global Trade and Technology Network (GTN)**

The activities performed by GTN in Albania during the second half of 2002 to support the Project are as follows:

- a. GTN Albania participated in the second GTN Regional Conference held Croatia, on September 9-11, 2002. The conference was aimed at improving the work of the GTN program in Southeast Europe. GTN Albania gave a country presentation on the first day of the conference. GTN Albania also presented three leads during the B2B meeting with Croatian companies held on the third day of the conference.
- b. GTN Albania organized the participation of Albanian companies in the GTN Trade Mission to International Exposition for Food Processors (IEFP) trade show held in Chicago, Illinois on November 2002. This Trade Mission consisted of 21 Agribusiness companies, 3 of which were from Albania. The GTN Program offered these companies several services during the trade shows, including the opportunity to present their business among the world's biggest companies in the respective sectors. The Albanian companies received assistance in creating new linkages with potential partners.
- c. GTN Albania participated in three Regional B2B Events organized by the USAID Program Kosovo Business Support Project. The purpose and scope of these Roundtables is to provide the business communities from the attending countries with a first hand perspective on doing business throughout the Southeast Europe region.
- d. During the GTN SEE Regional Conference in Zagreb, GTN Albania and GTN Ghana agreed to work together on the possibility of exporting Albanian olive oil to African countries. GTN Albania started to work in this direction with the AOA, which is an

association that aims to encourage the development of practical business in the areas of edible oil production and marketing. AOA and GTN Albania will prepare and submit a Sell Opportunity for Albanian olive oil.

- e. GTN Albania assisted local companies to register in the system and submit trade leads. Twenty-four companies were registered, 15 of which were from the Agribusiness sector. At the end of 2002 there are 21 active trade leads in the system (14 of these trade leads are from the Agribusiness sector) that have generated 1,749 matches with the registered companies in the system, and 68 active Letters of Interest sent in response to these trade leads. Some of these contacts have a good potential to become successful deals in 2003.

## **C. Public Private Partnership (PPP)**

### **General Status**

In keeping with AAATA's role in helping facilitate appropriate government institutions to provide services that are a public good and which enable the private sector, AAATA has working based on MOU with the Food Research Institute (FRI) and Veterinary Research Institute (VRI) that was signed. The joint work between the project and these institutions, which have real capabilities in the scientific area, are to improve food quality and safety standards. The project works with the two public institutes to upgrade their testing and analysis levels, but also to improve the capability of the staff for the implementation of GMP/HACCP in the food processing plants. In this way the private sector trade associations and their members can benefit from higher quality and timely services offered by the Institutes.

In addition to this role, the project supports generally the public sector where it disseminates scientific information to agricultural specialists and the agricultural clientele: farmers and agribusinesses.

### **Summary of Objectives**

- 1. Support and develop research institutes and laboratories.**
- 2. Ensure and improve food quality and safety.**
- 3. Program liaison with agricultural public institutions and donors.**

### **Activities in Support of Objectives**

- 1. Support and develop research institutes and laboratories**
  - a. In December 2002 two specialists from FRI and four from the AAATA Project participated in a training conducted by TEI, Thessalonica, Greece. The training focused on rules, regulations of the EU in the food safety. Participants saw how GMP/HACCP is implemented in different food processing plants. This training improved specialist's skills so that they can better assist food processors in Albania. Discussions on a possible future MOU between TEI Thessalonica and KASH were held.
- 2. Ensure and improve food quality and safety.**
  - a. In December a workshop for the "Quality and Safety in Processing Fruit and Vegetables" was conducted. This was a collaboration between AAATA Project, FRI and HABA. The FRI analyzed 20 samples of processed fruit and vegetables. The results of those analyses indicated that Albanian producers have achieved significant progress compared with the last year. Participants in this workshop included five businessmen from processing fruit

and vegetable processing companies, five FRI specialists, four MOAF specialists, and three University professors. The participants discussed the quality and safety of processing fruit and vegetables; improvements achieved to date and future needs.

- b. During November, the PPP staff worked to prepare the materials for the workshop (noted above) “Quality and Safety in Processing Fruit and Vegetables.” They presented the materials during the workshop, responded to questions and provided advice on the improvements needed in processing.
  - c. Prepared materials on the basic principles of food hygiene that should be adhered to by food processing companies in their production processes. This information is being published in the *Agrobiznes* newsletter.
  - d. FRI performed 126 tests for microbiological, physio-chemical, oleic acids, and pesticide residues on several products for project clients.
- 3. Program liaison with agricultural public institutions and donors.**
- a. Several meetings were conducted with the Food Processing and Food Quality Control Directories of MOAF to work on the preparation of Codex Alimentarium for Albania.
  - b. In November 2002, the Project provided financial support for the 50th Anniversary of the Faculty of Veterinary, Agriculture University of Tirana (AUT).

### **Achievements Contributing to Result Indicators**

- a. Two specialists from FRI and four project staff were trained for GMP/HACCP and food safety rules in European Union.
- b. A workshop on “Quality and Safety of Processing Fruits and Vegetables” was held by the Project in cooperation with FRI .

### **Contributions Calculations for July 2002 – January 2003**

<b>What</b>	<b>Contribution</b>
FRI staff training	\$ 700
Workshop on Food Safety	\$ 1,100
FRI Specialists Time	\$ 2,000
Meeting with MOAF Directors	\$ 400
<b>Total</b>	<b>\$ 4,200</b>

## **D. Develop Credit Unions Anchored In Ag Trade Associations**

### **General Status**

During the July 2002-January 2003 period, the Project's Credit Union Unit (CUU) in collaboration with the Development Credit Savings Movement Albanian Foundation (DCSMAF) continued to develop the HABA and ANSPA credit savings associations. In addition to supporting credit associations of AAATA related agricultural associations, IFDC provides direct assistance to LOL's work to develop credit unions based in the women's dairy groups it has supported. During the period of this report, LOL provided development and on-going support to 14 credit unions consisting of 340 members (104) women with deposits totaling over \$20,000, and loans outstanding of \$13,000 at yearend 2002.

### **Summary of Objectives**

- 1. Assist in the development of safe, sustainable, quality credit unions serving agribusiness trade association communities.**

### **Activities in Support of Objectives**

- 1. Develop Safe, Sustainable, Quality Credit Unions Serving Agribusiness Trade Associations and their Communities. Help Identify and Mobilize Groups, Establish Procedures and Framework.**

**Focus:** Participate in ANSPA meetings to meet members, build a better understanding of credit unions and increase savings.

- The CUU, in collaboration with DSCAMF participated in ANSPA CU meetings with the purpose to increase individual savings.
- Two ANSPA Credit Savings Association (ACSA) Executive Council meetings were held during the reported period. These meetings focused on:
  - Reviewing routine activities
  - Examining the financial records of the AFADA Credit union
  - The new strategy to increase membership
  - The new strategy to increase savings
  - Loans approved
- Eleven ANSPA Credit Union Regional Promotional Seminars were held during October 2002.

- d. One meeting of the National Credit Union monitoring body was held during this period. Participants: 1 representative of the ANSPA Credit Union.

**Focus:** Develop the Loan procedures and training programs for the ACSA

- a. Procedures for accounting, budget and internal auditing
- b. Financial Performance Reporting Report
- c. Loans approved
- d. ANSPA Treasure Training
- e. All loans are constantly monitored to make sure that agreements are adhered to. When arrears occur members are notified immediately advising them to bring their accounts up to date.

**Focus:** Participate in HABA meetings to meet members and build a better understanding of credit unions philosophy

- a. Five HABA CU Executive Council meetings were held during the reported period. These meetings focused on:
  - Reviewing routine activities.
  - Examining the financial records of the ANSPA Credit union.
  - The new strategy to increase membership.
  - The new strategy to increase savings.
- b. One meeting of the National Credit Union monitoring body was held during this period. Participants: 2 representatives of the HABA Credit Union

**Focus:** Further develop and training programs for HABA Credit Union

- a. HABA Credit Committee training (beginner training).
- b. Participants: Credit Committee (three members).
- c. HABA Supervisory Committee (beginner training).
- d. Participants: Supervisory Committee (three members).
- e. HABA Credit Union Chairman training (beginner training).
- f. HABA Treasure training (beginner training).
- g. Financial Performance Reporting Report.
- h. Organizing Regional Promotional Seminar during November 2002 with all the members of HABA Association and the partners of the greenhouse business to increase membership and Savings. In total 135 participants attended these seminars.

### **Achievements Contributing to Meeting Results Indicators**

1. ANSPA CU stands at 205 members at the end of December 2002. Membership savings of ANSPA CU increased to the level of 1,190,000 lek = \$8,500.
2. HABA CU stands at 105 members in at yearend 2002. HABA Membership savings is 1,100,000 lek = \$7,857.
3. Six Loans were disbursed for HABA CU Members during the report period, with the value of loans issued amounting to 850,000 lek = \$6,071.

## Contributions Calculations for July 2002–January 2003

<b>What</b>	<b>Contributions</b>
ANSPA CU Executive Council Meetings (2x10 members)	\$ 1,000
ANSPA CU Members Savings	\$ 2,500
Training Program for ANSPA CU Regional Coordinators	\$ 200
ANSPA CU Regional Promotional Seminars (330 people)	\$ 16,500
HABA CU Executive Council Meetings (5x10 members)	\$ 2,500
HABA CU Members savings	\$ 3,000
Training Program for HABA CU Directors (3x4 people)	\$ 600
HABA CU Regional Promotional Seminars (140 people)	\$ 7,000
Savings of LOL Credit Unions	\$ 13,100
<b>Total</b>	<b>\$ 46,400</b>

## IV. Appendices

### Appendix A. Critical Clients List

#### AAATA Critical Clients List

No	Company Name	Owner Name	Location	Activity
<b>Dairy Processing</b>				
1	“Kozara”	Qemal Kozara	Lushnje	Dairy Processing
2	“Deltadon”	Edmond Gjata	Lushnje	Dairy Processing
<b>Meat Processing</b>				
3	“Meat Master”	Çesk Kimça	Shkoder	Meat Processing
4	“EHW”	Luan Leka	Tirane	Meat Processing
<b>Olive Oil</b>				
5	“Kapllani”	Lulzim Kapllani	Vlore	Olive oil
6	“Piku”	Petrit Piku	Elbasan	Olive oil
7	“Aliraj”	Pellumb Aliraj	Vlore	Olive oil
8	“Shkalla”	Shpresa Shkalla	Tirane	Olive oil
9	“Iljazi”	Rakip Iljazi	Sarande	Olive oil
10	“Alliu”	Festim Alliu	Vlore	Olive oil
11	“Ani”	Anastas Gjikondi	Vlore	Olive oil
12	“Ivap”	Valentina Postoli	Tirane	Olive oil
13	“Aruni”	Faik Aruni	Vlore	Olive oil
14	“Borshi”	Ylli Hajdini	Tirane	Olive oil
15	“Sipol”	Petrit Telegrafi	Tirane	Olive oil
16	“Jal”	Robert Kasneci	Tirane	Olive oil
17	“Bekleen”	Qani Qalliu	Elbasan	Olive oil
18	“Papagjika”	Agron Papagjika	Sarande	Olive oil
<b>Poultry/Egg Producers</b>				
19	“Floryhen”	Sefedin Cengo	Peshkopi	Poultry/egg Producer
20	“Aiba”	Igli Çela	Durres	Poultry/egg Producer
21	“AgrooZoo”	Igri Sinani	Fier	Poultry/egg Producer
22	“Hoxha”	Qemal Hoxha	Tepelene	Egg Producer
23	“Ferizaj”	Shefqet Ferizaj	Kavaje	Egg Producer
24	“Cenga”	Sefedin Cenga	Diber	Poultry/egg Producer
25	“Hysgjokaj Group”	Guxim Merko	Lushnje	Poultry
26	“Elvis”	Myftar Çela	Shkoder	Poultry/egg Producer
27	“Driza”	Hiqmet Driza	Patos, FR	Poultry
28	“Eralba+E	Ethem Bitaj	Fier	Poultry

<b>Horticulture &amp; Greenhouse</b>				
29	“Shpiragu”	Kristaq Gallani	Berat	Fruit and vegetables processing
30	“Sema”	Agim Sema	Lushnje	Greenhouse
31	“Albkonserva”	Xhovani Gallani	Lushnje	Fruit and vegetables processing
32	“EN & ZY”	Enver Ferizaj	Kavaje	Fruit and vegetables processing
33	“Redi”	Qani Gjylsheni	Kavaje	Fruit and vegetables processing
34	“”Backa”	Petrit Backa	Fier	Tomato processing
35	“Koçi”	Agron Koçi	Elbasan	Fruit and vegetables processing
36	“Bujqesia”	Engjell Jazxhi	Tirane	Horticulture
37	“”Alfa Romeo”	Fatmir Kallbaqi	Durres	Greenhouse
38	“23 Korriku”	Irakli Kola	Lushnje	Greenhouse
39	“Goxhaj”	Liljana Goxhaj	Tirane	Greenhouse
40	“Vitalba”	Hajdar Kuci	Tirane	Greenhouse
41	“Koço”	Lili Koço	Lushnje	Greenhouse
42	“Teta”	Riza Teta	F. Kruje	Greenhouse
43	“Hysgjokaj Group”	Zabit Sharka	Lushnje	Greenhouse
44	“Xhunga”	Todi Xhunga	Lushnje	Greenhouse
45	“Agrokoni”	Ruzhdi Koni	Tirane	Trader
46	“Lico”	Ali Lico	Sarande	Greenhouse
47	“ISAK”	Ismail Sinani	Sarande	Greenhouse
48	“Tabaku”	Abdyl Tabaku	Hysgjokaj	Greenhouse
49	“Sharra”	Elham Sharra	Vlore	Greenhouse
<b>Fish</b>				
50	“Mani”	Hysen Mani	Sarande	Fish Processing
51	“Hydra”	Arjan Palluqi	Tirane	Fishing
52	“Guras”	Mihallaq Shegani	Pogradec	Fishing
53	“Hysgjokaj Group”	Petrit Daullja	Lushnje	Fish Farm
54	“Belshi Group”	Met Hoxha	Elbasan	Fish Farm
55	“Ek Korani”	Petrit Llakmani	Pogradec	Fish Farm
56	“Luca”	Viktor Çela	Delvine	Fish Farm
57	“Hysa”	Gjergj Hysa	Shkoder	Fish Farm
58	“Topalli”	Kujtim Topalli	F. Kruje	Fish Farm
59	“Shezairi”	Besnik Kadia	Lexhe	Fish Farm
<b>Herbs and Spices</b>				
60	“AlbDucros”	AlbDucros	Tirana	H&S exporter/processors
61	“Filipi Co”	Filip Gjoka Kujtim Zere	Laç	H&S exporter
62	“Liperi”	Ulijam Liperi	Durres	H&S exporter
63	“Gurra Sh.p.k”	Mehmet Guga	Tepelene	H&S exporter
64	“Xherdo Company”	Xhevit Hyseni	Skrapar	Processor
65	“Galen”	Alfons Cico	Shkoder	H&S dealer
66	“Likaj”	Ramadan Likaj	Shkoder	H&S dealer
67	“Daci”	Arif Daci	Tirana	H&S dealer
68	“Cupi”	Preng Cupi	Lezha	H&S processors

## Appendix B. Contribution Calculation

### Contribution Calculation For July 2002 – January 2003

Component	Amount \$
<b>I. Agribusiness Institutional Strengthening</b>	
KASH	
3 KASH board meetings	5,400
Meeting of regional chairmen and coordinators	1,000
Participation in the Poznan Trade Fair	2,000
Sponsorship for Tirana Trade Fair	1,700
2 KASH Regional Meetings	47,750
KASH National Conference	15,325
Parliamentary committee visit to Kosova	3,600
<b>Sub-total</b>	<b>76,775</b>
BKFSH	
Board Meetings	170
BKFSH General Meeting	400
Public Hearing	1,000
<b>Sub-total</b>	<b>1,570</b>
ABMC	
Four Association Board Meetings (ABMC members)	2,990
Three Association Annual Meetings (ABMC members)	12,260
AFADA Regional Meetings	11,000
Site Visits	6,800
Trade Missions	85,150
ABMC Budget	93,657
Total Budget of Seven Associations	22,892
<b>Sub-total</b>	<b>234,749</b>
KEA	
KEA Board of Directors Meetings	4,000
Round table discussions	3,500
Time spent for preparing “Tribuna e Ekspertit” magazine	3,800
National Seminar on Olive Oil Industry	4,250
Two seminars on competitive analysis	2,000
<b>Sub-total</b>	<b>17,550</b>
<b>Total I</b>	<b>330,644</b>

## II Agribusiness Development

### ACG

Site visit to clients (210 x \$ 100)	21,000
New self investments	2,975,000
Disbursed Loans	1,200,000
Trade Credit	910,000
Business Plans (10)	1,000
2 Israeli mobile courses	1,440
AFPA trainings	310
ANSPA trainings and field days	2,400
Seminar on "Quality Improvement, Marketing, and Micro and Macro-analytical Testing" with ASHTA members	7,872
2 meetings of Board of Directors of ASHTA	1,600
Meetings with Institutions Representatives	1,000
<b>Sub-total</b>	<b>5,121,622</b>
<b>TOTAL II</b>	<b>5,121,622</b>
<b>III PPP</b>	
FRI staff training	700
Workshop on Food Safety	1,100
FRI Specialists Time	2,000
Meeting with MOAF Directors	400
<b>Sub-total</b>	<b>4,200</b>
<b>TOTAL III</b>	<b>4,200</b>
<b>IV Credit Unions In Ag Trade Associations</b>	
ANSPA CU Executive Council Meetings (2x10 members)	1,000
ANSPA CU Members Savings	2,500
Training Program for ANSPA CU Regional Coordinators	200
ANSPA CU Regional Promotional Seminars(330 people)	16,500
HABA CU Executive Council Meetings(5x10 members)	2,500
HABA CU Members savings	3,000
Training Program for HABA CU Directors (3x4 people)	600
HABA CU Regional Promotional Seminars(140people)	7,000
Savings of LOL Credit Unions	13,100
<b>Sub-total</b>	<b>46,400</b>
<b>Total IV</b>	<b>46,400</b>
<b>Contributions Total</b>	<b>5,502,866</b>

### Notes

#### Origin of Contribution Determination

The parameters of assessing contributions were determined in a meeting of USAID officers and contractors in Ohrid, Macedonia in 1999. The meeting took place in Ohrid because of the second evacuation of 1998/99. Positions on this varied. IFDC thought that concrete financial indicators, institutional loans and trade credits, would be appropriate given the real money provided by U.S. taxpayers. This position was based on several years of liaising with both

state and private banks and suppliers of equipment and commodities. However, other opinions were voiced taking into consideration factors other than business indicators: time contributed by attending meetings and trainings and self-investment in business. These latter recommendations were addressed to the situation of the smallholder farmer and others in Albanian society not having much financial means. IFDC, recognizing this, agreed acknowledging that farmers and businessmen by taking time away from their livelihood were contributing to USAID projects.

Thus, besides the contributions in terms of finance provided by lenders to clients and trade credit, other measures are used including participation in trainings and meetings and self-investment. This tends to inflate figures in monetary terms but there is right in the principle established in Ohrid that people not only risk money in bettering their business but there is an opportunity cost of time. The rates established at Ohrid for time were based on real differences in the market value of time. On this point, it perhaps would be inappropriate to compromise though there are truly justifiable differences on the value of time. Reporting is not meant to be a philosophical document so AAATA is following the 1999 guidelines.

## **Appendix C. KASH National Conference Resolution**

Tirana, November 1, 2002

The second National Conference of Albanian Agribusiness Council was organized in the framework of the National Conference “Agriculture and Agricultural Sciences from Transition toward the European Integration”, which was held at the Agricultural University of Tirana from October 31 till November 1<sup>st</sup>, 2002. Via this activity KASH managed to attract the attention of the main players of agricultural policies in Albania. The second National Conference of KASH analyzed its work during one year and approved these future objectives:

### **I. Objectives**

#### **1. For Organizational Strengthening**

- a. The conference approved changes in the bylaws of KASH, changes that foresee the inclusion of the regional leaders in the national board as well as the possibility of extending the membership.
- b. The conference supported the work done for the strengthening of the regions and decided to open a campaign for the collection of necessary funds required to buy KASH offices in Tirana.
- c. To start the work for organizing the Albanian agribusiness trade fair in Spring 2003.

#### **2. To increase International Activity**

- a. To work intensively so that agribusiness association members move easily everywhere in the world.
- b. To recognize KASH as an institution with the right of issuing the verbal note for purposes of traveling outside the country. To give mission passports for the presidents of associations members of KASH.
- c. To work for the establishment of an agribusiness forum for southeast Europe.
- d. To increase the participation in international fairs as the Berlin Fair in January 2003.

### **II. Requests to the Government**

#### **1. For the Free Trade Agreements**

The Conference supported the process for the regional and European integration and recommends to the government that especially for agriculture and food, the scientific research institutes as well as the private sector should be included more extensively. The further liberalization of Free Trade should be on the basis of better knowing the international markets and building special strategies for reaching those markets.

## **2. For the Fiscal Package 2003**

- a. **Changes in-Law no. 7928, date 27.4.1995 "For the Value Added Tax."**
  - Actual level of VAT in Albania is the highest in Europe; we request that VAT is reduced.
  - We ask that VAT is lower for agribusiness.
  - VAT should be removed from agricultural inputs.
  - VAT should be reimbursed for the raw material used in agricultural processing industry.
- b. **Changes in law no. 8560, date 22.12.1999 "For taxation procedures in Albanian Republic"**
  - Article No.36 of the law should be abrogated as it allots space for arbitrary in the tariffs organs.
- c. **Law no. 8438, date 28.12.1998 "For tax on income."**
  - Article 30 of this law and the respective rules are not exercised by the tariffs administration, which uses arbitrary methods purposely.
- d. **Draft law: "For excises in the republic of Albania"** should foresee the removal of this tax for fuel used in agriculture and fishery as well as putting less taxes for the other local products.

## **3. Other requests of KASH addressed to the Government are:**

- a. Create guarantee funds for crediting agribusiness as well as extend the programs for the support of Credit Unions.
- b. Increase the level of checking services for food. Accept KASH as member of National Food Board.
- c. Guarantee total transparency during all the process of compiling laws and articles as well as during the usage of public funds in the fields covered by KASH.

The Second National Conference put in charge the national board, President and Executive Director for following the continuity of these objectives as well as their realization.

### **For Albanian Agribusiness Council**

**Agim Rrapaj**  
**President**

**Zydi Teqja**  
**Executive Director**

## Appendix D. KASH National Conference Agenda

### KASH National Conference November 1, 2002

#### Conference Room Faculty of Forestry Sciences

- 09:00-10:00** Registration
- 10:00-10:10** Opening speech  
*Z. Teqja, Executive Director of Agribusiness Council of Albania*
- 10:10-10:30** Report on Agribusiness Council Activity  
*A. Rrapaj, President of KASH*
- 10:30-11:00** Welcome remarks by Honored Guests
- 11:00-11:10** Free Trade Agreements: Position and role of Agribusiness Council  
*I. Beka, A. Rrapaj, Z. Teqja*
- 11:10-11:20** Policy Analyses Matrix. Measurement of competitiveness and comparative advantages.  
*Sh. Agolli, A. Cipi, M. Mance*
- 11:20-11:30** The project “Increase of Food Production” 2KR. Conclusions regarding agricultural mechanization.  
*A. Rrapaj*
- 11:30-12:00** Coffee Break
- 12:00-12:10** Agri-tourism sustainable development. Dilemmas for “Natural Park PRESPA” development.  
*A. Bexholli*
- 12:10-12:20** SWOT analyses for Albanian Agriculture  
*Y. Bicoku, Sh. Agolli*
- 12:20-12:30** Marketing and the consumer  
*S. Gjergji, E. Mali*
- 12:30-12:40** SWOT analyses for fishery in Albania  
*A. Flloko*
- 12:40-12:50** Agribusiness, welfare and fiscal policies which help its development  
*A. Binaj*
- 12:50-13:00** Olive oil industry in Albania. The analyze of marketing, competitiveness and technology  
*A. Gjyrezi, A. Cipi*
- 13:00-13:10** Development of greenhouse sector in Albania. Opportunities for future development  
*A. Balliu*
- 13:10-13:30** Questions and discussions
- 13:30-14:00** Discussions and approval of the Resolution of the Conference
- 14:30** Lunch