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Horticulture Promotion in Kosovo (HPK) Helvetas Swiss Intercooperation (HSI) Component

Annual Report January – December 2012



Pristina, March 2013



HELVETAS
Swiss Intercooperation

KOSOVO

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List of Abbreviations

ARDP	Agriculture and Rural Development Plan 2009-13, revised Sept. 2010
APF	Administrated Project Funds
BIC	Business Idea Competition
B2B	Business to Business
CC	Collection Centre
CFH	Competitive Fund for Horticulture
GiZ	Deutsche Gesellschaft fuer internationale Zusammenarbeit
GoK	Government of Kosovo
EYE	Enhance Youth Employment; project funded by SDC, implemented by HSI
HPK	Horticulture Promotion in Kosovo
HSI	HELVETAS Swiss Intercooperation
HSIK	HELVETAS Swiss Intercooperation Kosovo
HQ	Headquarters
IP	Integrated Production
IR	Intervention Report
KCC	Kosovo Chamber of Commerce
KIA	Kosovo Institute for Agriculture
MAFRD	Ministry of Agriculture, Forestry and Rural Development
MFA	Ministry of Foreign affairs DK
MoU	Memorandum of Understanding
NOA	New Opportunities in Agriculture; US-AID project 2012-15
PIU	Project Implementing Unit
ProDoc	Project Document
PO	Project Officer
PM	Project Manager
RI	Riinvest Institute for Development Research
SCO K	Swiss Cooperation Coordination Office Kosovo
SFH	Special Fund for Horticulture
S4RE	Skills for Rural Employment; HSI funded project 2013 - 15
VET	Vocational Education and Training
YEP	Young Entrepreneurship Programme; US-AID project
YPO	Yearly Plan of Operation

1 Basic Information

Country: Kosovo	Name of project:
SDC No SAP: 7F – 01204.05.01	Horticulture Promotion in Kosovo – HPK-HSI
Domain of Cooperation Strategy: Economy and Employment	HELVETAS Swiss Intercooperation Component

Goal	The horticulture agribusiness sector generates sustainable and broad-based employment and income for its actors and contributes to economic growth
Project purpose	Key value chains are competitive and sustainable and are underpinned by an effectively organised sector based on wide representation.

Project phase duration: 01.01.2010 – 31.12.2012	Reporting period: 01.01.2012 – 31.12.2012
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Budget phase 2010 -12 (CHF) 5'870'411	Budget 2012 (CHF) 1'802'495
	Expenditures 2012 1'747'942 (97%)

Information on contributions of partners and/or other donors (calculated in CHF):
 HPK is co-funded by SDC and the Ministry of Foreign Affairs, Denmark (MFA DK)
SDC CHF 2'726'411; MFA DK D Kr 19'147'565 (= approx. CHF 3'144'000)

Implementing organisation: Intercooperation			
Main national partners	Private market actors: Input providers, producers, processors, traders/retailers; ETC, CC. Producer associations, consultants & advisers MAFRD University of Pristina	Main international partners	Tetra Tech/ARD, USA, (subcontract for implementation USAID NOA program) YEP (Young Entrepreneurship Programme - USAID) MEST/Danida, KPEP, GiZ NADEL (Impact Study) Consultants (regional/Intl.)

Project coordinator: Mr. Heini Conrad	Number project staff	Expat: 2 (140%) National: 9 (2 part time)
Internat. consultant (days): 82 (80 planned)		
Regional consultant (days): 39 (60 planned)		
National consultant (days): 74 (100 planned)		

2 Executive Summary

HPK project closed by the end of the year after 12 years duration; in 2012 project was focusing on three main tasks: Consolidation, Capitalization and Closure.

Consolidation: Project activities are completed and have been winded up. Using mostly the private sector approach most of activities are now in the hands of the market actors and will be continued. Knowledge was transferred to them; whereas some interventions in IP, formalizing business systems and quality standards will be continued by NOA project. Knowhow and data in on farm accounting have been transferred to the economic analysis unit of MAFRD. At the end of phase V, measured by the set outcome indicators, HPK has achieved most of the set targets and even exceeded some. Management's self evaluation of achievements is satisfactory to very satisfactory.

Capitalization: Internal and external reviews were carried out to capture the rich experience of the project. The project team evaluated the experiences in the major areas of intervention; the results and lessons learnt are summarized in 8 Intervention reports and 2 case studies that have been published. In addition two videos illustrate current state of horticulture sector and the history of the project. 3rd impact study was completed and data interpreted. The study shows that income of the project beneficiaries has increased and productivity is higher compared to 2010 data. The external review on systemic changes in the sector concluded that there is strong evidence of change triggered by the project in relevant areas of the horticulture market system. Some issues remain to be tackled, mainly in up grading quality and formal business management. In his conclusion the consultant stated; 'HPK made significant contribution to better functioning market ... and demonstrate viable business models in aggregation ..'.

Closure: Implementation of grant projects was completed; in 2012 HPK disbursed 12 CFH grants for a total of € 386,400 leveraging over € 1 Mio total investments in the sector. In the Business Idea Competition (BIC) grants scheme for VET agrischool graduates 15 small grants projects were awarded and implemented. Monitoring and handing over of assets of all 2010/11 CFH grants was done. The closing event was well attended by representatives of public entities, partners and stakeholders highlighting the broad recognition the project has gained over the years.

Administrative closure of project was, thanks to extra efforts of the whole team, finished in time and the project assets handed over to other SDC projects. The management of project funds was well done; expenditures totalled to 97 % of budget.

Project management: 2012 was challenging year for the management; while staff was further reduced all activities were winded up and the team kept aligned and focused. Tasks were finished and team's spirit was high till the end of the project. All HPK staff found new employment perspective. This is testimony of the high professional competences of the local staff; together with the achieved results the local competences that have been created in the project is an outstanding contribution of HPK to enhance local capacities.

In parallel to the closure of HPK, new opportunities have come up and HSI in consortium with local partner did win the EYE project focusing on youth employment. Pproject manager oversaw and strategically accompanied the preparation of EYE project which started by mid June.

At the end of a long-lived project which allowed all involved parties to learn a lot, to develop and test new approaches gratitude is extended to all partners and the team for their commitment and excellent collaboration.

3 Background

3.1 Context

The *agricultural year* 2012 was difficult climatically with rainfall much below average. This had impact on the production; harvested quantities, specifically for the wild harvested berries and mushrooms and for top fruit like apples, were very low. Vegetable production was less affected as long as modern techniques were applied (drip irrigation, greenhouses). Prices overall were good and above average.

The support framework of the sector saw in general positive developments; MAFRD in line with the ARDP targets and with a higher budget has stepped up its activities in different areas (e.g. product aggregation concept with 3 big Collection Centres, extension services, establishment of economic analysis department). Also the donor support through the Ministry has increased with new grant schemes from World Bank and EU.

3.2 Project

The HPK project closed by 31.12.2012 after 12 years duration was the longest running project in rural development in the country. This allowed the project to apply a unique mix of approaches during its life span. In the beginning the production side of the sector was strongly emphasized, after it has gradually moved to more market sided approach in the upper value chain. At the end of the project the sector has considerably changed and looks much more promising then what existed in 2001.

This report is focusing on the last 6 months of 2012 distinguished with main activities in capitalization and closure of the project.

Capitalization: The efforts to capture part of the rich experience of the project were intensified over the last months and included internal and external review.

Internal review/capitalization: The team focused on important intervention areas describing the project's approach, the results and lessons learnt in 8 Intervention Reports (IR). Areas reviewed were: Product Aggregation; CFH grants; IP and Advisory Services; Contract Farming Partnerships; Vegetable Nurseries, Quality Standards, Apple and NWFP value chains. The IR's were published in an attractive layout. In addition to the IR's 2 case studies on the HPK support of the Kosovo Institute for Agriculture and IP Pest Management were published. Two videos were produced; "HPK: Highlights of 12 year project work", a selection of best clips from the media coverage of the project; and 'Creating Income and employment in the horticulture sector of Kosovo' presenting the sector's current state and portraying some of our partners. All materials have been widely distributed to donors, partners and stakeholders, they are available on the HPK website¹ as pdf downloads and in Youtube².

Impact: The impact survey was carried out in October/November. Data was collected from more than 230 direct and indirect beneficiaries with the help of local enumerators. This 3rd impact survey allowed now to compare some indicators over the 3 years of this last phase. The income data confirm that beneficiaries' average income did increase by 19 % and is higher than of the non beneficiaries group. The productivity has increased thanks to the production techniques introduced by HPK in the key value chains. There is evidence that in different fields the introduced new practices are now copied and also taken up by non beneficiaries which is a clear indication of system change triggered by the project.

Systemic change: The project has mandated Marshall Bear, an experienced M4P expert, with an external review and reflection of the projects achievements focusing mainly on systemic and sustainable changes in the market system. The report compares in 7 relevant areas the adoption of change in the last 3 years and evaluates where in the system HPK's

¹ www.helvetas/ks.org

² <http://www.youtube.com/channel/UCCYLH7e92t25JQXLtYTegSw>

interventions in product aggregation have fostered systemic changes. The areas of measurement were: Lowering transaction cost; better information flows; faster adoption of tech/know-how; formalization of business practices, financing cash flow gaps in trading, rightsizing investments and upgrading quality. In five areas Bear finds strong evidence of systemic change which was triggered by the project where as the areas of formal business management and up grading quality do yet not show much uptake of change. Bear concludes: "These past 12 years HPK with SDC and Danish Government support have made significant contribution to a better functioning Fresh Fruit and Vegetable market; its prior work in agriculture production was a major factor in being able to demonstrate viable business models in aggregation in the short period of three growing seasons." The full report³ is available on the web.

Closure activities: Most of the activities besides the capitalization exercise were related to the winding up of activities at the end of the project and its administrative closure.

The *implementation of grants* was concluded by the end of 3rd quarter, thanks to the careful planning also the difficult cases could be closed in time. In total 27 grants have been implemented (12 CFH/SFH fund projects and 15 BIC awards) in 2012. What remains to be done is the monitoring and handing over of 2012 CFH/SFH grants; HSI and SCOK have agreed that this monitoring shall be carried out by HSI by mid 2013.

Phasing out: The approach based on market actors and private sector development allowed the project to discontinue most of its activities. "The sector's main players – farmers, inputs supply companies, traders, retailers and now commercially oriented aggregators – have access to information, technology, know-how within the value chain and more widely within the region. " (Bear; page 19) The core frame work has been set; this leaves us relatively confident as to the chances that project partners will stay in the market and increase their competitiveness.

Transfer of knowledge: What remains to be tackled are some of the so-called soft issues, namely issues of management and formal business practice. To this it can be reported that HPK could conclude with NOA some arrangements which allow transferring and continuing activities in the fields of IP, formalizing business systems and quality standards. This has already started in 2nd half of 2012 it with short term technical support delivered by Basri Pulaj and Stuart Pettigrew. Some assignments will be continued in 2013 and can ensure that the project knowledge in crucial areas for the sector development is pursued. Similarly knowhow and data in on farm accounting have been transferred to the newly formed economic analysis unit of MAFRD.

Enhancing local competences: Over the years HPK has accumulated rich knowhow and knowledge in various fields of activities. These competences and skills, owned by the local staff, are in high demand in Kosovo. All HPK staff has found continued employment either in other projects of international and local organization or in new HSI projects funded by SDC or HSI own funds. This can be considered as one of the major achievements of HPK besides other achievements reported here.

Closing event: On 23rd of November a joint closing event of HPK was held in Hotel Emerald; over 200 persons (donors, representatives of public entities, partners and stakeholders) attended the event; the high participation highlighted the importance and appraisal HPK has gained over the years. Blerand Stavileci; Minister of Agriculture expressed it as follows: "This project is considered by everybody and from our institution as well as one of the most important and successful projects. There are many visible results." (HSI Video: Highlights of 12 years of project work⁴)

³ Aggregation and its effects on Kosovo's Fresh Fruit and Vegetable Market System; Marshall A. Bear, November 2012

⁴ <http://www.youtube.com/watch?v=GM1GCIKwnwU>

4 Results Reporting per Outcome

Our reporting is referring to the revised Log Frame as presented and shown in Annex 1. The progress made in 2012 is given on the level of each Outcome Indicator and compared with the target set for the end of phase (2012). Results are presented as either the 2012 result only or as a cumulative total for the phase, depending on how the target has been defined. The method of reporting is made clear under each Outcome Indicator.

4.1 Outcome 1: Quality Goods and Services

Outcome 1	A set of quality goods and services (inputs, machinery, business services, finance, training, advice, information) is in place and affordable to the actors in the sector
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Table 1

Outcome Indicators (OCI)	Baseline 2009	Achievement 2010	Achievement 2011	Achievements 2012	Target End of Phase 2012
OCI 1.1 Improved packages of technologies for <u>key</u> value chains established and use documented.	0	7	8	8	5
OCI 1.2 Number of producers adopting IP (Integrated Production) in key value chains	51	117	400	380 ⁵	250
OCI 1.3 Service providers providing quality advice in 3 sub sectors (production, financial and post harvest)	n/a	22	18	20 ⁶	30
OCI 1.4 Input suppliers providing quality advice	3	10	6	6	7
OCI 1.5 Producer groups co-financing advice to at least 50% of costs	0	8 (50%) 4 (25%)	18 (50%)	21 (50%)	30

Outputs (OP) related to Outcome 1

Outcome 1 specific outputs are:

OP 1.1 Improving the quality, quantity and continuity of supply of local fruit and vegetables

OP 1.2 More actors participating in the formal economy and have access to financial services

OP 1.3 Integrated production is accepted standard for all HPK supported production activities

HPK has continued to support improving supply of 7 main crops through co-financing advisory services. Crops included in this activity are apples, strawberries, tomatoes, peppers, cucumbers (plus gherkins), onions and cabbage.

20 advisors are currently active (including nurseries providing embedded services) delivering

⁵ This includes 340 fruit and vegetable farmers supported by HPK, 30 supported through a joint initiative with the USAID project, NOA and 10 strawberry farmers privately contracting an advisor. Additional farmers may also be adopting IP outside of the HPK program.

⁶ Service providers include advisers and nurseries providing embedded advisory services – in 2012 there are 16 advisors and 4 nurseries actively providing advisory services

advisory services; they have increased the number of farmers they collaborate with and deliver more advisory days, also for other projects. 10 strawberry farmers are paying for advisory services with no co-financing from HPK, and some vegetable farmers have contracted additional days. There are a further 6 input suppliers providing specific production advice as well. In 2012 regional consultants were engaged to assess the skills and capability of the advisors to evaluate the quality of their services. The consultancies included meetings with users. Overall findings are positive, reports and recommendations have been shared with advisors and other actors.

In 2012, the project has introduced with 6 collection centres an innovative scheme of pre-financing inputs against later delivery of contracted quantities. HPK has co-financed 48 % of inputs (mainly vegetable seeds) and the producers repaid the inputs supplying agreed quantities of products. A total of 123 farmers participated and the results were excellent; repayment was 100% and production from the supported inputs was higher than estimated. Farmers supplied 5,731 tonnes of various crops which represented 93% of the total volume collected by the 6 centres. This as a result of improved information flow and increased trust between producers and collection centres. All centres have indicated they would like to continue this collaboration further.⁷

HPK made efforts to encourage and persuade market actors to operate within the formal economy. Requirements and benefits of formal business practices were explained in the brochure 'Agriculture as a business'. Basic requirement of project for all cooperation with partners was to use correct invoicing, to register the business and execute all payments via bank account instead of cash. Further support in managing their business better through adopted software, proper accounting and other services were offered, but the response was minimal,

The On-Farm Accounting System (OFAS) introduced to 7 associations in 2011 has been useful in gathering more data to review gross margins and crop costing. Information from this, as well as access to the original software, has been passed to the newly established Economic Analysis Unit at MAFRD.

Under two mandates of short term technical assistance for, NOA project, IP technical advice and monitoring has been extended to a number of apple farmers supplying a local fruit processing company and issues of formal business management and quality standards have been tackled. The latter will continue into 2013 under a HSIK consultancy.

Outcome 1 – General Comments

Given the long time engagement of HPK in improving supply of local fruit and vegetables at the end of the project it can be concluded the desired change for faster adoption of modern practice has taken place and availability of affordable services has much improved. Thanks to better productivity quantity and continuity have improved, less the quality. The latter still depends much on buyers request for quality which is yet not always clearly articulated. The number of service providers providing advice is at the end of phase lower than the set target, but the active advisors are providing more days (also outside HPK) and a market for advisory services is emerging. This is under the sustainability perspective a promising and positive outcome for the sector.

The end of phase target of 250 farmers adopting IP has been exceeded already in 2011; it remained stable in 2012; impact survey results showed impressively higher productivity of IP compared to conventional production.⁸

HPK-HSI was placing more emphasis on encouraging all actors of the horticulture market system to engage in formal business practices. This cannot change quickly, the take up is slow as the entrenched system of cash payments and informal agreements are widespread.

⁷ For a detailed analysis: HPK Intervention Report; Promotion of contract farming partnerships for growth

⁸ More details in HPK Intervention Report; Promotion of Integrated Production and advisory services and annex 2

Rating of result (outcome) achievement for Outcome 1

Rating	Definition	Comments
A	Very satisfactory. No needs to adjust plans	Through improved production practices and quality advisory services, HPK has achieved excellent results at the production level. At the project closure the production base shows good signs of replication and sustainability

Implications of results and process for closure/sustainability

A challenge for the sector after the closure of HPK is to maintain this consolidation of advisory services and not to distort the growing market for privately paid advisory services. The willingness of other projects and donors to pay above 'market rates' for advisors when using their services may have the impact of pricing farmers out of the services market.

The achievement of 380 farmers using Integrated Production does by far exceed the phase target of 250 farmers. It is largely based on the cost savings and higher productivity achieved by participating farmers. However, for this to become truly sustainable, the market needs to also recognise the value of IP products, and demand this from all producers.

With regard to encouraging more formal business practices, modest results have been achieved, but it also needs to be recognised that this is a long term strategy, well beyond the timeframe of HPK.

Efforts are now being made by HPK to ensure same interventions can be continued by other stakeholders. In particular, collaboration with NOA increased in late 2012, with the focus on 'handing over' some of these initiatives. Consultancies for NOA by former HPK Advisor will be continued in 2013 and thus ensure transferring knowledge and started initiatives.

4.2 Outcome 2: Markets and Post Harvest

Outcome 2	Key Processes for sustainable access to markets related to post harvest, processing, quality standards and marketing are in place and produce positive and large-scale effects on the horticulture sector
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Table 2

Outcome Indicators (OCI)	Baseline 2009	Achievements 2010	Achievements 2011	Achievements 2012	Target End of Phase 2012
OCI 2.1 Number of storage facilities established:					
• On-farm	10	19	0 (total 19)	0 (total 19)	15
• Commercial	2	3	5 (total 8)	1 (total 9)	5
OCI 2.2 Number of women organisations marketing home made products	7	2	2 (total 4)	0 (total 4)	10
OCI 2.3 Number of processors linked to producers	0	5	6	6 ⁹	4

⁹ The activities of linking processors and producers has been undertaken mostly via collection centres, but direct contracts with farmers and processors also occurred. In most cases this now includes working with Integrated Production and the formal economy.

OCI 2.4 Joint marketing activities undertaken through					
• Collection Centres	0	6	8	13	6
• Processors	0	7	6	7	4
• Exporters	0	2	9	8	5
OCI 2.5 Increase in export turnover of partners ¹⁰	n/a	4,715 Tonnes	5,463 Tonnes	6,185 Tonnes (+31% on 2010 data)	30 %

Outputs (OP) related to Outcome 2

Outcome 2 specific outputs are:

OP 2.1 Market linkages between actors are strengthened by focussing on product aggregation

OP 2.2 Quality standards for key crops are available and disseminated to actors

OP 2.3 Processors improve quality and market access through QA or food safety standards

OP 2.4 Production, marketing and consumption of locally produced, high quality fruit & vegetables is promoted

OP 2.5 Market opportunities are identified and information disseminated to actors

OP 2.6 Post harvest skills and technologies are improved and fully utilised

Product aggregation through Collection Centres remained the/a central activity for HPK, 13 centres have been included in more activities in 2012. At the beginning of the season each CC's situation was discussed and assessed; and 6 CCs undersigned a MoU specifying the agreed cooperation and services offered by HPK; this included support co-financing inputs at the start of the season to producers (refer to Outcome 1). 5 B2B roundtables, attended by 5 to 60 participants at each, were organized creating new linkages between producer groups and post harvest actors. The 13 CCs over the last 3 years together marketed over 25,000 tonnes of locally produced fruits and vegetables!

Joint marketing activities with selected partners 2012 included fair visits in Germany (Fruit Logistica and Biofach) and a visit to processing equipment fair in Turkey (3 participants),

Training on formal economy by a local accounting firm commenced in the 2nd quarter to strengthen the CC's capacities to manage their business, and was completed in the 3rd quarter. This activity showed limited results, but the aim was to raise awareness of the related issues. Future work by other projects (notably, USAID-NOA) will build on this work.

Continued support to NWFP actors included visit to BioFach, supported by external market expert, a number of joint meetings, including a workshop undertaken in collaboration with GiZ and MAFRD.

Quality guides for 8 crops were completed (apples, strawberries, plums, peppers, cucumbers (plus a guide for gherkins), tomatoes, carrots and onions) in 3 languages (Albanian, Serbian and English) and distributed to partners. In addition, guides for tomatoes and cucumbers were published in Turkish. Training with farm advisors has been given for some crops, and was completed in the second half.

Activities promoting local fruits and vegetables were undertaken by the Riinvest component of HPK.

An assessment of current storage capacities in Kosovo for fresh fruits and vegetables was conducted by HPK, which indicated over 22,000 m³ of cool storage capacity is available in Kosovo (this excludes storage of NWFP). However, utilisation of this was estimated at only 40%, giving a clear indication that additional investments in storage are not required in the short term.

¹⁰ Includes exports only of fresh fruit, vegetable and non-wood forest product sectors, and from the main actors in each sector, Processing data is not included

Outcome 2 – General Comments

The results from Outcome 2 in most cases exceeded the phase targets. The only indicator were expected target was not achieved relates to women processors. No new partners could be identified in 2012. There is little to no growth potential for small home-style producers of ajvar or fruit products, as this market is increasingly dominated by large commercial producers of high quality products.

A major review of the market system changes brought about by HPK was done in October 2012 by Marshall Bear. The areas of measurement were: Lowering transaction cost; better information flows; faster adoption of tech/know-how; formalization of business practices, financing cash flow gaps in trading, rightsizing investments and upgrading quality. In 5 of the measurement areas Bear finds strong evidence of systemic change which was triggered by the project where as the areas of formal business management and up grading quality do yet not show much uptake of change.

Rating of result (outcome) achievement for Outcome 2

Rating	Definition	Comments
A	Very satisfactory. No needs to adjust plans	The results under Outcome 2 indicate that HPK approach has been successful. Compared to the situation at the beginning of this last phase there is evidence of systemic changes that have happened.

Implications of results and process for closure/sustainability

Marshall Bear's review, reported above, was positive and able to show evidence of larger impact on changes in Kosovo's horticulture sector. "The adoption of aggregator services by suppliers and buyers have lowered search and bargaining costs while also encouraging more pre-season planning and investment because the CC's offer a more reliable and trustworthy source of information than existed before. CC's have made right sized investments in short-term storage capacity though trading volumes will need to increase by about 40% to take full advantage of this capacity. There are few examples of effective "on-farm" use of longer-term storage (e.g. apples), but HPK co-investments in storage with larger integrated business such as processors of jams, compotes and all natural juices is likely to show more success in future."¹¹

A sign of the success of the product aggregation strategy is the duplication of these by other donors and projects, including MAFRD/ARDP and NOA. However, the risk remains that over investment may occur, particularly in light of the low utilisation of already installed storage capacities.

Excellent results have been achieved, but more remains to be done, in particular in relation to processing, formal business practices and quality standards.

4.3 Outcome 3: Associations and Institutions

Outcome 3	The sector's associations and institutions are professionally sound and they contribute to the effective organisation of the horticulture sector
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¹¹ "Aggregation and its effects on Kosovo's Fresh Fruit and Vegetable Market System" Marshall A. Bear, November 2012; page 3

Table 3

Outcome Indicators (OCI)	Baseline 2009	Achievements 2010	Achievements 2011	Achievements 2012	Target End of Phase 2012
OCI 3.1 Strengthen sector representation					
• Number of associations working in the sector on behalf of members	20	20 formal 6 informal	15 formal 6 informal	15 formal 6 informal	20
• National representative body operating	0	1 (Apple Union)	1 (Apple Union)	1 (Apple Union)	1
• Private organizations active in sector (KCC, Tregu, others)	Agreements of cooperation	Agribusiness Fair (KCC) participation in CEIWMF ¹²	Agribusiness fair supported with KCC	Agribusiness fair supported with KCC	Handing over of sector wide activities
OCI 3.2 Support to Government in establishing legal framework on :					
• Combating virulent diseases	Draft Admin. Instruction for Fire blight (FB)	FB & plum Pox Virus activities	Consultancy on FB. Support on inspection and training	Continued support to KIA	Admin. Instruction & activities on virulent diseases.
• Lists for safe use of pesticides	2 (apples, tomatoes)	5 (+ cucumber, plum, strawberry)	7 (+ lettuce & peppers)	7	6
OCI 3.3 Number of graduates starting business	0	0	5	15 (total 20)	20

Outputs (OP) related to Outcome 3

The outputs under Outcome 3 are:

OP 3.1 Strengthening sector representation**OP 3.2 Support to Government****OP 3.3 Support to sector initiatives and education**

Associations were requested to prepare annual plans for their activities. 15 of these have been accepted by HPK, and in addition 6 informal groups are working on joint marketing and advisory services through activities of collection centres.

The Apple Union continued to organise activities with only small direct project support, and has worked more closely in 2012 with the Riinvest component of HPK on Fruit label.

HPK continued to support activities with MAFRD, including the Kosovo Institute of Agriculture (KIA) with 2 visits by regional consultants for trainings in pesticide residue testing. Other activities in the in 2012 have been limited to a number of meetings with staff and external consultants from MAFRD and participation in some workshops. HPK provided information on gross margins and the On-Farm Accounting Software to the Economic Analysis Unit at MAFRD.

HPK-HSI support again KCC to organize the yearly Agricultural Products Fair in October 2012

¹² CEIWMF (the Central European Initiative Wholesale Market Foundation) is a regional organisation supporting wholesale markets in central and Eastern Europe.

together with MAFRD and other donor agencies.

The trade Balance Report for 2007 - 2011 was published in September in an improved format; its findings were presented and discussed in a stakeholder's workshop.

The BIC grants for agriculture school graduates have been implemented in 2012 in collaboration with the Young Entrepreneurs Project of USAID (YEP). This has been a requiring and good collaboration; 15 grants of slightly more than € 70,000 have been awarded. All projects were fully implemented by October 2012, the phase target was achieved..

Outcome 3 – General Comments

Activities under Outcome 3 have been reduced in 2012, Phase results have been mostly achieved. The sector representation remains weak, with the exception of the fruit union which is making progress and has also been recognized by MAFRD as representative of the fruit growers. Work with producer associations has been focused on encouraging them to increase the cooperation between members and manage their own activities; some of the more active associations are advancing better. Some vegetable growers have organized themselves in informal groups linked to the CC to access relevant services; this approach proves to be more successful in this sector than any formal organization.

Contacts with MAFRD were maintained on the current good level and additionally focused on the strategic level and donor coordination. Numerous meetings were held at different staff level within the Ministry and the support to KIA on pesticide residues analyses was completed.

KCC is increasing their efforts to represent the agribusiness sector, mostly through the bigger operators on post harvest level; the cooperation with the project though was limited to their participation in the CFH board and financial support for the organization of the agriculture products fair.

A particular success was the awarding of 15 grants in the Business Idea Competition, together with YEP. Whilst this collaboration helped in managing the activity, it still required a considerable time input from HPK staff; small grants require as much time for close monitoring during implementation as do the bigger ones.

Rating of result (outcome) achievement for Outcome 3

Rating	Definition	Comments
B	Satisfactory. Minor problems may arise and small adjustments in implementation may be necessary	Related to the phase outputs progress made is satisfactory, but clearly still a lot more needs to be done for an effective organisation and representation of the sector..

Implications of results and process for closure/sustainability

Sustainability of the associations and informal groups supported for many years by HPK will rest on their own ability to provide services required by their members. Many of them have recognised this, and are functioning well. On the national level a lot still needs to be done in order to have strong and genuine representation of the horticulture and even more the whole agriculture sector

The importance of the agriculture sector is more widely recognized now and the increased efforts of government through MAFRD and other donors are encouraging. Direct Swiss support to the sector has ended, but will be continued with a new focus on employment in Agribusiness and other sectors with potential. The well established contacts and the reputation of HSI will be helpful in the implementation of EYE project.

4.4 Outcome 4: Competitive Fund for Horticulture

Outcome 4	Key investments by the private sector are leveraged through grants provided by the Competitive Fund for Horticulture (CFH).
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Table 4

Outcome Indicators (OCI)	Baseline 13(2009)	Achievements 2010	Achievements 2011	Achievements 2012	Target End of Phase 2012
OCI 4.1 Number of successful projects	30	22	17	12 projects (total 51 for phase)	60
OCI 4.2 Investment leveraged through CFH <ul style="list-style-type: none"> Total investment CFH grants Leveraged ratio 	€812,849 €378,490	€493,836 €205,658 2.4 : 1	€1,049,801 €507,113 2.1 : 1	€1,003,886 €386,412 2.6 : 1	2 : 1
OCI 4.3 Percentage of CFH funds are allocated to ¹⁴ : <ul style="list-style-type: none"> women minorities 	2 of 30 4 of 30	3 of 22 2 of 22	9% 14%	0% 14%	10% 10%

Outputs (OP) related to outcome 4

The outputs under Outcome 4 are:

OP4.1 CFH grants increase employment and income to a wide range of beneficiaries

OP4.2 Previous grants are monitored and supported to maximise benefits

As a result of a wide publicity for the last grant round in 2012; 179 concept notes were received, only 21 were shortlisted for full proposals. From these, 14 were approved by the board and contracts were concluded, but subsequently 2 were cancelled at the request of the grantees. The average grant amount for this last round was higher than in earlier rounds (€32,200); 3 bigger co-financed projects were concluded with processors, completing and modernizing their processing facilities, where as 4 projects were co-investments in larger greenhouses equipped with up to date equipment. The total investments leveraged were highest of all rounds including only the directly related investment. Processors have invested even beyond this as the grants concerned one specific part of bigger investments.

Additional efforts undertaken by HPK to identify suitable projects to be implemented by women and minorities including also North Kosovo. This resulted in a larger number of concept notes being submitted, but very few of these were suitable for funding under the guidelines of the CFH. Only 1 suitable project was approved for women's groups, but unfortunately due to problems with the association's management and inability to co-finance, this contract was cancelled. The 10% target for women will therefore not be achieved in 2012. The target for inclusion of minorities is over target; thanks also to extra efforts done in cooperation with SCOK, two projects in the North and one in Shterpce were implemented.

A monitoring of all grants from 2009 to 2011 has been completed during 2012. The impact reported

¹³ Baseline refers to Competitive Fund of Innovation (CFI) which was launched in 2009; in 2010 renamed Competitive Fund for Horticulture (CFH)

¹⁴ The percentage of grants going to women and minorities was clarified by SDC after the 2010 Annual Report as referring to the 'value' of the grants, whereas reporting in 2009 and 2010 was on the 'number' of grants.

by beneficiaries is an additional 180 full time (105 male, 75 female) and over 400 seasonal jobs; increase in turnover resulting from investments was estimated at 3,5 Mio €, Full details of the entire CFI/CFH/SFH program are contained in the Intervention Report¹⁵.

Outcome 4 – General Comments

The CFH/SFH grant instrument has proven to be an effective tool to enhance the development of the horticulture sector. It has accelerated investments in new technologies and better organization of the market and allowed HPK by reducing risks for investors to target crucial leverage points in the system. The experience gathered contributed to improve the procedures over time and reducing some of the inherent risks. Thanks to this CFH/SFH had small, but acceptable number of failures with the grants and most of the beneficiaries were satisfied with the quality of support delivered by the project. The continuation of grant schemes by other donors shows the crowding in effects of HPK's approach.

Rating of result (outcome) achievement for Outcome 4

Rating	Definition	Comments
B	Satisfactory. No needs to adjust plans	CFH 2012 was completed well and in time. The monitoring shows good results

Implications of results and process for closure/sustainability

CFH/SFH has set high standards and worked with good success. The grants implemented in 2012 will be monitored in mid 2013; a respective arrangement has been agreed between HSIK and SCOK. The longer term impact of the supported investments can only be seen after 3 to 5 years. As the project is closed this can eventually be taken up by the donors.

An ongoing challenge for the agriculture sector in Kosovo will be keeping the correct level of financial support to the private sector actors. There is always a risk that grants distort the market development as they may create market distortions and uneven competition.

4.5 Outcome 5: Project Management and Programme coordination

Outcome 5	Project management assures efficient implementation of activities and enhances capacity development in the team
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Project management had a challenging year; during the year out of the number of staff members was further reduced, out of 11 three left the team during the year to join new projects and the advisor's assignment was terminated by midyear.. Project can report that all activities were implemented as planned with the smaller team. Capitalization produced 8 Intervention reports, 2 case studies and 2 videos; this material gives a good overview on the results and lessons learnt by the project; at the end of the year remaining were the impact survey, this annual and the end of phase report. All necessary steps for the administrative closure were undertaken and the transfer of HPK assets agreed with SCOK.

One main achievement in this last year was to keep the staff aligned and focused to the tasks till last days. Two team workshops with the external coach Frank Kretzschmar were held to support management and team in this critical phase.. At the end of the project all HPK staff have found employment with new projects (EYE, S4RE) or new employer, except one which is following an

¹⁵ HPK IR 'Competitive fund for horticulture, by S. Pettigrew, E. Kotherja & L. Dida, December 2012

academic career. This is underpinning the high professional competences of the local staff, a knowledge and human capital which has been accumulated by HPK; this is one of the most precious outcomes of the whole project.

In parallel to the closure of HPK, project manager oversaw and strategically accompanied the preparation of new EYE project which started by mid June.

4.6 Transversal themes

Gender: As reported further above HPK has made additional efforts inviting women's organization to bring forward their proposals for co-financing under the CFH grant scheme this year. Of the many proposals received, only 1 project was assessed as suitable for co-financing. Due to problems within the management of this association though, also this grant was cancelled by the partner. The nature of the co-financed grants makes it difficult to meet with gender requirements; women (and minority) investors do often only have low resources at hand which makes it hard to meet with even softer criteria that were put.

Governance with a focus on social inclusion: As for gender HPK follows the market driven approach, which does not always easily combine to with transversal themes. HPK was more successful with the social inclusion of minorities. In the CFH funding three projects were co-financed with in Serbian communities of Shtpce and North Kosovo.

Partner collection centres for vegetables follow non-discriminatory approaches linking many producers belonging to ethnic minorities; this relates to Kllkot (Serbian) and Mamusha (Turkish) municipalities for example. The NWFP sector through the collection of wild produce (berries, mushrooms, medicinal plants) offers includes many families of minority groups in Dragash, Shtpce and North Kosovo and procures additional income in remote areas.

5 Finances

The budget was increased against the initial phase budget 2012 and agreed with SCOK by the end of the 1st quarter of the year. The main consideration was to use all remaining project funds of 1.9 Mio CHF including not completely implemented grants from 2011. Effective expenditures (in CHF) are strongly depending on external factors like effective exchange rate and progress in implementing the grant projects which cannot be influenced directly by the implementer. The management through the year monitored the progress in spending closely and considering these external factors predicted remaining funds to the tune of CHF 110'000. The closing figures are tabulated below:

HPK HELVETAS Swiss Intercooperation Expenditures 2012				
In CFH	Budget 2012	Expenditures 2012		
Description		Total expenditure	Balance 2011	% budget
Part 1 Services Headquarters	64,905	47,191	17,714	73%
3a - Long-term experts Professionals-National	602,500	583,649	18,851	97%
3b - National/regional short - term experts	168,125	167,170	955	99%
3c - Local support Total	156,715	138,997	17,718	89%
Total Part 3 Project Implementation Unit (PIU)	927,340	889,816	837,524	96%
Part 4 - Administrated Project Funds (APF)				
OC 1 Quality goods and services	35,750	14,981	20,769	42%
OC 2 Marketing and Post harvest	106,000	105,161	839	99%
OC 3 Sector organisation	116,000	114,948	1,052	99%
OC 4 Competitive/Special Fund for Horticult..	515,000	519,211	(4,211)	101%
OC 5 Project Management	37,500	56,634	(19,134)	151%
Total Part 4 - Administrated project funds	810,250	810,935	(685)	100%
GRAND TOTAL	1,802,495	1,747,942	54,553	97%

5.1 Budget – Expenditure

The overall achievement is excellent with a variation of only 3 % related to the budgeted total sum. This is within acceptable budget variation.

The budget lines with variations bigger than 5 % are shortly commented here below:

- Part 1: Services of Headquarters: The support and backstopping from HQ during the year was lower than budgeted. 2 planned back stopping missions; one thematic on grants and finances; were not needed; less 15 working days.
- Part 3 local support: Operating costs of local PIU were lower than budgeted; project made efficient use of available funds and office cost are shared with LOGOS project.
- Part 4: Overall APF expenditures were fully spent as planned, but with some variations within the outcomes budget lines. More money was spent under project management for production of all capitalization materials (2 videos and publications), HPK-HSI also covered all costs for the closing event.

5.2 Efficiency

Considering the achieved results as presented in this report project management believes that project funds were used in an efficient and effective way. The closing year required special flexibility in using the funds within the given budget frame work; the reported results show that this was done with due diligence. Management goal was to spend all available project funds; this could not fully be achieved because of the already mentioned reason of variation in exchange rates and cancelled grant projects. In 2012 the exchange rate used for budgeting was 1.25 CHF to 1 €; the effective exchange rate of transfers was 1.2082; the total calculated difference is CHF 36,340. Two contracted grant projects for a total value of € 36,000 (=CHF 43,500) have been cancelled. In 2012 the remaining balance was CHF 54,553.

Financial status at the end of phase V presents is as follows:

HPK HELVETAS Swiss Intercooperation 2010 - 12 Phase Budget					
		Expenditures			Balance
	Phase Budget	2010	2011	2012	End of phase
GRAND TOTAL	5,870,412	1,843,218	2,020,683	1,747,942	154,240

CHF 154,240 remain unspent at the end of phase V; these are only 2.6% of the total funds for three years of implementation. This is an outstanding result indicating sound financial management over the phase.

The reasons for remaining with some funds unspent are again to be found with the unforeseeable variations of the exchange rate and the project partners reliability to implement the projects. It is worthwhile to mention that out of the 61 contracted projects 51 were fully implemented whereas 10 had to be cancelled for different reasons. It is estimated that in the last year some additional € 100'000 could have be spent.

6 Lessons Learnt

❖ Market approach for systemic change

Over the last years applying M4P and private sector approaches HPK has gained a lot of experiences in how to use these market development tools. HPK's focus has switched in 2010 to a more systemic approach with better linkages in the value chain through product aggregation with collection centres. It showed to be the right move and HPK was able with the partners to trigger changes in the horticulture system as assessed and reported by the latest reviews. Indispensable precondition to apply this is a good understanding of markets.

❖ Understanding markets

HPK has since the very beginning of the project focused on market needs, assessed and validated them. The experience accumulated has helped a lot in understanding market dynamics and has then become increasingly the main focus allowing finding the 'right' intervention points and triggers to enhance scaling up. HPK was with some assumptions made ahead of their time; e.g. emergence of modern supermarket retail structure, quality labels for local/IP products, quality standards. These were useful lessons and some became important later as markets developed. The long duration of the project allowed longer learning and increased understanding of the markets which could then be applied. The learning is never finished; markets have their own dynamics and for all market oriented project the continuous learning loop is crucial for their success.

❖ Finding the right partners and gaining credibility as facilitator

When using an indirect project approach where most of the activities are performed by the market actors, a major challenge and decisive for the impact of the project activities is identifying the right partners. One crucial precondition to do so is the project's understanding and the recognition by potential partners to be a fair, transparent and impartial facilitator.

❖ Rightsizing the interventions

A challenge for all interventions is to 'right size' the support (financial or other) to partners required to achieve the desired change without distorting the system. HPK learnt several lessons to this in providing the grants for co-financed investment. Over the time the percentage co financing was reduced and leverage of the grants increased. Similar subsidies for services (advice) were continuously reduced.

Equally important is to find and use the right entry points (where in the system do we intervene with the selected partners?) which have high leverage and combine interventions with a bundle of connected activities. Good example to this is the product aggregation approach the project followed with several related services; like technical support and advice offered by the collection centres and HPK's interventions higher up in the value chain that did have impact on more beneficiaries

❖ Monitoring

During the first 4 phases of the project there had been lots of narrative reporting, but no comprehensive and coordinated approach monitoring of project impacts. It was only decided in the last 3 years to conduct an impact study and collect data for the purpose to understand the impact of the project. This was obviously late and made the attribution of project impact which per se a complex matter very difficult. Establishing the monitoring system right from the beginning of any project would have been much of a help to establish better the impact HPK had.

7 What else we would like to say

What still needs to be done?

HPK has reached its conclusion; but it is worthwhile to mention some issues still to be addressed in the agribusiness sector. These include improving the formal business practices at all levels of the market system, strengthening the linkages between actors through more structured agreements, addressing the quality standards of both fresh and processed products, and encouraging young people to take up agribusiness as a career.

None of these are easy to overcome, but none of them are unique to agribusiness either.

The Swiss and Danish Governments that have supported the agriculture sector for a long time, plus other donors active in Kosovo, may have an interest in more strongly promoting these activities across the sectors they are supporting. Insisting on what can be grouped as 'better business practices' should be included in all future support.

Measuring Sustainability

Evidence of the sustainability of the interventions of HPK can already be seen in some limited areas, such as Integrated Production, but the medium term success of these cannot be measured yet.

The HPK donors should consider supporting a follow up study in 2014 of the sustainability of the Swiss/Danish support. This can build on the Impact Study already being undertaken, and be used as both a review of a long program such as HPK, as well as to inform future investments by donors.

Thank you

Implementing HPK - Horticulture Promotion in Kosovo project has been a challenging and requiring task. It permitted to all involved parties to learn a lot and to develop together. At the end of the project we want to extend our gratitude to all partners for their good collaboration and contributions. Special thanks go to the donors – Swiss Development Cooperation and Danish Ministry of Foreign Affairs – to make with their support and comprehension this unique experience.



8 Annexes

- Annex 1: HPK LogFrame
- Annex 2: List of publications

9 Annex 1: Log Frame

Overall Project Goal	The horticulture agribusiness sector generates sustainable and broad-based employment and income for its actors and contributes to economic growth
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Hierarchy of Objectives	Key indicators	Source of Verification	Assumptions
Purpose	Key value chains are competitive and sustainable and are underpinned by an effectively organised sector based on wide representation		

Outcome 1			
A set of quality goods and services (inputs, machinery, business services, finance, training, advice, information) is in place and affordable to the actors in the sector	<ul style="list-style-type: none"> - At least 5 competitive packages of technology for key value chains are established and effectively used (2012) - At least 250 producers of 5 crops adopted IP - Cadres of trained Service Providers (30) for 3 sub-sectors provide quality advice on both technologies and post-harvest - At least 7 input dealers provide quality advice - 30 groups are co-financing advice at an increasing rate 	<ul style="list-style-type: none"> - Half yearly and yearly reports - Yearly market trends report - Statistics and meetings with farmers, traders and other actors - Surveys on the demand of producers for advice 	<ul style="list-style-type: none"> - Demand for locally-produced planting material exists - Advisors interested to upgrade knowledge for modern production techniques and business tools
Outputs			
Output 1.1: Introducing improved practices			
Output 1.2: Nurseries			
Output 1.3: Inputs & credit			

Outcome 2			
Key processes for sustainable access to markets related to post-harvest, processing, quality standards and marketing are in place and produce positive large-scale effects on the horticulture sector	<ul style="list-style-type: none"> - At least 15 on-farm and 5 commercial stores established - At least 10 women groups sell high-quality home made products through retail channels - At least 4 processors collaborate with farmers' groups - Marketing of quality and safe produce is being undertaken by traders, supermarkets and an IP farmers' association - Producers groups promote joint marketing through at least 6 collection centres where quality standards are implemented - Export of F&V incr by 30% through at least 5 exporters 	<ul style="list-style-type: none"> - Half yearly and yearly reports - Survey, statistics and meetings with farmers - Publications 	<ul style="list-style-type: none"> - Demand for home processed products increasing - Supermarkets are interested on promotion of the fresh fruit and vegetables to differentiate from the competitors
Outputs			
Output 2.1: Access to post-harvest knowledge			
Output 2.2: Storage			
Output 2.3: Processing			
Output 2.4: Marketing			

Outcome 3			
The sector's associations and institutions are professionally sound and they contribute to the effective organisation of the horticulture sector	<ul style="list-style-type: none"> - The mechanism for combating virulent diseases at national scale is operational - A national association/union representing horticultural associations throughout Kosovo is operating successfully - At least 20 producers' associations are established - Private organizations targeted are increasingly active in the sector - The legal frame and enforcement of the safe use of pesticides is operational - At least 5 legal pesticide lists for key value chains are in place - At least 20 graduates successfully started a business 	<ul style="list-style-type: none"> - Half yearly and yearly reports - Survey, statistics and meetings with farmers and input dealers 	<ul style="list-style-type: none"> - Consumers demand quality and safe products
Outputs			
Output 3.1: Strengthening sector representation			
Output 3.2: Support to Government			
Output 3.3: Support to private initiatives			

Outcome 4			
Key investments by the private sector are leveraged through grants provided by the Competitive Fund for Horticulture	<ul style="list-style-type: none"> - At least 20 grants per year successfully implemented and followed up - CFH grants leveraged at least 200% of other funding - 10 % of grantees are women - 10 % of grantees are minorities 	<ul style="list-style-type: none"> - Half Yearly and Yearly reports - Assessment of degree of investment leveraged - Statistics and meeting with grantees 	<ul style="list-style-type: none"> - Actors of the sector interested and willing to invest in horticulture
Outputs			
Output 4.1: Operation of Fund Output 4.2: Fund disbursement			
Outcome 5			
A local entity is established to facilitate the development of the horticulture sector focusing on major value chains	<ul style="list-style-type: none"> - KABC is operational and attracts at least € 1 mio./year as funding from a variety of local and international sources - KABC is becoming attractive for local actors 	<ul style="list-style-type: none"> - Feasibility study for KABC - Round tables and meetings with different stakeholders farmers - Yearly reports of KABC 	<ul style="list-style-type: none"> - Demand for local entities to facilitate the development of the sectors exists - Agreement to establish KABC allows for selection of staff on merit
Activities			

10 Annex 2: List of publications

❖ Reports

1. Kosovo Horticulture Trade Balance Report; Edvin Kotherja, September 2012
2. HPK Project Review; Aggregation and its Effects on Kosovo's Fresh Fruit and Vegetable Market System; Marshall A. Bear, November 2012
3. HPK: Highlights of Impact Assessment 2010 – 2012, Hans Rudolf Felber, Edvin Kotherja, Stuart Pettigrew & Hamit Qeriqi, March 2013

❖ Intervention reports

1. Vegetable Nursery Industry in Kosovo; Lumta Dida & Stuart Pettigrew, January 2012
2. Promotion of Integrated Production and Advisory services; Basri Pulaj, Stuart Pettigrew & Heini Conrad, September 2012
3. Increasing Employment and Income by strengthening the Non-Wood Forest Product Market; Nora Gola & Heini Conrad, September 2012
4. Making Horticulture Markets more competitive, Stuart Pettigrew, Luan Hoti & Basri Pulaj, September 2012
5. Promotion of Contract Farming Partnerships for growth, Basri Pulaj, Heini Conrad & Stuart Pettigrew, November 2012
6. Introduction of Quality Standards for local fruits and vegetables; Edvin Kotherja & Stuart Pettigrew, November 2012
7. Competitive Fund for Horticulture, Stuart Pettigrew, Edvin Kotherja & Lumta Dida, December 2012
8. Development of a competitive Apple Value Chain in Kosovo; Lumta Dida, Stuart Pettigrew & Heini Conrad, December 2012

❖ Case studies

1. Integrated Pest Management: Less Pesticides, higher quality; Lumta Dida, May 2012
2. Little support can make big difference in professional public services, Kosovo Institute for Agriculture; Basri Pulaj, Stuart Pettigrew & Heini Conrad, November 2012

❖ Videos

1. Creating Income and Employment in the Horticultural Sector in Kosovo; documentary, October 2012; available Albania/English, Albania/Serb version
2. "HPK: Highlights of 12 year project work", December 2012, available Albania/English, Albania/Serb version