

Study of best practices and potential of participation of the smallholders in the short value chains in the Western Balkans region and Turkey

Interim Meeting

REPORT



13 – 14 February 2020

Milloshëv, Kosovo*

* *This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence*

1. Introduction

The interim meeting for the project “Study of best practices and potential of participation of the smallholders in the short value chains in the Western Balkans region and Turkey” gathered 8 participants who will be directly involved in implementation of the project activities. Unfortunately, the corona virus outbreak restricted international air travel, so that the international expert (Judith Mollers), the expert from Turkey (Ahmet Ali Koc), as well as JRC representative (Federica Di Marcantonio) joined via Skype, while DG AGRI representative (Iwona Lisztwan) sent her comments via e-mail. The Junior Researcher from Albania (Etleva Thimo) called in sick. The list of participants is provided in **Annex 1**.

The purpose of the interim meeting was to discuss the interim report, as well as the technical details for performing the survey and conducting the analysis. The program of the meeting is in **Annex 2**.

2. Interim report

Completed activities thus far are:

- Kick-off meeting
- Description of the areas to be studied, structure of the market and current and potential high-value niche products in short-supply channels versus other sale channels
- Semi-structured questionnaire design and translation
- Testing of the semi-structured questionnaire (31 interviews in total)
- Amended questionnaire, approved by JRC

The upcoming activities include:

- Implementation of semi-structured surveys (total of 400)
- Analysis of best practices and potential of participation of the smallholders in the short-value chains in the Western Balkans region and Turkey
- Final meeting
- Presentation of the final results at the Agricultural Policy Forum 2020.

The presentation is provided in **Annex 3**.

3. Description of the areas to be studied, structure of the market and current and potential high-value niche products in short-supply channels

Existing and potential selling channels have been identified including, but not limited to: on-farm direct sale ('Pick-your-own' systems, own agritourism); Delivery (direct delivery to homes of final consumers, box schemes/internet selling, solidarity purchasing groups); Markets (street market, local farmers' markets, urban farmers' market); Own processing (the crop was processed on the farm before selling); Small businesses (local small shops, local processors or gastro businesses, urban gastro businesses); Farmers' organisations (cooperatives, producer organizations, other farmers' groups/associations/unions); Long supply chain buyers (agri-food industry, traders/wholesalers and exporters);

Current and potential high-value and niche products have been identified including, but not limited to:

- Vegetables (peppers, tomato, olives etc)
- Fruits (plum, raspberry, apple etc.)
- Milk (goat, sheep & cow's milk)
- Meat (mutton/lamb, goat kind and calve)
- Fish and molluscs (aquaculture)
- Mushrooms
- Herbs
- Vegetable preserves (ajvar, sour preserves, preserves in oil, brine etc.)
- Fruit preserves (dry fruit, jams, juices and sweets/organic or conventional)
- Traditional dairy products made of raw milk (ripened white cheeses in brine and hard yellow cheeses, milk cream etc.)
- Fresh, roast-ready or traditional dishes, dried and/or smoked, from autochthonic breeds)

They will be further analysed through the data collected from primary and secondary sources. The presentation is provided in **Annex 4**.

4. Report from the pre-testing of the semi-structured questionnaire

The interviewers reported that they did not experience major problems during the testing phase. Technical issues with the electronic application were reported and consequently measures were taken to resolve them. The main remark was the length of the interview, sometimes resulting in decreasing focus of interviewees. Question related to income was also mentioned as a bit tricky, since interviewees tended to be reluctant to answer or unprecise. Among others, advice was given how to avoid lengthy political discussion or at least postpone them to the end of the interview.

5. Amended questionnaire based on the pre-testing report

As a result of the reports from the testing phase additional explanations were provided in a couple of questions and the questionnaire was slightly shortened. The final version was approved by JRC as part of the interim report. The presentation is provided in **Annex 5**.

6. Technical details on implementation of the semi-structured surveys

Senior Researcher provided instructions on the implementation of the semi-structured surveys. Respondents should be mainly small farmers and groups of farmers. The focus should be open when it comes to specific sub-sectors, i.e. the interviews should cover all relevant subsectors, with the intention to discover ones with the highest potential for short value chain development. Still, in order to achieve some statistical significance of the results some recommendations were provided to the interviewers regarding the minimal number of questionnaires for certain categories of products (with potential for short supply chains). Also, it was recommended that isolated cases of good short supply-chain practice should not be ignored but noted as special cases with potential to be replicated.

The number of interviews per country will be as follows:

Country/territory	Number of respondents
Serbia	136
Bosnia and Herzegovina	68
Albania	68
North Macedonia	38
Kosovo*	38
Montenegro	26
Turkey	26
TOTAL	400

The presentation is provided in **Annex 6**.

7. Draft outline of the Analysis of best practices and potential of participation of the smallholders in the short-value chains

The Analysis will have the following content:

- I. Methodology
 - General approach to the identification of good practices
 - Selection criteria for specific products
 - Mapping of the value chain
- II. Results
 - Good practices identified
 - Value chain analysis for the selected products
- III. Development options & future trends
 - Business environment concerns
 - The actions of competitors
 - Changes in consumer demand (changing tastes, health preferences)
 - Social requirements and expectations (e.g. to operate in an ethical way or environmental concerns e.g. risks)
 - Legal changes (legal requirements. e.g. what is legally expected)
 - Changes in technology (technological constraints – availability of technologies)
 - Changes in the economic environment (purchasing power, poverty etc.)
- IV. Conclusions
 - Small farms and short supply chains in West Balkans and Turkey
 - SSC good practices per country
 - Relevance of the practices for the region (including similar practices or initiatives region wide)
- V. Recommendations
 - Possibility for dissemination (comparison in different business environments)
 - Recommendations per country, including policy recommendations on specific measures that should be taken to promote short supply chains under IPARD

The presentation is provided in **Annex 7**.

8. Detailed workplan

Task	Activity	Who	Deadline Green = completed
1,2,3,4	Participation in the kick-off meeting	All	28-Nov-19
2	Design of the semi-structured questionnaire and guidelines	SR, IE	9-Jan-20
2	Improve semi-structured questionnaire according to JRC comments	SR, IE	26-Jan-20
2	Introduce JRs with questionnaire and guidelines (online workshop)	SR, IE	30-Jan-20
2	Translate the questionnaire in local languages	JRs, ET	3-Feb-20
2	Pre-testing of the semi-structured questionnaire	JRs, ET	7-Feb-20
2	Provide report from the pre-testing of the questionnaire	JRs, ET	13-Feb-20
2	Amend the questionnaire based on the pre-testing report	SR, IE	19-Feb-20
1	Description of the areas to be studied, structure of the market and current and potential high-value niche products in short-supply channels versus other sale channels	SR, IE	23-Feb-20
1,2,3,4	Interim report	SWG	26-Feb-20
1,2,3,4	Participation in the interim meeting	All	9 – 11 Mar-20
3	Implementation of semi-structured surveys	JRs, ET	30-Apr-20
3	Provide summary report of the semi-structured interviews in English for each surveyed respondent	SR, IE	10-May-20
4	Analysis of best practices and potential of participation of the smallholders in the short-value chains in the Western Balkans region and Turkey	SR, IE	1-Aug-20
1,2,3,4	Final report	SWG	1-Sep-20
1,2,3,4	Participation in the final meeting	SWG, SR, IE	15-Sep
1,2,3,4	Presentation of the findings in the Agricultural Policy Forum 2020	SR	Oct-20

SR – Senior Researcher

IE – International Expert

JRs – Junior Researchers

RT – Researcher from Turkey

Important Note: the workplan is subject to change related to the situation with the corona virus outbreak. The field work is more likely to be delayed considering the strict restrictions to move in the region.